



License Simplification & Fee Flexibility Initiative

*Make hunting and fishing **SIMPLER, EASIER,
BETTER VALUE***

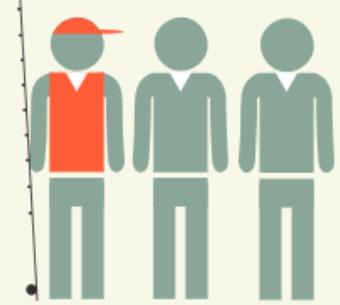
Presented by

J.D. Strong, Director

Oklahoma Department of Wildlife Conservation

ECONOMIC IMPACT OF HUNTING & FISHING IN OKLAHOMA*

Annual Expenditures



1 in 3 Oklahomans hunt and/or fish

HUNTING



\$1.2 Billion

FISHING



\$2.5 Billion

The Oklahoma Department of Wildlife Conservation does not receive any state or local tax dollars.



Retail Sales Generated Annually

FISHING: **\$1.4 billion**
HUNTING: **\$816 million**



THIS is economic development, particularly in rural Oklahoma.



Big Game Hunters in Oklahoma

Food & Lodging

- \$62 million

Transportation

- \$44 million

Other Trip Costs

- \$25 million

Equipment

- \$163 million



* Information gathered from the 2016 "50-State Survey of Fishing, Hunting, and Wildlife-Related Recreation - Oklahoma", produced by The Rockville Institute under the support of the Association of Fish and Wildlife Agencies

Oklahoma's Current Wildlife License Structure

OKLAHOMA DEPARTMENT OF WILDLIFE CONSERVATION
LICENSE SALES - FISCAL YEAR 2019

	NUMBER	Excludes Dealer Fee	AMOUNT
(Refunds Deducted)			
Annual Fishing	126,261	24.00	3,030,272.00
Youth Resident Fishing (16-17 yrs of age)	7,601	4.00	30,404.00
NR Annual Fishing	30,434	49.00	1,491,248.00
NR 1-Day Fishing	20,427	14.00	285,975.00
NR 6-Day Fishing	16,887	34.00	574,172.50
Resident 2 Day Fishing	3,358	14.00	47,007.00
Resident 5 year Fishing	3,589	87.00	312,225.00
Lifetime Fishing License	905	224.00	202,625.00
Texoma Fishing License	33,549	11.00	369,039.00
Temp Resident Fish	937	50.00	46,850.00
Lake Texoma - Texas			354,410.41
Temporary NR Fishing Combination	310	90.00	27,900.00
Resident Combination Fiscal Year	12,530	41.00	513,720.00
Youth Resident Combination	2,092	52.00	108,758.00
Youth Resident Combination Fiscal Year	1,728	8.00	13,824.00
Resident 5 year Combo	501	18.00	9,018.00
Cherokee Nation Combination Compact	2,015	147.00	296,190.00
Youth Cherokee Nation Compact	120,147	2.00	240,294.00
Choctaw Nation Compact	332	2.00	664.00
Youth Choctaw Compact	2,970	2.00	5,940.00
Lifetime Combination	426	2.00	852.00
Disable Veterans Combination LT	2,227	775.00	1,725,700.00
60-100% Disabled Vet Combination LT	160	199.00	31,800.00
Wildlife Conservation Passport	975	24.00	23,400.00
Resident Land Access Fee	356	25.00	8,900.00
Resident 3 Day Land Access Fee	2,637	39.00	102,843.00
NR Land Access Fee	483	9.00	4,347.00
3-day Wildlife Conservation Passport	390	84.00	32,760.00
Disability Hunting	567	14.00	7,938.00
Disability Fishing	931	9.00	8,380.00
Resident Annual Trapper	2,191	9.00	19,720.00
Professional Trapper-Furbearer	500	9.00	4,500.00
NR Annual Trapper	4	68.50	274.00
Fur Dealer	1	344.00	345.00
NR Fur Dealer	16	100.00	1,600.00
Res Minnow Dealer/Intrastate	2	Varies by State	963.00
NR Minnow Dealer/Interstate	6	100.00	600.00
NR Minnow Dealer/Interstate	10	500.00	5,000.00
Res Minnow Dealer/Interstate	9	100.00	900.00
Res Minnow Dealer/Interstate/Extra Veh	19	25.00	475.00
NR Minnow Dealer/Interstate/Extra Veh	20	25.00	500.00
Res Minnow Dealer/Intrastate/Extra Veh	11	25.00	275.00
Paddle Fish Permit	29,331	0.00	0.00
Fishing Guide License	397	89.00	35,320.00
Resident Aquatic Turtle	21	40.00	840.00
Aquatic Turtle Helper	0	40.00	0.00
Resident Turtle Buyer	3	200.00	600.00
Duplicate Annual IPOS	8,788	0.50	4,394.00
Duplicate Annual License	1,567	1.50	2,350.50
Duplicate 5 year License	526	4.00	2,104.00
Duplicate Senior Citizen Lifetime License	252	10.00	2,520.00
Duplicate License - LT	1,499	10.00	14,990.00
Duplicate Disability	35	1.50	52.50
Duplicate Hunter Safety	355	5.00	1,775.00
Nuisance Wildlife Control Operator	173	75.00	12,975.00
Field Trial Permit	8	5.00	40.00
Commercial Hunt Area-Combination	33	500.00	16,250.00

	NUMBER	Excludes Dealer Fee	AMOUNT
(Refunds Deducted)			
Spec Hunt Application Fee	0	5.00	0.00
Res Spec Hunt Youth Deer Tag(Antlerless)	95	9.00	855.00
Res Spec Hunt Youth Deer Tag(Any Sex)	553	9.00	4,977.00
Res Spec Hunt Youth Deer Tag(Antlered)	0	9.00	0.00
CH Youth Deer Private Lands	39	9.00	351.00
Spec Hunt Youth Deer Primitive - Antlerless res	62	10.00	620.00
Res Spec Hunt Deer Primitve Tag(Any Sex)	67	19.00	1,273.00
Spec Hunt Youth Deer Primitive - any sex res	166	10.00	1,660.00
Res Spec Hunt Deer Primitive Tag(Antlerless)	73	19.00	1,387.00
NR Spec Hunt Deer Primitive Tag(Any Sex)	1	200.00	195.00
NR Spec Hunt Deer Primitive Tag(Antlerless)	0	195.00	0.00
Spec Hunt Youth Deer Archery - any sex res	28	10.00	280.00
Res Spec Hunt Deer Archery Tag(Any Sex)	196	19.00	3,724.00
Res Spec Hunt Deer Archery Tag(Antlerless)	87	19.00	1,653.00
NR Spec Hunt Deer Archery Tag(Any Sex)	16	200.00	3,120.00
NR Spec Hunt Deer Archery Tag (Antlerless)	0	200.00	0.00
Spec Hunt Youth Deer Archery - (Antlerless res)	0	19.00	0.00
Res Spec Hunt Deer Gun Tag(Any Sex)	202	19.00	3,838.00
Res Spec Hunt Deer Gun Tag(Antlered)	0	20.00	0.00
(Refunds Deducted)			
Commercial Hunt Tags	636	20.00	12,710.00
Commercial Hunt Area - Small Game	46	100.00	4,600.00
Commercial Hunt Area Big Game	30	500.00	14,750.00
Non-Commercial Wildlife Breeder	170	10.00	1,700.00
Commercial Wildlife Breeder	96	48.00	4,608.00
Wildlife Rehabilitation Permit	102	10.00	1,020.00
Resident Exhibitors Permit	3	50.00	150.00
Resident Falconry	39	45.00	1,755.00
NR 10-Day Falconry	3	25.00	75.00
Scientific Collector Permit	291	10.00	2,910.00
Resident Hunting	28,114	24.00	674,747.00
NR Hunting	5,763	136.00	783,773.00
NR 5-Day Hunting	9,509	69.00	656,089.00
Youth Resident Hunting (16-17 yrs of age)	2,628	4.00	10,512.00
Commercial Hunt - 10 Day	1,721	5.00	8,605.00
5 Day Rattlesnake Permit	184	4.00	736.00
Hunting Dog Trainer	248	10.00	2,480.00
Waterfowl Stamps Collectors	334	9.00	3,006.00
Fox, Raccoon, Bobcat	1,645	9.00	14,805.00
NR Fox, Raccoon, Bobcat	168	50.00	8,400.00
Waterfowl Stamp - DS	20,267	9.00	182,403.00
Waterfowl Stamp - WF	0	9.00	0.00
Lifetime Hunting	201	624.00	125,675.00
Resident 5 year Hunting	753	87.00	65,550.00
Turkey - Spring	13,105	9.00	117,945.00
Turkey - Fall	2,292	9.00	20,628.00
Resident Antelope - Special Hunts	23	50.00	1,150.00
IR Antelope - Special Hunts	0	305.00	0.00
Resident - Private Land Elk	275	50.00	13,750.00
Elk	28	50.00	1,400.00
IR Elk	0	305.00	0.00
Non-Resident - Private Land Elk	55	300.00	16,520.00
IR Special Hunt Permit	21	50.00	1,050.00

THIS is a nightmare and does not help us recruit more hunters, anglers and outdoor lovers!

ODWC Strategic Plan → “R3”

- “R3” is recruiting, retaining & reactivating hunters, anglers & recreational shooters
- Package of high priorities:
 - ✓ Online/app-based licensing
 - ✓ CRM system for more effective marketing
 - ✓ Simplify the regulations
 - ? Simplify the licenses & fees (HB 2214 and SB 774)



Current challenge

150

Licenses and
permits

Different
licenses across
groups

10

“Youth”
definitions

16

Years since last
fee change

Creates customer service
and participation challenges

Experienced contractor hired in 2018

- Majority of ODWC funding comes from license sales, directly or indirectly
- Ours is a quasi-retail business, so we lose if we don't get it right!

Southwick's Tasks:

- Identify privileges most frequently purchased by customers that could be packaged into new combination licenses.
- Evaluate whether current prices are too high, low or just right.
- Survey current Oklahoma hunters and anglers to scientifically identify which packages of licenses are most desirable, and what customers are willing to pay.
- Identify the ideal suite of licenses from a revenue perspective and the prices that can be charged to optimize revenues.



Evaluation of current prices

Priced too high:

**Resident 2-Day
Fishing**
(currently \$15)

Direct revenue
maximized at
\$10.00

Total revenue
(license sales +
WSFR) maximized
at **\$6.50**

**Resident
Combo License**
(currently \$42)

Direct revenue
maximized at
\$39.00

Total revenue
maximized at
\$24.00

**Resident Deer
Gun License**
(currently \$20)

Direct revenue
maximized at
\$19.00

Total revenue
maximized at
\$16.00

Introduction of
NR 1-day
fishing license
in 2014
negatively
impacted NR
6-day fishing
license sales.

Evaluation of Current Annual Prices

Priced too low:

**Resident Fishing
License**
(currently \$25)

Direct revenue maximized
at **\$34.00**

Total revenue maximized
at **\$31.00**

**Resident Hunting
License**
(currently \$25)

Direct revenue maximized
at **\$64.00**

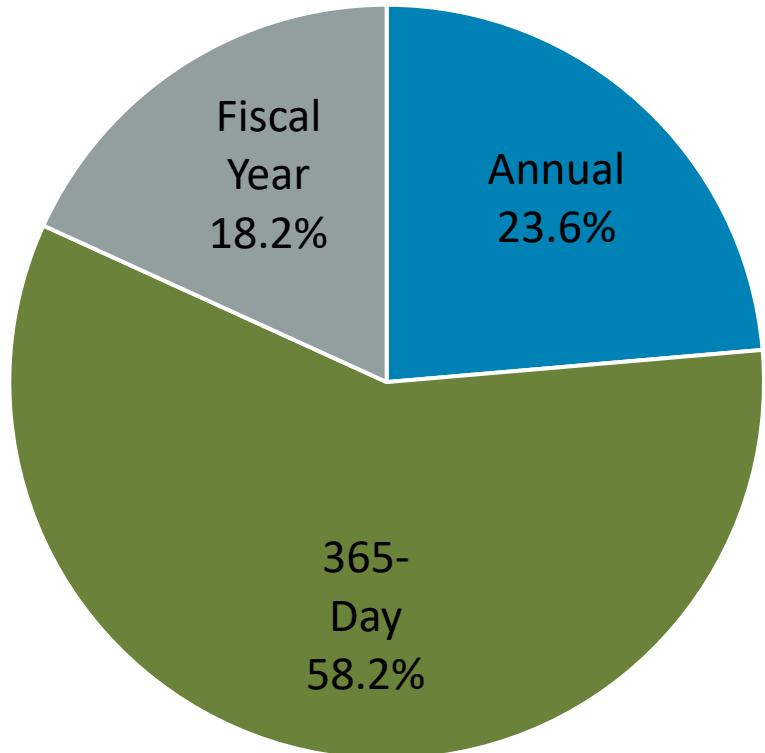
Total revenue maximized
at **\$62.00**

Introduction of NR
1-day fishing
license in 2014
negatively
impacted NR
annual fishing
license sales.

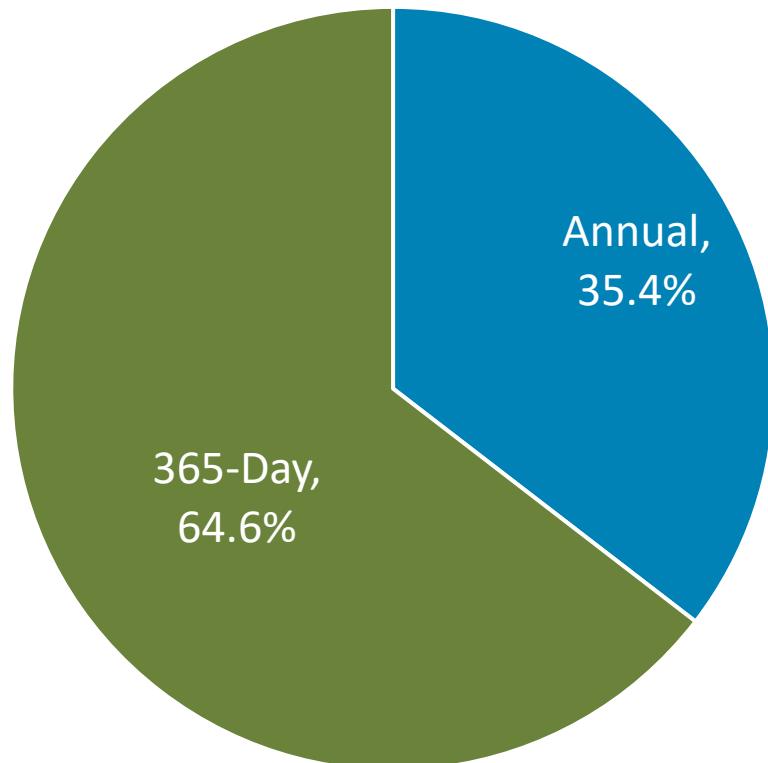
365 Licenses... Survey says?

Preferred license year given same price

The average resident hunter would be willing to pay **\$11.30** more for a 365-day license compared to the current annual license.



Resident hunting



Resident fishing

The average resident angler would be willing to pay **\$4.90** more for a 365-day license compared to the current annual license.

Survey says... “package” for more value

- Customers support "packaging" of licenses
- Packaging both simplifies AND increases value

Current License	Potential New License
Deer gun (antlerless)	Deer gun: full season, full bag limit 1 license, 2 prices (resident and nonresident)
Deer gun (antlered)	
Holiday Deer Gun	
Deer Gun	
Deer Muzzleloader (antlerless)	Deer Muzzleloader: full season, full bag limit 1 license, 2 prices (resident and nonresident)
Deer Muzzleloader (antlered)	
Deer Muzzleloader	
Deer Archery	Deer Archery: full season, full bag limit 1 license, 2 prices (resident and nonresident)
Deer Archery	

Administrative Rules vs. Statute



- Radical changes needed to simplify today's complex licensing
- Overhaul is best accomplished all at once, as a package
 - Options and prices should be compatible
 - Hunters and anglers make tradeoffs just like any other customer
- ODWC seeks to operate more like a business, and be more responsive to customer needs and market conditions
- Market conditions are much more dynamic than the legislative cycle (e.g., seasonal discounts, COVID response, etc.)

Accountability to our constituents



- 2018 survey to determine packaging, pricing, new options
- Public comment period and public hearings on all administrative rule proposals
- In-house experts to provide communications and outreach, assess ongoing satisfaction, license sales trends, and more
- Actual license sales
 - Customer satisfaction with licensing will translate into sales
 - **Lack of satisfaction = loss of customers, loss of revenue**

Legislative oversight

- Legislature grants AND revokes rulemaking authority
- Legislature reviews/disapproves rules, including license and fee proposals from numerous agencies
- What else can we do?
 - ▣ SB 774 includes annual report to the legislature
 - ▣ Other?



Arizona: case study for success



Changes Made

- Legislature gave AGF authority to set licenses and fees by rule in 2013
- Simplified license structure from 40 basic licenses to 6
- Consistent youth definition
- 365-day licenses
- Adjusted prices (youth went down, big game went up)
- No price changes since 2014!

Results (2013 vs 2014)

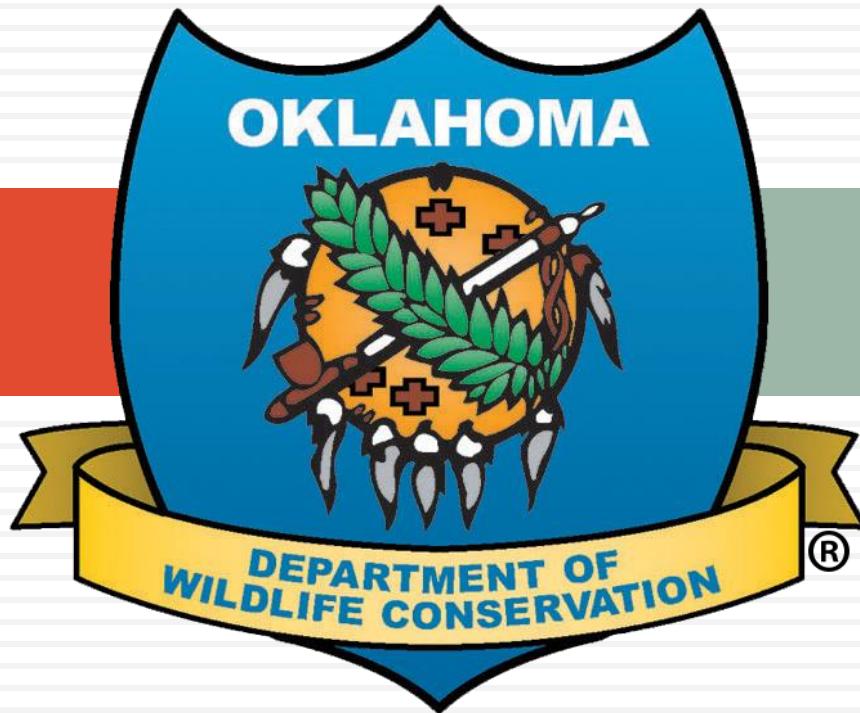
- Total license sales – 11% increase
- Combo sales – 59% increase
- Youth license sales – **141% increase**
- Fishing license – 10% increase

A partnership to grow Oklahoma!

- Not about who's in charge
- Not about raising fees
- Not about building fancy buildings
- It's ALL about growing Oklahoma's:
 - ▣ Healthy fish & wildlife populations
 - ▣ Hunting & fishing opportunities
 - ▣ Economy, particularly in rural OK
 - ▣ Status as a top 10 state for hunting & fishing



OKLAHOMA



Questions?