

Michigan's Hunting and Angling Customers

Natural Resource Commission

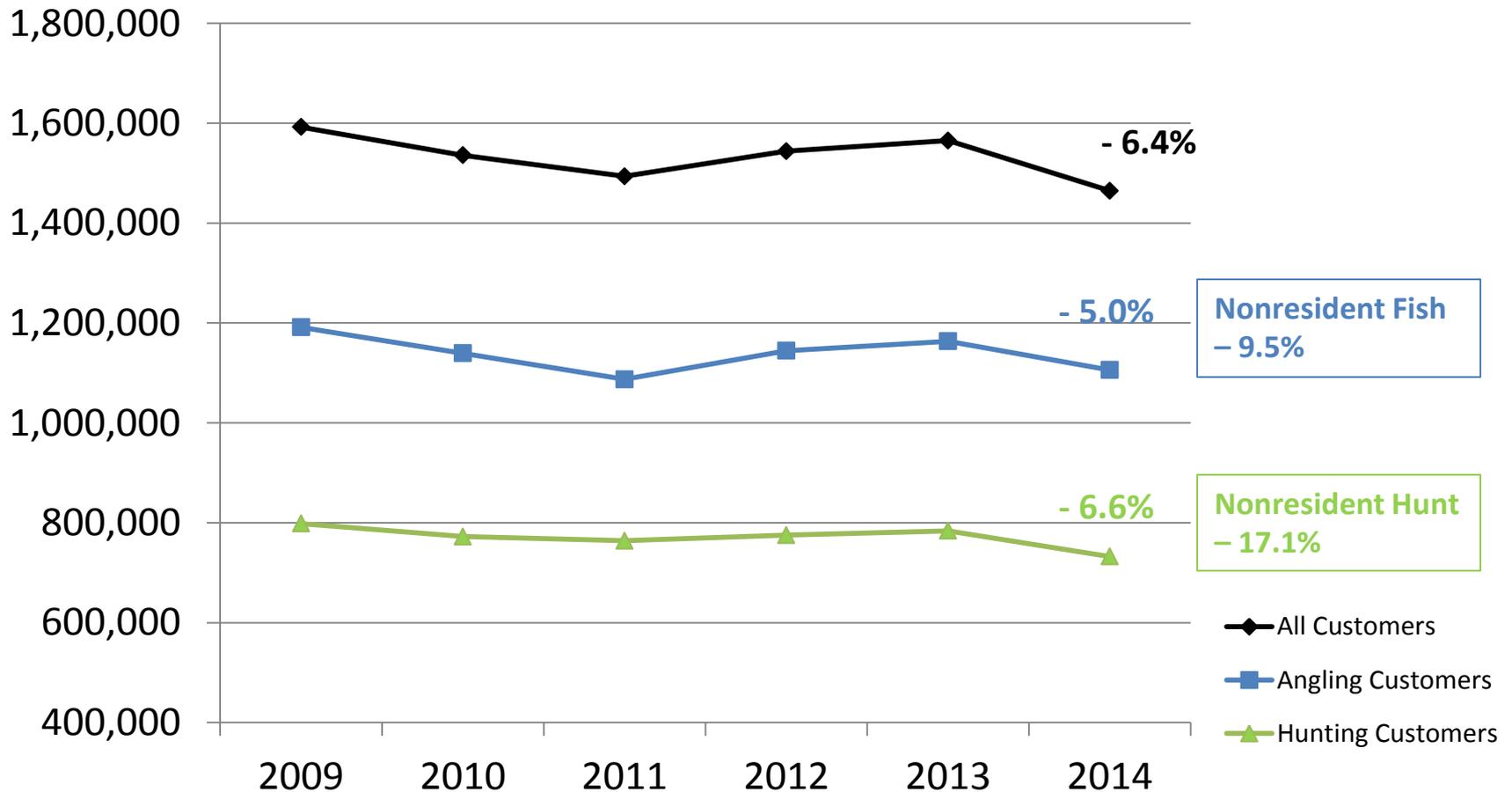
Marketing, Partnership, Youth, Outreach Advisory Committee

R.A.M. Center, Roscommon, MI

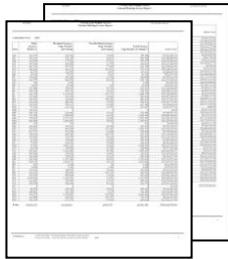
March 19, 2015

Jody Simoes, MOD

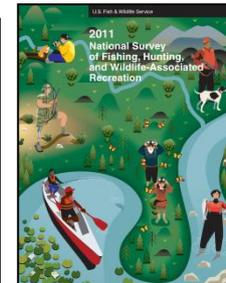
Michigan Hunters and Anglers Unique Customers 2009 - 2014



Understanding Customers: Example Data Resources



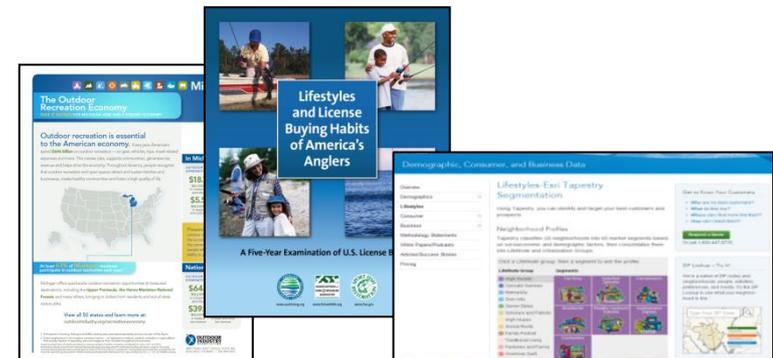
USFWS License Reports



USFWS HIP and FHWAR Surveys

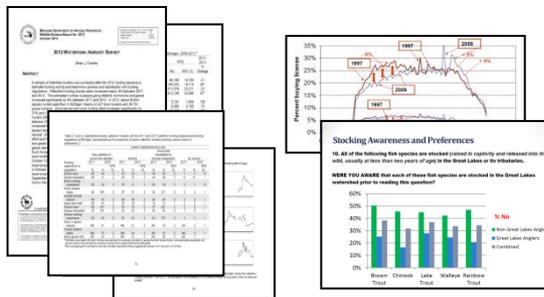


Michigan Retail Sales System



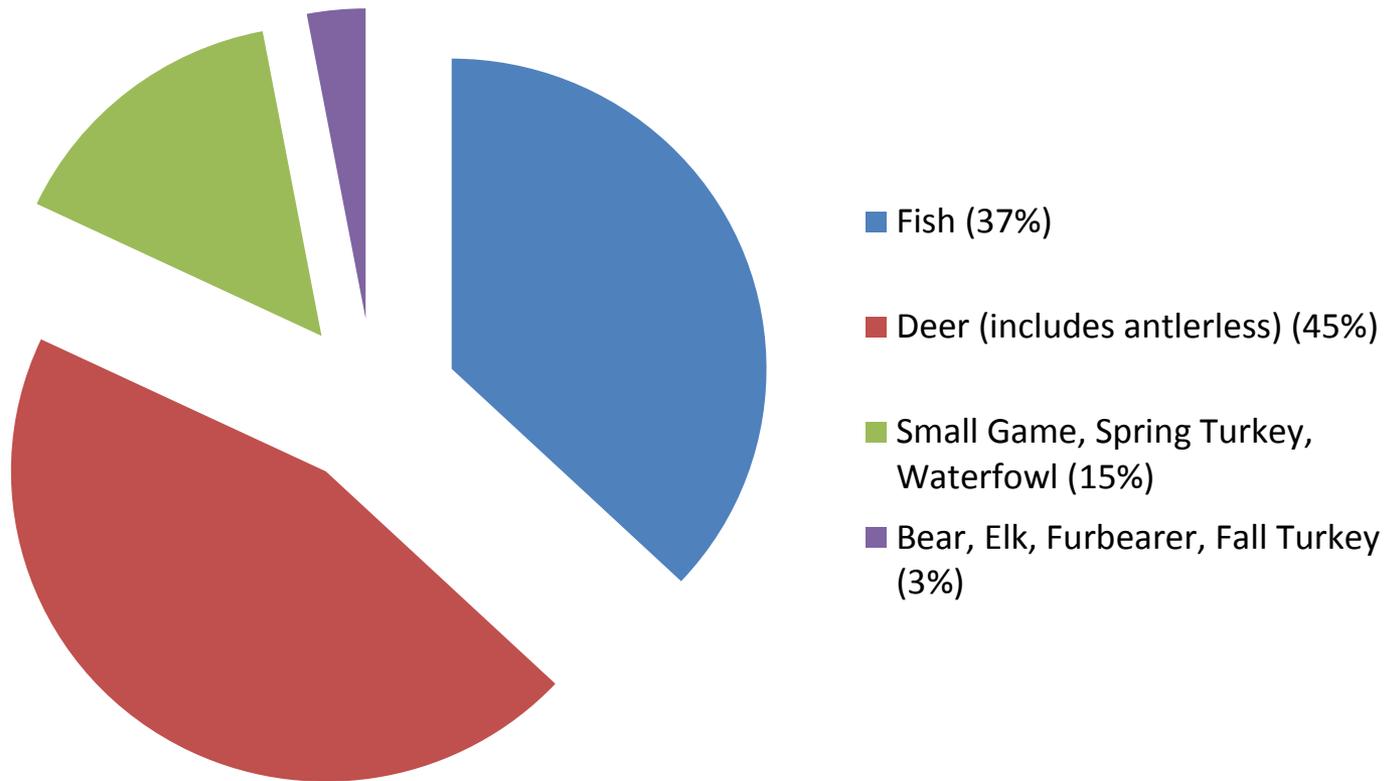
Academic, Industry and Agency Research (e.g.)

- Outdoor Industry Association
- National Shooting Sports Foundation
- American Sportfishing Association
- National Marine Manufacturers Association



MDNR Harvest Surveys and Technical Reports

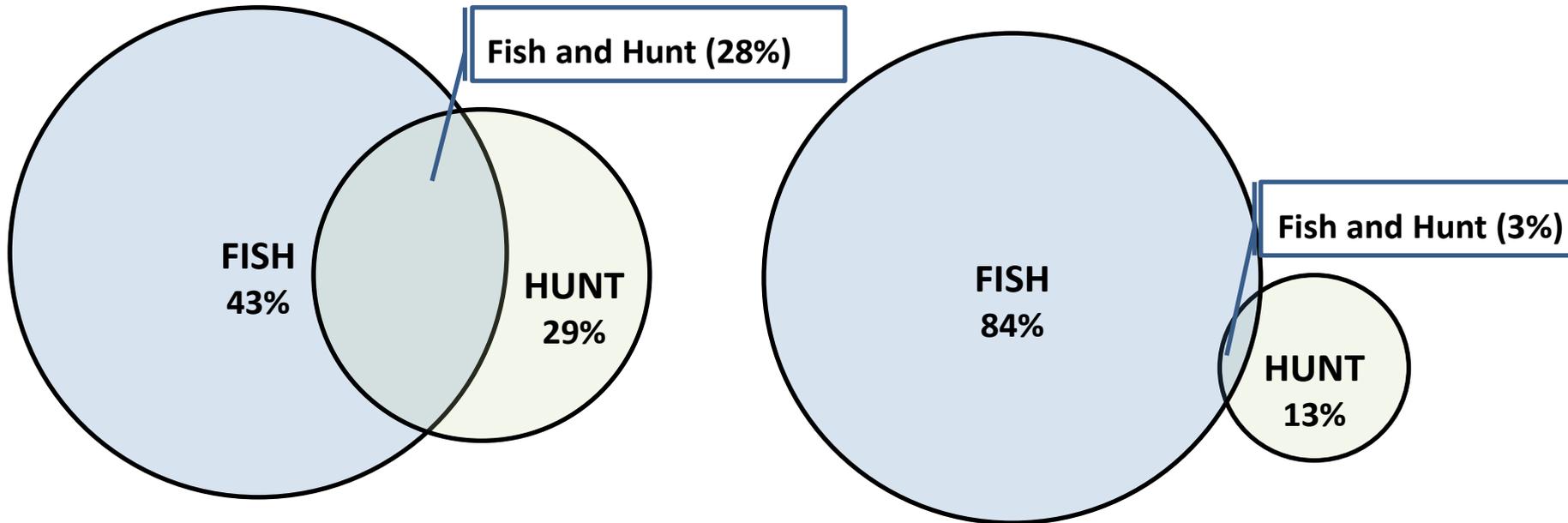
Michigan's Total License Market Tags and Licenses Sold*



***5 yr. average 2009 -2014**

Angler/Hunter Customer Markets*

2009 - 2013



RESIDENTS

Averaging 1.3M Customers

Resident Anglers: 43%

Resident Hunters: 29%

Resident Anglers+ Hunters: 28%

NONRESIDENTS

Averaging 230K Customers

Nonresident Anglers: 84%

Nonresident Hunters: 13%

Nonresident Anglers + Hunters: 3%

*approximate representation, part of a developing analysis of market share

Customer Data Collection: Developing a Targeted Marketing Approach

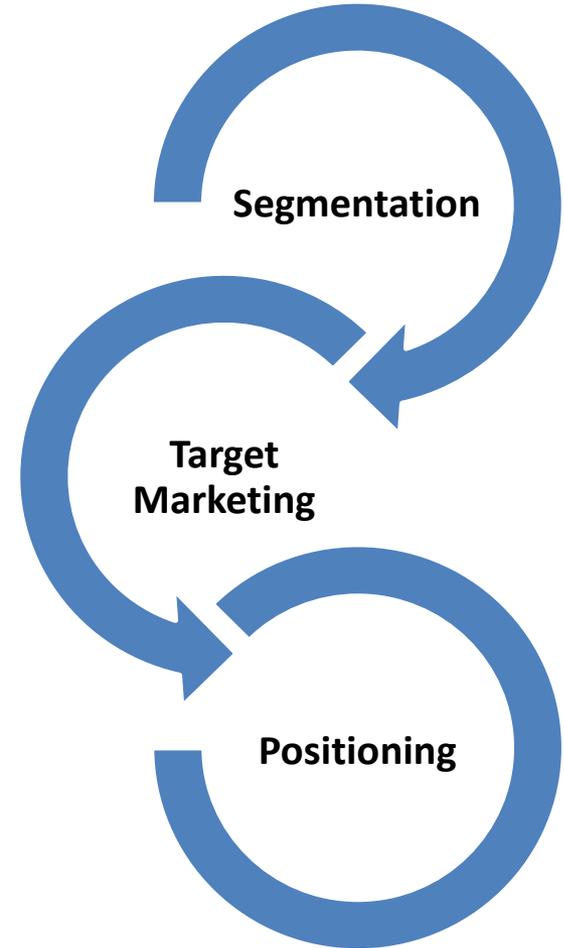
- The average camper/hunter/angler **doesn't exist**
- User profile research **implies a marketing perspective**
- Market research used to develop **targeted marketing mix**

Targeted Marketing Approach: Segmenting, Targeting & Positioning

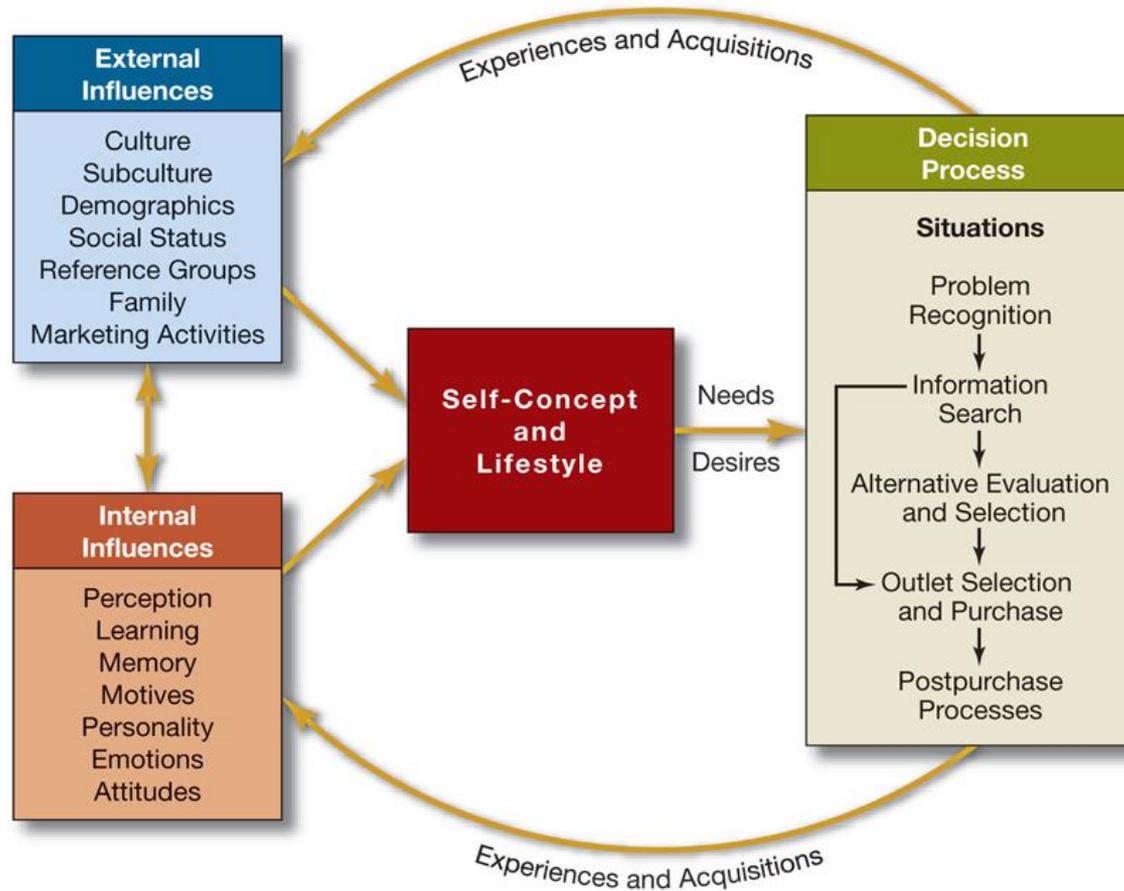
Identify and understand characteristics of customers.

Select customers to serve and focus resources to serve them.

Tailor marketing efforts (e.g. timing, content, medium).



Model of Consumer Behavior



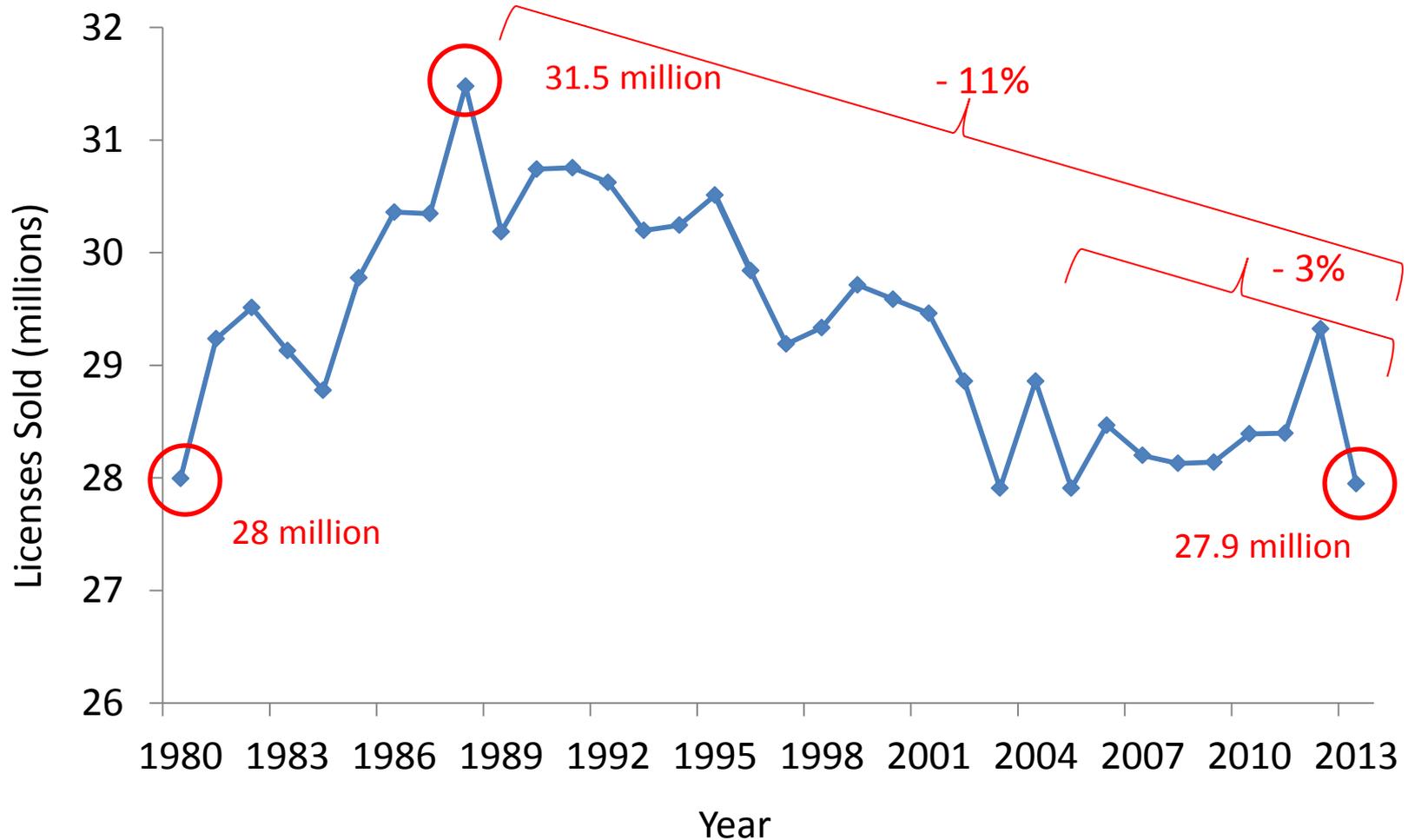
Consumer Behavior Model (Hawkins Mothersbaugh 2010)

So what happened?

Examining License Purchasing Behavior

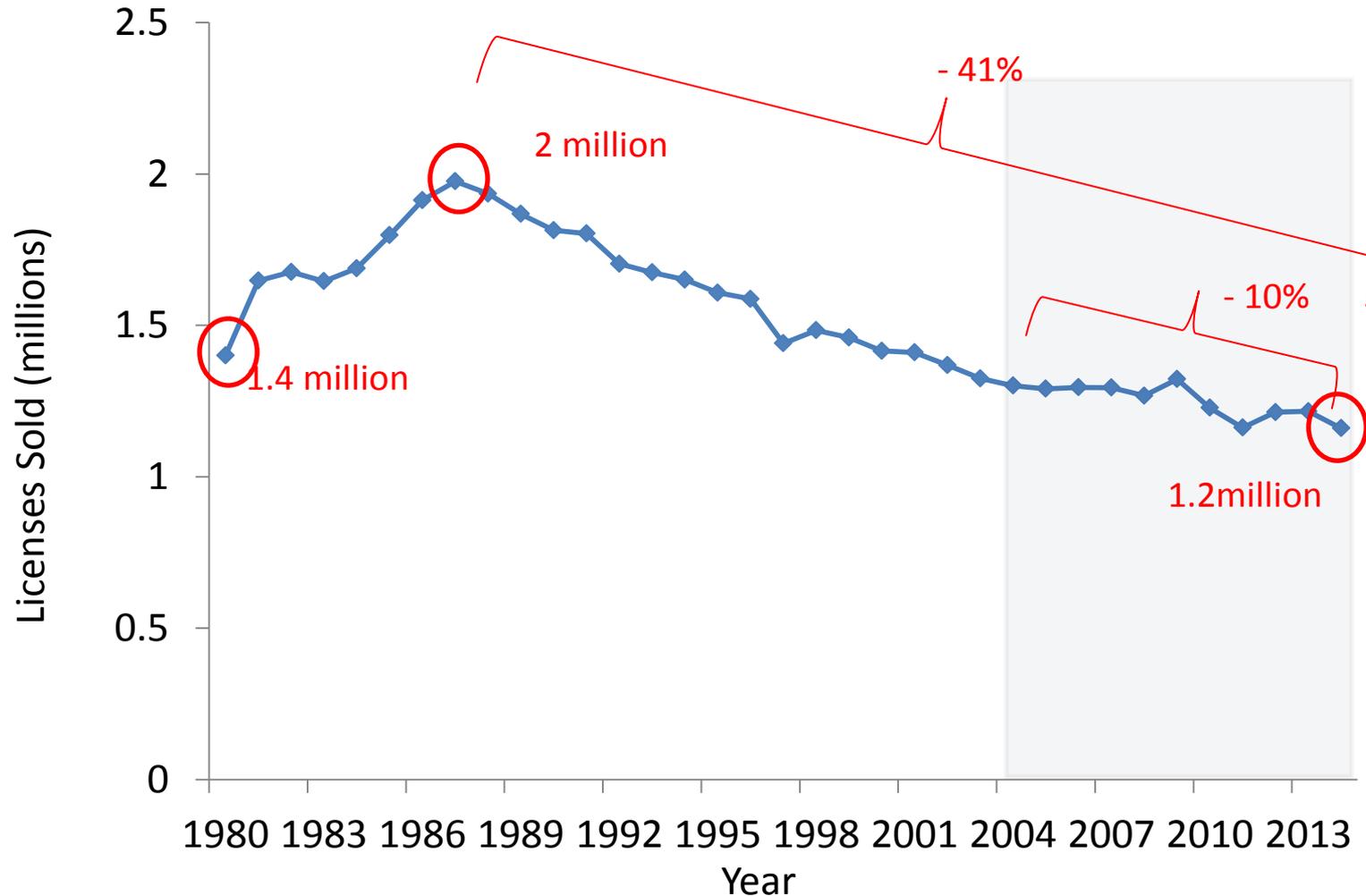
Sales of U.S. Fishing Licenses

1980 - 2013



Sales of Michigan Fishing Licenses

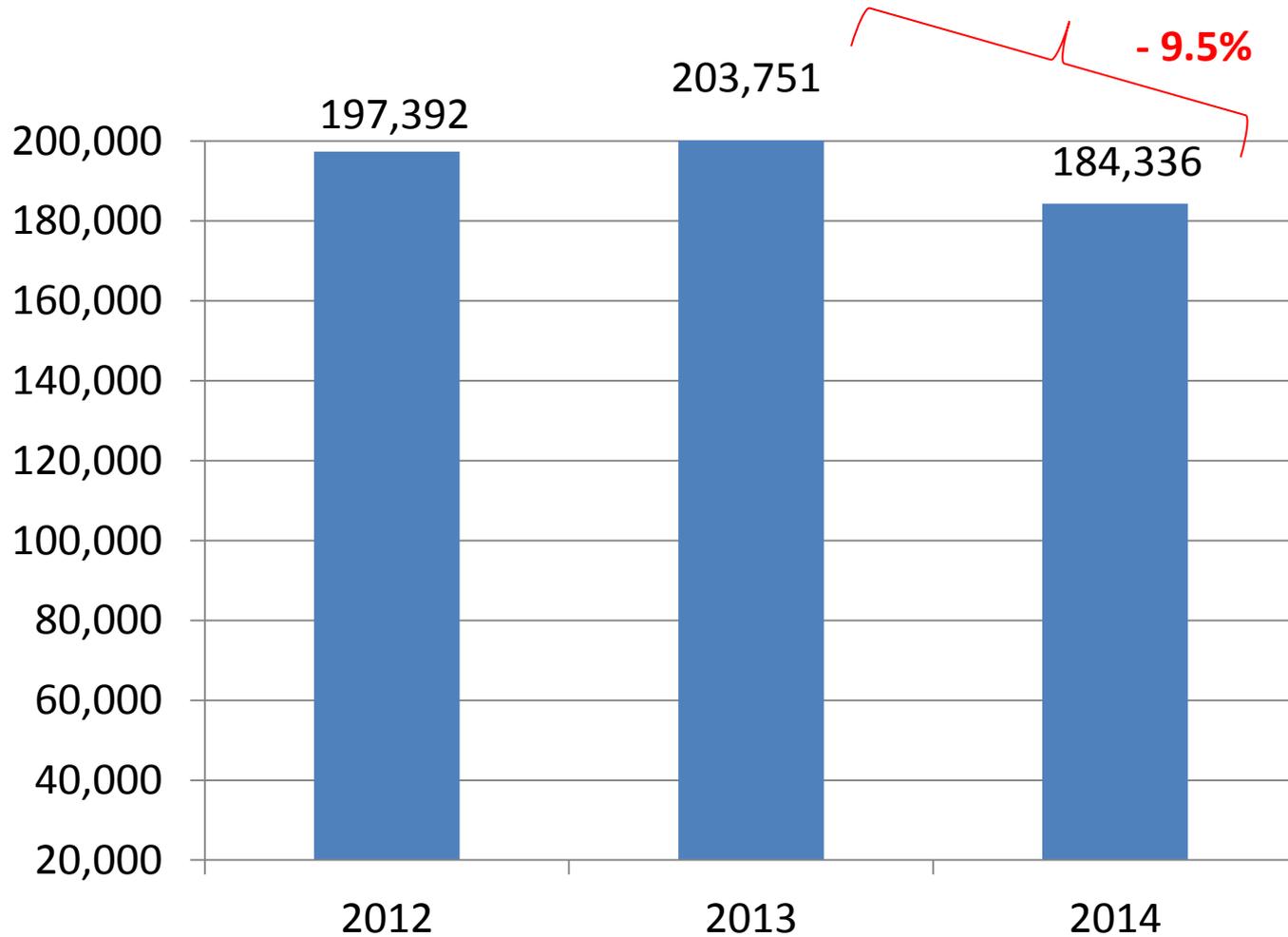
1980 - 2014



Resident v. Nonresident Angler Demographic Comparisons

Description	Esri Tapestry™ Profile Description	Resident Anglers	Nonresident Anglers
<i>High Society</i>	affluent, well educated, professional employment, highest income, travel, active	10%	19%
<i>Upscale Avenues</i>	prosperous, well educated, above-average income	16%	19%
<i>Metropolis</i>	city families, urban lifestyles, row houses, public transportation, service related jobs	3%	2%
<i>Solo Acts</i>	city life, single, young, well educated, professionals, urban lifestyles	2%	4%
<i>Senior Styles</i>	large group, retires, income f/ Soc. Sec. & pensions,	15%	12%
<i>Scholars and Patriots</i>	young, lower incomes, college and military, low home ownership	1%	1%
<i>High Hopes</i>	young, mobile, college educated, couples, single parents, and singles	2%	3%
<i>Global Roots</i>	ethnically diverse, young, modest income, renters, recent immigrants, mostly with children	1%	2%
<i>Family Portrait</i>	fastest growing, young families, ethnically diverse, single family homes	4%	7%
<i>Traditional Living</i>	middle America, settled families, older, neighborhoods, traditional media	11%	11%
<i>Factories and Farms</i>	lower income, rural living, manufacturing and agriculture employment	20%	13%
<i>American Quilt</i>	small towns, rural areas, mobile homes, rural lifestyle	16%	7%

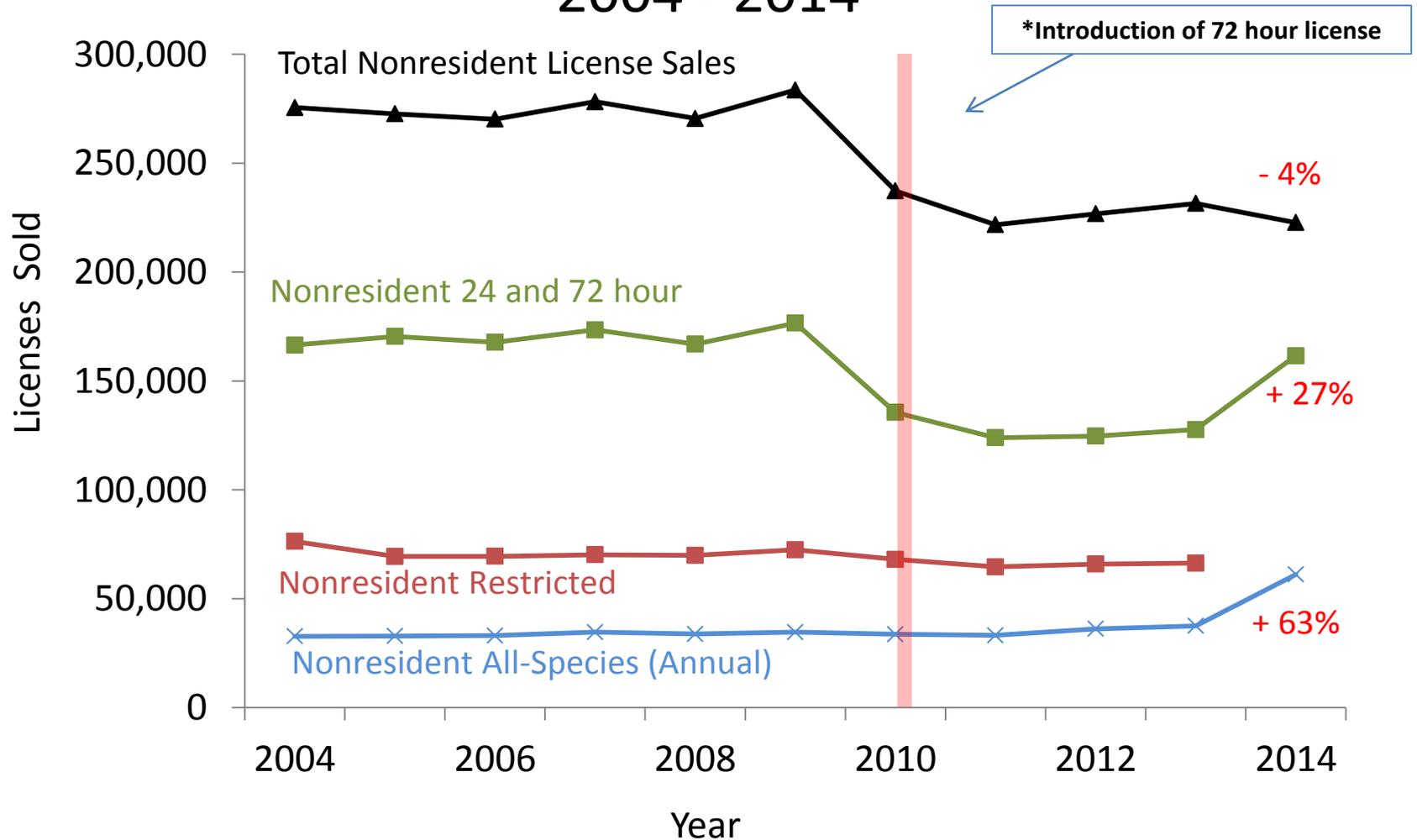
Fishing customers with an out-of-state address



Nonresident Licenses

(Restricted and All-Species & 24 and 72 hour)

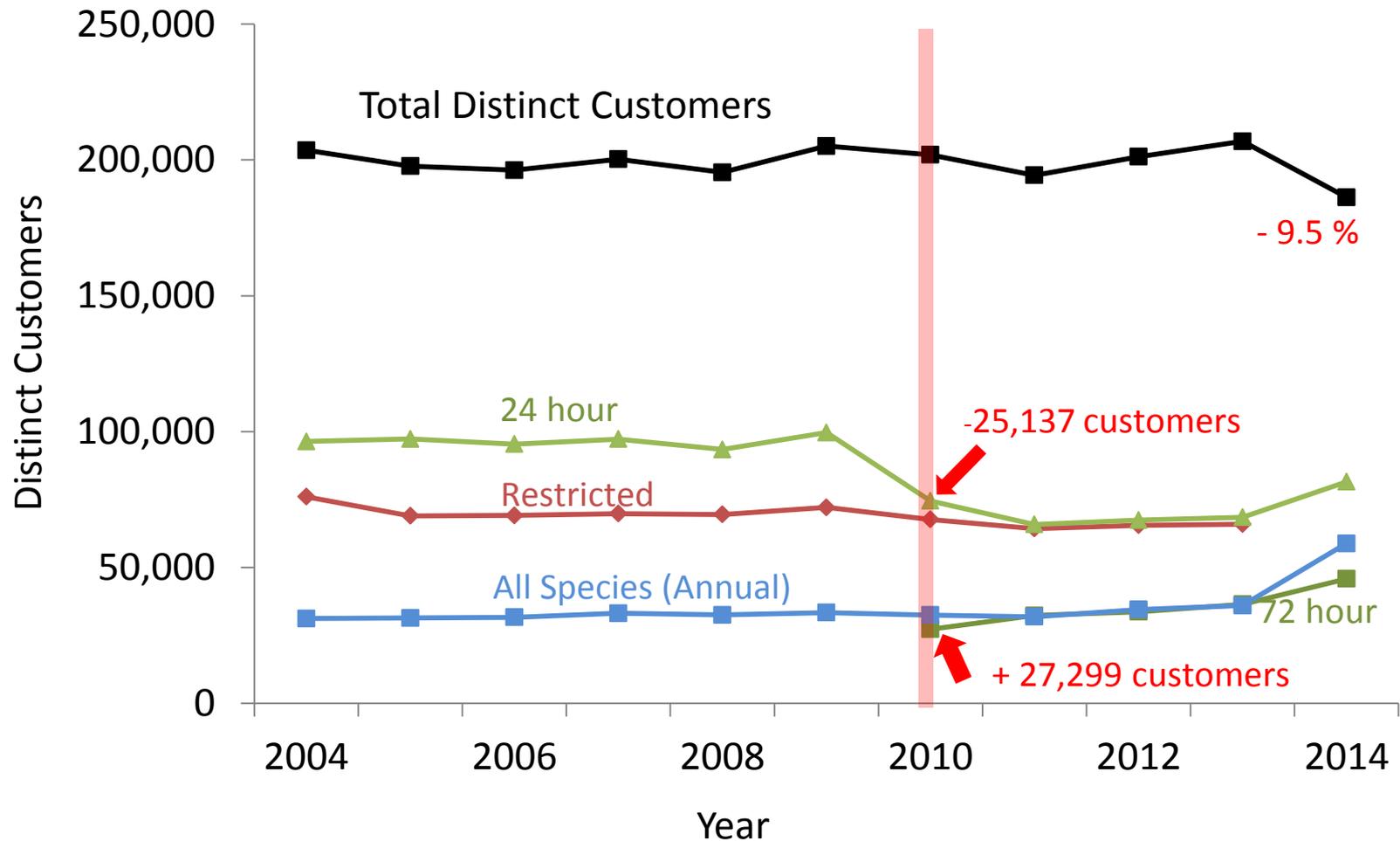
2004 - 2014



Nonresident Customers

(Restricted and All Species & 24 and 72 hour)

2004 - 2014

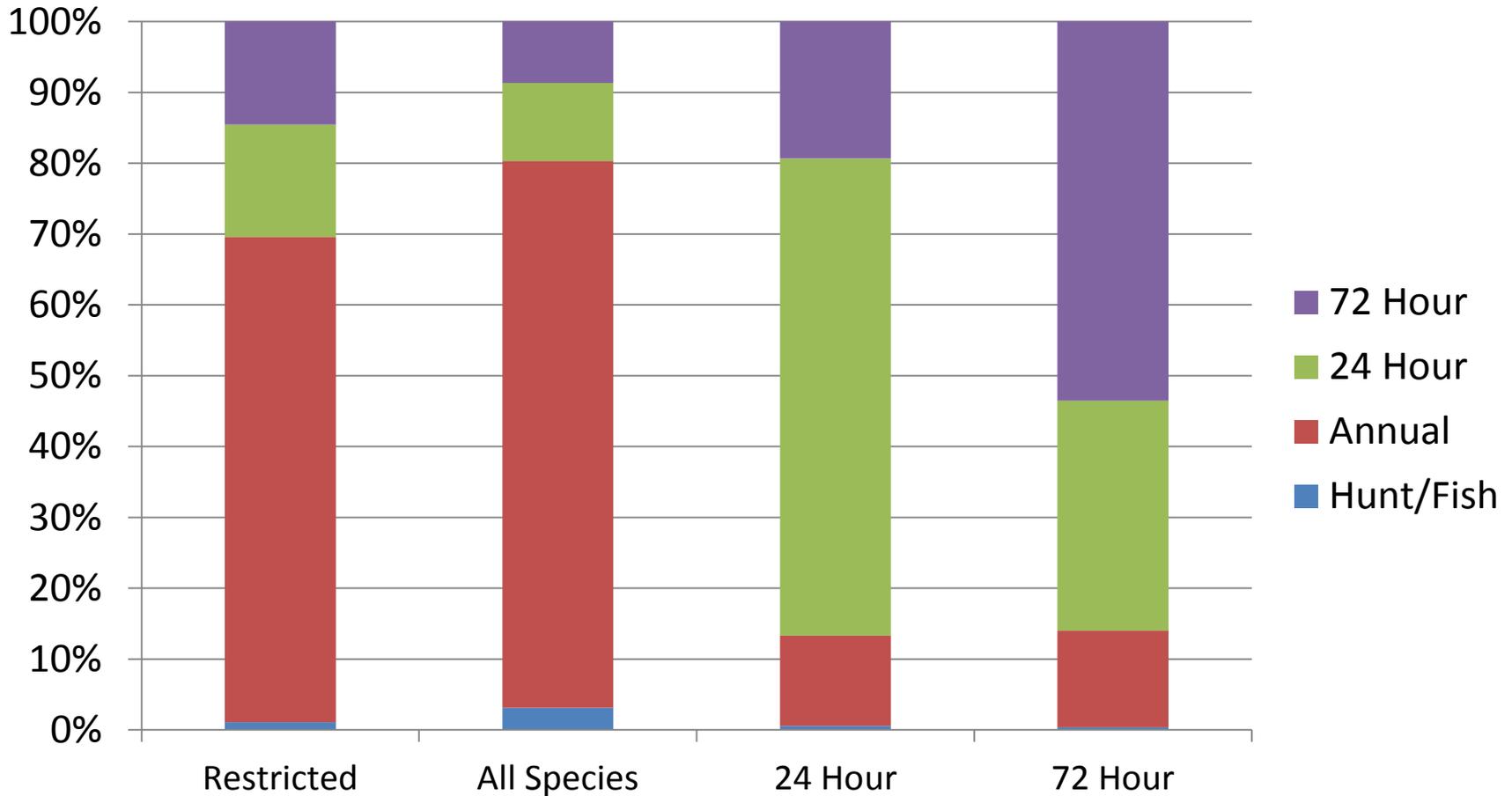


Nonresident Customer Behavior

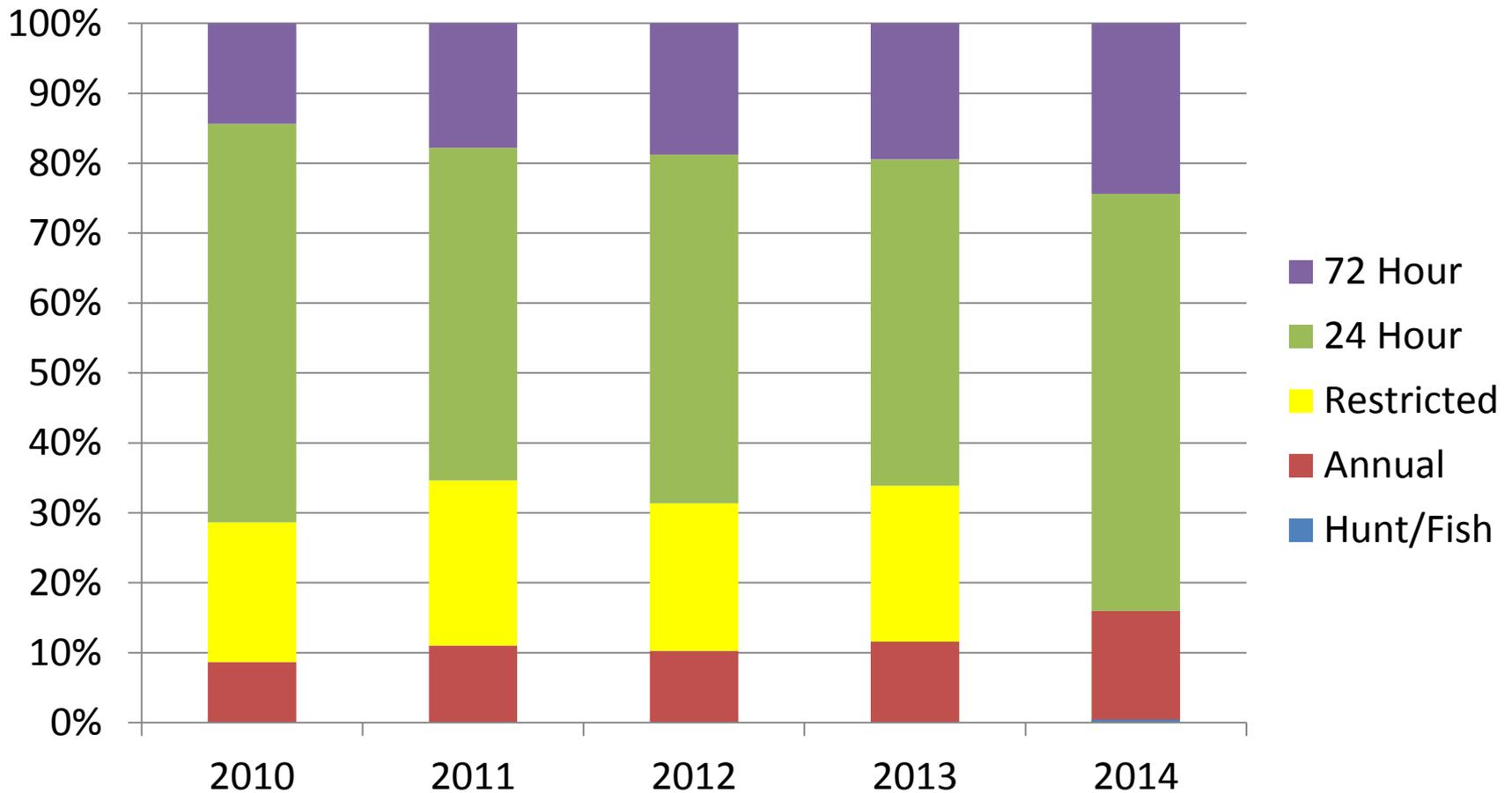
Purchasing Behavior / Churn Rate 2009 - 2014

	2010	2011	2012	2013	2014
<u>Repeat Customers (purchased in previous year)</u>					
<i>percent</i>	37%	26%	36%	27%	38%
<u>New Customers (did not purchase in previous 5 years)</u>					
<i>percent</i>	53%	70%	59%	67%	58%

2014 License Purchasing Behavior of Repeat Nonresident Customers



License Purchasing Behavior of New Nonresident Customers



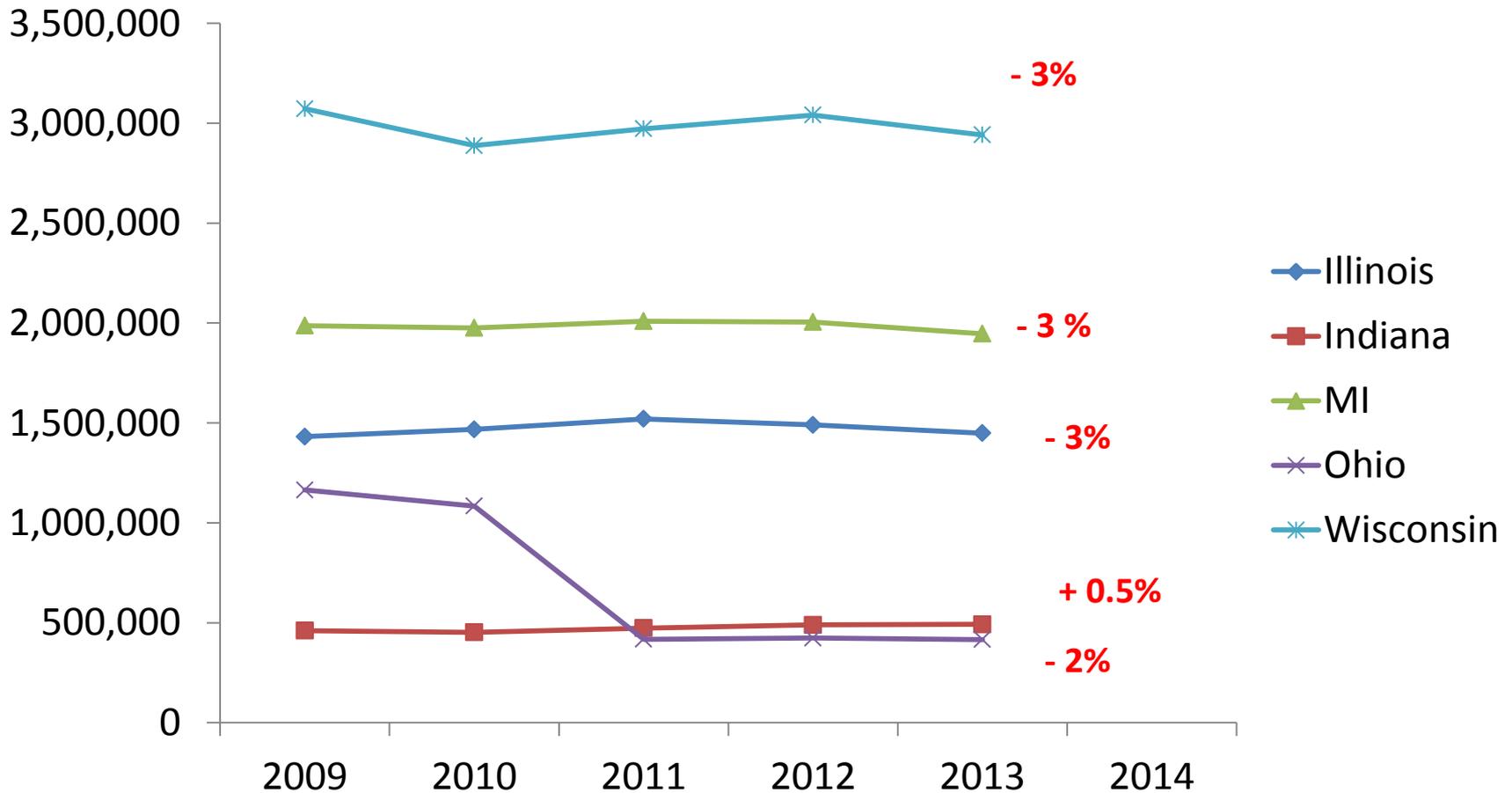
Fishing Summary

- Nationally:
 - Long term declines since 1980's, considerable volatility since 2008
- Michigan
 - Residents
 - 5% decline in customers
 - Lower churn rate
 - Higher propensity to purchase annual licenses
 - Repeat and New customer percentages stable
 - Nonresidents
 - 9.5% decline in customers
 - Higher churn rate
 - Higher propensity to purchase 24 and 72 hour licenses
 - Possible decline in New customers
 - Narrow fishing focus, more catch and release
 - Former Nonresident Restricted license in a longterm decline

Hunting

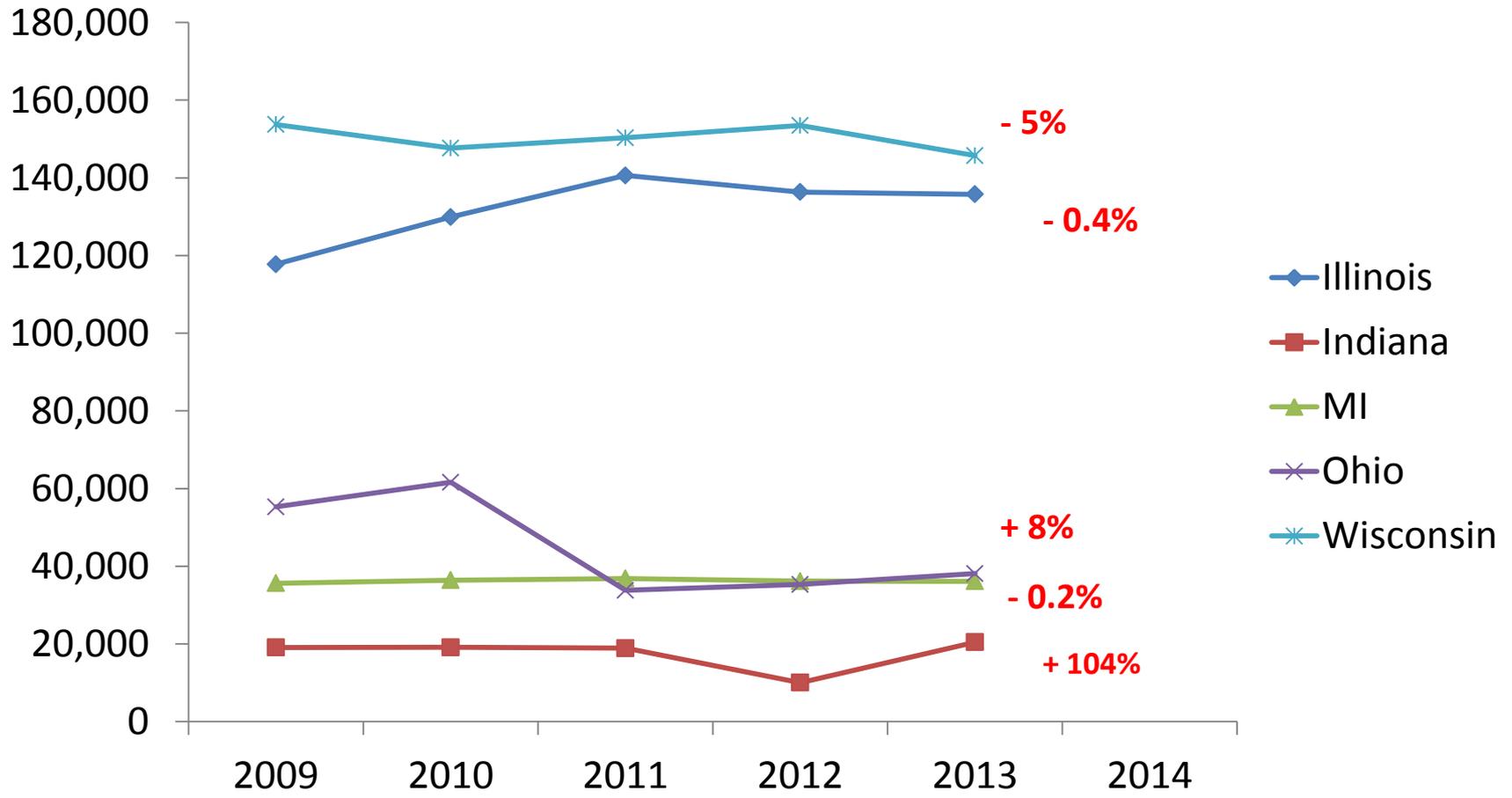
USFWS National Hunting License Report

Total License, Tags, Permits & Stamps: State Totals



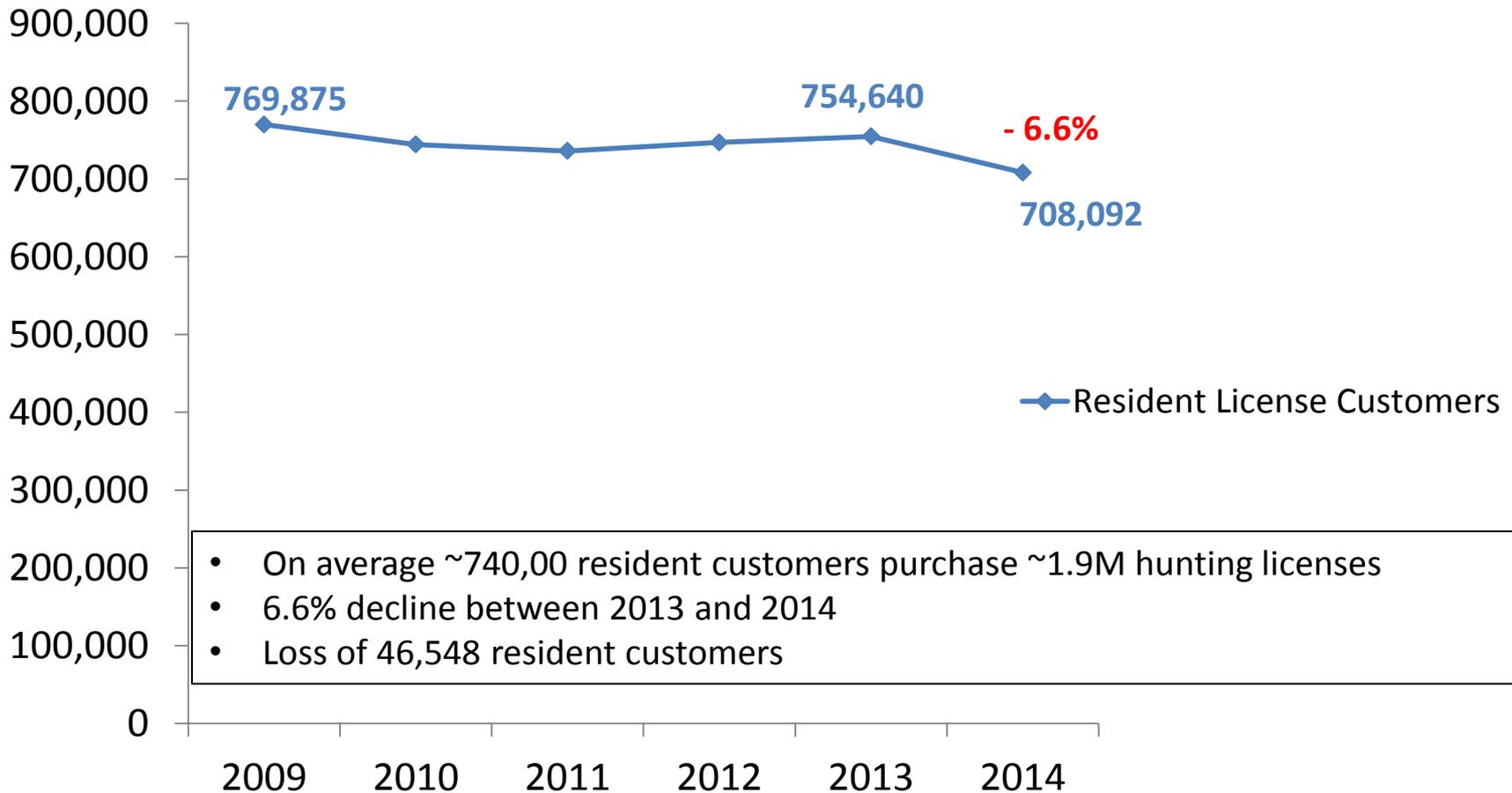
USFWS National Hunting License Report

Total License, Tags, Permits & Stamps: Nonresidents



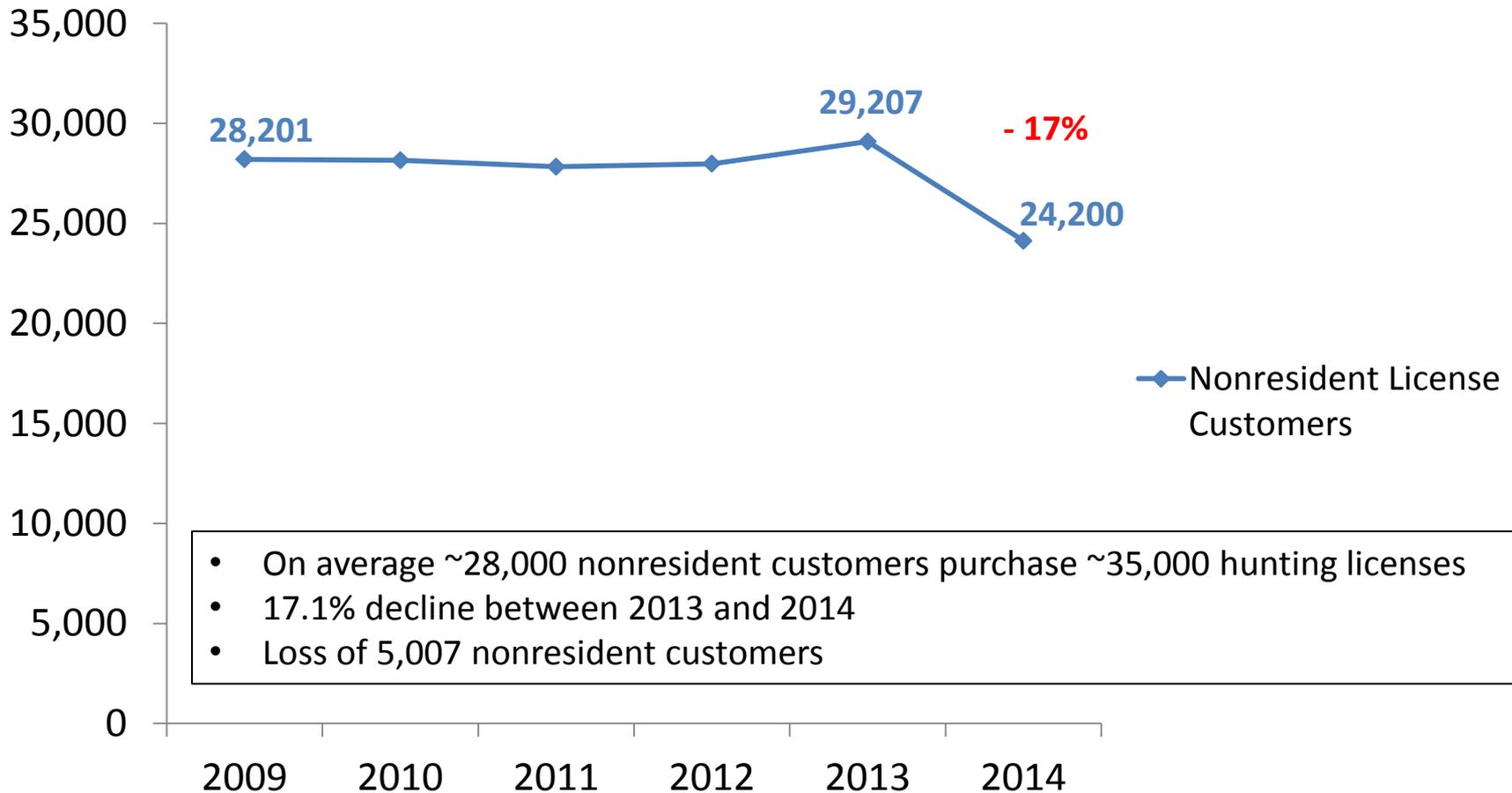
Michigan RSS Data

Resident Hunting Customers

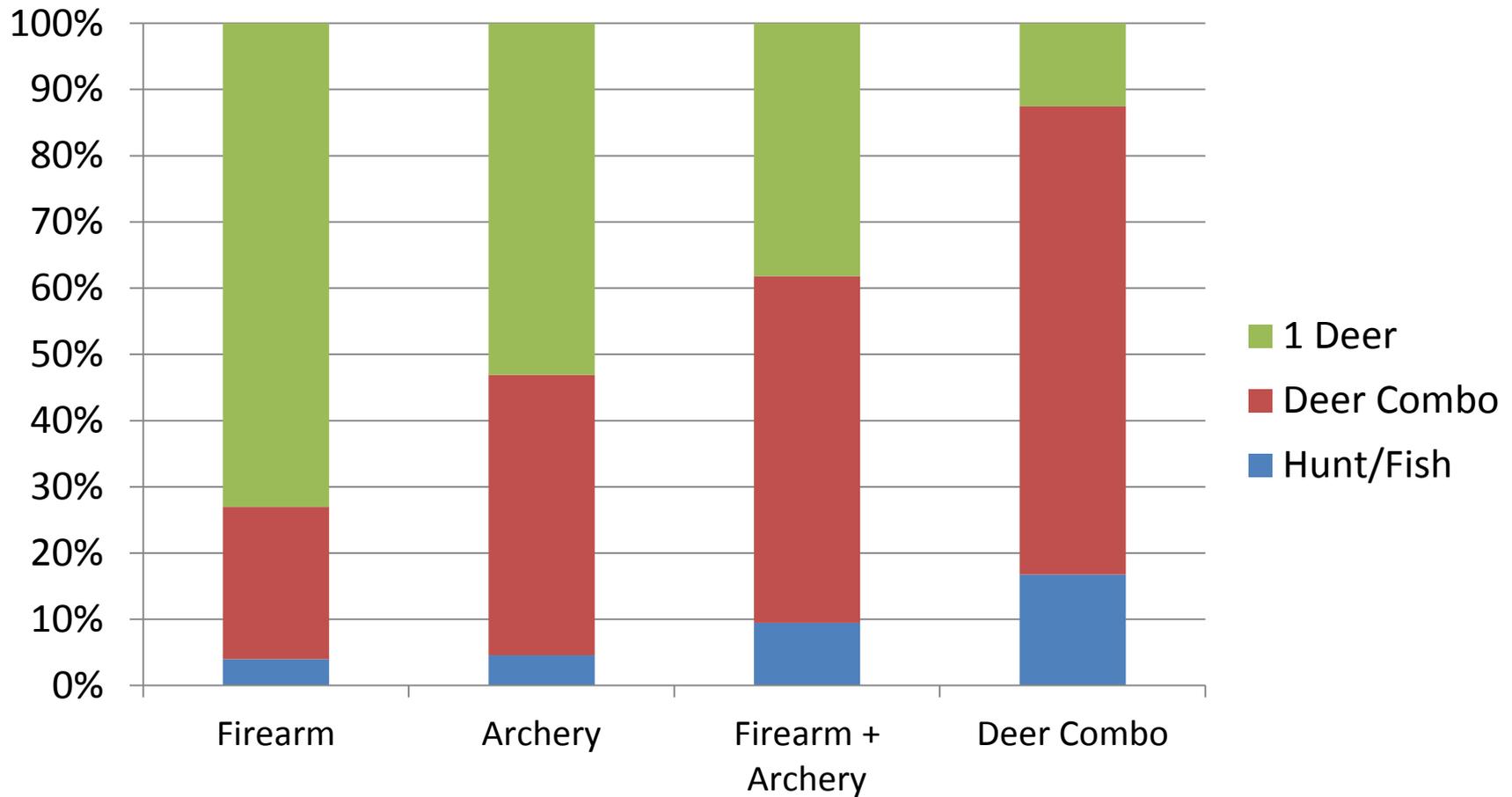


Michigan RSS Data

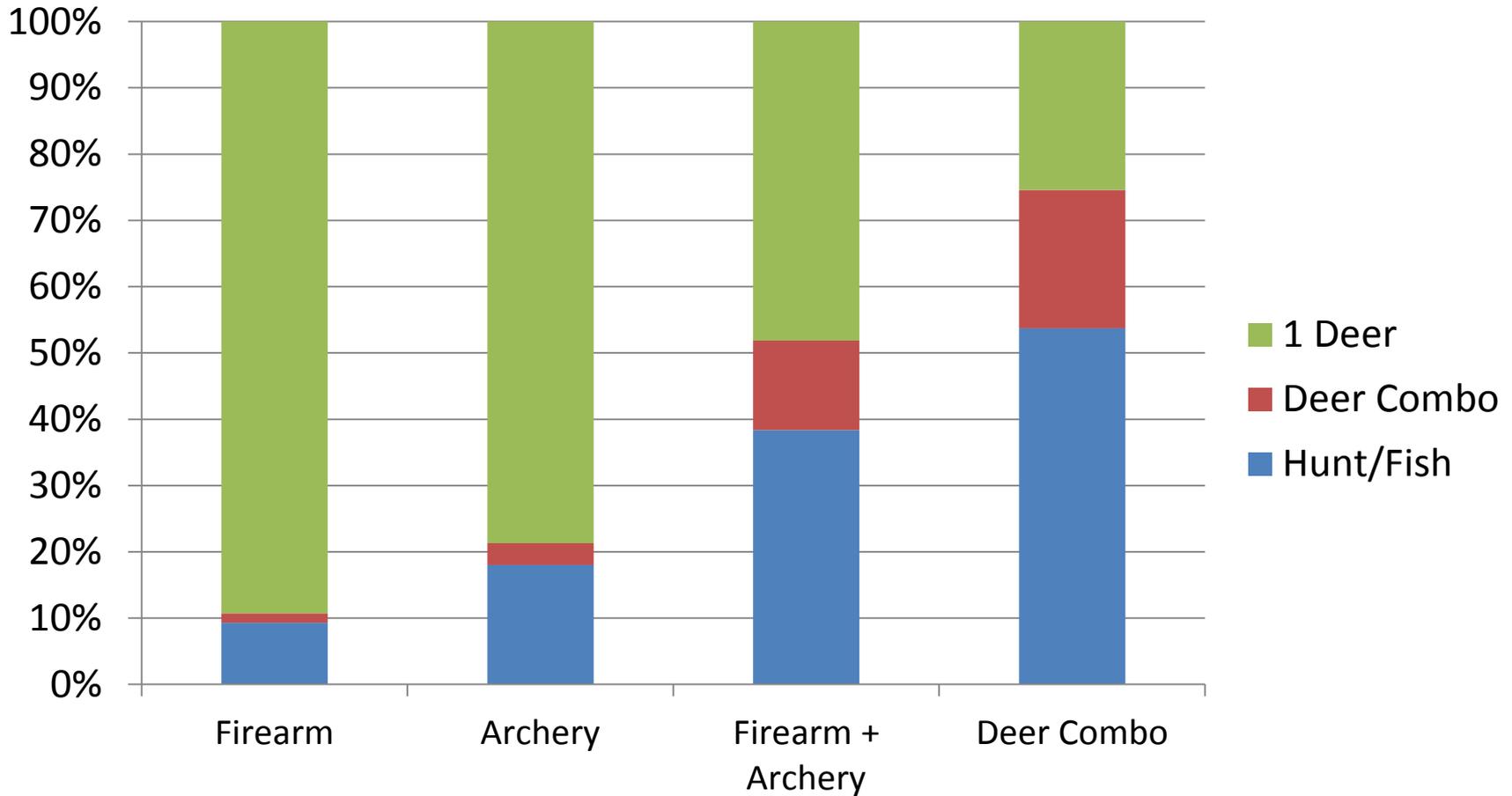
Nonresident Hunting Customers



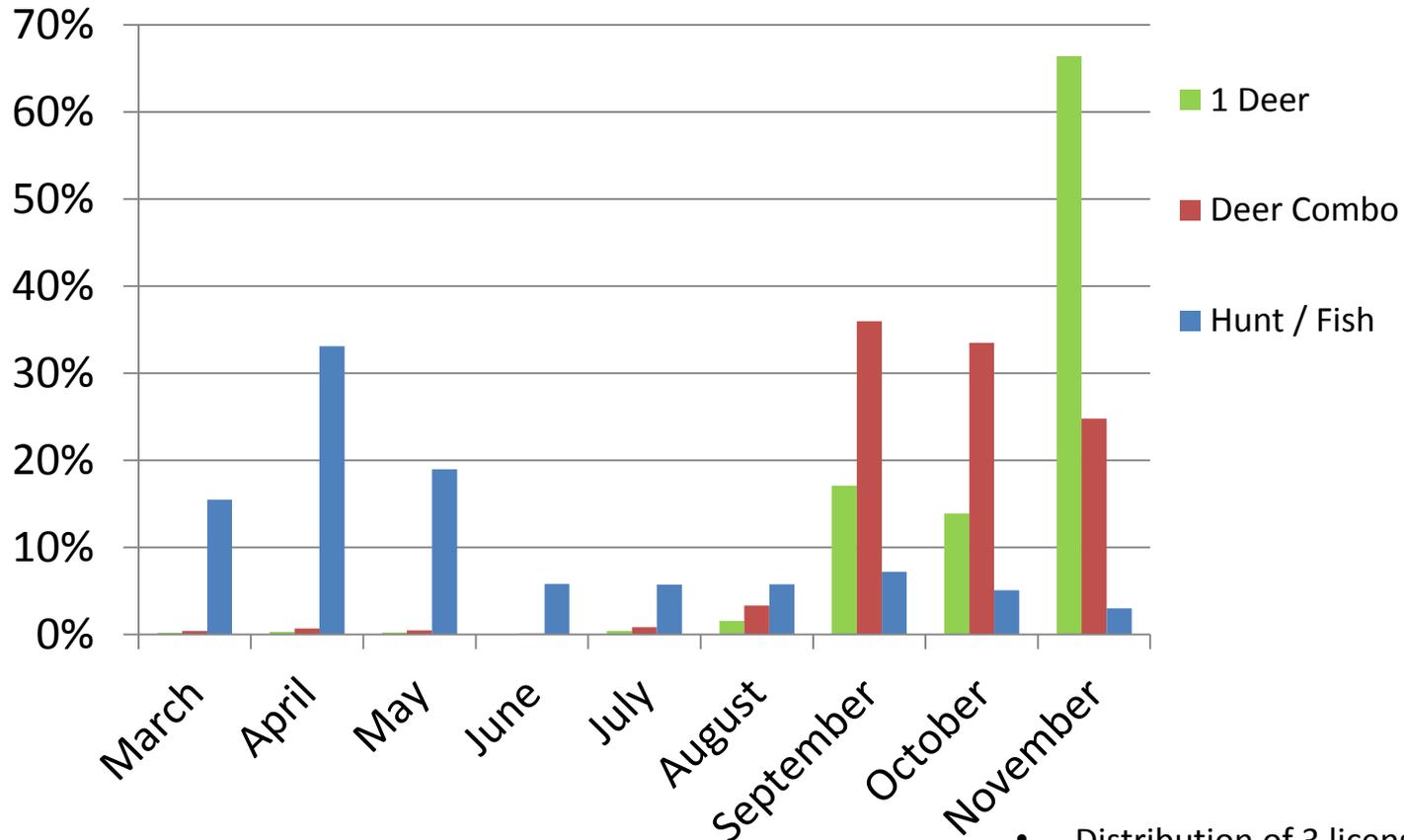
2014 License Purchasing Behavior of Repeat Resident Customers



2014 License Purchasing Behavior of Repeat Nonresident Customers



2014 Purchasing Behavior: Resident and Nonresident Customers



- Distribution of 3 license groups.
- “1 Deer” licenses purchased relatively late in season.

Deer Summary

- Nationally:
 - Recent, modest sales gains swamped by longterm declines
 - Regional nonresident sales mixed
- Michigan
 - Residents
 - Single deer sales in longterm decline
 - Combo sales relatively stable
 - More likely to repeat
 - Combo and multiple tag holders most likely to repeat
 - Higher proportions of customers purchasing combo tag
 - License purchases made earlier in season
 - Nonresidents
 - Single deer sales fluctuating
 - Combo sales increasing
 - Combo and multiple tag holders somewhat more likely to repeat
 - Higher proportion of customers purchasing Hunt/Fish license and single deer
 - Purchases made later in season

What are we doing?

Market Research and Target Marketing

- Understand characteristics of most volatile license groups (single deer, nonresident single deer, daily fishing)
- Discount on nonresident fishing
- Targeted marketing for nonresident fishing and hunting
- Timed communications to resident hunters and anglers
- Revised message to residents and nonresidents