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State of State Partnerships Report Programs and Resources: Developments, Results and Learnings

FY 2014–2015
(April 2013 - March 2015)



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Recreational Boating & Fishing Foundation

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Recreational Boating & Fishing Foundation
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INTRODUCTION

The mission of the Recreational Boating & Fishing Foundation (RBFF) is to increase participation in recreational angling and boating, thereby increasing public awareness and appreciation of the need to protect, conserve and restore our nation’s aquatic natural resources. RBFF partners with state agencies to fulfill this mission and to implement recruitment, retention and reactivation (R3) programs to increase sales of fishing licenses and boat registrations that contribute to aquatic resource conservation.

This State of State Partnerships Report covers ongoing and new state marketing programs, state capacity-building programs and research, and additional marketing/communications resources that support states’ consumer engagement. For each activity, the report explains continuing efforts and any new developments that occurred during the report period, the results of the activity and developments, and RBFF’s responses to those results and follow-up recommendations. Also included is a brief mention of activities planned for the fiscal year ahead. For more detail on any of the activities mentioned, please go to TakeMeFishing.org/Corporate.

Throughout RBFF’s years, our state agency partnerships have been collaborative and dynamic, with each year’s experience generating improvements to activities and to the partnerships themselves. As evidenced in this and RBFF’s previous two-year report, RBFF and state agencies continually learn from research and program performance, learnings that in turn spur new generations of ideas and modifications.

One final introductory note: this report covers RBFF’s FY 2014–2015 (April 2013–March 2015), as compared to the calendar years 2013-14, to conform with RBFF’s fiscal year-based planning, implementation, tracking and assessment of its activities. The RBFF fiscal year runs April 1 – March 31.

MARKETING PROGRAMS

Fishing License Marketing Program

About the Program

The Fishing License Marketing Program (FLMP) began in 2008 as a direct mail program to encourage lapsed anglers to return to fishing. As of FY 2013, RBFF fully funds and implements the program on behalf of participating states, with states receiving 100% of revenues.

FY 2014

In FY 2014, RBFF tested color vs. black-and-white postcard mailings and piloted in five states a follow-up email to direct mail recipients.

Results. 40 states participated in the program, as compared to FY 2013's 35 states. Revenue from the program reached \$4.64 million. Tests yielded the following results: the black-and-white postcard significantly outperformed the color postcard, and the email follow-up generated higher response.

Learnings. Overall, the FLMP continues to be successful. The use of black-and-white postcards should be expanded, and email follow-up proved effective. However, the five-state pilot test revealed a need to maintain better email address databases.

Next Steps and Recommendations. RBFF continued the FLMP in FY 2015, along with RBFF management of the program.

FY 2015

In FY 2015, RBFF tested a conservation message against an outdoors message in mailings sent to the subset of lapsed anglers who had only bought a license the year prior to lapsing, based on a five-year history (Tier 8). RBFF also expanded to 12 states its test of follow-up emails sent to direct mail recipients.

Results. 40 states participated in the program, which resulted in revenues of \$5.4 million. There was no significant difference in the response to the conservation and outdoors messages among Tier 8 anglers. Email follow-up continued to be effective.

Learnings. The FLMP continues to be a reliable program for reaching lapsed anglers, and follow-up email messages improve response. It became clear, however, that state databases hold far fewer email addresses than postal (direct mail) addresses. At the end of the year, the need to maintain better email address databases became even more critical when the US Postal Service alerted RBFF that FLMP mailings no longer qualify for non-profit rates.

Next Steps and Recommendations. RBFF is continuing the FLMP, as well as its management of the program. But for the FLMP to remain cost-effective in the face of higher postal rates, RBFF is proceeding with a 100% email program in FY 2016. RBFF alerted participating states about this change and announced the upcoming FY 2016 program would only reach 20% of the anglers that were reached in FY 2015 (down from a total of 1.85 million lapsed anglers across FY 2016's participating states to 400,000), and stressed the subsequent importance of collecting email addresses for license

holders. RBFF is urging all states to make email address collection a high-priority, mandatory field in their data collection.

According to the FY 2015 RBFF State Agency Feedback Survey, states' support for the FLMP held steady from previous years with a rating of 63% Very Satisfied/Extremely Satisfied.

Boat Registration Marketing Program

About the Program

The Boat Registration Marketing Program (BRMP) began in 2009 as a pilot program to encourage lapsed boat owners to renew their boat registrations. The program went nationwide and has been RBFF-funded and administered since FY 2013, with 100% of revenues going to participating states.

FY 2014

In FY 2014, RBFF continued the previous years' tactics.

Results. 19 states participated, up from 15 states participating in FY 2013. The program resulted in \$1.68 million in revenue for states, roughly \$500,000 more than the \$1.16 million generated by the FY 2013 program.

Learnings. The BRMP is a successful program, and states support RBFF's implementation of it.

Next Steps and Recommendations. RBFF committed to expanding the program by increasing the number of participating states. It continued to administer the program and fund its costs.

FY 2015

In FY 2015, RBFF continued with existing tactics and efforts to expand the program.

Results. Participation in BRMP grew to 21 states, and the program generated \$1.6 million.

Learnings. Once again, results validated the program's success and tactics. States continued to support the RBFF-operated approach. As with the FLMP, the US Postal Service determined that BRMP mailings would no longer qualify for non-profit rates.

Next Steps and Recommendations. RBFF has continued efforts to maintain the program with previous participating states and to expand to additional states in the future. RBFF will continue to manage the program. It also will continue direct mail outreach in FY 2016 even with the higher postal rates, as the ROI with boat registrations outweighs the US Postal Service's increased mailing costs for the BRMP.

States are enthusiastic about the BRMP, giving it a 75% Very Satisfied/Extremely Satisfied evaluation.

Retention Pilot Program

About the Program

The Retention Pilot Program is a new effort to encourage first-time fishing license buyers to continue fishing and renew their fishing licenses.

FY 2014

FY 2014's research laid the foundation for the program. RBFF conducted a multi-stage research effort including data analysis, focus groups and an online survey. Together, their qualitative and quantitative findings revealed insights into the reasons first-time anglers try fishing, and the reasons they either continue or discontinue fishing.

Learnings. The findings from the First-Time Anglers Analysis National Summary Report (based on license data analysis) included that first-time anglers are twice as likely to lapse than repeat anglers (31% v. 68% renewal rate). First-time anglers are more likely to be young, female, urban and Hispanic than repeat anglers. Nearly 80% of first-time anglers purchased an annual license.

The First-Time Fishing License Buyers Focus Group research indicated that invitations to go fishing are an important incentive. Most first-time license buyers have only a vague understanding that fees are used for conservation management. The two main appeals of fishing are the opportunity to relax and temporarily disconnect from today's hectic technology-driven life, and the opportunity to spend time with family and friends.

A third study, the online First-Time Fishing License Buyers Survey, looked into the preferences and motivations of first-time fishing license buyers. Key findings included that more than 90% of first-time license buyers had fished as a child, and that relaxing and spending time outdoors with family and friends are top reasons to go fishing. In fact, the main attractions to fishing are invitations by family and friends or requests by a child to go fishing together. More than 75% reported that their first fishing trip met or exceeded their expectations. The likelihood of renewal more than doubles when first-time license buyers go fishing more than once during their first year, and over half of first-time license buyers who did not renew are still interested in fishing.

Next Steps and Recommendations. RBFF incorporated the three studies' research findings into the design and development of the Retention Pilot Program.

FY 2015

In FY 2015, RBFF shaped the Retention Pilot Program based on the findings of its FY 2014 research. The email-based program was developed to include a series of e-communications, including Thank You's, Fishing Content and Information, license expiration reminders to first-time license buyers, and a control group. This also was based on the Online Fishing License Assessment's recommendations that included requiring customer email addresses, thanking customers, and following up with e-communications.

A key stage in the program's development was identifying a state to pilot it. RBFF set a number of criteria to identify candidate states such as partnership in the Fishing License Marketing Program and First-Time Anglers Analysis, mandatory email collection, and marketing/communications staff to implement the program. During the pilot state

selection process several states were identified. However Georgia Wildlife Resources Division was the only agency identified as having a system in place and able to participate.

Results. Georgia was selected as the state to pilot the program in FY 2016.

Learnings. The process involved in identifying a state to pilot the program revealed that more states need to establish a Customer Relationship Management (CRM) system, and that states need to build their email databases.

Next Steps and Recommendations. RBFF is on course for the Georgia Retention Pilot Program in FY 2016. In the meantime, states are encouraged to establish CRM systems and make email address acquisition a priority.

State Innovative R3 Program Grants

About the Program

This new grants program was developed to fund innovative and sustainable marketing initiatives that 1) focus on increasing fishing license sales and boat registrations; 2) can be replicated in other states; and 3) utilize methods for recruiting, retaining and reactivating (R3) anglers and boaters.

FY 2015

In FY 2015, RBFF created the program based on RBFF State Board members' recommendations. RBFF Board approved a total of \$100,000 for R3 grants in its FY 2016 budget.

Learnings. RBFF has learned that states are eager for new approaches that they can implement and adapt to their own unique circumstances. RBFF also learned that it is seen as a trusted partner for supporting and disseminating new marketing ideas.

Next Steps and Recommendations. In FY 2016, RBFF will develop program details, set proposal criteria, and prepare and distribute the request for proposals. The first grants will be awarded in the Spring. Looking forward, RBFF will continue according to plan: publicizing the grant awards, sharing outcomes, developing case studies and growing the program based on findings that emerge.

CAPACITY BUILDING

State Marketing Workshops

About the Workshops

Established in 2008, RBFF's State Marketing Workshops invite state agency representatives to build their marketing skills. With a consistent focus on customer-centric marketing, the Workshops typically include presentations by leading marketing professionals, case studies of successful state programs, information about RBFF marketing programs and latest research, and roundtable discussions in which state representatives share learnings and ideas. RBFF funds attendees' travel expenses and all other Workshop costs.

FY 2014

FY 2014 hosted the seventh State Marketing Workshop. Forty-five states were represented. Disney's approach to quality service was highlighted by the keynote speaker. Additional topics included RBFF's first-time angler research, using email to drive consumer engagement, engaging the Hispanic audience, and improving the online fishing license purchase experience, with Arizona and Florida presenting their state case studies.

Presentations and podcasts of the FY 2014 State Marketing Workshop are posted on RBFF's website.

Learnings. Workshop feedback continued to be positive. There is a continued widespread and growing demand among state agencies and their representatives for marketing expertise.

Next Steps and Recommendations. RBFF committed to continue holding Workshops. Other "next steps" included planning new speakers and content for the following year, and continuing to post Workshop presentations online for easy access by all state agency personnel, including those unable to attend Workshops in person.

FY 2015

The eighth State Marketing Workshop was the largest Workshop to date with more than 125 representatives, in total, and participants from 48 states and the District of Columbia. Marketing experts focused on engaging tomorrow's customers today. Additional topics included consumer insights from RBFF's *Mystery Retail Shopper* study, improving the online customer experience, and email marketing. State agencies also shared their own customer engagement strategies.

Presentations of the FY 2015 State Marketing Workshop are posted on RBFF's website.

Learnings. States continue to be positive about the Workshops and the marketing knowledge that Workshops impart. Attendees appreciate sharing ideas and discussing state marketing initiatives already being implemented. They also value learning from marketing experts, the latest consumer research and trends, and how to engage audiences to increase fishing and boating participation.

Next Steps and Recommendations. RBFF will continue the Workshops, along with efforts to motivate more state agencies and their representatives to attend.

States continue to rate the Workshops very highly, giving them an 86% Very Satisfied/Extremely Satisfied evaluation.

State Webinar Series

About the Webinar Series

RBFF developed the State Webinar Series as a distance-learning opportunity for state representatives to build their marketing skills. The series began in FY 2014 as a quarterly series on highly relevant marketing topics to help states connect with their constituents. RBFF selects topics most requested by state agency partners and develops webinar content that addresses them.

FY 2014

The first year included quarterly webinars on State Fishing License and Boat Registration Marketing Programs, social media, mobile marketing, and email marketing strategies. Presentations and recordings of the FY 2014 webinars are posted on RBFF's website.

Learnings. It became apparent that states appreciate the webinar format and content.

Next Steps and Recommendations. RBFF committed to continue the webinar series, offering content of greatest practical use and appeal. Other "next steps" included that RBFF would continue to post presentations and recordings of webinars for on-demand access to content, and would continue to promote future webinar opportunities through articles in its stakeholder newsletter *NewsWaves*.

FY 2015

In the second year, webinars covered RBFF's Hispanic Campaign (Vamos A Pescar™), Search Engine Optimization (SEO), Hispanic marketing strategies and insights, RBFF's 2015 national media plan and its new First Catch Campaign. Presentations and recordings of the FY 2015 webinars are posted on RBFF's website.

Learnings. State support of the webinar series continues to grow. Increasingly, RBFF is seen as a trusted source for marketing expertise and for expanding one's own marketing capabilities.

Next Steps and Recommendations. RBFF will continue to develop, post and promote states' participation in webinars. RBFF also will continue to create new content in response to states' feedback and requests, as well as the latest advances in marketing.

States rated this new capacity-building series very highly, giving it an 80% Very Satisfied/Extremely Satisfied evaluation.

Online Fishing License Assessment

About the Assessment

During FY 2013, RBFF conducted a study to evaluate the online fishing license purchase process from the consumer's perspective, and to identify ways in which the customer experience could be improved. The Assessment resulted in six specific recommendations: go mobile, require email addresses, say "thank you," provide follow-up communications, focus on families and offer Spanish translation. In FY 2014–2015, RBFF began to focus efforts on helping states implement the Assessment's recommendations and use the Assessment as a tool for improving their consumers' purchasing experience.

FY 2014

RBFF conducted the first follow-up survey of state agencies in FY 2014 to gauge their progress and challenges in implementing the Assessment's recommendations.

Learnings. The survey incorporated input from 42 states. Its findings indicated that the Assessment itself was being considered and widely shared. The survey quantified state progress in implementing mobile-friendly purchasing sites, mandatory email address collection, thank you messages, follow up and educate tactics, family focus and Spanish translation. RBFF presented the learnings at its State Marketing Workshop, along with insights and how-to guidelines from states implementing improvements. Arizona shared its learnings in streamlining its license offerings, and Florida shared its experience in developing a Spanish language website.

The complete survey presentation is posted on RBFF's website.

Next Steps and Recommendations. RBFF committed to continue monitoring progress made toward the Assessment's six recommendations, and to continue sharing states' successes.

FY 2015

RBFF conducted a second follow-up survey to gain an updated view of states' progress regarding the Assessment's six recommendations, and also to gain insights into their experience.

Learnings. The survey compiled input from 46 states. Its results indicated that a growing number of states had adopted or were in the process of adopting the Assessment's six recommendations. Change appears to be happening and progress is being made, although slowly and to a still relatively small number of states.

The complete survey presentation is posted on RBFF's website.

Next Steps and Recommendations. RBFF will continue to encourage states to adopt the Assessment's six recommendations, and share state case studies.

States rated the Online Fishing License Assessment highly, giving it a 73% Very Satisfied/Extremely Satisfied evaluation.

MARKETING/COMMUNICATIONS RESOURCES

Hispanic Market Resources

About Hispanic Market Resources

The nation's 53 million Hispanics represent an important market opportunity for many states to increase participation in recreational fishing and boating. RBFF has conducted extensive market research into this significant portion of the American public, and developed tools to help states attract Hispanics to fishing and boating.

FY 2014

In FY 2014, RBFF shared with states the findings and recommendations from its recently completed research study *Engaging the Hispanic Audience: Insights to Actions* (June 2013). The research provided actionable insights into the Hispanic market, motivations to boat and fish, and barriers to participation.

Learnings. The report's findings included five specific recommendations for states to use in marketing to Hispanic audiences. The report also recommended launching Hispanic outreach programs in two pilot states, and subsequently creating new initiatives that build upon pilot program learnings.

Next Steps and Recommendations. RBFF presented the report's findings to states in its State Marketing Workshop and in RBFF's first webinar (both presentations available on RBFF's website). RBFF also began to lay the groundwork for partnerships with states on local efforts.

FY 2015

In FY 2015, RBFF launched its Hispanic-outreach *Vamos A Pescar™* campaign focused in Florida and Texas. The campaign's Spanish-language microsite includes content of direct benefit to states: where to fish, and why and how to obtain a fishing license and register a boat. The website has won numerous, prestigious industry awards. Other materials for states to use include Spanish-language, downloadable PSAs, "how to" videos for state agencies' own use, web banners, and a translation guide featuring fishing and boating terms.

RBFF supported Florida and Texas' Hispanic outreach programs with local events through RBFF's Radio Disney partnership.

Also in FY 2015, the George H.W. Bush *Vamos A Pescar™* Education Fund was established. This grant program, initiated with a contribution from Bass Pro Shops Founder and CEO, Johnny Morris, was created to support states' multicultural youth and family-focused boating and fishing education. Later in the year, The Walt Disney Company contributed to the fund, and the RBFF Board approved a non-Federal fund contribution as well. RBFF will distribute grant awards from the fund to states' education programs. In FY 2015, RBFF began developing the grant awards process for launch in FY 2016.

In addition, RBFF conducted new research studies for engaging the Hispanic market.

Learnings. RBFF and its state partners learned that states can play a major role in engaging the Hispanic market and increasing participation in fishing and boating. States appreciate the related insights, guidance and resources that RBFF develops and provides.

Through its experience with the George H.W. Bush *Vamos A Pescar™* Education Fund, RBFF learned that its stakeholders and partners recognize and respect the central role of states in attracting and developing the Hispanic fishing and boating market, and are willing to support it through contributions to the fund.

Next Steps and Recommendations. RBFF will continue to develop Spanish-language marketing materials and Hispanic outreach educational resources, and make them available free to states. RBFF will focus the campaign in three additional states — California, Illinois, and New York — in FY 2016. Finally, with regards to the George H.W. Bush *Vamos A Pescar™* Education Fund, RBFF will begin distributing grants to states, and encourage additional donations from other sources.

Although most of the Hispanic Market resources were new in FY 2015, states rated them highly:

VamosAPescar.org — 71% Very Satisfied/Extremely Satisfied
Hispanic Marketing Research and Webinars — 73% Very Satisfied/Extremely Satisfied

America's Top Family Fishing & Boating Spots Sweepstakes

About the Sweepstakes

America's Top Family Fishing & Boating Spots Sweepstakes leverages the appeal of good-natured competition to help states both engage their consumers and promote their fishing and boating "spots." States propose location candidates based on the Sweepstakes criteria, and encourage their anglers and boaters to vote for them. As the Sweepstakes continues, RBFF publicizes ongoing standings of locations, and widely publicizes the final Top 100 results.

FY 2014

RBFF launched the Sweepstakes in FY 2014. More than 200,000 consumers voted. Although not announced until FY 2015, cities that produced the most votes not only included New York City, Chicago and Los Angeles, but also Omaha and Lincoln.

Learnings. The first Sweepstakes proved an effective consumer engagement strategy and that states that promote the contest can increase votes for their locations. Even less populated states such as Nebraska can motivate enough of their consumers to vote so their locations successfully compete with more heavily populated states' and reach the Top 100 list. Such efforts are a double-win for states, as they simultaneously engage more consumers and draw more attention to their fishing and boating locations.

Next Steps and Recommendations. After the conclusion of the first Sweepstakes in FY 2015, RBFF publicized its results. RBFF also decided to hold a second Sweepstakes, and to promote the Sweepstakes to states and consumers in the following year.

FY 2015

Winners of the first Sweepstakes were announced and publicized, with coverage appearing in state and national media.

Later in the year, a second Sweepstakes began. In this second Sweepstakes, RBFF began publicizing interim, ongoing results, so that states and their consumers could track the standings of their candidate locations. This provided states with more content to use in their own promotions.

Learnings. The popularity of the Sweepstakes remains strong, and has in fact increased. In the first two weeks of the second Sweepstakes, 31,847 consumers voted. By sharing interim results, RBFF motivates states to use the Sweepstakes to engage consumers and to increase the visibility of their fishing and boating locations.

Next Steps and Recommendations. RBFF will continue with the second Sweepstakes. As before, RBFF will promote states' participation as an easy way to engage consumers, as states urge them to vote. RBFF also will continue to publicize ongoing Sweepstakes results. Final Sweepstakes results will be announced in FY 2016.

States rated America's Top Family Fishing & Boating Spots Sweepstakes positively, giving it a 60% Very Satisfied/Extremely Satisfied evaluation.

Photo Library

About the Library

RBFF maintains a library containing a wide range of more than 100 downloadable, professional photo images of fishing and boating activities. Photos are free and easy for states to acquire and use in their own marketing efforts.

FY 2014

RBFF receives many requests to use images throughout the year. The photo library is a popular and highly rated resource.

Learnings. In keeping with RBFF's Hispanic outreach research, RBFF realized the need for a greater number of multi-cultural images.

Next Steps and Recommendations. RBFF acquired new multi-cultural images to bring greater ethnic diversity to its library collection.

FY 2015

RBFF added two sets of multi-cultural photos to the library. Together, the two sets offer dozens of new images.

Learnings. The new multi-cultural images have increased the library's appeal to states, who continue to view it as a very useful free resource. Photos from across the library are appearing in state marketing materials.

Next Steps and Recommendations. RBFF will continue to expand its photo library. With the goals of increasing the library’s geographical diversity and to show actual consumers enjoying fishing, RBFF will add consumers’ photos that are generated by the new #FirstCatch social media campaign.

States rated the Photo Library highly, giving it a 74% Very Satisfied/Extremely Satisfied evaluation.

Additional Take Me Fishing™ Resources

About Take Me Fishing Resources

Take Me Fishing is RBFF’s consumer marketing campaign. The campaign includes a wide range of free digital, print and broadcast resources designed to help states engage consumers and motivate participation in fishing and boating.

FY 2014–2015 TakeMeFishing.org. The one-stop resource for RBFF’s consumer marketing campaign, this consumer website gives states multiple opportunities to promote state-specific content. The website includes links to their own fishing license purchasing sites, places within the state to go boating and fishing, species of fish in the states’ waters, state fishing and boating regulations, state boating resources and state education programs. States also can promote and post links to their upcoming events, free fishing days, as well as other state-specific information, resources and consumer-engaging promotions. Both mobile and desktop versions of the website are continually enriched with new content.

PSA Distribution Kit. This compilation of Take Me Fishing-branded marketing materials includes professionally produced, 30-second television PSAs and other materials that communicate the link between fishing license sales and boat registrations with conservation.

Take Me Fishing Marketing Guide. The guide contains customizable materials for marketing boating and fishing, such as magazine and newspaper ads, radio and print PSAs, web banners, posters and event banners.

Next Steps and Recommendations. RBFF’s other Take Me Fishing-branded marketing resources will continue to be refreshed and made available free to states on TakeMeFishing.org/Corporate.

States continue to rate Take Me Fishing resources highly:

TakeMeFishing.org — 87% Very Satisfied/Extremely Satisfied
PSA Distribution Kit — 87% Very Satisfied/Extremely Satisfied
Marketing Guide — 79% Very Satisfied/Extremely Satisfied

LOOKING AHEAD

In FY 2016, the RBFF Board will undertake a strategic planning process to develop a new multi-year Strategic Plan, its implementation to begin in FY 2017. RBFF's partnerships with states in recruitment, retention and reactivation (R3) programs will remain at the heart of this new Strategic Plan. States play a critical role in increasing recreational fishing and boating participation, and supporting their ability to achieve this objective is a top RBFF priority.

Over the next year, RBFF will build on its successful state marketing programs, capacity-building opportunities, and marketing resources. RBFF will continue to implement appropriate improvements, expansions and enhancements based on learnings and as noted in the recommendations.

Overall, RBFF's iterative approach to strengthening, innovating and growing programs and products will continue. The success of these activities and the collaboration with states will, in turn, shape new RBFF efforts in the months to come.