



State of State Partnerships Report 2011-2012

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June 28, 2013



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The mission of the Recreational Boating & Fishing Foundation (RBFF) is to increase participation in recreational boating and fishing while increasing the public's awareness and appreciation of the need to protect, conserve and restore our nation's aquatic natural resources. RBFF partners with state agencies to achieve this mission and to increase sales of fishing licenses and boat registrations that contribute to aquatic resource conservation funding.

In 2011-12, as a result of input from state agencies and program learnings, RBFF began to shift its focus from product development to state-specific programs, marketing support and expertise. As a result, this report, unlike the previous biennial reports, focuses less on state agencies' usage of products and more on their participation in RBFF programs and utilization of services, as well as on lessons learned from each activity.

Fishing License Marketing Program

The Fishing License Marketing Program was introduced in 2008 as a direct mail program to encourage lapsed anglers to return to fishing. Since then, the program has evolved to better meet states' changing needs. A major change occurred between the 2011 and 2012 programs. Informed by RBFF's Pre-Workshop Survey conducted at the end of 2011, RBFF offered state agencies in 2012 a new option: to have RBFF fully fund and manage the program for them.

The 2011 Program. The fourth annual Fishing License Marketing Program followed the basic model from the inception of the program in 2008. RBFF made direct mail marketing materials available to state agencies, which managed the distribution of multiple mailings to lapsed and in some cases current anglers. The various partner state agencies employed a wide array of approaches, with some focusing on retention as well as renewal. Additionally, states employed a variety of tactics, including direct mail, email and social media.

Across all 25 participating states:

- The average response rate was 16.5 percent, well above the U.S. average of 4.4 percent (according to the Direct Marketing Association).
- More than 279,000 fishing licenses and permits were sold.
- More than \$6.1 million in gross program revenue was generated.

Lessons learned from the year's program included:

- An increased use of email results in higher net revenue.
- Mailings conducted earlier in the season generate higher lift.

- State agencies faced a number of challenges, including limited time, budget and staff, in implementing the program.

Pre-Workshop Survey. Following the 2011 Fishing License Marketing Program and in anticipation of the upcoming 2011 State Marketing Workshop at year's end, RBFF distributed a Pre-Workshop Survey to state agencies. Forty-one states responded.

Through the Pre-Workshop survey, RBFF learned more about the challenges states face in implementing the Fishing License Marketing Program on their own and their preference that RBFF handle the program for them. The survey specifically requested feedback on a new option, that RBFF fund 100% of the program, with the state agency responsible solely for providing mailing list data.

An overwhelming 81 percent of survey respondents expressed their preference for the RBFF-funded and managed option. Less than one-fifth, 18.9 percent, preferred that RBFF provide matching funds (75 percent RBFF/25 percent state agency), with the state agency maintaining responsibility for mailer printing and distribution as well as mailing list data. These survey responses played a key role in informing and shaping the 2012 Fishing License Marketing Program.

The 2012 Program. The fifth annual Fishing License Marketing Program offered participating states the RBFF implementation option based on feedback from the *Pre-Workshop Survey*.

For states choosing the new option, RBFF fully funded and managed the program on state agencies' behalf, with states receiving 100 percent of the revenue generated. This option relieved states of administrative and other challenges of managing the program themselves. Cost-effective for all, the option also allowed RBFF to leverage and standardize its activities across multiple states, while utilizing non-profit postage rates.

Participating states provided their fishing license data in early February for the single mailing launch date in early April. A testing element of the 2012 program was an incentive mechanism to respond to the mailing. In partnership with Pure Fishing, mailings offered consumers a Shakespeare incentive, which provided anglers who purchased \$40 worth of equipment and their 2012 fishing license, an opportunity to get \$10 back. Additionally, three states (Iowa, Oregon and South Carolina) implemented the cooperative matching program option and tested various strategies.

In 2012's Fishing License Marketing Program:

- 35 states participated.
- 2.59 million direct mail pieces were distributed.
- Mailings experienced an 8.63 percent average response rate, almost twice the U.S. average of 4.4 percent (according to the Direct Marketing Association).
- More than 242,000 licenses were sold.
- \$4.98 million in gross program revenue generated for state agencies and conservation.

The program also resulted in a 10.2 percent increase in fishing among the participating states versus a five percent decrease in fishing participation among the 15 non-participating states during the same time period, according to Southwick Associates in comparing data from the U.S. Fish & Wildlife Service's (USFWS) 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

State Agency satisfaction with the program also increased. According to the RBFF State Agency Feedback Survey, the percentage of respondents extremely or very satisfied with the program was 63 percent, up three percent from the 60 percent the year before.

Key Insights learned from the 2012 program, based on analysis of its results, included:

- An early Spring postcard mailing proved effective.
- Postcards with the Shakespeare offer performed similarly as the postcards that contained no offer.
- Target audiences should be refined to exclude anglers age 18 and under.
- Based on state pilot tests, strategies should include testing the use of a black and white "government-looking" postcard in addition to the oversized color postcard.

The above learnings were implemented in the 2013 program, and the 100 percent RBFF-funded and managed option was continued. Additionally, a pilot test effort was included in several states to test an email message as a second touch point. The 2013 RBFF Strategic Plan includes expanding the current fishing license program. Also ahead, RBFF will continue to refine the program each year to build on results.

Boat Registration Marketing Program

The Boat Registration Marketing Program applies to lapsed boat registrations the same strategy proven successful in the Fishing License Marketing Program. Boat owners with lapsed registrations receive mailings that encourage them to renew their boat registration. Begun in 2009 as a pilot program in partnership with the Oregon State Marine Board and the Oregon Department of Fish and Wildlife, the pilot program grew to four participating states in 2011 and went nationwide for the first time in 2012, with 15 states participating.

The 2011 Pilot Program. In 2011, Florida, Ohio and Tennessee joined Oregon, the first state to pilot the Boat Registration Marketing Program. Ohio had the best-tracked program, which resulted in:

- 23,000 boat owners with lapsed registrations reached.
- 750 boats re-registered.
- \$14,000 in net revenue generated.

By the end of the year, 28 percent of state agencies indicated that they were extremely or very familiar with the program, and 76 percent indicated they were extremely or very satisfied with it. RBFF also learned that state agencies participating in the pilot program

faced similar difficulties as states participating in the State Fishing License Marketing Program; that is, they had insufficient resources to implement the program effectively.

The 2012 Nationwide Program. This benchmark year saw 15 state partners across the country participating. RBFF fully funded and implemented the program on behalf of state agencies, with the states receiving 100 percent of the revenue generated.

In 2012's Boat Registration Marketing Program:

- 15 states participated.
- 450,000 direct mail pieces were distributed in early April.
- Mailings achieved a successful 7.93 percent response rate.
- More than 32,000 boats were re-registered.
- \$1.16 million in registration revenue was generated.

State agencies were pleased with the performance of this first nationwide year of the program. According to the 2012 RBFF State Agency Feedback Survey, 85 percent of state agency respondents indicated they are extremely or very satisfied with the Boat Registration Marketing Program (up 13 percent from the previous year), and 85 percent indicated they are extremely or very satisfied with it (up nine percent from the previous year).

Key Insights garnered in 2012 indicated that subsequent programs should:

- Include one renewal notice mailing in the same early April timeframe.
- Target households with licensed anglers with a four-color, fishing-focused renewal notice.
- Send non-angling households a four-color boating-focused renewal notice, and eliminate the black-and-white renewal notice.

The 2013 program included these learnings and build on the success of this first year, expanding to additional states. RBFF will continue to work closely with state agencies in supporting the 2013 RBFF Strategic Plan objective to expand the program with even more states.

State Marketing Workshops

RBFF has conducted State Marketing Workshops since 2008. Designed from the start to enhance states' communications and marketing capacity, the workshops have steadily grown in terms of 1) the number of state agencies attending; 2) the scope of content, which now extends beyond RBFF-state marketing programs; and 3) the range of outside experts and industry speakers who deliver substantive content.

2011 Workshop. In December 2011, 45 state agencies convened in Phoenix for the fifth State Marketing Workshop. The focus of the 2011 workshop was on the importance of

marketing and communicating with anglers, and implementing integrated marketing efforts to increase fishing license sales. Sessions held during the workshop included:

- Presentations by outside experts, including the golf industry's participation challenges and solutions.
- RBFF integrated marketing approach and new program materials.
- States' efforts in the 2011 Fishing License Marketing Program and their results.
- The Boat Registration Marketing Program.
- State agency presentations and roundtable discussions focused on angler engagement strategies.

2012 Workshop. A record was set in 2012 with 47 state agencies attending the State Marketing Workshop held in Dallas. Workshop presentations and discussions covered:

- Keynote presentation by Howard Hyden, Founder and President of the Center for Customer Focus.
- State agency perspectives on customer engagement and experiences with multi-year licenses.
- Digital strategies for maximizing an agency's online presence, including tips and techniques for making best use of their state website, social media, email marketing and RBFF marketing resources.
- RBFF's related upcoming Strategic Plan objective, to enhance marketing and communications capacities of state agencies.

Additionally, the 2012 Workshop:

- Reflected a new emphasis on focusing on customer engagement strategies to increase fishing license and boat registration sales.
- Included initial results of RBFF's Online Fishing License Assessment, described below in this report.
- Held roundtable discussions that explored what state agencies can do to improve their customers' online experience.

RBFF's 2012 State Agency Feedback Survey revealed that 86 percent of state agency respondents were extremely or very satisfied with the State Marketing Workshop.

Comments made as part of the survey, in combination with staff debriefings, yielded learnings and recommendations for subsequent workshops to engage all 50 states. These included a continued focus on enhancing the marketing and communications capabilities of state agencies, and sharing marketing success stories from outside experts and state representatives.

Going forward, RBFF sees the workshops becoming even more valuable as they continue to broaden their focus to encompass digital marketing strategies, especially as technology plays a growing role in marketing. Workshops also will continue to focus on developing states' capacities to reach and engage customers and to improve the customer experience as a strategy for increasing participation in fishing and boating.

Online Fishing License Assessment

RBFF's Online Fishing License Assessment was a special study conducted in 2012 to understand and evaluate the online fishing license purchasing process from the consumer's perspective. The assessment yielded a set of learnings and recommendations that RBFF and states can use to make a positive difference in customers' online purchase experience. Ultimately, improving each phase of the customer experience will lead to increased participation in fishing, along with state revenues from the sale of fishing licenses.

National consumer trends show there will be many technology and demographic changes occurring in the next few years that will have a significant impact on the success of RBFF and its state partners. One measure, from Statista, indicates that nearly 190 million people will shop online this year, 118 million on a mobile device.

To understand customers' online experience, RBFF visited every state agency homepage and purchased a one-day, non-resident fishing license (or the shortest term available). RBFF then documented the experience in four categories: pre-purchase phase, purchase phase, post-purchase phase and customer support.

The study found that the current process allows for many examples of superior customer service as well as opportunities to become more customer-centric. The study tracked the significant variations that exist between online purchase systems, including the demographic information requested of customers; license types and choices offered; and post-purchase elements such as license delivery, thank you's, email confirmations and customer support systems. The report included examples and analyses of various existing processes, case studies and a means for states to evaluate their own system.

Learnings/recommendations that followed from the assessment include:

- *Go mobile.* Five out of 50 states offered mobile-friendly websites, and two out of 50 states offered mobile license buying.
- *Require every customer to provide an email address.* Forty-seven states collected email addresses, but only a little over half of those made their collection mandatory.
- *Say "thank you."* Thirty-two states offered no post-communication, thank you message.
- *Follow up and educate at every e-opportunity.* Eleven states offered the option to sign-up for subscriptions or news.
- *Focus on families.* Three out of 50 states offered a family license.
- *Offer Spanish-language translation.* One state offered Spanish translation.

The [Online Fishing License Assessment](#) was RBFF's first step towards better understanding the customer experience and assisting states in improving it. It specifically addressed an area that states have expressed great interest in, that is, using technology to increase participation, and gave states valuable insights that they can readily apply to their own online purchase processes.

Webinars

Throughout 2012, RBFF conducted several webinars, all well received. This led to RBFF focusing on conducting a greater number of webinars and on a more regular basis moving forward. RBFF assessed states' interest in topic areas, and has since utilized their feedback to guide webinar content.

RBFF's 2012 webinar series included webinars on the Fishing License Marketing Program, the Boat Registration Marketing Program, and RBFF's new PSA Distribution Kit, which guides states in obtaining media support of print and broadcast PSAs. The webinars proved to be effective. Specifically, from the 2012 State Agency Feedback Survey and the 2012 State Marketing Post-Workshop Survey, RBFF learned that:

- 86 percent of previous webinar participants thought the information presented was extremely/very useful.
- The top three topics of interest for future webinars are email marketing (77 percent and 49 percent, respectively), social media (69 percent and 58 percent, respectively) and mobile marketing (56 percent and 48 percent, respectively).

RBFF subsequently initiated a quarterly schedule of state webinars based on topics of greatest interest to state agencies. Areas to be addressed in the future, beyond greater depth in the Fishing License and Boat Registration Marketing Programs, include email marketing, mobile marketing and social media.

Take Me Fishing Marketing Guide

RBFF's Take Me Fishing Marketing Guide was developed as a tool to help states integrate their marketing efforts with RBFF's Take Me Fishing brand and leverage the national campaign's success. Over the years and as a result of states' input, the guide has evolved. In 2012, its marketing materials became more customizable, it offered a greater depth of digital materials and digital marketing guidance, and it offered more extensive marketing guidance to enhance states' overall marketing capacity.

New, customizable elements in 2012 included updated imagery, with photos featuring a greater variety of fishing opportunities. Digital marketing materials included banner ads and how-to guidance on using email marketing and social media.

A major new component in the 2012 Marketing Guide was the Public Service Announcement (PSA) campaign, "This Is a Test." Characteristics of the campaign included:

- A humorous retro announcement style to communicate the link between fishing license and boat registration purchases with aquatic resource conservation.

- Multiple TV and radio formats, including :60 and :30 commercials, with and without customizable tagging options, as per states' request.
- Multiple print/digital formats, including full and half page print ads that can be customized with state agency logos.

A PSA Distribution Guide, available through the Marketing Guide, gave states step-by-step instructions for encouraging media to air or place the PSAs.

In addition to these new components, the 2012 Marketing Guide continued its established function of providing states with materials that complement:

- RBFF's national Take Me Fishing advertising.
- States' direct mail marketing.
- Integrated public relations, including social media.

As materials have been from the start, marketing materials were developed to drive consumers to TakeMeFishing.org, RBFF's comprehensive participation-building consumer website.

State Agency Feedback Surveys indicate satisfaction with the Marketing Guide. In 2011, 74 percent of respondents to the survey were extremely or very satisfied with the guide, and in 2012, 76 percent of respondents were extremely or very satisfied with the guide. Ahead, RBFF expects the guide resources to continue to evolve as states' needs and marketing technologies change, and also as RBFF focuses on developing states' marketing capacity as a strategic priority.

Hispanic Pilot Program with Texas

In 2012, RBFF partnered with the Texas Parks & Wildlife Department (TPWD) to conduct a pilot marketing campaign aimed at increasing participation in fishing and boating among the state's Hispanic population. The program provided the groundwork for a future nationwide RBFF program to reach this important demographic growth segment.

As presented at RBFF's 2012 State Marketing Workshop, the TPWD pilot campaign carefully considered the size and nature of the Hispanic market (over 50 million Hispanics in the U.S., of which 1.6 million fish, according to the U.S. Census Bureau and the USFWS's 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation), along with barriers to their entry into fishing. The program responded with a targeted online marketing approach, with the goal of motivating the Hispanic audience to add fishing and boating to their outdoor activities consideration set.

Results provided key learnings and indicated that future program considerations should include:

- Recognizing the Hispanic market includes both English and Spanish speaking Latinos.

- More in-depth market segmentation.
- Refinement of Spanish website content, media messaging and creative.

Insights from the pilot campaign results will inform the development of a nationwide RBFF Hispanic outreach campaign moving forward in 2013.

Looking Forward

State agency survey feedback, states' ongoing input and RBFF's lessons learned from 2011-12 activities informed RBFF's Strategic Plan for the years ahead. To a great extent, the components of the Strategic Plan that affect RBFF-state partnerships formalize findings and trends apparent in the 2011-12 period.

RBFF relies on feedback from state agencies to guide its ongoing initiatives. From its 2012 State Agency Feedback Survey, RBFF learned that even in the face of a challenging economy, when state agency and consumer budgets were strained to the limits, satisfaction with RBFF held strong at approximately two-thirds (66 percent in 2011 and 64 percent in 2012.) In addition, 79 percent of State Agency Feedback Survey respondents said they believe RBFF's products and programs enable them to some extent to be more effective in their marketing, education and outreach efforts.

Moving forward, RBFF is committed to:

- Expand current lapsed angler and boater programs.
- Develop a retention program based on marketing programs implemented at the state level.
- Advise and assist states in improving fishing license and boat registration processes.
- Enhance the marketing and communications capacities of state agencies.

RBFF will move towards serving as a central collection point for state contacts, marketing activities and progress in growing participation, facilitating states' ability to learn from each other and build on each other's successes. Additionally, RBFF will provide marketing support and expertise to state fish and wildlife agencies so that they can enhance their interface with customers, key to increasing conservation awareness and participation in fishing and boating activities.

Building on learnings from 2011-12, RBFF will continue its forward approach to supporting state agencies, their marketing capacities and their resources, and move ahead with programs and services that will, by 2013-14, yield new learnings and gains to report.