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**National Marketing Strategy
for the Bureau of Land Management
Wild Horse and Burro Program**



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1.0 INTRODUCTION

This document contains a national marketing strategy for the Bureau of Land Management (BLM) Wild Horse and Burro Program. The objective of the marketing strategy is to increase awareness of the Wild Horse and Burro Program and to improve success of the Adopt-a-Horse or Burro Program.

The marketing strategy was developed by Dougherty & Associates, Inc. (DAI), teamed with Vector Resources, Inc. (VRI), under contract to BLM. The marketing strategy presented in this document is based on a review of previous studies and reports, an analysis of demographic data and program statistics, an assessment of market opportunities, and an evaluation of the program's current presentation, outreach, and communication tools. In accordance with contract direction, the DAI team developed the marketing strategy by relying on existing sources of information to the extent possible, combined with some additional limited interviews and research.

The marketing strategy is organized into the following sections:

- Market assessment report (Section 2.0)
- Adopter profile (Section 3.0)
- Report on trends and opportunities (Section 4.0)
- Assessment of program presentation and information (Section 5.0), and
- Proposal to reach untapped markets, including recommendations for educational and promotional materials needed to implement the strategy (Section 6.0).

2.0 MARKET ASSESSMENT REPORT

2.1 Introduction

This market assessment report is the first part of the national marketing strategy described above. The purpose of this assessment is to evaluate the present market as it relates to the BLM Adopt-a-Horse or Burro Program, and to recommend improvements to the program to better respond to the market opportunities and constraints identified.

2.1.1 Methodology

This market assessment was developed based on a review of background information as well as a limited number of interviews with individuals who are involved in or aware of the Adopt-a-Horse or Burro Program. The background information consists primarily of existing reports, studies, and other relevant documentation provided by the BLM. To augment this information, DAI contacted approximately 30 individuals including members of the BLM's Wild Horse and Burro Advisory Board, advocacy groups, adopters, and various BLM employees involved in the Wild Horse and Burro Program to obtain ideas and input for the marketing strategy. No attempt was made to conduct a formal market survey due to project cost and schedule constraints.

2.1.2 Organization

Section 2.2 provides an overview of the BLM Wild Horse and Burro Program, including the Adopt-a-Horse or Burro Program. The program's mission and goals are outlined in Section 2.2.1. Section 2.2.2 describes the adoption process and includes information on three current adoption methods--the lottery, competitive bidding, and Internet adoptions. Section 2.3 is devoted to a market assessment, including an understanding of current markets in Section 2.3.1 and how these markets are currently reached through publicity and outreach in Section 2.3.2. Section 2.4 presents overall conclusions associated with the market assessment. Unless otherwise stated, numbers of animals referred to in this report include both wild horses and burros.

2.2 Background

2.2.1 Program Mission

Wild, free-roaming horses and burros have been recognized as a major part of the heritage of the old West. Various laws have been enacted to ensure that BLM will manage these animals in a manner that maintains a robust ecological balance within the confines of multiple use. Included in pertinent laws are the Wild, Free-Roaming Horse and Burro Act of 1971, the Federal Land Policy and Management Act (FLPMA) of 1976, and the Public Rangelands Improvement Act (PRIA) of 1978. In accordance with these laws, BLM is responsible for maintaining wild herds at appropriate management levels to support a properly functioning ecosystem and healthy, viable populations. BLM is also responsible for ensuring the health, welfare, and humane treatment of these animals for life, or until the titles to individual animals are passed to appropriate adopters.

To effect its mandate, the BLM must manage wild horses and burros on two fronts--on and off the range. Through FLPMA and PRIA, the BLM has established 186 herd management areas (HMAs) on public rangeland in the West which, according to recent calculations, should be able to support approximately 27,600 animals. However, consistently throughout the years, this number has been exceeded by 30 to 40 percent.

Wild horse and burro populations tend to increase at a high rate due to natural selection and the lack of true natural predators. During good forage years, this increase may be as high as 40 percent. In drought years or years of weather extremes, it can drop to as low as 5 percent. Otherwise, the overall average is 18-20 percent per year. However, under any ecological condition, wild horse and burro herds compete with populations of wildlife and domestic cattle for a finite quantity of natural resources. Because the resource base is limited and reproduction rates are usually relatively high, excess animals soon cause an ecological imbalance leading to range degradation and a decline in the health of the animals themselves.

BLM addresses this imbalance by gathering the excess wild horses and burros and making them available for adoption by the public through its Adopt-a-Horse or Burro Program, a labor intensive and expensive process. Adoptions are scheduled during the year at several BLM holding facilities throughout the United States. BLM also conducts satellite adoptions using temporary facilities at about 60 to 100 other locations each year. The budget for managing the entire program has evolved from \$400,000 in 1973 to \$18.6 million in FY 1999.

Since 1972, BLM has placed more than 164,000 wild horses and burros through the adoption program. Nearly 7,600 animals per year have been adopted over the last 10 years, on average. Despite these relatively high adoption rates, at the end of 1997, the number of wild horses and burros on the range exceeded the estimated carrying capacity by 38 percent. Added to that figure are the numbers of animals in the adoption system, or pipeline, at any given time (i.e., animals that have been gathered from the range but are not yet adopted). In early October 1998, BLM estimated that approximately 2,700 animals were in the system awaiting adoption.

One of BLM's current program strategies is to improve movement of wild horses and burros through the adoption pipeline. BLM has established goals to increase the total number of animals adopted in order to achieve appropriate management levels in the designated herd management areas. In addition, BLM has issued guidance to minimize stress on the animals by limiting the total time in the pipeline to 90 days, and minimizing the number of times that animals are shipped from adoption to adoption.

2.2.2 The Adoption Process

At various times throughout the year, horses and burros are gathered from the open range and sorted for adoption. Animals not selected are returned to their habitat. Those chosen for adoption are transported by truck to one of the several BLM holding facilities where they are given medical exams, are inoculated against various equine diseases and wormed, and are given medical treatment if necessary. In addition, each animal is marked with a unique freeze brand, which ensures permanent identification.

The wild horses and burros are kept in corrals at the holding facilities for a minimum of 30 days. During that period, they are given booster vaccines and are allowed to acclimate to confinement and the presence of human beings for the first time in their lives. After this initial holding period, they are transported to one of over 60 adoptions held throughout the United States each year. BLM state and district offices request the number, age, and gender of the animals they want to offer for adoption based on their estimates of market demand. In addition, as part of its annual budget and work planning process, BLM establishes goals for each state, including adoption dates and numbers of animals to be gathered and adopted each month. Figure 2-1 shows the FY 1999 targets for removals and adoptions of wild horses and burros for each BLM state office.

Figure 2-1		
FY 1999 Goals for Removals and Adoptions of Wild Horses and Burros		
BLM State Office	Number of Animals To Be Removed from BLM Land	Number of Animals To Be Adopted
Arizona	250	280
California	940	1,080
Colorado	245	450
Eastern States	0	3,615
Idaho	0	240
Montana	0	440
Nevada	3,462	640*
New Mexico	0	620
Oregon	558	368
Utah	160	280
Wyoming	1,102	600
Total	6,717	8,613
*Includes Nevada state office and the National Program Office located in Reno, Nevada.		

Once the animals reach the adoption site, they are sorted by gender and age and are allowed to rest in corrals for a minimum of 24 hours before adoption proceedings begin. In some instances, animals are housed for longer periods of time at certain holding facilities so they can be gentled before being adopted.

Adoptions are open to any person who is at least 18 years of age, a resident of the United States, and has never been convicted for inhumane treatment of animals. Any qualified adopter is allowed to adopt up to four animals per year. Commercial exploitation of the animals (such as bucking stock in rodeos) is not allowed.

Each adopter must provide information regarding the facilities in which the animal(s) will be kept, the type of feed to be provided, watering arrangements, and the type of transportation to be used to haul the horse or burro to its new home. Pre-qualification of adopters is preferred; however, on-site qualification is allowed at some locations with a physical check of facilities within 30 days of adoption. Animals can be removed from facilities or conditions deemed unacceptable or inadequate by BLM. Follow-ups are typically performed by a BLM employee or volunteer who personally inspects the animal and its new facilities at least once prior to the government officially handing over title to the animal.

At present, BLM uses either a lottery system or a competitive bid process to carry out adoptions. In the lottery system, adopters pay a flat fee of \$125 per animal and are allowed to pick the animal(s) of their choice based on a drawing of all qualified adopters at a given adoption. In other instances, BLM conducts adoptions using a competitive bid process with a base bid of \$125 per animal. The BLM has also instituted a computerized bidding process that offers animals through the Internet with potential adopters being allowed to bid for a specific time period. Fees collected from adoptions are used to defray adoption costs to the Federal government which are estimated to be over \$1,000 per animal.

Application for title is automatically made with the application to adopt. After the adopter has maintained the animal for a year, BLM sends the adopter a Title Eligibility Letter. The adopter must supply the BLM with a statement from a qualified person such as a veterinarian, humane society representative, or county extension agent, indicating that he or she has provided the animal with humane care and treatment. Once the BLM receives the statement back with the Title Eligibility Letter, it mails the title to the adopter. From this point, the animal is no longer under the protection of the Federal government.

2.2.3 Public Outreach

Prior to adoptions, the BLM promotes each event through selected outreach methods. These can include distribution of press packets and fliers, direct newspaper advertising, radio spots including public service announcements, and notification to equine-related clubs, businesses, and groups in the area. An Internet website is maintained with adoption schedules and general information regarding the Wild Horse and Burro Program. The BLM's standard brochure, *So You'd Like to Adopt*, is also provided to approximately 10,000 individuals per month.

BLM staff at the state and district offices are responsible for identifying and renting facilities where satellite adoptions are held. They are also responsible for screening and pre-qualifying adopters, answering inquiries about the adoptions, providing publicity and media relations, and managing the adoptions including any training sessions and demonstrations that are arranged during the events. The methods and intensity of promotional activity vary from site to site and

state to state with little indication of any concerted effort among states to standardize the message or method.

A wide range of variability in adoption practices exists between each location, especially from one BLM district to another. Some of the apparent differences include the application and pre-qualification process, the information handouts provided at the adoption, and the bidding process, for example. Since policy and regulation seems to be interpreted differently among the state offices, this causes confusion among adopters who have the potential of adopting in multiple states. Some potential adopters may also perceive the variability as a lack of organization on the part of BLM, especially when BLM staff at the adoptions are unaware of the variations that occur from site to site.

2.3 Market Assessment

2.3.1 Understanding the Market

Formal market assessments of the BLM's Wild Horse and Burro Program are extremely limited in number and are somewhat out of date. To support available market information, over 50 sources (documents and interviews) were drawn upon by the DAI team.

BLM does not employ any standard, routine methods to collect and analyze information on prospective adopters. Some offices maintain databases and most maintain mailing lists of previous adopters and people who have requested information about the program. BLM needs to develop this information/capability in order to support an efficient marketing program/function. Even though some BLM offices have a reasonable understanding of the markets they are trying to reach, they do not provide a way of capturing this data. Also, BLM has only recently initiated a requirement for state/field offices to prepare a debriefing/evaluation of each adoption event to indicate results, comments, and lessons learned. This data needs to be recorded, analyzed, and used as a routine practice.

There appears to be no "ideal" horse profile according to most BLM employees. Likened to the market for automobiles, it seems that many combinations of features are sought after. Horses of color such as palominos, appaloosas, and paints rarely go unadopted. However, oftentimes other attributes such as age, personality, and gender play an equally important role in selection.

Based on some interviews and data analyses conducted by BLM, the following general adopter preferences for wild horses and burros were identified (in descending order of preference):

1. Young animals (without regard to sex) from weanling to 5 years old (animals with color or apparent breed type are preferred over solid type colors);
2. Mare-foal pairs;
3. Animals age six to nine (females, gelded males, then males; animals with positive color and disposition characteristics are preferred over other animals);

4. Mares ten years of age and older (animals with positive color and disposition characteristics are preferred over other animals):
5. Gelded males ten years of age and older (animals with positive color and disposition characteristics are preferred over other animals); and
6. Stallions ten years of age and older (animals with positive color and disposition characteristics are preferred over other animals).

Staff at many of the various BLM offices indicated that this profile does not fit their local market. In order to better meet market demand, regional differences in adopter profiles and markets should be carefully analyzed to determine appropriate distribution of animals to the scheduled adoption sites.

During the pre-qualification process, there is currently no mechanism such as a simple checklist or questionnaire to elicit adopter preferences and intended uses for the animal(s) requested. If this information were readily available, some of the guesswork could be taken out of the process of distributing horses to the various adoption sites, and could even perhaps factor into the criteria used to gather the animals from the range.

Many adopters interviewed expressed a desire to have more information about the animals they were adopting--not only what state they were from, but also their herd characteristics and herd management areas, for example.

Recent information from 47 scheduled satellite adoptions held since June 1998, indicates that of 3,375 horses gathered and shipped to various facilities, 1,930 (57 percent) were adopted. Of these, 16 were adopted through the Internet out of the Cross Plains, Tennessee facility. Of the 512 burros gathered and shipped to the same adoption sites, 253 (49 percent) were adopted. At the permanent BLM holding facilities, success rates ranged from 100 percent at one facility to 0 percent at another, with an average success rate of 62 percent for horses. The burro success rate average was unobtainable since, in one instance, no burros were shipped to a facility, but three were adopted.

These figures lead one to believe the markets being addressed are potentially saturated or promotion of the adoption events is inadequate or misplaced. Target groups appear to have been inadequately identified or pursued, and, in the case of those facilities that maintain animals year round, they may no longer entice or excite potential markets because of over exposure. In addition, low adoption rates could signal that the timing of the event was wrong, or that weather was poor. Ultimately, no one has a firm grasp on the reasons for the overall results falling short of requirements and goals. The adoption evaluation process recently instituted by BLM should provide a mechanism for field personnel at adoption sites to provide insight and comments on lessons learned.

For simplicity, the market can be divided into two segments of use: agricultural (ranching and farming) and companion (family pet and recreational use such as endurance and trail riding, etc.). Demand in the agricultural market is driven by need and economic factors. There appears to be a

constant need, but it is tempered by the economic condition of the agricultural industry at any given time.

Companion animals are usually adopted for a longer term, and general economics (price of hay, transportation, etc.) do not seem to play as important a role as with the agricultural industry. Depending on the population base (age, lifestyle, etc.), the market for companion animals appears to be relatively static and can be easily saturated on an area-by-area basis. Numbers of adoptions in any geographic area are more a function of awareness than current economics. Wild horses and burros, as opposed to domestic stock which have been bred for different attributes, are generally more sure-footed and possess an ability to anticipate potentially dangerous situations. In addition, these animals often display a high level of attentiveness, loyalty, and intelligence. These combined attributes make the animals especially well suited for endurance, outfitting, backcountry and trail riding, as well as many competitive disciplines.

Since wild horses and burros are still coming into their own as a definitive class of animals, almost all of those interviewed agreed that if the general public were made aware of the value of these animals and success stories involving adoption, more animals could be placed.

Based on the review of existing data and the interviews conducted, it appears there is a large market segment of former adopters who want to adopt more animals. Many of these individuals are anxious to share their success stories and have offered to volunteer their knowledge and services to new adopters. In addition, a growing number of people, including several BLM staff and previous adopters, also believe that there are sizeable untapped markets within the traditional horse industry throughout the United States. These potential markets and opportunities will be addressed in greater detail in subsequent sections of this marketing strategy.

2.3.2 Reaching the Market

No scientific approach to determine where and when adoptions are held seems to be available. Some states schedule adoptions in conjunction with other events such as county fairs to enhance promotion and possibly share costs. Weather, seasons of the year, major holidays, and local calendar events are considered. Adequate facilities are a major and often inhibiting factor in site selection since portable corrals and pens are not readily available to most offices.

Although cognizant of the various classes of use for horses such as pleasure, riding, endurance, trail riding, packing, breeding, etc., no concerted effort seems to be made to market animals based on their strengths in these areas. It also appears that no efforts are made to market the animals' individual attributes (color, size, conformation, gender, etc.). At present, there is no way of matching the product to the buyer since animals at satellite adoptions arrive within hours of the actual adoption. Rarely do the BLM offices or the prospective adopters know what animals will be sent to the adoption until two weeks before the event; and even then there are no guarantees. This may be avoided at holding facilities where horses and burros are under observation for a longer period of time. Publicizing the animals' characteristics in advance, and targeting sectors of the population that participate in relevant sports, activities, and occupations would allow for better selectivity on the part of BLM and the adopters and likely improve success of the adoption program.

It may be appropriate for BLM to analyze various market distribution strategies and alternatives. For instance, BLM may wish to evaluate the cost effectiveness of gathering during the peak season and holding animals until the most opportune time for adoption instead of transporting animals from adoption to adoption. The Bureau might also consider intense marketing of excess horses and burros in holding facilities in the southern climates during the winter months.

Most adopters and potential adopters interviewed were very positive about the program, especially about the animals. It appears that success is a function of education. However, interviews also indicated that many potential adopters were unaware of the Adopt-a-Horse or Burro Program until they accidentally stumbled on information about an adoption. In most cases, the information came to them too late to make adequate preparation or plans to adopt an animal. Newspaper and word of mouth seemed to be the most effective methods of reaching potential adopters.

A more detailed evaluation needs to be focused on the prison gentling program as a possible strategy for placing the older, harder-to-adopt horses. It is not clear how horses are selected for gentling at the prison facilities and how interested parties actually go about adopting a gentled horse. There are some indications that the prison facilities maintain waiting lists and will send photographs of gentled horses to people to assist them in selecting a gentled horse for adoption. Based on a review of comments, several adopters of gentled horses seemed pleased with the process, while others were not satisfied with the degree or quality of gentling provided.

In general, the BLM staff involved with the adoption program seem highly motivated, experienced, and dedicated. Most of the staff have expertise as wild horse and burro specialists or as public affairs specialists. Many BLM offices need more expertise and/or support in marketing including help in identifying potential markets, packaging the product in a better way to increase public interest, and increasing product diversity to meet local market demands. There is fairly widespread recognition that BLM needs to develop a cohesive national marketing strategy for the Wild Horse and Burro Program including several standardized informational and promotional materials.

Staff at some of the BLM offices have made efforts to work with national and local organizations to help promote adoptions, but effectiveness has varied. Also most offices ask previous adopters to volunteer in helping with promotional and logistics support associated with the adoptions, and to also bring their horses to adoption events. Again, results vary widely from office to office and many cite a need for better organization, support materials, and follow through.

2.4 Conclusion

The BLM Adopt-a-Horse or Burro Program faces significant challenges from a marketing perspective. Many organizations that market a product or service must first identify potential customers and then educate those potential customers about the benefits of the product or service they are selling. In some cases, it is also necessary to educate consumers about the requirements for properly maintaining the product or service once the purchase is made. In order to conduct a successful adoption program, BLM must carry out all of these functions and more. In addition to these basic marketing requirements, BLM must also take steps to select and pre-qualify its

customer base and follow-up with individual adopters for up to a year, or until title is transferred, to ensure that the adopted animals are receiving appropriate care in adequate facilities.

BLM has never done a national marketing strategy and operates in many respects in a decentralized fashion. Very few aspects of the Adopt-a-Horse or Burro Program have been standardized across the BLM. State and district offices often employ varying practices in administering components of the adoption program such as the selection of adoption locations, recruitment of potential adopters and volunteers, maintenance of application mailing lists and databases, and publicity/advertising of the adoption events, for example.

There appear to be ample opportunities for BLM to improve the success of its Adopt-a-Horse or Burro Program by increasing participation of existing adopters and also tapping into new markets of potential qualified adopters. An adopter profile is presented in the next section of this document. Market trends and opportunities are discussed at some length in the subsequent section, followed by ideas and recommendations for reaching these viable markets.

3.0 ADOPTER PROFILE

3.1 Introduction

Identifying and attracting an adequate number of qualified potential adopters is a key requirement for ongoing success of the adoption program. In order to identify potential adopters and develop effective educational and promotional strategies to reach these individuals, it helps to know something about them. As with any marketing endeavor, it is important to know who the potential customers are, how to reach them, what their needs and preferences are, and what might attract them to the product or service being offered.

The purpose of the adopter profile presented in this section is to identify characteristics of the people who have adopted wild horses and burros from BLM in the past and to determine what general attributes might apply to potential future adopters.

3.1.1 Data Sources

In developing the adopter profile, DAI relied on existing data and interviews. In accordance with contract specifications and cost and schedule constraints, we did not attempt to conduct a survey of previous adopters. The primary data sources used for the profile include the following:

- *Adopter Satisfaction with the Bureau of Land Management's Wild Horse and Burro Program*, prepared by the Pacific Consulting Group, October 1997,
- *Wild Horse Marketing Study, Minnesota, Wisconsin, Iowa*, prepared by Project Mustang, Beverly Sandlin, 1988, and
- the BLM Wild Horse and Burro Information System (WHBIS) and informal interviews with BLM staff.

The adoption satisfaction survey was based on telephone interviews conducted by a market research firm under contract to BLM in August and September 1997. In areas served by all of the BLM state offices, a total of 1,202 surveys were completed by individuals who had adopted animals between January 1, 1996 and July 30, 1997. Based on the survey design, high response rate, and weighting of responses, the author of the survey, Pacific Consulting Group, indicates that results are representative of the overall national population of wild horse and burro adopters. Although data contained in the report is relatively current and considered to be quite useful for the marketing strategy, it is important to note that this data source was designed as an adopter satisfaction survey, not a market survey or demographic profile.

The second source listed is a marketing study prepared for the BLM Milwaukee District Office in 1988. It provides a demographic study of adopters in Minnesota, Wisconsin, and Iowa. This study was based on a mailing of 320 surveys, of which 114 (36 percent) were answered. Although the study by Sandlin is now 10 years old and covered only a tri-state area, it does provide data on adopter demographics and attributes which may still apply to some segments of the adopter population.

The third source of information is the WHBIS database and discussions with BLM staff. Although BLM uses the WHBIS database to track information related to the Wild Horse and Burro Program, it contains only minimal information about each adopter (e.g., name and address, location where animals are kept, adoption date, fees paid, previous adoptions by the individual, and compliance history). At present, the database does not track the specific satellite locations where animals are adopted, only the BLM district offices that manage the adoptions. Due to these factors, WHBIS can be used to generate limited analyses of adopter demographics and cannot be readily used to track statistics for satellite adoptions.

Based on the informal interviews conducted by the DAI team, it appears that staff at many of the BLM state and district offices have a relatively good understanding of the kinds of people who come to adoptions and who have adopted in the past. In many cases, BLM personnel involved with the adoption program know what kinds of animals people are looking for as well as their intended use. However, unless local databases and files are maintained to capture this data, no permanent records are kept on adopter demographics and preferences.

3.1.2 Report Organization

In Section 3.2.1, general attributes of the adopters are discussed. These include state profiles based on adoption data; the number of wild horses and burros various adopters have; why they adopted in the first place; overall satisfaction with the animal(s) they already have; if adopters would be willing to adopt more animals; and unsuccessful adoptions and why they are unsuccessful. Section 3.2.2 discusses demographics of the adopters: their age and gender; their family size; how close they live to the adoption sites; population statistics in the areas where adopters live; clubs and organizations to which adopters belong; and any special interests of adopters.

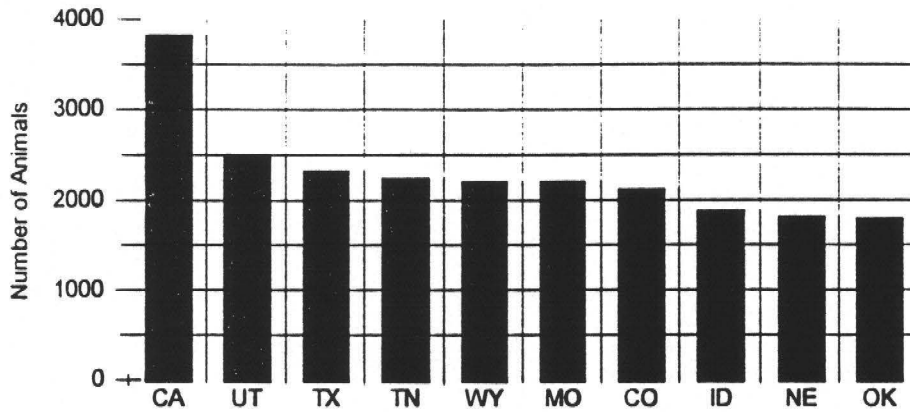
3.2 Profile of Adopters

3.2.1 General Attributes

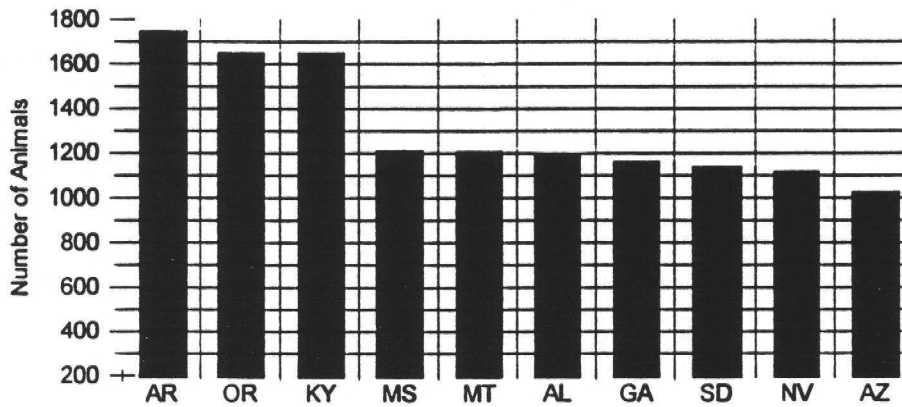
Figure 3-1 shows the adoption levels for each state, ranked in descending order according to the number of animals on record for the last six years in the WHBIS database. This data reflects the location of animals that have been adopted from BLM, not the actual location of adopters. As noted above, the WHBIS database is used primarily to track information about wild horses and burros in the adoption system, and contains very little information about the adopters themselves. However, this data can be used to provide a general indication of adopter demographics, assuming that most people live near the facilities where they keep their adopted animals. California ranks as the top state where adopted animals reside, followed by Utah and Texas. The top 10 states, combined, account for almost 40 percent of all adoptions between FY 1993 and FY 1998.

According to the WHBIS database, approximately 45 percent of all adopters over the last six years have adopted more than one animal from BLM. As shown in Figure 3-2, about one-third of these people have adopted two animals. Similar findings, showing even higher percentages, are

Figure 3-1
State Adoption Levels (Ranked 1-10)
 Total FY 1993 - FY 1998



State Adoption Levels (Ranked 11-20)
 Total FY 1993 - FY 1998



State Adoption Levels (Ranked 21-30)
 Total FY 1993 - FY 1998

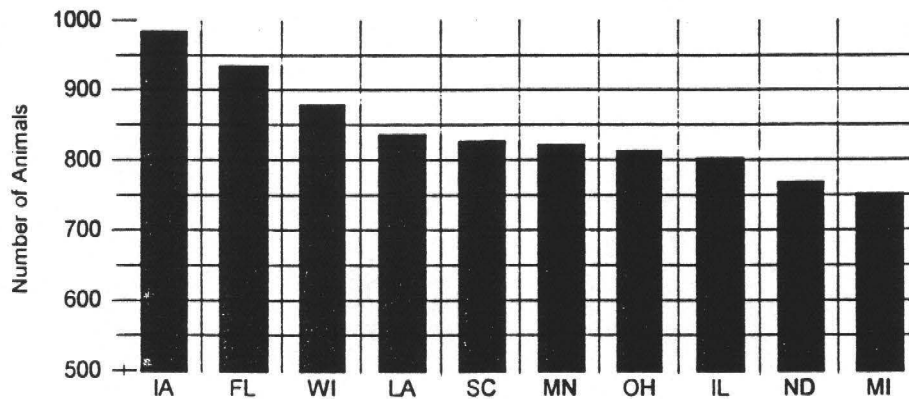
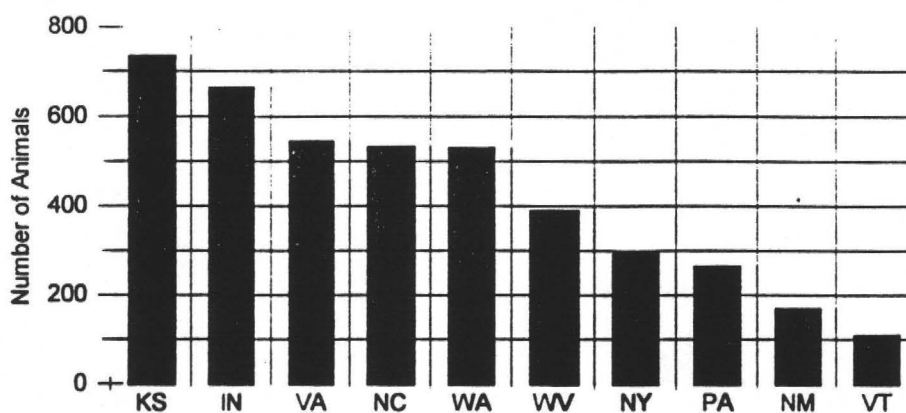
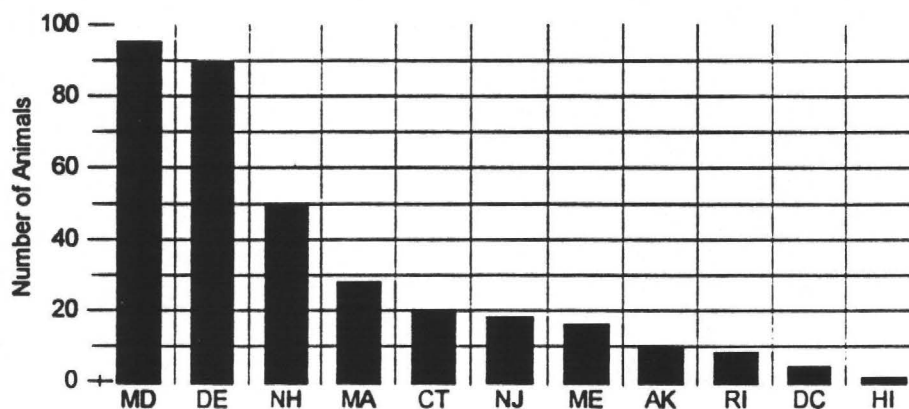


Figure 3-1 (Continued)
State Adoption Levels (Ranked 31-40)
 Total FY 1993 - FY 1998



State Adoption Levels (Ranked 41-51)
 Total FY 1993 - FY 1998



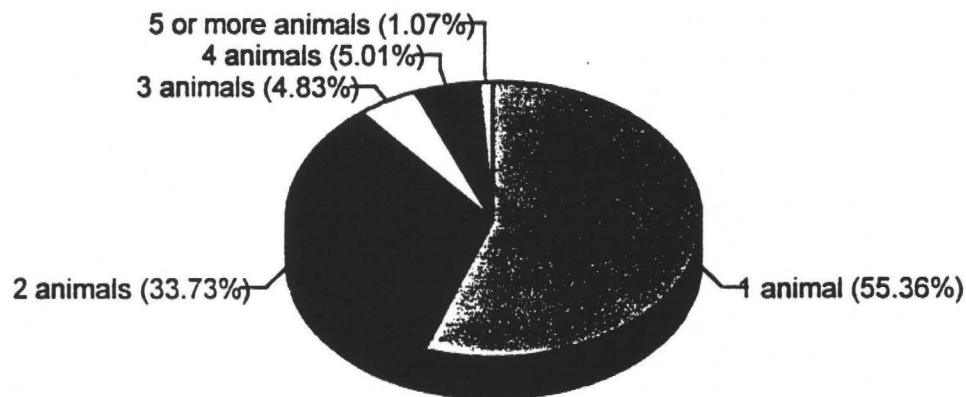
reported in the 1997 study conducted by the Pacific Consulting Group. Based on the survey of 1,202 adopters presented in the study, over half (63 percent) have adopted more than one animal from the BLM. Approximately 35 percent of the respondents have adopted two animals. The vast majority of adopted horses that were owned more than three years was in the western United States.

It is generally known that many owners would adopt more animals. According to the Sandlin sample of 114 adopters in Minnesota, Wisconsin, and Iowa, 78 percent said they would like to adopt more animals. Interviews also bear this out. However, in many instances facility size or the capability to take care of more animals prohibits additional adoptions. In other cases, individuals with adequate facilities and qualifications are denied additional animals if they have already adopted the limit of four animals per year allowed by BLM. Some BLM offices have imposed an adoption limit of two animals per year based on compliance concerns. It may be appropriate for

BLM state and district offices to request a waiver or exception to these limits on a case-by-case basis where circumstances warrant.

No information was found to indicate the race, gender, or ethnic background of adopters. Some people have suggested that the majority of adopters are female; informal observation at the adoptions attended by the DAI team indicate that couples and families account for a large portion of the people who actually attend the adoptions. It has also been suggested that two potential untapped markets include Native Americans and the Hispanic population, both in the eastern and western United States. Further market research would be required to confirm these suggestions and could also help identify other important characteristics about the adopter profile and untapped markets.

Figure 3-2
Number of Animals Owned by Adopter
FY 1993 - FY 1998



Reasons for adoption are varied. Sandlin reports 75 percent of the adopters surveyed described their animals as pets. Sixteen percent adopted horses as work animals, 11 percent adopted their animals for pleasure riding and trail riding, and 14 percent adopted horses as show animals and for use in competitive disciplines. Interviews conducted by DAI indicate burro owners use their animals as pack animals, for pleasure riding, to work cattle, as family pets, and for predator control. In the background data reviewed, only a few adopters in over 800 comments reviewed, mentioned that they were adopting to save the animals from destruction or abuse. BLM marketing efforts could benefit from a better understanding of adopter preferences and intended/actual uses for the animals adopted. BLM should consider gathering this data as part of the applicant screening process and/or during compliance checks.

Regardless of motivation or use, overall satisfaction with the adopted horses and burros appears high. This is borne out by the previously mentioned statistics on adopters who indicated they would adopt more animals. Based on the 1997 adopter satisfaction survey conducted by the Pacific Consulting Group, adopters who gave the BLM Adopt-a-Horse or Burro Program high ratings also gave their animal high ratings and vice versa. Approximately 93 percent of the adopters surveyed said the animals they had adopted met or exceeded their expectations; 97 percent reported similar degrees of satisfaction with the BLM adoption program.

The WHBIS database contains a new module for tracking compliance activities. Although extensive data is not yet available from the compliance module, other statistics from the database show that approximately 7 percent of the total animals adopted over the past six years were returned to BLM for one reason or another.

BLM may wish to collect more information to determine the numbers of unsuccessful adoptions and the reasons they failed. This information can be used to identify ways of preventing or minimizing unsuccessful adoptions through positive action on the part of the BLM. One can only speculate that failures occur because adopters do not fully understand the labor-intensive nature of the care of wild horses and burros. It is possible they are not emotionally or physically equipped to take care of the animals or that they did not understand the extent to which the owner must be involved in the training and upkeep of any large animal. Regardless, this information is vital to a successful marketing effort.

3.2.2 Demographics

According to the 1988 Sandlin study, 52 percent of the adopters were between the ages of 25 and 44. Twenty-six percent were 45 to 64 years old.

Of the 114 respondents in the Sandlin survey, 40 percent of the adopters were agrarian, either ranching or farming. Nineteen percent were blue-collar workers and 12 percent were retired. The balance fell into the categories of white collar workers, law enforcement personnel/firemen, government employees, and professionals. Sixty-eight percent of those surveyed indicated they were from families ranging in size from one to six. Yearly income ranges produced a typical bell curve. Based on data reported in 1988, twenty-two percent earned under \$15,000; 34 percent had income between \$15,000 and \$24,999; 18 percent earned from \$25,000 to \$34,999; and 22 percent earned more than \$35,000.

Also according to Sandlin, 86 percent of the adopters live in ranching/farming areas, 49 percent live in areas where the nearest town has a population below 5,000 people; and 27 percent live near communities ranging in size from 5,000 and 15,000 people. An extremely high number of adopters (79 percent) said they were interested in volunteering to help promote the mustang, and 39 percent expressed interest in demonstrating the trainability of their mustang at a BLM adoption.

Adopter demographics and preferences were reported by many of the BLM personnel who were interviewed by the DAI team. In the Dakotas, for example, adopters come primarily from ranch backgrounds. They understand livestock and want breeding animals or ranch stock (color and age

of the horses are often irrelevant). The people in western Montana are more interested in companion animals or 4-H projects and therefore usually want the younger animals perhaps offering more color and trainability. Gelded horses appear to be popular in California markets. Typical adopters in Utah are families that want a saddle horse, ranchers and farmers who want working horses, hunters who want a horse to use in hunting, and outfitters that are interested in pack horses. In the Missouri area, adopters mentioned trail riding and breeding as popular uses for adopted horses. In general, potential adopters in Missouri expressed avid interest in horses with color, and showed very little interest in the gelded horses that were available for adoption. There appeared to be a high demand for burros in that geographic region and in the Dakotas.

Adopters in the tri-state area of Minnesota, Wisconsin, and Iowa are outdoor enthusiasts. Eighty-two percent enjoy pleasure and trail riding. Half of them fish while 46 percent camp and 44 percent hunt. A large majority (81 percent) enjoy country and western music, while 41 percent also listen to rock and roll. A high percentage of adopters (73 percent) watch the news; and over half (57 percent) watch the movie of the week. Nearly one third watch various sitcoms, and the two top magazines listed by the respondents were *Reader's Digest* and *Western Horseman*.

Taking this information into account, it is interesting to note that most BLM pre-adoption publicity currently employs some or all of the above-mentioned methods to inform potential adopters. For instance, where budget permits, ads are placed in local newspapers. A concerted effort is expended in developing news stories regarding the animals and the adoption process in both the print and electronic media. Public service announcement scripts and tapes are provided to both television and radio. Flyers are provided to local feed and tack stores and businesses that cater to the equine trade.

The geographic distribution of adopters is dependent to some extent on the locations where adoptions are held. Based on the interviews conducted by the DAI team, some adopters travel 200 to 300 miles to attend adoptions and many attend more than one adoption per year. However, a review of background data revealed that many individuals are interested in attending adoptions closer to home. The timing and frequency of adoptions, as well as the selection of animals available, may also influence the demographic profile. There is no indication of how many people attend the adoption events but fail to adopt. Some of the previous adopters who were interviewed by the DAI team said they generally wait for the next scheduled adoption in the area or a nearby state if they aren't pleased with the selection of animals available at a given adoption event, or if they are not able to adopt the animal(s) of their choice through the lottery or competitive bid process.

Section 4.0 of this report provides additional data on the geographic distribution of adopters and trends in state adoption levels.

3.2.3 Informational Sources

Based on the telephone survey of 1,202 adopters summarized in the October 1997 report by Pacific Consulting Group, well over one third of respondents (38.7 percent or two out of five) learned of the Wild Horse and Burro Adoption Program through word of mouth. This method of communication was also mentioned in some of the interviews conducted by the DAI team. At the

time of the 1997 survey, only 0.5 percent of the respondents learned about the BLM adoption program through the Internet although several people interviewed by DAI were enthusiastic about this means of communication and information exchange. Based on screen counts, the adoption schedule on the BLM web page has received over 45,000 hits since September 10, 1996. Direct mail and newsletters provide 13.8 percent of information cited by respondents to the 1997 survey, with effectiveness of television and radio at 12.5 percent.

Based on the 1988 survey by Sandlin, 46 percent of respondents heard about the Adopt-a-Horse or Burro Program through the newspaper, 25 percent by word of mouth, 22 percent by public service announcements on television, 17 percent by radio, and 15 percent by poster.

3.3 Conclusions

The BLM Wild Horse and Burro Program has relatively little data on the demographics and preferences of its current adopters. Personnel at many of the BLM state and district offices maintain some data about potential adopters, applicants, and other interested parties within their respective jurisdictions. However, among the various BLM offices, there do not appear to be any uniform requirements or guidelines for collecting and maintaining data on potential adopters and people who have requested information about the Wild Horse and Burro Program.

Increased efforts to maintain and track information about potential adopters could have a direct, positive impact on the success of the program. A standardized mailing list and database on potential and existing adopters could be used to publicize the adoptions and other events related to the care, maintenance, and use of wild horses and burros in the local areas served by the various BLM offices. This information could be used to coordinate volunteer efforts and to facilitate networking and information exchange among existing and potential adopters. This data could also provide important information for analyses of market potential and effectiveness of outreach and marketing efforts.

In addition to collecting and analyzing data on its current and prospective adopters, BLM should make use of market information and networks available through the domestic horse industry. To the extent possible, BLM should tap into the existing networks, publications, events, and Internet sites used by organizations and clubs that already reach sizeable markets of horse and burro owners and enthusiasts. These are the potential adopters that BLM needs to reach, along with the existing base of current and previous adopters who are already familiar with and supportive of the program.

4.0 REPORT ON TRENDS AND OPPORTUNITIES

4.1 Introduction

To successfully market any product, it is first necessary to determine the market that is available. Analysis of market trends, including program history, is also useful in developing a marketing strategy. Because the BLM's Adopt-a-Horse or Burro Program has been in existence for over 25 years, review of its past records of achievement is vital and enlightening in this regard.

BLM has an objective to adopt out nearly 9,000 animals per year for the next five to 10 years to reduce range populations to appropriate management levels. In order to achieve this objective, BLM must not only pursue existing markets, but also aggressively seek out new areas for wild horse and burro placement. The purpose of this section of the marketing strategy is to determine where the BLM has been with its Adopt-a-Horse or Burro Program and where it should go in the future to accomplish its goals.

4.1.1 Report Organization

Section 4.2 reviews the Adopt-a-Horse or Burro Program to determine any trends that have developed in the past six years. Section 4.2.1 discusses trends in the number, location, and frequency of adoption events, as well as the number of animals adopted. Also addressed are changes and trends in the adoption process and in the BLM's efforts to inform the public about the program. This section of the report also compares trends in the Adopt-a-Horse or Burro Program to general trends in the domestic horse market and animal advocacy movements of a similar style.

Section 4.2.2, based on the Market Assessment and Adopter Profile sections of this report, presents overall trends in the adopter profile, with emphasis on data from the last six years. This section identifies any trends in public interest about the Wild Horse and Burro Program in general, and the Adopt-a-Horse or Burro Program in particular.

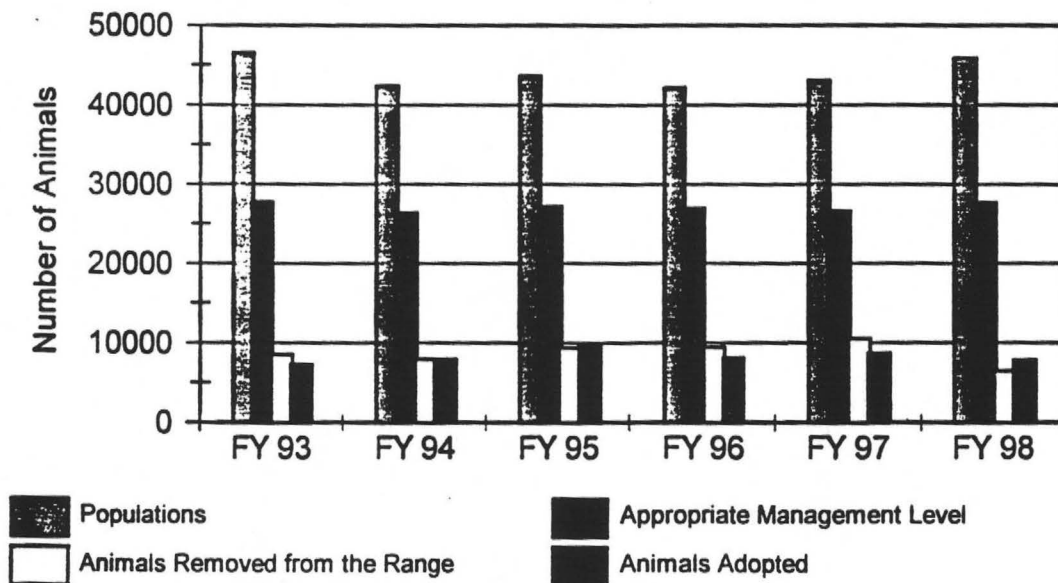
Section 4.3 discusses market opportunities based on the market assessment and trends analysis conducted by the DAI team. Section 4.3.1 identifies potential untapped markets. In Section 4.3.2, the report suggests opportunities to increase awareness of the Wild Horse and Burro Program and improve the success of the Adopt-a-Horse or Burro Program. In a subsequent section of this document, the Proposal to Reach Untapped Markets, more details on specific recommendations for the marketing strategy and implementation approach are provided.

4.2 Market Trends

This section of the marketing strategy is based on an analysis of available historical data about the Wild Horse and Burro Program. This analysis focuses on data from the last six years (since FY 1993) to identify recent market and program trends. Rather than supplying future projections, trends in the market place, by nature, give historical data that can be extrapolated. With the exception of expensive computer modeling, they are the best indicators at hand to determine future market viability.

As was indicated in the Market Assessment portion of this report, between FY 1973 and FY 1998, BLM placed over 164,000 wild horses and burros through its adoption program. However, at the end of FY 1998, BLM was more than 18,000 animals over the estimated appropriate management levels for herd management areas in western public rangelands. Figure 4-1 shows data for FY 1993 through FY 1998 on the numbers of animals removed from the range, the numbers adopted, end of year populations, and appropriate management levels.

Figure 4-1
Populations, AMLs, Removals, Adoptions
 FY 1993 - FY 1998



It can be seen from this data that on-the-range populations exceed the appropriate management levels by a considerable amount. In Figure 4-2, the overpopulation amounts are compared to the numbers of animals that have been removed from the range and adopted each year through the Adopt-a-Horse or Burro Program. Much work remains to be done in achieving the approved management levels for wild horse and burro herds. BLM has already begun several on-the-range initiatives aimed at achieving the herd management levels. In addition, this marketing strategy is being pursued to help increase the success of the adoption program.

Since FY 1993, BLM has placed approximately 8,200 animals per year through the Adopt-a-Horse or Burro Program. Figure 4-3 presents a closer look at the adoption and removal rates over the past six years. A breakout for wild horses and wild burros is shown in Figure 4-4, along with the annual percent change in adoptions for each animal type. There does not appear to be any documentation or data available to account for the large fluctuations in adoption levels from year to year.

Figure 4-2
Impact of Adoption Program on AMLs
 FY 1993 - FY 1998

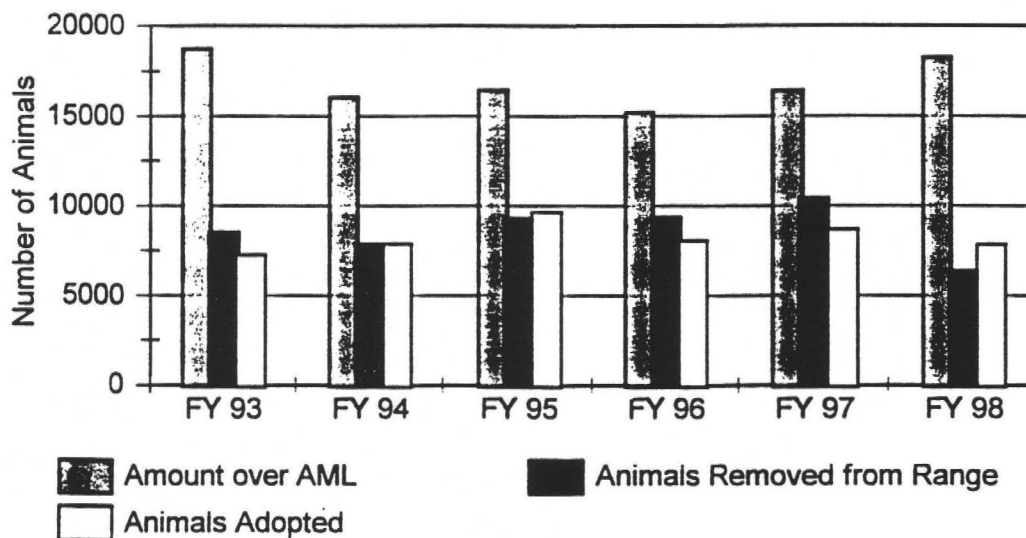


Figure 4-3
Removals and Adoptions
 FY 1993 - FY 1998

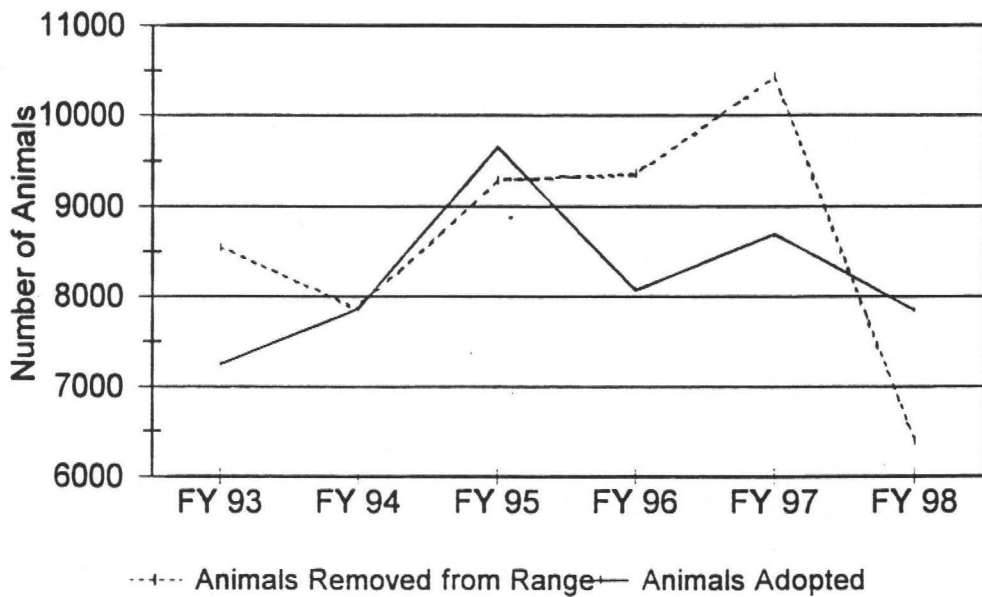
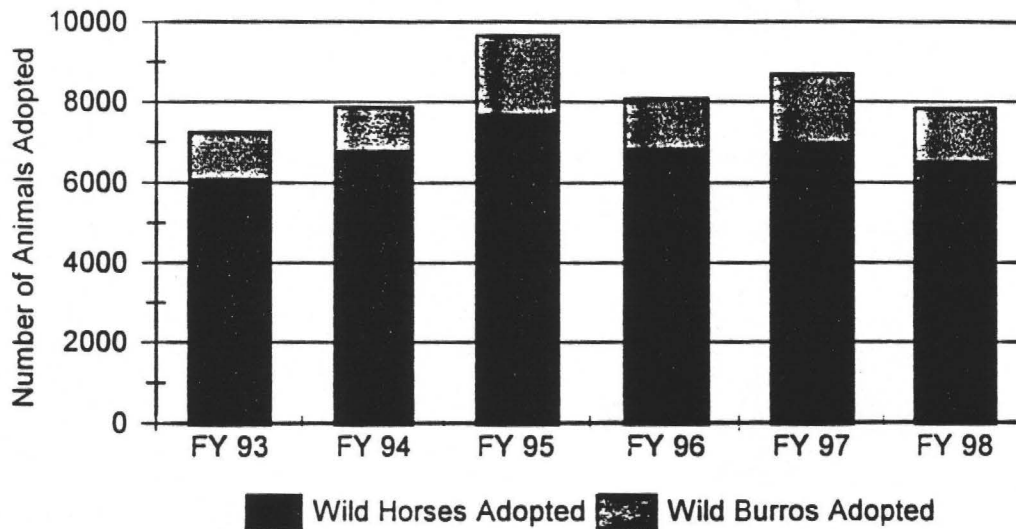


Figure 4-4
Wild Horses and Burros Adopted
 FY 1993 - FY 1998



Annual Percent Change

Horses	-	11.58%	13.16%	-11.48%	2.52%	-6.95%
Burros	-	-7.93%	84.39%	-35.71%	35.59%	-21.31%
Total	-	8.50%	22.73%	-16.37%	7.65%	-9.76%

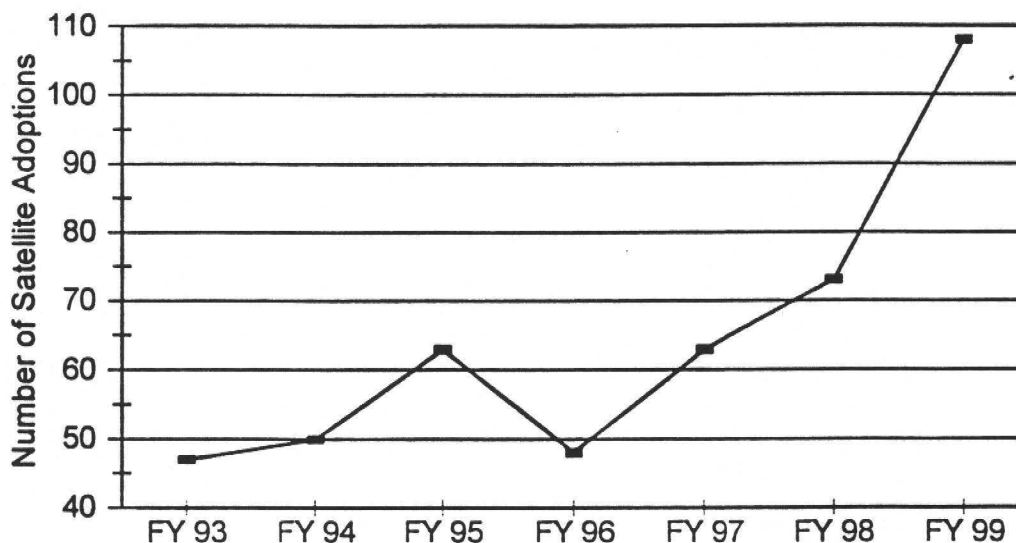
4.2.1 Wild Horse and Burro Adoptions

Adoption events have increased in number from one or two in FY 1973 to more than 70 in FY 1998. Precise data on the number, location, and frequency of adoption events was not readily available for this analysis. Information on adoption events may be kept at the state and/or district offices; however, BLM does not appear to maintain any centralized source for tracking this data. Some information can be derived from the Wild Horse and Burro Information System (WHBIS), but there are many limitations to this data source since it was designed several years ago to track horses and burros, not adoptions. Better record-keeping and access to data on adoptions will be critical in order for BLM to measure the effectiveness of its adoption program, and improve the overall quality of program management and planning.

Absent a survey of the individual field offices, DAI was able to derive estimates on the number of satellite adoptions, based on data generated from WHBIS on the number of remote locations (not holding facilities) that received shipments of animals by year. Figure 4-5 shows these estimates, as well as the goal for satellite adoptions that has been established for FY 1999. Trendline data was not developed on the size of the adoption events, i.e., how many animals were actually presented and adopted at each event. Although some offices have recorded this data over time, records are not consistent or automated. As mentioned in the Market Assessment section of this report, BLM field offices are now required to document all adoption events. From a general review of past data, it appears that BLM holds several larger adoptions in certain locations; however, most have involved well under 100 animals each. For FY 1999, the BLM goal for

satellite adoptions averages 67 animals per adoption. Historically, adoptions have been held throughout the year, but taper off in December and January. Over a five year period (FY 1993 through FY 1997), more horses were adopted in the months of September, October, March, and April than at other times of the year. Over the same period, adoptions of wild burros were more level from month to month, with slight drops in December through February. BLM has generally held adoptions over a two-day period (including a viewing period on the first day and the actual adoption on the second day), with most events occurring between Thursday and Sunday. Recently, BLM held an adoption on two consecutive week nights and appears to have had higher than expected turnout.

Figure 4-5
Satellite Adoptions Per Year
 FY 1993 - FY 1999



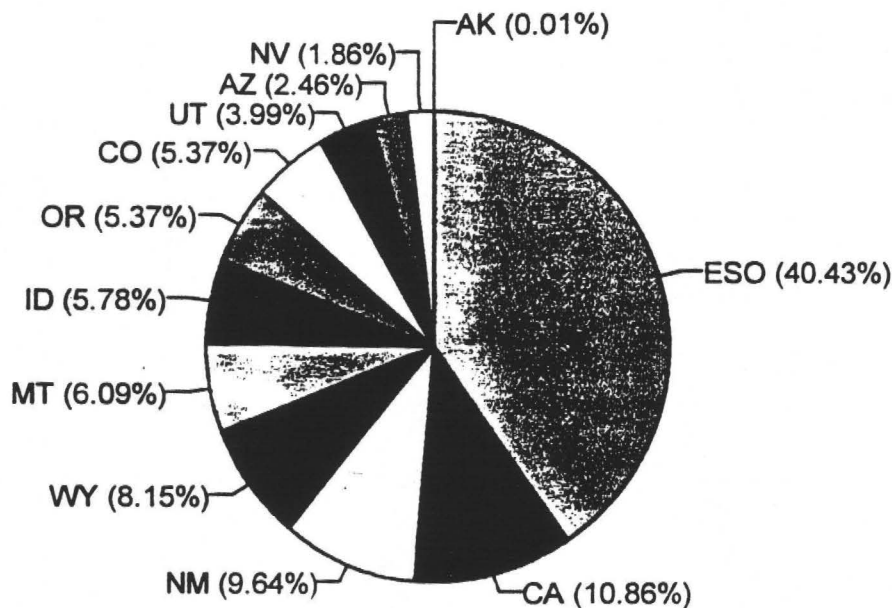
Adoption Locations

BLM manages adoptions through its state and district offices across the country. All adoptions in the east are handled by the Eastern States Office which consists of two district offices covering 32 states east of the Dakotas in the north, and east of Texas in the south. In the west, BLM manages adoptions from 11 state offices that cover 19 states. As defined by the BLM jurisdictions, the western states account for slightly more adoptions than the eastern states. In FY 1998, the Eastern States Office placed roughly 40 percent of the total animals adopted; BLM offices in the west accounted for the remaining 60 percent. Figure 4-6 shows the percentage of animals adopted through each BLM office in FY 1998.

Based on a review of plans and schedules, a similar trend is projected for FY 1999. BLM offices in the west plan to hold 64 adoptions in 17 states, with a goal of placing 4,998 animals—58 percent of the total annual goal. All states in the western region, except for Alaska and Hawaii, have at

least one adoption planned. Three states each have six adoptions planned during the year, and in California, 11 adoption events are scheduled. During FY 1998, the Eastern States Office plans to hold 43 adoptions in 20 states, with a goal of placing 3,615 animals—approximately 42 percent of the total annual goal. Some states in the east have no adoptions planned, while others have two or three, and, in Tennessee, where a large holding facility is located, 14 adoption events are scheduled throughout the year.

Figure 4-6
Animals Adopted by BLM State Office
 FY 1998



In many cases, in the eastern United States, adoptions are held near population centers, often at the same locations for several years in a row, and sometimes in conjunction with other events such as state or county fairs. The same can be said of adoptions held in the western United States, with the exception of location. Because it is generally more rural, more adoptions appear to be held at locations with populations below 100,000 people.

Although adoption events are increasing, indications are that the BLM is slowly slipping farther and farther behind its adoption goals. In FY 1998, BLM adopted about 1,500 animals less than its annual adoption goal, a shortfall of almost 20 percent. Where once most, if not all animals provided at an adoption were placed, indications are that the success rate has fallen to an overall average of 57 percent for horses and 49 percent for burros, based on BLM statistics for June through September, FY 1998. This could be a function of a slow-down in the market as well as many other factors such as the selection of animals available, the timing and frequency of

adoptions in each locale, the effectiveness of publicity for these events, the size of the markets involved, and/or stagnation in BLM's approach to adoptions.

Success rates vary from East to West according to some recent data. Figure 2-7 shows the results of 47 adoptions held in the last four months of FY 1998. The information included in Figure 2-7 pertains primarily to satellite adoptions and adoptions held at permanent facilities where the number of animals presented for adoption was noted.

Figure 2-7			
Recent Success Rates of Adoptions in the East and West			
	East	West	Total
Number of Adoptions Held (June-Sept. 1998)	16	31	47
Horses			
Horses Presented	1,596	1,779	3,375
Horses Adopted	1,063	867	1,930
Success Rate - Horses	67%	49%	57%
Burros			
Burros Presented	312	200	512
Burros Adopted	164	89	253
Success Rate - Burros	53%	45%	49%
Total			
Total Animals Presented	1,908	1,979	3,887
Total Animals Adopted	1,227	956	2,183
Overall Success Rate	64%	48%	56%

Adoption Formats

In an effort to improve its success rate, BLM has begun to change the adoption format from the lottery system to competitive bidding. Although popular in some areas, the lottery system has received a growing number of complaints from participants in recent years. Many individuals travel a considerable distance to attend adoption events and select the animals of their choice.

Under the lottery system, all adoption fees are \$125, and names are drawn to determine the order in which adopters make their selections. Often, people wait several hours for their turn in line, only to find out that their first choices among the animals have already been adopted. Many people leave before their names are called when they find out the animals they want have already been adopted.

BLM instituted a rule change in March 1997 to allow competitive bidding. Following the rule change, several competitive bid methods were tested at various locations over a four month period. Through the pilot study, BLM determined that the competitive format appeared to be more responsive to potential adopters than the original lottery system. Under the competitive bid process, the minimum bid for each animal is \$125 and each consecutive bid must be in an increment in the range of \$5 to \$100. The competitive bid process includes silent bids, sealed bids, and oral bids. Based on the WHBIS database, BLM has now placed 2,349 horses and 1,310 burros through the competitive bid process. According to some accounts, high bids have been in the \$600 range and average bids have been around \$175, making it feasible for individuals to at least have a chance at adopting the animals of their choice. As of November 1, 1998, BLM required that all satellite adoptions be held using the competitive bid process; however, not all offices have fully implemented this policy.

The March 1997 rule change also included a few revisions to the adoption fees. The minimum fee for burros was raised to \$125 from \$75 because some felt that lower fees had a negative effect on the perceived value of these animals. The fee for mare and foal pairs was also increased to a minimum of \$125 per animal. No formal data is available on how these fee changes have impacted the adoption placement rates, if at all.

With the mostly positive acceptance of the competitive bid process, it would seem logical that bidding procedures could be further expanded to promote more adoptions. Some people have suggested that BLM employ more oral bidding formats to capitalize on the popular procedures commonly used at auctions for cars, antiques, furniture, and livestock, for example. In addition, BLM might consider lowering the base bid to \$75 to broaden the entry range and possibly have more animals adopted in the first round. Other pricing promotions, discounts, and incentives may also be quite effective in increasing adoption attendance and placements.

A suggestion received from many sources is that adoptions would increase if more animals were somewhat tame, at least halter gentled, when offered for adoption. BLM currently maintains cooperative agreements with five prison programs in four western states to provide animals that have been gentled and trained to varying degrees. In three of the programs, the animals are gentled first, then offered to the public through adoptions held at the prison facilities. In the other two programs, the animals are adopted first, and then sent to the facilities for training over a three to six month period. In these two programs, adopters pay for care, feed, and training of their animals while enrolled in the program, in addition to the adoption fees. Although no statistics were available, BLM reports that there are waiting lists for animals with even a minimum of training. Information about the prison gentling program needs to be packaged and promoted more effectively. Even some of the BLM field personnel involved in the adoption program are not fully aware of the prison gentling programs or the procedures for adopting or enrolling animals in this program. In addition, it may be worthwhile for BLM to pursue several different

options for training of animals in the adoption system, such as contracts with professional trainers, and more fee-based training options for adopters. BLM might also consider some up-front investment in halter training so animals could be shown in a ring if the oral bidding process were used to a greater extent in the future.

As mentioned in the section of this report on program presentation and informational resources, there is tremendous potential for using the Internet to promote adoptions and provide information about the Wild Horse and Burro Program to a wide audience of interested people. There is also great potential for increasing actual adoptions over the Internet. BLM has already held two Internet adoptions to date, and another is scheduled in early 1999. In this format, pictures and biographical information about the available animals are provided through the Internet approximately two weeks before actual bidding begins. Internet adoptions have used the competitive bidding process, accepting open bids for a two week period. In the first Internet adoption, 12,000 hits were recorded at the web site during the process. Before the second Internet adoption, the American Broadcasting Company (ABC) featured information on its web site regarding the upcoming adoption, and hits on the BLM web site increased to 21,000.

Figure 2-8 shows the results of the first two Internet adoptions including the number of applicants who were approved, the number who adopted, and the number of animals they adopted. BLM designed the initial Internet adoptions as a pilot program to test and evaluate the concept before full implementation. BLM met or exceeded its expectations and performance criteria in these first two trials. With the ever-increasing popularity of using the Internet and some fine-tuning of the process, this should become an increasingly important tool for the BLM's adoption program. A nationwide Internet adoption event could be highly effective, allowing participants to view and select animals for adoption in their local geographic areas.

The cost of setting up the web page and other attendant expenses were charged off to the first adoption. Once start-up costs are taken care of, the cost to adopt an animal by Internet is far less than the average cost of approximately \$1,100 per animal that BLM incurs for satellite adoptions. Internet adoptions also save wear and tear on the animals that are not adopted, in that they can be retained at a holding facility and re-advertised at subsequent Internet adoptions.

Although preliminary numbers on the Internet process are extremely encouraging, BLM will never be able to use this format exclusively. At present, many people still do not use computers or are not on the Internet. Also, not all individuals ascribe to benefits of computer shopping. In all probability, a combination of methods will continue to benefit the program.

Another avenue that could be explored is that of television's QVC-type sale. This format would lend itself to actual video-taped footage of the horses and burros with concurrent audio narration. Thirty-second promotional spots could be run weeks in advance, not only depicting the individual animals, but announcing the adoption events. It is possible that partnerships could be formed with corporate sponsors (possibly QVC itself) to produce a pilot program to assess the viability of this adoption format. Both television and computer formats could support this approach.

**Figure 2-8
Results of the Initial Internet Adoptions**

	1st Internet Adoption	2nd Internet Adoption
Applications Received	53	109
Applications Approved	18	43
No Shows	3	1
Number of Animals Offered	27	47
Number of Animals Adopted	19	32
Number of Animals Picked Up	16	29
Average Bid	\$172	\$178
Total Bid	\$2,755	\$5160
Cost/Animal Adopted	\$1,688	\$220

Unfortunately, no real trend information exists regarding outreach, education, or publicity efforts on the part of BLM. As the marketing program is implemented in the future, it will be important to incorporate methods to measure program success, including evaluations of adoption locations, formats, and publicity efforts.

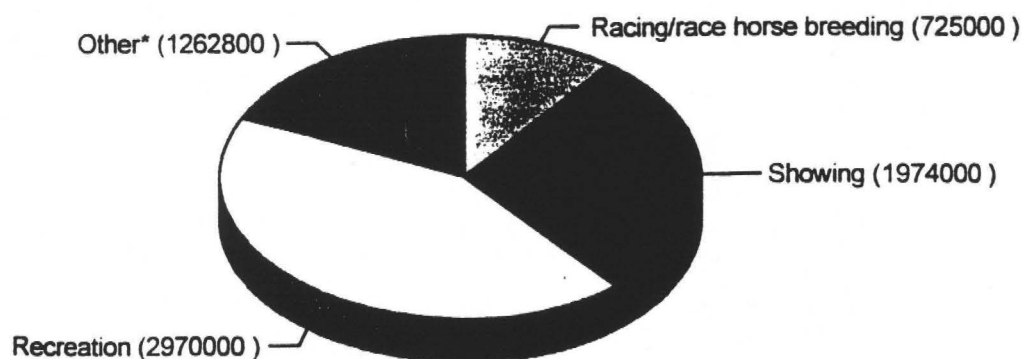
Trends in Similar Markets

There are several indications of market viability and opportunity for the Wild Horse and Burro Program. The American Horse Council Foundation (AHCF) recently published a four-volume study on the domestic horse industry entitled, *The Economic Impact of the Horse Industry in the United States*. This report is based on a year-long study conducted for AHCF by the Barents Group. AHCF reports that the horse industry is highly diverse and supports a wide variety of activities in all regions of the country. The AHCF study provides a detailed analysis of the domestic horse industry—where horses are located, who owns them, and the many uses of horses throughout the country such as racing, breeding, recreation, and show. According to the AHCF study, there are 6.9 million horses in the United States, including both commercial and recreational horses. Figure 2-9 shows the breakout of uses reported in the study. Recreation is identified as the largest usage category for domestic horses, accounting for almost three million horses and 43 percent of the total.

There are reportedly 7.1 million Americans involved in the industry as horse owners, service providers, employees, and volunteers. Of this number, 3.6 million people participate in showing and 4.4 million in recreation, with some overlap in cases of people who participate in both activities. Approximately 1.9 million people own horses. The report also provides some

interesting demographic data about horse owners including their geographic distribution and median income. The study indicates the median income for all U.S. households is \$36,000 while the median income for horse owning households is \$60,000. Fourteen percent of horse owning households have incomes under \$25,000, 38 percent under \$50,000, and 64 percent under \$75,000.

Figure 2-9
Domestic Horse Use



*Other includes farm and ranch work, rodeo, polo, police work, etc.

The AHCF study shows that there are sizeable untapped markets for the Adopt-a-Horse or Burro Program in all areas of the country. Further review of the state summaries contained in the study may reveal additional data and insights that can be applied to the marketing strategy for the adoption program.

Other market indicators are the multitude of interest groups and clubs now available for animal lovers and enthusiasts. Public interest and involvement in these groups, including ones devoted just to horses and burros, can be seen by the numbers of magazines that have appeared on the subject, and by the sizeable numbers of related web sites on the Internet.

In addition, for the past several years, many humanitarian programs have evolved using adoption as a tool to ensure the welfare and safety of various excess animals. Among the most successful is the extensive adoption program managed by the Humane Society of the United States in which

stray or abandoned cats and dogs are placed in appropriate homes. There are several other organizations involved in the protection and placement of a wide range of animals including greyhounds, Great Danes, racehorses, and the ponies of Chincoteague Island, Maryland, for example. The advent of these types of groups as well as animal rescue societies provides a strong indicator that the humanitarian market exists. It also shows that successful marketing, education, and outreach campaigns can significantly impact the effectiveness of these programs. Further research and contact with these groups may allow BLM to benefit from their expertise and lessons learned.

4.2.2 Wild Horse and Burro Adopters

As indicated in the adopter profile section of this report, BLM has collected very little data about the people who have adopted wild horses and burros in the past. However, the WHBIS database can be used to track where adopted animals are kept (which is, in most cases, where the adopters live). In Section 3.0, data on state adoption levels for FY 1993 through FY 1998 was shown. In Appendix A of this report, a trendline analysis for each state over the same six year period shows some interesting results. Further analyses and discussions with personnel in the BLM field offices may explain some of the fluctuations and trends depicted.

Figure 4-10 shows the geographic distribution of animals that have been adopted through the Adopt-a-Horse or Burro Program based on the WHBIS database. The map included in Figure 4-10 was produced by BLM using an ARC-INFO geographic information system (GIS). Although data can be entered manually into the GIS, it may be worthwhile to build an interface between the WHBIS database and the GIS. This interface would facilitate spatial analysis and display of statistics and market data pertinent to the Wild Horse and Burro Program (e.g., geographic distributions of wild horse and burro populations, removals, adoption events, adopters, equestrian centers, tack and feed stores, etc.). The GIS could also be used to help identify apparent data anomalies in WHBIS such as misspelled cities, state codes, etc.

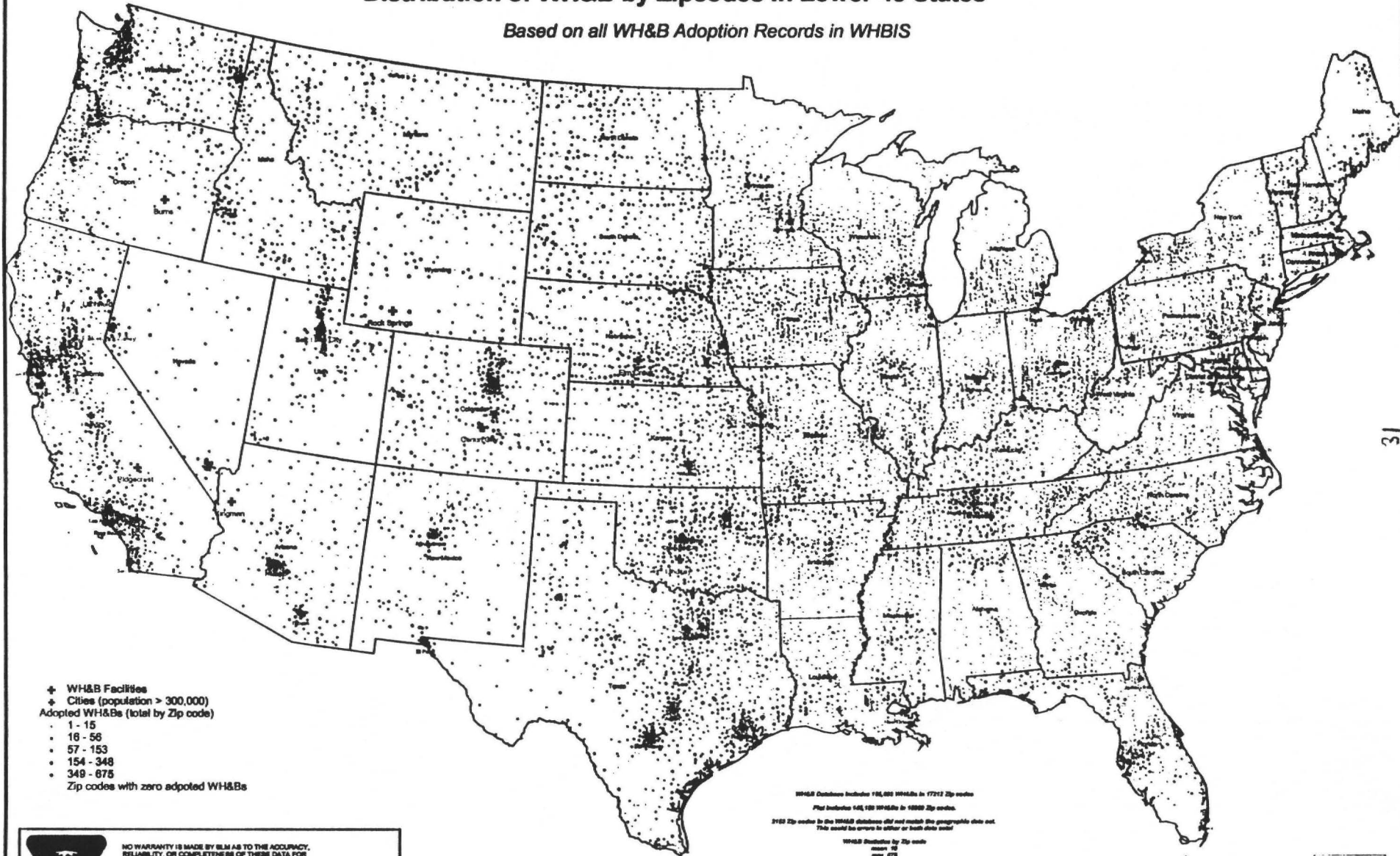
As was indicated in the section about adopter profiles, the current adopters appear to be as diverse as the animals they adopt. Many experience a rural life style, are outdoor enthusiasts, enjoy country and western music, keep in touch with current events, and enjoy movies. At the same time, others consider themselves suburban, like hiking and back packing, are professionals or service providers, and listen to classical music or rock and roll. Their equine experience ranged from none to as many as 70 years. Reasons for adopting wild horses or burros include pleasure riding, ranching, packing, breeding, showing, and competitive pursuits—all the things domestic horses and burros are used for. With a domestic market of 6.9 million horses and 1.9 million horse owners, (not counting the market for burros and mules), BLM would only have to secure a very small market share in order to have a large impact on the Adopt-a-Horse or Burro Program.

Public awareness in the program seems to be increasing, but much remains to be done. The program's national newsletter has more than 8,000 subscribers, and Internet inquiries are on the rise. It is estimated that approximately 10,000 brochures, *So You'd Like To Adopt*, are distributed each month. However, with the exception of printing records, the BLM does not keep specific data regarding inquiries on a national level.

Figure 4-10

Distribution of WH&B by Zipcodes in Lower 48 States

Based on all WH&B Adoption Records in WHBIS



- ✦ WH&B Facilities
- ✦ Cities (population > 300,000)
- Adopted WH&Bs (total by Zip code)
- 1 - 15
- 16 - 56
- 57 - 153
- 154 - 348
- 349 - 875
- Zip codes with zero adopted WH&Bs

NO WARRANTY IS MADE BY BLM AS TO THE ACCURACY, RELIABILITY, OR COMPLETENESS OF THESE DATA FOR INDIVIDUAL USE OR AGGREGATE USE WITH OTHER DATA. ORIGINAL DATA COMPILED FROM VARIOUS SOURCES. SPATIAL INFORMATION MAY NOT MEET NATIONAL MAP ACCURACY STANDARDS. THIS INFORMATION MAY BE UPDATED WITHOUT NOTIFICATION.

WH&B Database includes 108,600 WH&Bs in 17,712 Zip codes.
Plus includes 146,100 WH&Bs in 10,000 Zip codes.
2162 Zip codes in the WH&B database did not match the geographic data set.
This could be errors in either or both data sets!

WH&B Database by Zip code
rows: 88
cols: 875
cols: 0

Author: Pat Green
WC-229
Dec 1, 1998

Although public awareness in the program seems to be growing, interviews indicated that many people still do not know about the program. There does appear to be a direct correlation between bad publicity about the Wild Horse and Burro Program and adoption success. A reported (but not statistically substantiated) drop in adoptions in 1998 evidenced this after the Mendoza report created a great deal of controversy. No real information concerning the effects of favorable national press is available, with the exception of increased interest in the Internet adoption after ABC ran an Internet segment prior to the second adoption.

Interviews indicated a general trend in high customer satisfaction and enthusiasm among existing adopters. Repeatedly, wild horse and burro owners indicated an interest in showing and promoting their animals and a willingness to help mentor new adopters. Some organizations and groups of wild horse and burro enthusiasts have emerged around the country. BLM should contact these groups and facilitate networking and outreach to the extent possible. Also, to reach a broader market and increase public awareness, BLM should aggressively publicize success stories in every aspect of its program.

4.3 Market Opportunities

4.3.1 Untapped Markets

Through interviews and research conducted by DAI, it is clear that there are abundant market opportunities for the Wild Horse and Burro Program. As mentioned earlier, one of the largest untapped markets is that of the domestic horse and burro owner. BLM records reveal that only 95 horses have been adopted in the past six years in Maryland which is reputed for its excellent horse country.

This trend is borne out by a state-by-state analysis. In reviewing mapped demographic data provided by BLM, it appears that there are several geographic areas that have good potential for increased adoptions. Within the jurisdiction of the Eastern States Office, for example, all states in the northeast; several mid-Atlantic states including New Jersey, Maryland, Virginia, and West Virginia; and many areas of Illinois and Alabama fall into this category. Additional markets of domestic horse owners occur in every region of the country. The recent study by the American Horse Council Foundation provides some information that can be used to identify market opportunities by geographic area. The information officers at land grant universities and state horse specialists in agricultural states are other possible sources of assistance in identifying horse country. Market data from the feed and tack industry can also be used to identify potential markets where equine animals are popular.

Most of the existing adopters who have owned domestic animals previously have been highly impressed with the results they have had with animals adopted through the BLM program. In interviewing various individuals who are considered part of the "horse set," it is found that they are generally positive about wild horses and would consider adopting. In many cases, they simply don't know about the BLM adoption program. In other cases, they are not aware of the value and attributes of these animals, or have impressions that mustangs are hard to train, too small, in poor health, or of poor quality. Most are quite surprised to see the beauty, strength, and skill of animals that have been adopted through the BLM program and given proper care, attention, and training.

There are few areas of domestic horse and burro use into which wild horses and burros do not belong. In addition to pleasure riding, wild horses have been successful in many competitive disciplines including endurance racing and dressage, for example. Some people have suggested that mustangs would be ideal for sports such as polo, where players need strings of horses that are agile, dependable, and smaller in size. Breeding is another use of wild horses and burros that represents a market opportunity. The wild horse, known for its stronger bones and foot structure, is gaining the attention of many domestic horse owners and breeders who have experienced problems with their thoroughbreds and other domestic breeds. Whether for personal or commercial purposes, many people are interested in breeding wild horses and burros to add to and improve their stock of domestic animals. BLM has generally been aware of market opportunities in this area but has tended to back away, apparently because of perceptions that it would be competing with the private industry, or would somehow commercialize or exploit the wild horse in the process.

The domestic horse industry is mature and diverse, representing a broad range of interests and activities. Most importantly, people involved with domestic horses and burros already have an infrastructure for care of the animals. They have existing information networks and have proven track records in equine experience. The reasons they own horses and burros are the same as those of individuals who adopt wild horses and burros. They use their animals for work, play, entertainment, and pleasure. They do not have to be convinced of the benefits of owning a horse or burro. They are an already educated audience.

Equine-related clubs and organizations provide a wealth of market potential for the Wild Horse and Burro Program. The U.S. Pony Club is always looking for donations of horses to help teach children to ride. Most boys' and girls' ranches use animals to help teach young people responsibility. Therapeutic riding is becoming quite popular in helping physically and mentally challenged children. The animals required for these pursuits need to be completely gentled and trained before being turned over to the various groups. However, through partnerships with trainers or previous adopter mentors, the animals could be gentled before being adopted or donated to the appropriate organization.

Although there are restrictions about wild horses and burros being used as bucking stock in rodeos, these animals would be ideal to accomplish the working stock goals of rodeo events. Their sure-footedness, quickness, and intelligence are naturals for barrel racing, calf roping, and team tying. Their smaller size is ideal for the younger rider and performer. Appearing at the National Finals Rodeo, the Calgary Stampede, or International Finals Youth Rodeo is a success story waiting to happen.

The BLM also needs to explore various ethnic markets such as the Hispanic and Native American cultures. Both are historically connected with horses and burros. Marketing plans could be designed to take advantage of the advent of Spanish language media outlets throughout the United States. Possibly, in partnership with the Bureau of Indian Affairs, the BLM could launch an aggressive pilot program to place animals with Indian tribes throughout the nation.

The 4-H, an arm of the United States Department of Agriculture (USDA) Extension Service, has long been noted for its agricultural education programs. Through cooperation with the USDA, a unit on wild horses or burros could be included in the 4-H curriculum. BLM could offer to

provide animals for free, or a reduced fee, serving a two-fold purpose. The same approach could be made with the Boy Scouts of America and Girl Scouts of America with their merit badge programs. The Future Farmers of America (FFA) is another organization with an educational mission and a broad network of local chapters through the United States. BLM may want to consider working in partnership with some or all of these groups to carry out an educational campaign on wild horses and burros aimed at school children nationwide. In addition to its educational value, such a program would also heighten public awareness about the program and likely result in increased adoption rates.

At the other end of the spectrum is the older population. There are indications that older Americans might be a market segment that BLM should explore. The American Association of Retired People (AARP) has reported an increase in pleasure riding as a recreational pursuit among its members. Since Baby Boomers have now officially turned fifty, this market is one that is destined to grow.

Finally, the BLM should continue to aggressively pursue the current adopter market. Specific market plans should be devised to capture information about these individuals and methods of increasing repeat and multiple adoptions among their ranks.

4.3.2 Opportunities to Increase Awareness of the Wild Horse and Burro Program and Improve Success of the Adopt-a-Horse or Burro Program

Any activity that increases awareness of the Wild Horse and Burro Program is going to improve the success of the Adopt-a-Horse or Burro Program in the long run. The value of public awareness, outreach, and education cannot be over rated. It has been shown that negative press about the Wild Horse and Burro program has a negative effect on adoptions. Even more devastating is no information at all. If the public is consistently unaware of the Wild Horse and Burro Program, it is certainly not going to participate in the adoption portion of the program.

There are several logical outlets for increasing awareness of the Wild Horse and Burro Program. With the ever increasing interest in outdoor pursuits and the environment, the BLM Wild Horse and Burro Program has a natural message and product for the public. The BLM should aggressively pursue all types of equestrian organizations; it should create a presence in schools; it needs to take advantage of the increased interest in National Parks and provide wild horse and burro information in kiosks and park centers as well as in its own resource center facilities. Although some programs are already in place, BLM could do more work with veterinary and equine studies programs at universities to sponsor research, education, outreach, and adoption events.

In addition to increasing public awareness about the Wild Horse and Burro Program, to increase adoptions, the BLM should include adoption goals in its newsletter. It needs to expand its base of adoption locations to include areas where horses and burros are used but where adoptions have not been held before. Registration campaigns need to be sponsored approximately three months prior to each adoption in a new area. Attention should be paid to event planning to include demonstrations, training clinics, competitions, raffles, and concessions at adoption events to draw in larger crowds.

In order to reach new markets and increase the success of the adoption program, BLM needs to target specific market segments and use categories among the traditional domestic equine industry where market opportunities are the greatest. BLM should package and present the adoption program (and the animals available through the program) in ways that appeal to the particular interests and preferences of the identified market sectors.

Much more attention and focus should be devoted to establishing partnerships with public and private sector organizations to assist in all facets of the program. Corporate sponsorships by organizations such as Purina, Ford Motor Company, and Disney, for example, represent significant opportunities to promote the Wild Horse and Burro Program and to improve its overall success. Corporate sponsorships and alliances should be pursued at the national level of BLM, with coordination at the field level once established.

Finally, it might benefit the BLM to create a national or regional adoption team(s), not only with representation from the BLM, but from marketing professionals, horse and burro clubs, advocacy groups, and successful adopters. These groups could be influential and beneficial in site selection, information dissemination, and the overall increased success of the adoption program.

No single effort will provide a panacea for the Wild Horse and Burro Program, nor will all suggestions work in all areas. However, through careful thought and planning, the best combination of activities can only increase the visibility of the Wild Horse and Burro Program, and, in turn, increase adoptions.

The next section of the marketing strategy provides an assessment of presentation and informational materials used in the Wild Horse and Burro Program. This is followed by a proposal to reach the untapped markets identified throughout the document. The final section provides details and specific recommendations for the marketing strategy and implementation approaches.

5.0 ASSESSMENT OF PRESENTATION AND INFORMATIONAL MATERIALS

5.1 Introduction

The purpose of this assessment is to evaluate the overall presentation of BLM's Wild Horse and Burro Program. The assessment considers how the program is presented to the public and how its products and services are portrayed and communicated to the audience it is trying to reach. The objective of the assessment is to identify possible improvements to increase public awareness and support of the program, as well as success of the Adopt-a-Horse or Burro Program.

5.1.1 Report Organization

Section 5.2 provides observations about the overall presentation and image of the Wild Horse and Burro Program. Background information is included in Section 5.2.1, followed by a discussion of the program's identity and message in Section 5.2.2. In Section 5.3, product presentation and packaging are addressed. This includes how the animals being shown for adoption are presented in Section 5.3.1, and observations on the comportment of individuals who manage and staff adoption events in Section 5.3.2. In Section 5.4, the information that is provided to the public about the Adopt-a-Horse or Burro Program is reviewed. Section 5.4.1 summarizes several of the individual publications and information resources used by the program. The Internet web sites maintained by the program are also discussed. Publicity and advertising issues are addressed in Section 5.4.2. Finally, in section 5.5, specific conclusions and recommendations regarding program presentation and communication are provided.

5.2 Program Presentation and Image

5.2.1 Background

Since its inception in 1972, the Adopt-a-Horse or Burro Program has grown from a fledgling process in which 23 animals were adopted in 1973 to a program that placed nearly 8,700 animals through adoptions in FY 1997. During this time, the program's presentation and image have varied based on a wide range of factors including changes in leadership, funding, public interest and involvement, and program objectives and priorities. Over the years, several types of informational materials have evolved, but without the cohesiveness needed to portray a well thought out and well planned program.

The BLM Wild Horse and Burro Program has been fraught with controversy since its very beginning. The program has often been the subject of heated debate regarding appropriate uses and allocations of the arid rangelands that comprise much of the public land under BLM's stewardship. Other issues have centered around the BLM's designation of appropriate herd management levels, and concerns about the viability and success of the adoption program as well as alleged abuses.

The program's image has suffered as a result of these controversies and the negative media coverage in recent years. In addition, the BLM is a highly decentralized organization in which State Directors have broad authority to manage programs within their respective regions. This organizational structure influences the way that the Wild Horse and Burro Program is managed and the way it is presented to the public. There are very few aspects of the program that are consistent from one BLM office to another. In recent years, some standardized guidelines and direction for the program have been issued at a national level. However, there have been no previous efforts to develop a comprehensive marketing and communications strategy for the Wild Horse and Burro Program.

5.2.2 Program Identity and Message

The program does not have a clear identity within BLM or among the general public, at large. Many people outside of BLM have never heard about the program. Those that do know about it often have widely varying impressions. Of utmost importance, there is no official emblem or logo identifying this major program to its constituency. Several different icons representing the Wild Horse and Burro Program are used in mastheads and informational materials. In many cases, the burro does not appear in these icons. Similar variations occur on the business cards of BLM staff assigned to the program. Some of the cards depict horses only, and others show horses and burros. Likewise, some program materials incorporate the BLM and Department of Interior logos, while others do not. The Wild Horse and Burro Program can project a more unified, positive image by using a standardized logo for all program presentations. Once it is designed and finalized, special publicity should be used to introduce and promote the new logo.

Name recognition and program identity can also be enhanced by using a catchy phrase or slogan on promotional materials. The most commonly used phrase associated with the program is, "Adopt a Living Legend" which appears on a poster, a brochure, and some of the flyers used to advertise individual adoption events. It may be appropriate for the BLM Wild Horse and Burro Program to use more than one slogan to convey different informational and promotional messages and themes.

BLM does not provide the public with a single point of contact for the Wild Horse and Burro Program. Instead, individuals are encouraged to directly contact the BLM office that serves the area where they may be interested in adopting. Each of the 12 BLM state offices maintains a separate telephone number, and three of the offices plus the National Program Office provide toll-free telephone numbers. Separate contacts are also provided to the public for BLM Resource Area Offices, holding facilities, and prison training programs involved in the adoption program. It is not clear if the multiple points of contact for the program actually confuse the general public, or if they provide the public with increased, more responsive access to the adoption program. As the BLM evaluates ways to improve its overall presentation of the Wild Horse and Burro Program, it may want to consider establishing toll-free telephone numbers for all BLM offices, or one single toll-free number where staff can direct callers to the appropriate BLM office when local support is needed.

5.3 Product Presentation and Packaging

5.3.1 Presentation of the Animals

BLM is becoming more aware of the need to improve the overall presentation and packaging of the adoption program, including the actual presentation and composition of the wild horses and burros that are made available through the program. To satisfy the existing market demand and also open up new markets, BLM must become more skilled at communicating the value and benefits of owning wild horses and burros, and also at providing an appropriate level of product diversity matched to specific regional markets.

Program experience has shown that adopters generally prefer younger animals. In an effort to meet this demand, and limit the number of older animals entering the adoption system, BLM implemented a selective removal policy in 1992. This policy limited the gathering of wild horses and burros for the adoption program to animals five years of age or younger. This policy has since been modified to allow the removal of animals up to nine years in age in order to achieve and maintain appropriate management levels for some herd areas. The increased number of younger animals in the system should improve the adoption success rates.

BLM has instituted efforts to increase adoptions of older horses and other animals that have been to multiple adoptions. These efforts include gelding of stallions, contracting with five prison programs in western states to gentle and halter break selected animals, and use of reduced adoption fees in some instances. With the possible exception of the gelding program, these efforts appear to be effective in increasing the marketability of the harder-to-place animals that are in the adoption system. However, BLM should implement a more rigorous system for evaluating the success of these programs and make necessary changes as appropriate. BLM also needs to explore a variety of techniques to achieve desired program objectives. For example, there may be several viable approaches to gentling and training animals in the adoption system in addition to the prison training program.

Interviews with BLM staff and previous adopters indicate that much improvement is needed in matching the supply of animals at each adoption event to the actual market demand. Even though BLM staff at the various field offices request the number, age, gender (and sometimes color) of the animals they want for each adoption event, the actual selection of animals shipped from BLM holding facilities seldom matches the requests. It is almost certain that more animals can be adopted by improving the distribution process. For example, the demand for burros in Missouri is relatively high, yet only two burros were sent to the recent adoption held in that location. Meanwhile, the demand for wild burros in the Oklahoma district is down due to local market conditions and low prices for domestic burros in that region. In addition, most of the BLM staff interviewed by DAI commented that publicity and outreach activities could be improved by knowing well in advance what variety of animals would be available for each adoption. As it currently stands, BLM offices find out what animals are scheduled for shipment anywhere from two weeks to only a few days in advance of the adoptions. In some cases, even then, there are variations in the actual number of animals shipped which can create problems from a public relations and logistics perspective.

Another area in need of improvement is the packaging and presentation of the animals available through the adoption program. With the time frames involved in gathering and shipping wild horses and burros to adoption events, it is sometimes difficult for the animals to be in top-notch condition. However, BLM should make increased efforts to improve the overall appearance and condition of the animals that are shown at adoptions. Many of the animals presented at adoptions are dirty and some appear to be sick. If possible, BLM should clean up the animals and rest them prior to the adoptions. Also, any animals that appear to be sick should be given appropriate veterinarian care and should not be displayed at the adoption. In several cases, interviewees said they were clearly dissuaded from adopting animals when some of them appeared to be ill.

The physical layout of the adoption facility can also influence the quality of presentation. Some people have commented that it is difficult to actually observe individual animals at the adoptions due to the grouping of animals in the pens or other visual constraints. Others may not be able to hear announcements, especially when microphones are not used.

All wild horses and burros available through the adoption program can be identified by a unique alpha angle freeze mark that BLM places on the left side of each animal's neck. The mark indicates the animal's date of birth, the state where it was gathered, and other unique data to identify the animal. The freeze mark allows BLM to track each animal until titled. Some individuals interviewed by DAI commented that the freeze mark is too prominent and detracts from the appearance of the animals. Some felt that it was also out of keeping with the fact that the animals, before capture by BLM, were wild and free roaming. Although it is not apparent what impact, if any, the freeze mark has on people's willingness to adopt a wild horse or burro, it has been suggested that BLM consider moving the freeze mark to a less prominent area on the animal, or replacing the freeze mark with a microchip tracking device that doesn't detract from the animal's physical appearance.

As indicated in Section 5.4, below, the publicity and promotional activities associated with each adoption vary from one event to another. Media coverage is inconsistent. Also, some adoption sites are well marked with banners and signs while others are not. The timing and frequency of adoption events, the formats and locations used, and any special events associated with the adoptions can all influence the way in which wild horses and burros are presented to and perceived by the public. One of the biggest areas for improvement may be the actual staging and presentation of the adoptions. Adoption events can be planned and publicized to attract more people by providing a much broader range of educational and promotional activities designed to increase public awareness, participation, and adoption success rates.

In addition, many adopters and potential adopters routinely ask for more information about the individual animals available through the program. People want to know more about the animal's physical characteristics such as height, color, gender, and age as well as characteristics about its temperament or personality, if known. Any information about the animal's origin including breed affiliation and herd area is also of interest. There are several options for providing this kind of information. At minimum, BLM could indicate the state where each animal was gathered on the signs posted outside the pens, on individual bid sheets, or on rosters available at the adoption. BLM may also want to develop an information sheet for each animal in the adoption system. This

information could possibly be compiled in a catalog or other format and be available prior to or at the adoption event. Information on typical animals available for adoption may also be appropriate, as well as fact sheets on the individual herd areas.

Further recommendations and ideas for improvements in this area are included later in this report in the section on reaching new markets.

5.3.2 BLM Employee, Volunteer, and Contractor Presentation

For the most part, BLM employees, contractors, and volunteers appear to conduct themselves in a professional manner at the adoption events sponsored by BLM. It is especially important that any BLM staff who attend the adoptions be dressed in the appropriate BLM uniform and/or wear an official BLM name tag for ease of identification. Other participants such as volunteers and contractors should also wear name tags. At the adoptions, BLM may want to include some information or presentation on the staff involved in the program, including their various roles such as wild horse and burro specialist, wrangler, compliance officer, and public affairs specialist. This would also provide an opportunity to introduce and acknowledge the support by volunteers.

The individuals who conduct adoption events throughout the country appear to be very knowledgeable and for the most part, show a strong commitment to the success of the program. To maintain this caliber of staff, it may be beneficial to design a public affairs module for all BLM personnel, contractor staff, and volunteers involved in the adoption process. The module could be a one-day course designed to rejuvenate and revitalize the enthusiasm of the BLM staff; remind them that they are "placing" or "adopting" the animals, not "getting rid" of them; and reinforce some basic public interface and communication skills that sometimes become rusty, even for the seasoned professional. BLM could also improve personnel capabilities by providing better coordination and cross-training of the public affairs staff and wild horse and burro specialists who are assigned to the adoption program.

5.4 Program Information and Publicity

5.4.1 Informational Materials

BLM offices distribute a variety of different informational materials about the Adopt-a-Horse or Burro Program. The BLM offices that handle adoptions typically send out mailings to announce upcoming adoptions. They also provide various information in response to public inquiries that are received at the local level. Information packets are also assembled and provided to adopters and applicants at the adoption events. What goes into those packets is generally left to the discretion of the local public affairs officer at each BLM office.

Most of the BLM field offices have developed their own materials to supplement the few publications that have been provided by the National Program Office. Some offices send out two or three publications about the program, while others distribute information packets containing more than 10 different items. These items range from printed brochures, pamphlets, and posters to photocopies of fact sheets and other miscellaneous information. Some of the offices have

enclosed photocopies and excerpts from other publications, including some copyrighted materials. The quality and appearance of the informational materials vary from office to office. Topics range from characteristics of wild horses to care and feeding instructions, how to interpret the alpha angle freeze marks, tips for adopters when they get home with their animals, common diseases in horses, wild horse and burro facts, adoption requirements, and regional adoption schedules. Many of the materials appear to be designed for new or prospective adopters and tend to be informative for the most part. In other cases, the overall usefulness of the information is unclear.

There appear to be only a few standard materials that are used by the program on a routine basis. These materials and other selected informational resources are reviewed below.

- Adoption brochure and application

The primary publication about the program is a brochure entitled, *So You'd Like to Adopt*. This publication, which is currently being revised, presents general information about the adoption program, including adoption requirements and rules, a list of BLM offices, and an application form. The current edition is 13 pages long (not including the removable application form) and covers 20 questions and answers about the program. An addendum is currently used with the brochure to provide updated information on adoption fees. Also, some BLM offices supplement this brochure with inserts that elaborate on information contained in the brochure, or that ask for additional information on the application form. BLM uses this brochure as the primary source of general information about the Adopt-a-Horse or Burro Program and to provide applications to potential adopters. As this document is revised, BLM should seek input from the field offices and ensure that the brochure adequately addresses the information needs of the intended audiences.

- Caretaker's guide

Another publication entitled, *Adopt a Living Legend...A Caretaker's Guide*, appears to be widely used across the various BLM offices. This publication is presented as a 12-page pamphlet with color photographs. The content provides very general guidelines for the care of wild horses and burros and refers the readers to their veterinarians for more detailed information. Based on the interviews conducted by DAI, many individuals would like BLM to provide more information on the proper care and training of wild horses and burros. In this regard, BLM may wish to significantly expand and revise this document to address these information needs. This may also indicate the need for additional materials such as referrals to animal care providers, trainers, and mentors who are available to work with new adopters.

- Adopter video

Most BLM offices distribute a video to new adopters entitled, *Welcome Home Wild One*. This video is 20 minutes long and provides a very general overview of the Wild Horse and Burro Program as well as a few general tips about caring for the adopted animals. Because it is so general, this video seems to be more appropriate for use in presentations about the program, rather than as a guide for new adopters.

- Quarterly newsletter

The Wild Horse and Burro News is a quarterly newsletter that covers the program at a national level. This newsletter is an excellent publication that is informative, interesting, and easy to read. Although published in black-and-white, the overall design and layout is quite good. The subjects covered in the newsletter vary from issue to issue, but generally include updates in the national program, success stories from adopters, tips on caring for wild horses and burros, and the national adoption schedule. Personnel at the BLM field offices should encourage adopters and other interested parties to subscribe to the newsletter. The National Program Office should also consider efforts to broaden the mailing list for the newsletter to include more interest groups and organizations involved in the domestic horse and burro industry. To reduce the cost and effort of mailing the newsletter, and to reach more people, it will also be important to make the newsletter available on the BLM Internet web site.

At least one of the BLM field offices publishes a regional newsletter. The regional newsletter is also quite informative and covers topics of particular interest to people in the local area served by the field office. Whereas the regional newsletter may afford better coverage to local constituencies than the national newsletter, it is important to coordinate information between the two sources to optimize resources and avoid redundancy.

- Materials for young people

Other items that appear to be popular but not as widely available at the different BLM offices include two publications designed for younger audiences: 1) *America's Wild Horses...Five Day Lesson Plan and Workbook for 4th Grade* and 2) *The Wonder Series--Wild Horses. Stories and Activities*. The teacher's guide, developed by the Nevada State Office, presents a variety of educational activities related to wild horses. With the exception of the fact that it is tailored for Nevada and now slightly out of date due to policy changes, this is an excellent tool to capture the imaginations of America's children. The second publication, by Wonder Series, was developed with support from BLM. This publication contains information and activities related to wild horses including stories about adopting a wild horse from BLM. It also contains a series of removable trading cards that are also available without the activity book at some BLM offices. The trading cards include color photographs and depict success stories and uses of animals adopted through the BLM program. BLM may want to increase supplies of these materials and possibly develop other similar items. Several of the people interviewed indicated a need for more information about the Wild Horse and Burro Program that is suitable for school age children.

- Internet web page

Since early 1996, the BLM National Program Office has maintained a national-level Internet web page for the Wild Horse and Burro Program (<http://www.blm.gov/whb>). Some of the BLM state offices maintain their own web pages, and not all consistently link to the national web site for the Wild Horse and Burro Program. The web site for the national program provides general information about the Adopt-a-Horse or Burro Program including adoption requirements and a schedule of adoption events nationwide. This Internet site provides links to various publications

and reports about the Wild Horse and Burro Program, points of contact at the BLM state offices, and a reading list. A link is also provided to a limited number of interest groups involved with wild horses and burros. Since its June 1996, this web site has been accessed more than 132,000 times. Use of the Internet represents a significant opportunity for BLM to communicate information about the Wild Horse and Burro Program to a wide audience of interested parties. The Internet can also be used to facilitate information exchange and networking among previous and potential adopters. BLM should focus increased efforts on using the Internet as a communication, educational, and promotional tool for the Wild Horse and Burro Program. The web site should be expanded significantly. Also, BLM should register with the growing number of Internet sites that provide links to organizations involved with animal adoptions, horses, and burros, as well as other interest groups such as outdoor recreation and nature clubs, for example.

In addition to presenting information on its Internet site, BLM began a pilot program in May 1998 to test the process of holding Internet adoptions. A team headed by the BLM Eastern States Office was responsible for establishing the web page for this process (<http://www.adoptahorse.blm.gov>). The BLM Internet adoption site provided information about the program and adoption requirements, and also presented photographs of the animals available for adoption online. Initial results from the Internet adoptions are promising and are discussed in more detail in the section of this report that addresses trends and opportunities. Although the web page for the Internet adoptions is generally well designed, several improvements should be made as the program evolves. Organization by geographic location would be useful. Also, a search capability and more information about the animals available through the Internet adoption process are suggested. It is important, as well, to provide better integration of this web site with the home page for the BLM Wild Horse and Burro Program, including links to information about all aspects of the program.

- CD-ROM presentation

One of the most recent materials developed by BLM is a CD-ROM presentation. This material was developed with contractor support by one of the district offices within the Eastern States Office. Its initial use is in a kiosk display at the Kentucky Horse Park. The CD-ROM is an outstanding presentation of the Wild Horse and Burro Program in a multi-media format that includes video, sound, narration, and text pages that can be accessed on a touch-screen panel. The CD covers most all aspects of the program. It provides a brief history of the program and addresses why and how wild horses and burros are gathered from the range. The CD shows a state-by-state count of wild horse and burro populations. It also provides information on the kinds of animals available through the adoption program and presents before and after pictures as well as success stories based on actual adoptions. The CD-ROM format is versatile and can be incorporated into various settings such as mobile displays, guided presentations, kiosks, and even the Internet. BLM should try to incorporate a screen counter or other mechanism to track the overall usage of this presentation. The adoption schedule and application forms should be provided in conjunction with the presentation if possible. BLM is encouraged to make the CD-ROM available to all field offices and to continue exploring additional uses for this presentation.

- Additional information needs

DAI identified several information needs and suggestions for improving BLM's presentation of the Wild Horse and Burro Program. Specific recommendations for informational materials needed to implement the marketing strategy are provided in the section of this report that addresses ideas for reaching new markets.

5.4.2 Publicity and Advertising

In addition to informational materials, many BLM offices distribute a wide variety of promotional items associated with the Adopt-a-Horse or Burro Program. These items typically convey the program name and sometimes a slogan or telephone number associated with the program. Examples, which appear to be quite popular in certain markets, include various photos, an eraser, a ruler, lapel pins, a magnet, a bandana, a bookmark, a pocket knife, a key chain, and a post card. Again, there does not appear to be any consistency in the items available from one BLM office to another, and few efforts are made to share and coordinate information about these kinds of promotional materials. As the program grows in popularity, BLM may want to expand the list of promotional materials and make these items available for purchase through a catalog. This is a fairly common practice among clubs and organizations of enthusiasts in a variety of areas.

Field offices that are in charge of adoptions also prepare press information for local media outlets. The press information typically includes a public service announcement, press release, program summary, and letters addressed to assignment or news editors. Video news releases are usually sent with a transcript and B-roll tape. Most media outlets expect a standard amount of information when presented with a press kit. Packets of this nature, including the folders, could be compiled at a central location and provided to the field offices for tailoring to local events (addition of news releases, posters and flyers denoting date, time, place, etc.). Or, certain standardized information could be provided to field offices for compilation and tailoring on site. With centralized printing, cost savings will likely occur, and the message given out by all of the offices will be the same.

Any form of standardized poster might also be useful for announcing upcoming adoption events. This material could be easily mass-produced with a blank field at the bottom allowing the inclusion of information regarding the date, time and place of the upcoming event. Standardizing the production effort could also result in cost savings and improve the consistency of the information provided.

Many offices advertise in local newspapers or trade magazines as their budgets allow. Paid advertising was identified as far more reliable and effective than public service announcements for promoting adoption events. It would be helpful to BLM field offices if professional ad slicks were produced to provide to the publications. Since many printing processes are now automated, ads could be made available to each office via computer. It would also be helpful for BLM offices to have access to a centralized photo library that could be used in promotional materials. Other efforts such as national ad campaigns, could also be used to promote the adoption program, but should be initiated at the national level rather than at the state or district level.

5.5 Conclusions

The BLM has, under very difficult circumstances, come a long way from its first adoptions in 1973. However, until its mission is accomplished and its goals are reached, there is still a long way to go. Of primary importance to the entire endeavor is an overall marketing strategy that depicts a oneness of purpose and a cohesive approach to the mission at hand. Without that, the program will continue to be consumed by crisis management and competing interests.

As the Adopt-a-Horse or Burro Program has evolved, BLM has tended to react to suggestions and criticisms about the program, rather than developing a proactive approach to public relations, marketing, and communication. In order to increase program success, BLM needs to focus more effort on the marketing process, including better coordination of market research, planning, public outreach and communication, and program evaluation.

In general, the BLM Wild Horse and Burro Program needs to present a more polished, professional image. The overall presentation is fragmented and regionalized, and lacks a consistent look and message. The various BLM offices have developed different informational and promotional materials for use within their own jurisdictions and seldom are these materials shared among the districts. Some of the materials used by the program are well designed and appear to be appropriate for their intended use. However, other materials need to be revised to improve information content as well as organization and graphic design.

At present, most of the informational materials developed by field offices are not submitted for routine review and approval by the BLM Washington Office or National Program Office. There is some coordination at the national level for publications used by all offices, but there does not appear to be any process for standardizing materials. Also, there is no routine plan for tracking inventory or reviewing, revising, and developing program information.

At a national level, BLM needs to coordinate information development, outreach, and publicity to standardize the message and presentation, improve effectiveness, and make better use of its resources at all BLM offices and facilities. This is not to say that BLM should adopt a "one size fits all" approach for marketing and communication. Field offices should be encouraged to identify and respond to regional needs and market differences, and their ideas should be shared with other offices for the benefit of the entire program. Also, to keep public interest high, a variety of promotional materials and approaches are needed.

Initially, all publications and promotional materials used by the program should be reviewed, and updated or deleted as appropriate. Based on this review, additional information needs should also be identified. A single, national-level plan should be developed and used on an annual basis to review, update, delete, and develop materials to meet identified needs of the program. Assignments for developing the program materials can be shared by the various BLM offices.

Additional improvements in the public communication arena can be achieved by coordinating program information and outreach activities for the Wild Horse and Burro Program with other

related programs in BLM (e.g., the environmental education program), and with other Department of Interior agencies, especially the National Park Service.

BLM also needs to improve the distribution, diversity, and presentation of wild horses and burros at adoption events to meet specific regional market demands. More effort should be placed on packaging the product in order to increase public interest and change the overall image of wild horses and burros with the public. This can be done by demonstrating the animals' strong points and the many benefits and advantages of adopting, caring for, and owning a wild horse or burro.

6.0 PROPOSAL TO REACH UNTAPPED MARKETS

6.1 Introduction

This final section of the marketing strategy presents recommendations for a national marketing program based on the market assessment, adopter profile, assessment of program presentation and information, and report on trends and opportunities included in the previous sections. The purpose of this portion of the document is to provide BLM with a road map for promoting awareness of the Wild Horse and Burro Program nationwide while increasing the effectiveness of its Adopt-a-Horse or Burro Program. This section of the report is intended to provide a marketing strategy for the program, not a detailed plan which will be among the first actions needed to implement the strategy on a national scale.

6.1.1 Report Organization

Section 6.2 presents the overall marketing strategy. Included are specific recommendations for actions and initiatives to increase awareness of the Wild Horse and Burro Program and improve success of the adoption program. Recommendations provided in previous sections of the report are summarized as appropriate.

Many of the proposed recommendations are interrelated, but have been organized into general categories according to their primary focus. Section 6.2.1 discusses organizational issues associated with the national marketing strategy. The need for a national marketing plan is presented, along with specific initiatives for launching the program with input and involvement by various levels of the BLM organization. Strategies and recommendations to inform and educate the public about the Wild Horse and Burro Program are outlined in Section 6.2.2. Improvement of the adoption program itself is addressed in Section 6.2.3, with specific recommendations pertaining to the application process and adoption locations, schedules, and formats. Section 6.2.4 discusses outreach and publicity programs including advertising and publicity, special events and promotions, and partnerships with national and local organizations as well as volunteers. Ideas for informational and promotional materials needed to implement the marketing strategy are presented in Section 6.2.5. Mock-ups of selected items are included in Appendix B.

Section 6.3 provides an implementation strategy by prioritizing the recommendations according to near term and longer term actions.

6.2 Marketing Strategy

6.2.1 Organizational Issues

Listed below are the key strategies and recommendations for organizing, managing, and evaluating the national marketing program.

6.2.1.1 Develop and Implement a National Marketing Plan

BLM needs to implement a cohesive national marketing strategy for the Wild Horse and Burro Program. To implement the strategy and achieve results, BLM must change the way that it currently does business with regard to adoptions, public relations, and marketing. An integrated and coordinated national effort is required, along with an aggressive, proactive, and highly focused approach.

The first step is to develop a national marketing plan to implement the strategy. In order to achieve results in the near term, this plan should be developed immediately at the national level with input and participation by each of the state offices.

The national marketing plan should detail specific initiatives and action items needed to carry out the marketing program according to identified priorities and schedules. In addition to the actual timing, location, and format of adoptions, the plan should address program presentation and image, education and awareness programs, information and publication development, advertising, special promotions and events, and the use of partnerships and volunteers.

The plan should clearly identify the roles, responsibilities, and assignments of the various BLM offices (e.g., the Washington Office, National Program Office, state offices, etc.) in implementing the marketing program. Resource requirements needed to implement the plan should also be identified, including staff from the Wild Horse and Burro Program, other BLM offices, outside organizations, contractors, and volunteers. Tiered from the national plan, state strategies can be formulated that support and augment the national effort. Each plan or strategy needs to indicate goals, activities, action items, milestones, cost estimates, and performance measures.

As mentioned above, an integrated and coordinated national effort is required. Many aspects of the marketing program must emanate from the national level, but can draw upon the expertise and resources available in the field. Likewise, state offices should develop plans to meet their respective goals, but should be encouraged to share resources as needed. Although each BLM office should be held accountable for meeting their marketing goals and responsibilities, a team approach must be used to optimize overall program success.

As the plan is implemented, BLM should closely monitor the results of the marketing program through routine reports and conference calls that address the status, plans, progress, and problems encountered. Individuals who meet or exceed assigned goals should be recognized and rewarded accordingly.

6.2.1.2 Establish a National (Core) Adoption Team

BLM needs to create a national or core adoption team to guide or augment all aspects of the adoption process including scheduling, adoption formats, promotion, advertising, evaluation etc. The core adoption team could either function under the auspices of the Wild Horse and Burro Steering Committee or be a specially created entity. Regardless, the core team should consist of wild horse and burro specialists, public affairs specialists, and marketing specialists (either BLM or contract employees) from across BLM. The core team will be instrumental in developing the

national marketing implementation plan. This team will play a key role in developing and implementing the national initiatives associated with the adoption program that are identified throughout this report. Among the initiatives are plans for a new image and logo; uniform marketing and informational materials; participation in major equine events and shows; national ad campaigns; and a system for collecting and analyzing relevant program data. Other activities include lead efforts in establishing national level partnerships and education/awareness campaigns, coordination with other Federal agencies, and overall program evaluation.

A priority of the national adoption team will be to provide results-oriented support and tools to the field offices to increase adoptions. By coordinating efforts at the national level, the team can share lessons learned, optimize resources, present a more unified image, and help improve the success of the adoption program throughout the country.

6.2.1.3 Form "Hot Shot" Teams to Staff Adoptions and Special Projects

It is recommended that BLM expand the consistent use of state or regional adoption "hot shot" teams within each jurisdiction. "Hot shot" teams can also be composed of staff from multiple state and district offices to support the program nationwide. Currently, wild horse and burro specialists and public affairs staff handle multiple responsibilities within the program. The "hot shot" teams will differ by focusing only on adoptions. Their duties will encompass all aspects of the adoption process including marketing, public affairs, promotion, outreach, and the adoption itself. In effect, they will become internal event planners for the program. Members of the "hot shot" teams can also be assigned to special task forces, pilot projects, or other initiatives associated with the national marketing strategy.

6.2.1.4 Develop System for Data Collection and Analysis

At the national, state, and district levels, BLM needs to collect and analyze data on all aspects of the adoption program in order to better plan, manage, and evaluate program activities. BLM should identify data needs for the Wild Horse and Burro Program and either modify the WHBIS database to accommodate those needs, or design a new, more user-friendly system to capture information. A data management plan should be developed and implemented to coordinate and standardize data collection, record-keeping, and reporting procedures needed for the adoption program. Data on program results should be incorporated into standard reports and disseminated to all state and district offices as well as the national program offices and core adoption team on a monthly basis.

At a minimum, BLM should be able to generate data and analyses on the number and location of adoption events, the bidding process used, the number of animals presented and adopted, and the adoption fees collected. Breakouts by age, gender, and color of the animals presented and adopted will also be useful to determine any trends and variations in market demand. If possible, data should be recorded on the estimated attendance at adoption events and any pre-adoption publicity. BLM should collect similar data to evaluate the effectiveness of the prison gentling programs, Internet adoptions, fee reduction and incentive programs, and different adoption formats. Although not yet automated, BLM has begun a debriefing exercise to determine the relative success of adoptions, including what went right, and what went wrong. This data will

provide an initial starting point for program planning and evaluation. As mentioned in the adopter profile section of this report, BLM should consider the possibility of developing an interface between the WHBIS database and the ARC-INFO geographic information system in order to graphically display and analyze data on program activities, market trends, and opportunities.

Better data is also needed on existing adopters as well as potential adopters who have requested applications and/or information about the program. Standard procedures should be used at all BLM offices to capture and maintain this data. Mailing lists and databases of existing and potential adopters can be used to publicize adoptions and other pertinent events. The mailing lists can also be used to expand the newsletter distribution, coordinate volunteer efforts, and facilitate networking and information exchange. The effectiveness of marketing and outreach efforts can be assessed from this data as well.

As a high priority, BLM should develop a new checklist or questionnaire as a supplement to the application to identify specific adopter preferences and intended uses for the animals requested. The checklist should indicate any preferences regarding age, gender, color, or other attributes desired. The questionnaire can be used to determine if applicants are interested in obtaining gentled animals, and if so, whether or not they are willing to pay more for these animals. A need for transportation/delivery services can be determined in the same way. By capturing this data on a routine basis, BLM can begin to tabulate forward looking information regarding what adopters want, where they live, where future adoption events might be held, etc. BLM can use this data to improve the distribution and movement of animals through the adoption pipeline. It may also be possible to match up adopter requirements and preferences with specific animals available in the adoption system.

BLM should also make efforts to gather and analyze comments, suggestions, and evaluations from previous adopters and people who attend the adoptions. An evaluation card could be included in the adopter packet, or a suggestion box could be placed at the adoption facilities. It is unlikely that BLM will receive a high response rate from these methods; however, any comments from satisfied (and unsatisfied) customers can represent valuable marketing insights. If in-house resources are not available to tabulate responses, perhaps volunteer support could be enlisted.

6.2.2 Education and Awareness Programs

Presented below are recommendations for various education and awareness programs that should be addressed in the national marketing plan. These recommendations should be considered in conjunction with related proposals in other sections of this report on outreach and publicity and informational and promotional materials. All of these initiatives should be coordinated to ensure that they project a unified, consistent image in keeping with the national marketing strategy. They should also employ standardized publications and promotional materials which are discussed in Section 6.2.5.

6.2.2.1 Optimize the Use of Existing BLM Facilities

The BLM maintains a variety of permanent facilities throughout the country to support the Wild Horse and Burro Program. These facilities should be reviewed to determine ways of optimizing

their use to support education and awareness initiatives as well as the adoption process. Standard information and exhibit materials about the Wild Horse and Burro Program should be developed and displayed at these facilities. Where appropriate, additional information tailored to the individual facilities should be presented. For example, this information might include maps of viewing areas and other details about specific herd management areas at facilities in the west. Special exhibits on the care and training of wild horses and burros, as well as the overall adoption process can be provided at permanent holding facilities.

BLM should consider offering formal education, awareness, and research opportunities through its facilities on a national or regional level. Initiatives could range from facility tours to research on population studies, habitat and range management, veterinarian science, ecology, and genetics, for example. In all cases, information about the adoption program should be prominently displayed.

BLM also maintains various permanent facilities designed primarily for reasons other than the Wild Horse and Burro Program. These include visitors' centers, informational kiosks for programs like the Back Country Byways Program, trail head information booths, office lobbies, etc. Each, in its own way, can be used to provide information regarding the Wild Horse and Burro Program. In using these facilities, BLM should ensure that information is kept current, and that adequate supplies of brochures or fact sheets on the program are available.

6.2.2.2 Increase Awareness through Other Agencies and Organizations

To the extent possible, BLM should work with other agencies, especially within the Department of the Interior, to present information on the Wild Horse and Burro Program. For example, the National Park Service has several kiosks and park centers that could be used for this purpose. Through contact with equestrian organizations, universities, and other groups, BLM can identify other educational and awareness initiatives that support the marketing strategy.

6.2.2.3 Implement an Education Campaign in the Schools

BLM should increase awareness and participation in the Wild Horse and Burro Program by creating a national program aimed at school children. At minimum, the current publications suitable for school age children should be updated and made available in sufficient quantities for use by the BLM field offices. The need for additional informational and educational materials should also be determined and addressed.

The educational campaign should incorporate lesson plans and activities as well as demonstrations of wild horses and burros, and special promotions and competitions involving young people. If each district were to sponsor at least one school program per year, using a standardized guide and supplementing it with actual wild horse and burro demonstrations, the awareness level about the program would rise exponentially throughout the United States. Adoption rates are likely to increase as well.

As part of this initiative, BLM should develop a strategy to involve public and private sector sponsors in the educational campaign. As mentioned in the previous section on trends and

opportunities, the 4-H Club, Boy Scouts and Girl Scouts, Future Farmers of America, and U.S. Pony Club are some of the organizations that BLM should approach for support on the educational program. Other corporate sponsors may also be interested in participating in this initiative and should be considered in the planning process.

As a separate initiative, BLM should expand its efforts in working with veterinary and equine study programs at universities to sponsor research, education, and outreach.

6.2.2.4 Provide Training Programs for Staff

Another important function of the national core adoption team, or that of a small task force, would be creation of a one-to-two-day Wild Horse and Burro Program seminar. The module should cover the basics of the Wild Horse and Burro Program, the Adopt-a-Horse or Burro Program, and various aspects of marketing and public interface.

The training program could be an internal product, but would probably benefit from outside assistance. Input on the training module should be obtained from all levels of the field including wranglers, contract employees, volunteers, wild horse and burro specialists, public affairs specialists, and managers. With the wealth of knowledge that already exists within BLM, it is important that employees be empowered to exercise their knowledge.

At least once a year, a national level meeting of individuals involved in the Wild Horse and Burro Program needs to take place. The first meeting would include the seminar mentioned above. Subsequent meetings, under the auspices of the core team, should be designed to provide a forum for assessment of the Wild Horse and Burro Program, discussion of ways to improve performance, and an opportunity for other short courses designed to hone the skills of those involved in the adoption program.

6.2.2.5 Create a Wild Horse and Burro Foundation

Of great importance, but in the long term, BLM should consider creation of a wild horse and burro foundation to assist in its mission. Possibly patterned after the National Parks Foundation, the Wild Horse and Burro Foundation could significantly enhance education, outreach, and promotion of the Wild Horse and Burro Program. The foundation would provide continuity to program initiatives from one administration to another. It could also raise money for activities that are not provided for in the general operating budget. Until the foundation is established, BLM should pursue many of the initiatives identified below through its own organizational structure.

Designed with a high profile spokesperson, the foundation could have as its board of directors representatives from major organizations that are identified with the equine industry or the Western mystique such as Purina, Justin Boots, Levi, Disney (wild animal parks), Ford Motor Company (Mustang automobile), Wrangler, Resistol, etc. Several other corporations representing a broader spectrum of products and services might also be interested in participating in the foundation or helping to sponsor some of the activities associated with the Wild Horse and Burro

Program. It is also possible that with this type of buy-in, negative press about the program would not be as prevalent as in the past.

Once established, the foundation could create a Wild Horse and Burro Hall of Fame, housed at some permanent BLM holding facility like Palomino Valley in Nevada. In addition to honoring special wild horses and burros, the foundation could create a special award for exemplary BLM employees or volunteers that make a positive difference in the overall program.

As the money making adjunct to the Wild Horse and Burro Program, the foundation could create a catalog sales division. A jewelry and artwork line could be designed for sale either by catalog or at various BLM facilities throughout the United States. Also available through the catalog or at appropriate BLM locations could be tee shirts, ball caps, emblems, collectors' buttons, key chains, pens, pencils, stuffed animals and other toys, calendars, books, trading cards, stickers, and drinking glasses, for example.

A foundation could fund a variety of activities such as marketing studies and surveys, computer modeling, special exhibits, and development of informational and promotional materials. Also, at the present time, there is no vehicle for those who would like to help protect wild horses and burros, but do not want to adopt them. The foundation could appeal to that segment of the market, which is potentially very large, by soliciting private donations to be used for habitat improvement, scientific studies, scholarships for graduate students in the equine field, etc.

The foundation could also sponsor and track a national point system to select state and national winners in various sports, a special class at big horse events, and promotion of the winners through ads in horse magazines, national periodicals, and newspapers. Various members of the board could get the groups they represent to create standing or traveling trophies for various classes of winners.

Among its projects, the foundation could also track the lives of 200 horses and burros adopted in the past five years, document their histories, and help promote the success stories in its general information. The foundation might also sponsor funding for new initiatives to expose and train women and/or minorities, students, and youth in non-traditional skills and professions. This could provide an avenue for individuals to become trained in wild horse and burro management, recreation management, interpretation, or veterinary medicine.

The foundation could also commission a children's author to write an illustrated book about a wild horse or burro. Out of this effort could come a mascot appropriate for creation as a stuffed animal for catalog sales, and an animated, instructional video to be used in schools.

6.2.3 Adoption Process

Following are specific recommendations for improving the actual adoption process.

6.2.3.1 Improve the Distribution and Presentation of Animals in the Adoption System

The national adoption team should carefully review the current system that is used to distribute animals to permanent and satellite adoption facilities and recommend improvements as appropriate. The team should evaluate the way that state and district offices request shipments and the actual distribution criteria and practices that are used. Ways to increase the timeliness and accuracy of advance notice of shipments to the adoption facilities should also be explored. A plan to implement needed changes should be developed and implemented as a top priority. The national adoption team should also develop specific recommendations for improving the overall condition and appearance of the animals shown at the adoption events.

6.2.3.2 Standardize and Expand the Application Process

BLM should immediately ensure that procedures and forms for adoptions at all locations are standardized. Because of discrepancies and variations among the BLM offices, there exists a great deal of confusion on the part of potential adopters regarding the adoption process. Also, as discussed in section 6.2.1.4, above, BLM should modify the application process to obtain information from potential adopters about their specific preferences and intended uses for the animals requested.

BLM should make a concerted effort nationwide to increase its pool of applicants. Increased adoptions are likely to occur if more people know about the program in advance, have time to prepare facilities and arrange for transportation to and from the adoptions, and have already filed an application and been approved. The national adoption team should consider a variety of methods to increase applications nationwide. It is recommended that BLM conduct an intensive application/registration campaign about three months prior to each scheduled adoption. The application campaigns could be combined with other events and demonstrations involving the equine industry. BLM could also set up mobile application centers near shopping areas, feed and tack stores, schools, or other appropriate locations in areas where upcoming adoptions are scheduled. The registration drives can draw in applicants by exhibiting a few trained horses and burros that have been adopted through the program. These application campaigns should make use of local volunteers, sponsors, and media outlets to publicize the program. The application drives can be used to identify potential adoption sites and to publicize specific adoption events.

Using pilot programs, BLM should explore a variety of registration campaign methods prior to adoptions. These could include special promotions and advertising campaigns including use of the BLM newsletter and Internet web site. Targeted mailings could also be done using existing BLM mailing lists as well as lists provided by corporate sponsors or purchased from equine-related publications.

6.2.3.3 Evaluate and Improve Adoption Locations and Times

By reviewing and analyzing data obtained through the application process, BLM can determine where and when to hold adoptions across the country. It is possible that BLM could establish more adoption sites that would be convenient to more adopters. Until BLM establishes a

sufficient database on its own adoption activities and applicant profile, efforts should be made to use demographic data on the domestic equine industry available through sources such as the American Horse Council Foundation, information officers at land grant universities, and state horse specialists in agricultural states. BLM can also review market data on locations of feed and tack stores to determine possible markets. It is possible that BLM can use its GIS capabilities to graphically display data and identify areas for potential adoptions. Also, previous adopters and volunteers can be asked to suggest locations for adoptions.

BLM should consider scheduling a series of adoptions along a planned route, focusing on geographic areas where few adoptions have been held in the past, or holding adoptions at several locations around larger metropolitan areas. In this way, publicity and logistics support could be combined for nearby locations (preferably within 100 miles of each other). In addition, BLM should consider the use of a regional delivery service or publicize contractors who are available to haul animals for a fee.

It is recommended that a limited number of pilot projects be employed to test the feasibility of holding adoptions at times other than weekend days (possibly two evenings in a row during the week). Since the traditional family is more likely to be a two-income family, it is highly possible that this format will better fit busy work schedules.

In addition to satellite adoptions, BLM needs to routinely publicize its holding facilities and prison programs where animals are available for adoption year round. In addition, national and regional marketing initiatives should publicize planned Internet adoptions.

6.2.3.4 Explore a Variety of Pricing and Incentive Programs

On a pilot project basis, BLM should explore a variety of pricing schemes, promotions and incentives to increase adoptions to qualified individuals. States and districts should be allowed to test certain approaches based on their local markets. Examples include the possibility of offering discounts to people who adopt more than one animal, any older animal, or any animal that has been to more than two adoptions. Also, since horses are social animals, BLM should encourage adoption of a burro at a reduced fee as a companion animal for the horse. BLM may also want to evaluate the possibility of offering rebates or certificates toward equine supplies and services to previous adopters who refer or bring someone else to the adoptions who end up adopting. Fee reductions may also be appropriate for 4-H or FFA projects.

Other promotional incentives could include raffle-type drawings where discounts are awarded or where local sponsors offer prizes such as bales of hay or sacks of feed. BLM might also use raffle drawings to give away books and art work depicting mustangs or certificates toward training or veterinarian services.

6.2.3.5 Review and Improve Adoption Formats

After considerable study, BLM decided to employ the competitive bidding process at all adoptions. Since this decision has been made, consistent use of this method should be ensured.

On a case-by-case basis, the national adoption team should work with state and district offices to evaluate any desired exceptions to this format, before events are held.

The use of credit card payments should be encouraged at all adoptions. Mechanisms to verify credit card numbers are available by telephone, making this form of payment more secure than by check.

BLM should develop a national level plan to improve the staging and presentation of adoption events. As mentioned in previous sections of this marketing strategy, a much broader range of educational and promotional activities should be included to attract larger crowds and increase adoption levels. A variety of presentation techniques and bidding procedures such as the oral auction-style format should be evaluated in different locations around the country. The national adoption team should develop an events planning guide with help from outside organizations and contractors as appropriate. As data is obtained on the effectiveness of various formats, BLM should incorporate results in its planning process and share lessons learned at all BLM offices.

Any sales atmosphere is enhanced with meaningful information and activity. All adoption events will benefit, as will the adopters, with the increased use of veterinarian seminars, gentling demonstrations of both horses and burros, and hoof care and shoeing clinics. Successful adopters should be encouraged to bring their animals to the events for show and tell. Children should be encouraged to pet already tamed animals and become familiar with them. A local photographer or volunteer might offer his/her services to take Polaroid pictures of children with already tamed animals. Keeping liability in mind, short rides might be offered with the animal in lead.

Competitive events or various riding demonstrations should be staged using the tamed, adopted animals. Information regarding possible mentors in the area can be provided to new adopters at the BLM information booths. Increased information about the actual animals available and their herd management areas should also be readily available at the adoptions. Registration tables should be set up to discuss the adoption process with attendees and to take applications and survey data onsite. Volunteers can hand out small favors like pencils, balloons, bumper stickers, or buttons with the wild horse and burro logo. Local civic groups should be encouraged to sponsor food booths. Within reason, live or recorded music or other forms of entertainment could be provided in nearby areas. Local 4-H and FFA chapters could be enlisted to help all the way around.

Adopting an animal is an exciting experience. The BLM should capitalize on that atmosphere. Adoptions should become community affairs. All levels of the BLM management team need to become visible supporters of adoption events. Depending upon the location, at least one manager of the appropriate level needs to attend and lend support to each adoption.

The BLM needs to keep in mind that an adoption event not only serves to place animals in new homes, but it is a forum for learning and fostering good will for the Wild Horse and Burro Program and the BLM.

6.2.3.6 Provide Support Services to Increase Adoptions

BLM may be able to increase adoptions by providing a hauling/delivery service or referring adopters to contract haulers that can be available at each adoption event. To improve overall customer service and satisfaction as well as program success, BLM should compile information on local veterinarians, farriers, and mentors who are experienced with wild horses and burros and make this information available during the application process and at the adoption sites. Volunteers and previous adopters are good potential sources of information and support for this initiative.

Especially lacking in the adoption program is information for adopters on how to take care of and train wild horses and burros. A task force or the core team, with help from a professional resistance free trainer, should begin immediately to produce a handbook for new adopters. In addition to the general maintenance of large animals, it should include information on necessary inoculations and routine medical treatment as well as detailed step-by-step information on training a wild horse or burro. A simple regional fact sheet can be included as an addendum to the handbook to cover localized information.

6.2.3.7 Expand Wild Horse and Burro Gentling Programs

BLM needs to increase the potential for offering more gentled animals to the public. A variety of options should be explored including the use of professional trainers, the prison gentling program, and possible arrangements with other groups.

BLM should consider expanding the gentling program throughout the entire country, either with the prisons or other organizations. If the gentling program were expanded, it might provide an ideal way to make some of the horses that have been in the pipeline for a long time more attractive to potential adopters. Regardless of where an animal is housed, it costs a certain amount of money per day for its upkeep. It seems only logical that the expense be augmented with the type of value added training that will provide a more marketable and appealing product. Many people appear willing to pay for the cost of gentling. Pre-gentled animals also lend themselves perfectly to the Internet form of adoption. Base bids can be raised to reflect the cost of training.

6.2.4 Outreach and Publicity Programs

Strategies for improved outreach and publicity are presented below.

6.2.4.1 Develop a National Advertising Campaign

BLM needs to develop a national advertising campaign to promote the adoption program. The campaign should include plans for advertising in national magazines and publications as well as radio and television. Other outlets including the Internet and use of billboards should be included as well. The national campaign should include a media outreach plan that identifies the specific publications, media outlets, presentations, and timeframes involved. At the national level, BLM

should develop at least one display ad, a series of articles and feature stories, interview and presentation materials, and press releases as needed.

As a high priority at the national level, BLM needs to explore the possibility of placing articles in national periodicals regarding success stories. Publications aimed at the equestrian markets should be emphasized initially although additional publications may also be appropriate. With the buy-in of the Director or appropriate Assistant Secretary, editorial boards should be approached to encourage more positive press about the Wild Horse and Burro Program. A briefing book consisting of program facts, figures, pictures, and background information should be used to support this activity. Included in the list of possibilities is *USA Today*, *Time Magazine*, *Newsweek*, *the New York Times*, *Wall Street Journal*, and the *Washington Post*. After creating the national marketing strategy, the reason for appearance before the boards could be an event in itself, centered on the BLM's new way of doing business in the Wild Horse and Burro Program. Included in the package could be an offer to escort a feature writer and photographer to wild horse and burro ranges, accompany the BLM on a gather, etc.

Although a great deal of effort is placed on traditional methods of publicity before adoptions, increased support, coordination, and planning can improve results in this area. At the national level, BLM should develop standard press kits, drop-in ads, and flyer/handbill information that can be readily tailored by field offices to promote individual adoption events. With the creation of a national marketing strategy, including the design of a new drop-in ad format, it will be possible for local jurisdictions to place professional ads with newspapers as well as capitalize on the ads placed in national periodicals.

In many areas, radio still captures a large audience. The BLM, possibly with outside help, needs to develop a series of professional 30 and 60 second spots that can be tailored by local stations. Advance public affairs personnel need to determine what talk shows or calendar of events announcements are available in a given market area. Where possible, they should personally make themselves known to program managers and radio news directors at least three months in advance of the adoption event, suggest a live interview with a district manager or state director, lock in a tentative date, and follow-up proactively.

Most newspapers offer a calendar of events for their local area. In addition to paid advertising, it is important that this venue be utilized. Further study needs to be made of the cost of television advertisement. If at all feasible, professional ads must also be created for this medium. It is quite possible that with placement of paid advertisement, BLM might reap the benefits of a few public service announcements as well.

In addition, BLM staff should increase efforts to have adoption events and program information listed in other publications, events calendars, and Internet sites maintained by equine-related publications and organizations. BLM should take steps to broaden the mailing list for the newsletter to include more interest groups, media, and organizations involved in the domestic horse and burro industry.

6.2.4.2 Increase Participation in Special Promotions and Events

Included in the national plan should be a section on special promotions and events. The plan should indicate specific activities for each state and region. If possible each state should sponsor at least one promotion or special event per year. As mentioned above, BLM should produce an events planning guidebook or toolkit to assist the field offices in planning and putting on special promotions, either as separate events or in conjunction with the adoptions.

It would benefit the BLM to emulate various competitions sponsored by the domestic horse industry such as the American Quarter Horse Association (AQHA). The BLM could create its own wild horse and burro regional competitions in endurance, dressage, and various show disciplines. It could also work in conjunction with domestic associations like the AQHA to sponsor special wild horse and burro divisions in already established events. Regional competitions could culminate in national finals.

At a minimum, BLM should seek out events like the National Indian Horse Show to showcase the wild horse and burro, solicit applications for future adoptions, and promote the Wild Horse and Burro Program. In collaboration with the Bureau of Indian Affairs, it might be possible for the two agencies to sponsor information booths, a traveling information van, and several horses for demonstrations. After a period of time, it is possible that competitive events for the wild horse and burro could be included at the National Indian Horse Show.

Continued sponsorship and expansion of shows and expositions like the New Mexico Regional Wild Horse and Burro Expo, should be encouraged. These shows not only provide a forum to showcase the animals, but they also provide opportunities to sponsor much-needed wild horse and burro clinics, a place for adopters to get together and trade information, and a venue to promote the Wild Horse and Burro Program. Collaboration with various local equine related groups as well as the participation of noted spokespersons help elevate the profile of the event.

Other special events and promotions to consider include:

Photo, poster or coloring competitions -- To be held among school children, judging of these events could be held in conjunction with state and local fairs. Finalists' artwork could possibly hang in the Department of the Interior museum for a year, or be viewed at various state offices throughout the country. Prizes could include Savings Bonds or small scholarships, a trip to Washington, D.C. for the annual Department of the Interior awards program, or other appropriate recognition.

Live remote radio broadcasts -- Most stations, including country and western, have the capability to broadcast from sites other than the station itself. For some time in advance, they announce that they will be live-remote from a certain location and invite the public to join them. This would be a fine opportunity for feed and tack stores or western wear retail outlets to advertise their products, hold drawings, or give away promotional material. BLM could supply sponsors with wild horse and burro give-aways like trading cards, calendars, balloons with the wild horse and burro logo, etc. And, indirectly the whole process promotes the adoption and the Wild Horse and Burro Program.

National trail events -- BLM could sponsor a national trail or endurance ride to showcase the surefootedness and endurance of the wild horses and burros. This could be a one-day event across the nation, or could take place in various segments throughout the country over a period of time. A special division of the National Wild Horse and Burro Hall of Fame could be devoted to annual winners in these events.

Breed-sponsored events -- Various breed associations routinely sponsor events to increase the popularity of certain breeds of horses. BLM should capitalize on this concept. Using information from wild horse and burro registries created by the public, BLM could design awards for accomplishments by wild horses and burros. A national system, tied to the Wild Horse and Burro Hall of Fame, could be created in which animals are given points for numbers of miles ridden on trails or for other events in which the animals have participated. Through points and rankings national championship goals could be created. The BLM would not have to sponsor the events, but would be the repository for keeping records and making awards. In this way, adopters would be given goals to strive for and would have a forum for recognition of their animals. Championship animals could then be featured in advertisements in various horse and burro magazines and periodicals.

National Internet adoption -- Events that take on a national scope tend to provide wider benefits for the program. With regard to Internet adoptions, the BLM should consider sponsoring a national adoption event in which horses and burros are showcased by region. Individuals would be encouraged to adopt regionally. However, if willing to pay the hauling charges, they could avail themselves of any horses offered on the entire roster.

Wild horse and burro clubs and associations -- On a more local level, districts should be encouraged to work with volunteers and other organizations to create and/or expand wild horse and burro clubs and associations. These types of organizations exist in some areas. A existing, successful organization could be used as a model nationwide. It is possible that a national organizational umbrella could be created under the sponsorship of BLM.

Target use markets -- The BLM should take advantage of the special qualities of the wild horse and burros and target markets according to various uses in the domestic market such as trail riding, rodeo sports, work animals, endurance riding, etc.

Special donations -- BLM should consider donation of a certain number of animals each year for humanitarian purposes. In addition to supporting worthwhile causes, this gesture can help improve BLM's image and generate positive publicity and interest in the Wild Horse and Burro Program. Examples might include donations of animals to the U.S. Pony Club or various girls' and boys' ranches throughout the country. Organizations that support therapeutic riding for challenged children are other possibilities. It is possible that BLM will need to train the animals before donating them to these groups, but this could be at a minimum expense in partnership with various prison programs, professional trainers, or volunteers.

6.2.4.3 Develop Partnerships with National and Local Organizations

BLM can greatly improve the success of the adoption program by enlisting support from private citizens, corporations, clubs, and institutions. In this regard, it is imperative that BLM establish a strong program to cultivate partnerships with corporations and organizations. In addition to money and expertise, corporate partners add national credibility to the program. Partnerships with local groups provide visibility at the local level as well as volunteers to assist in various tasks.

A wide range of sponsors can be pursued to support the Wild Horse and Burro Program. BLM should explore the possibility of forming partnerships with major national companies to sponsor some of the individual marketing strategies described in this report. National equine interests and industries are good candidates for sponsoring events and publicizing wild horses and burros. Local or national tack and feed outlets could also be approached to sponsor adoption events. The benefit to them might be an increase in their customer base as more and more wild horses and burros are adopted. It would also be a way for them to promote their own names or brands. In addition, BLM should form partnerships with wild horse and burro clubs and associations for the same reasons. Through sponsorship of adoptions, these groups could promote wild horses and burros and broaden their own memberships.

In the national implementation plan, a segment should be devoted to developing a plan for partnerships and alliances with companies and organizations. BLM should create a list of potential sponsors with input from the field, identify initiatives that could benefit from corporate sponsorship, and address possible ways that sponsors can help. A wide range of opportunities should be pursued including sponsorship of educational programs, exhibits, contests and competitions, publicity, and support of actual adoption events. On a smaller scale, many local businesses will agree to display handbills or distribute applications for local area adoptions.

Several ideas for potential sponsors have been mentioned throughout this report, and more should be considered during the planning process. For some initiatives, it may be appropriate to establish exclusive agreements with corporate sponsors; in other instances, teams of sponsors may be more appealing. The partnership plan should indicate which corporate sponsorships and alliances should be pursued at the national level and which should be pursued locally. In most cases, partnerships with major corporations and national organizations should be handled at the national level of BLM, perhaps with direct involvement by senior agency officials.

Specific action items and schedules for establishing the partnerships should also be indicated in the plan. At the national level, BLM should develop materials for presentation to potential sponsors as well as a manual or short course to assist local offices in approaching potential partners. BLM should strive to secure at least one major national sponsor during FY 1999. Each state or district office should also establish goals.

Other forms of partnerships could involve the use of contractors and consultants for various activities associated with the Wild Horse and Burro Program. As the national marketing strategy is implemented, BLM should draw on expertise from outside organizations and contractors as appropriate. If sufficient resources are not available in-house, BLM should contract out for advertising, events planning, and market research. In general, BLM should make more use of

private sector expertise in marketing, training, and placing wild horses and burros. It may be worthwhile to consider a pilot program on privatizing some aspects of the adoption process.

6.2.4.4 Organize and Expand the Use of Volunteers

BLM needs to capitalize on its large base of satisfied customers and their expressed interest and willingness to serve as volunteers. Most former adopters have indicated an interest in supporting the adoption program and sharing their knowledge and skills with new adopters. They constitute a existing pool of potential workers. Former BLM employees are another source of expertise.

The national core adoption team should appoint a national volunteer coordinator for the Wild Horse and Burro Program. This person should work with state and district volunteer coordinators to mobilize volunteers across the country. At the national level, a guidebook for organizing and managing volunteers should be developed as a tool for state offices, if one does not already exist. BLM should set up a state-level volunteer unit in each state (except Alaska and Hawaii) and identify different ways that volunteers can help carry out activities needed to support program goals and objectives. Volunteer support should be tied into action items in national and state plans. BLM should solicit volunteer support on a routine basis and follow up in a timely manner on all offers of help from volunteers. BLM staff should include a volunteer sign-up form in the adopter packet and mention volunteer opportunities during follow-up with adopters. A volunteer drive can also be publicized in the national newsletter. In addition, the Internet web page is an ideal place to install a volunteer registry.

The roles of volunteers in support of the Wild Horse and Burro Program are diverse and can be greatly expanded. Volunteers can continue to help with local publicity and logistics at adoption events. They can also be included on the adoption schedules to demonstrate their adopted animals or provide seminars on various aspects of owning a wild horse or burro. With proper support and guidelines from BLM, volunteers can assist with compliance checks on new adopters. They can also serve as mentors and lead application drives. Volunteers can be used to identify potential adoption sites and to even sponsor adoption events and training clinics. Some volunteers have expressed interest in photographing the animals, developing informational materials, and helping with record-keeping. BLM could also use state volunteer units to evaluate certain prototypes and pilot projects that are initiated by the adoption program.

In implementing a structured volunteer program, BLM should address ways to evaluate success and incorporate lessons learned. It will also be important for state coordinators to formally acknowledge and recognize the efforts of volunteers--at adoptions, in the newsletter, and through the BLM volunteer award system or other special awards. If a Wild Horse and Burro Hall of Fame is established, as discussed in Section 6.2.2.5 above, state volunteer units could be recognized in that forum.

6.2.5 Informational and Promotional Materials

As a top priority, the national adoption team must determine what informational and promotional materials are needed to support the adoption program and the implementation of the national marketing strategy. At a national level, with input from the field, BLM should review all

informational and promotional materials currently used by the program to determine which items should be used, revised, or deleted. The need for new materials should be identified as well. Priorities for informational and promotional materials should be determined quickly and action items and deadlines assigned to address these priorities. After this initial effort, a publication review and development plan should be generated at least annually.

At the national level, BLM must provide a standard suite of publications, including fact sheets, brochures, and other written materials on the program for use in the field. Other standardized information, such as educational, marketing, and promotional materials should also be provided for use throughout the program. Guidelines need to be drawn up that give the field direction for producing localized material. Regional or state information may be appropriate, but it should be reviewed and approved at the national level and shared with all offices as needed. As informational and promotional materials are reviewed and developed, it will be important to determine the intended use and audience for each item as well as production and printing costs. It will also be essential that the materials present consistent information, a professional image, and a uniform overall appearance.

Although the national adoption team should evaluate and determine specific priorities for informational and promotional materials, there appear to be several initiatives that warrant immediate attention, especially within the context of a new marketing strategy for the program. These initiatives include:

- Develop a new logo and slogan for the Wild Horse and Burro Program
- Update the application and general brochure
- Finalize and distribute the new CD-ROM on the program
- Establish a single toll-free telephone number and inquiry/application response system, and
- Expand the Internet web site.

A standard drop-in ad and presentation/exhibit materials may also be needed in the near term.

The suggested high priority items are discussed below. Following these descriptions, a list of other informational and promotional materials needed to implement the marketing strategy is provided. Mock-ups of selected items are provided in Appendix B.

6.2.5.1 Develop a Logo and Slogan

Concurrent with the creation of a national marketing implementation plan is the need for a single image with which to identify the Wild Horse and Burro Program. A single logo is needed to give the program a unified identity and professional image. The use of a standardized visual symbol on all program materials will help provide a wider name recognition and stronger identity for the program. The logo should be designed for use in a variety of print and multi-media formats.

Either with outside assistance or from within, BLM should decide on a new logo immediately and incorporate the image on all informational and promotional materials. Various mock-ups for a new logo are presented in Appendix B.

In addition, BLM needs to create or adopt at least one slogan that can be used in conjunction with the logo to convey a consistent overall theme and message to the public. Ideas for slogans are also presented in Appendix B.

6.2.5.2 Reprint/Revise the Application Brochure

The publication, *So You'd Like to Adopt*, is currently being revised. The primary purpose of this document is to provide the application form for adopters and basic information about the adoption process and requirements. Because other general information about the program is not available, this publication is also used widely throughout BLM as a general brochure. Because of its wide use, this document should be closely reviewed by the national adoption team and other BLM staff to ensure that the proposed revisions are sufficient and necessary. In updating the document, the application form should be standardized to serve the needs of all offices so that special inserts and addenda are not required. Also, BLM should consider adding a few questions to the application to determine the applicants' preferences and intended uses for requested animals as suggested in Section 6.2.3.2, above.

The current inventory of this publication is almost depleted. For distribution until the new brochure is finalized, it is recommended that a limited, interim (emergency) printing of the old document be made to cover approximately six months of use. In the meantime, the marketing plan, new logo, slogan(s), standard artwork, etc. can be created. Once complete, the new artistic concepts and input from the field can be included in a new brochure.

6.2.5.3 Finalize and Distribute the CD-ROM

The new CD-ROM on the Wild Horse and Burro Program is essentially complete. BLM needs to develop a plan for its immediate general distribution and use. The new image artwork can be included at a future date.

6.2.5.4 Establish and Publicize a Single Toll-free Telephone Number

One toll-free number should be established and publicized to take requests for information, provide post-adoption advice, or direct specific requests to the proper jurisdiction. The existing toll-free number maintained by the National Program Office could be used, although a number like 1-800-2-GO-WILD, 1-800-GO-ADOPT or something appropriate and easy to remember may be more effective. The purpose of the single toll-free number is to improve and simplify public access to the BLM adoption program. Until an appropriate computer program is designed to capture inquiry and application data, basic information should be maintained in a temporary file, possibly using a common database package. Minimal information from each call including name, address, and the subject of the inquiry or request should ultimately be entered directly into a computer to generate correspondence, mailing lists and labels, follow-up, tracking, and statistics on inquiry levels and topics. This 800 number would not necessarily take the place of the toll-free and other

telephone numbers maintained by individual state and district offices. Staff who answer the national number would make referrals to specific state and district offices as needed. Also, data records and statistics on the inquiries received would be provided to the state and district offices on a regular basis. In addition to improving public access, a centralized number would free up field personnel for other activities.

Until new materials are produced, the 800 number could be stamped on existing publications and handouts. The toll-free number, along with the Internet web page address for the Wild Horse and Burro Program, should appear on all information disseminated to the public.

6.2.5.5 Expand the Internet Web Page

The Internet web page for the program offers a variety of useful information but needs to be reviewed and expanded as the marketing strategy is implemented. New artwork should be included in its format. Much more information should be provided on the web page including details about the adoption process, information on the kinds of animals available through the program, training and care of the animals, and more success stories. Also, the newsletter should be available on the Internet as well as all new publications, press releases, and other program announcements as they are developed for the program. BLM should make available on the Internet some of the information presented in the new CD-ROM, at least in a text format, and possibly with some of the video and sound clips. Several people have suggested that a chat room be set up to provide a venue for Internet users to exchange information. Also, as mentioned above, the web page can be used to register volunteers. It may also be possible to use the Internet for online applications and public inquiries about the program.

In general, better integration is needed between the Wild Horse and Burro Program home page and the Internet adoption web page. For Internet adoptions, there is a need to organize the photo gallery with separate pages for each geographic region and/or pick-up location within a 250-mile radius. Animals should be arranged by pairs, mares, studs, and burros. More and better pictures of the animals should be included, and the web page should allow for online searching and downloading by color, age, and breed. Where feasible, field trips should be scheduled to actually view the animals. Transportation to adoptions and hauling pools from the site should be considered, and where feasible, incorporated via chat rooms or bulletin board features on the web site.

Referrals and links to other groups and publications should be expanded. Also, as indicated earlier in this report, BLM needs to greatly expand efforts to register the web site with other directories, search engines, and organizations that will reference, index, or link to the BLM web site.

As the web page is revised, care should be taken to ensure ease of navigation and use, as well as overall appearance. Outside expertise should be obtained as this initiative proceeds.

6.2.5.6 Develop Other Informational and Promotional Materials

Provided below is a list of additional informational and promotional materials that are needed to implement the marketing strategy. Mock-ups of the first two items are contained in Appendix B. The following items are presented in no particular order.

Drop-in ad -- A standard drop-in ad is needed that can be used to promote the Wild Horse and Burro Program in magazines and newspapers throughout the country. A mock-up of a sample drop-in ad is presented in Appendix B.

Multi-media mobile van exhibit -- A multi-media display and exhibit, housed in a 30' to 40' mobile van or trailer, could be developed for use at state and local fairs, equestrian events, large adoptions, and at regional shopping areas, schools, exhibitions, and conventions. The van would be a walk-through exhibit with multi-media, interactive panels and displays. Included in the informational format could be graphics, the CD-ROM, interactive television modules, and handout material including applications to adopt. It is possible that a gentled wild horse and/or burro could accompany the van at various sites and be housed in a portable corral attached to the unit. Drop panels with photographs depicting the herd areas and other information (on gentling, care, and feeding, for example) could be displayed outside the corral. Registration tables and program information could be available outside the trailer as well. This concept is patterned after a similar exhibit used by Purina at large horse expos. This initiative could be done as a pilot project, possibly with support from a corporate sponsor. A mock-up of the multi-media van is provided in Appendix B.

Display ad -- A display ad is needed that can be placed in national magazines aimed at the equine industry. Possible magazines to be targeted are *Horse and Rider*, *EQUUS*, and *Practical Horseman*. The ad should be tailored to appeal to various target audiences.

Events Planning Guide -- A planning guide could be developed to assist BLM staff in planning, advertising, and staging special events, promotions, and formats for adoptions to increase awareness and success of the Wild Horse and Burro Program.

Volunteer/Mentor Guide -- This guidebook would be designed for use by BLM and volunteer groups to organize, manage, and coordinate support from volunteers, previous adopters, and mentors. It would also address ways to acknowledge and recognize volunteers for their support.

Modular display -- With professional graphics support, a magnetic traveling display could be designed with interchangeable modules for use at state and local fairs, in BLM office reception areas, at conventions and expositions, and at adoption sites where appropriate. Production costs could be minimized if more than one display were produced (for example, one display for each state office jurisdiction). The background and overall message about the program would be permanent, but regional pictures and information could be substituted for optional information in the modules.

Poster -- A poster could be designed to promote the program, particularly with schools. An annual poster contest could be used to produce a series of posters and create publicity and promotional opportunities as well as the outreach and awareness about the program.

Calendar -- A wild horse and burro calendar would be an effective and popular way to promote adopters and their animals. An annual photo contest could be held, with the winning photos featured in the calendar. Stickers could also be included for use in marking adoptions and other special events on the calendar. BLM could possibly charge for the calendar.

Video on success stories -- A 20-minute video could be produced to promote and publicize the success stories involving wild horses and burros that have been adopted from BLM. The video could feature interviews with adopters and a variety of uses for the animals shown. Excerpts from the video could be used in a variety of other educational and promotional formats including news stories, CD-ROM, and Internet for example.

PBS quality documentary -- With outside help, the BLM should consider producing and promoting a 30-minute to one hour Discovery Channel or PBS quality video about wild horses and burros. In addition to nationwide viewing, it could also be shown to civic groups, schools, current and potential adopters, and potential sponsors. BLM should seek corporate sponsorship in developing the documentary.

Information about animals available through the adoption program -- BLM could develop information about typical animals available through the adoption program. Also addressed would be information about herd characteristics and herd management areas. BLM could also consider designing an information sheet on each animal that would provide more information about its origin, height, color, etc. This information could possibly be presented in a catalog format at the adoption events or over the Internet. A photo of the animal would also be preferred, but may not be practical or cost-effective. At a minimum, the information sheet should be provided in the adopter packet when an adoption occurs.

Information on care and training of wild horses and burros -- This information could be presented as a series of factsheets, a handbook, or a video that could be used to provide information about the care and training of wild horses and burros. BLM should develop this information with the assistance of a professional trainer and veterinarian, and/or with support from a wild horse and burro organization. A corporate or non-profit organization may be interested in helping to sponsor this initiative. Possibly, a panel of volunteers could draft the document for BLM.

Interpretative center display -- A display and accompanying information (possibly a map or brochure) is needed for use in an interpretative center presentation on the Wild Horse and Burro Program. Existing BLM facilities such as resource area offices, herd management areas, and holding facilities are the intended sites for housing this kind of display. National Parks are another possible venue. A generic display could be produced with basic information about the program and modular panels that could be tailored to specific sites. As an alternative, one site could be developed for illustration purposes. The display could address herd areas, points of access for

viewing herds, herd management practices, and information on the adoption program as a way to achieve AMLs.

It's a Wild Life" video -- This video would show wild horses and burros in the wild, during a gather operation, through the adoption process, and then in their new home under saddle in various disciplines.

Overhead or video presentation -- A general overhead presentation or brief video is needed to describe and promote the program with general audiences, equine organizations, potential sponsors, and volunteers, for example. Presentation material and script could be drawn from the CD-ROM as appropriate.

Facility brochure or fact sheet -- This material would describe BLM's regional corral facilities throughout the United States. Formatted as a brochure or fact sheet, this publication could be used to increase public awareness of the program and identify facilities where animals are kept and made available through the adoption program year round. A list of the prison gentling programs could possibly be combined with this document.

Model and toy horses - BLM should continue to cultivate the relationship with Breyer Animal Creations. Many model horses that they produce are likened after wild horses. These models can be used to help promote the adoption program. Other toy manufacturers may also be interested in similar initiatives. These items could be made available at adoption events or through a catalog. Perhaps some additional use could be developed for use in an educational campaign with the schools or other programs involving young people.

List of additional ideas for needed publications and presentation materials -- A list of ideas for other needed materials should be developed as part of a publications development planning activity at least once each year. Examples of items for the list include a series of fact sheets on topics such as the prison gentling program, compliance results and success rates of adoptions, information on ongoing research efforts to improve management efforts on the range, general information about the Wild Horse and Burro Program, materials for youth, etc.

6.3 Implementation Strategy

This section of the report provides an implementation strategy by indicating priorities for the various recommendations based on immediate (first six months), near term (first year), and longer term (outyear) initiatives.

6.3.1 Initiatives for First Six Months

In the first six months of calendar year 1999, the following actions should be completed. The initiatives appear in logical order, not necessarily in order of importance. Many provide the groundwork for subsequent activities while others are actions that have been identified as necessary, but do not require further study for implementation.

Core Adoption Team -- Create national core adoption team to guide and augment all aspects of the adoption process. First order of business would be to create the National Marketing Implementation Plan.

National Marketing Implementation Plan (NMIP) -- At the national level (possibly under the auspices of the core adoption team), develop a plan to promote awareness of the Wild Horse and Burro Program and to increase adoptions. The NMIP would indicate roles and responsibilities of the Washington Office, the National Program Office, and state offices as they relate to the NMIP. At a minimum, the plan should include goals, activities, action items, milestones, cost estimates, and performance measures for each of the following areas:

- Education, and awareness programs
- Improving the actual adoption process
- Generic marketing products
- National advertising
- Publication needs and development
- Special promotions and events including a campaign for the new image
- National partnerships
- Volunteer mobilization
- Data needs and development

State plans should be developed to augment the national effort.

Adopter survey/questionnaire -- Develop adopter survey/questionnaire as part of adoption application to reflect the type of animal desired (gender, color, age, level of gentling, fertility, breed affiliation, etc.) and the intended use of the animal (pleasure, work, endurance, etc).

Data collection -- Create an appropriate database or revise WHBIS to provide needed data on adoption locations, statistics, and results. Also, using the application and questionnaire, collect marketing data to include name, address (by zip), type of animal wanted, etc. Input this information into the central database for on-going marketing studies. While waiting for BLM data to accumulate, review and analyze demographic data from other sources such as the American Horse Council Foundation study on the domestic horse industry. Where appropriate, begin to implement changes based on data analysis and findings.

Toll-free telephone number -- Establish a single toll-free telephone number to take requests for information, provide post adoption advice, or direct inquiries to the appropriate jurisdiction. Capture data in same system developed above for applicant information.

Informational and promotional materials -- At a minimum, the following informational and promotional materials should be attended to:

- **Logo** -- Design and select a uniform, professional icon with which to identify the Wild Horse and Burro Program.
- **Slogan** -- Develop and select at least one slogan to accompany the logo.

- **New brochure** -- Under the auspices of core team and with input from the field, design a new Wild Horse and Burro Adoption brochure to include the application and survey documents. An interim supply of the existing brochure should be printed until the new brochure is completed.
- **CD-ROM** -- Create a distribution plan for the new CD-ROM. Determine options for using the information in different media configurations and formats (video, Internet, fact sheets, etc.).
- **Web page revision and expansion** -- Add the latest issue of newsletter; include information on training, care and feeding of adopted animals; set up chat room for information exchange; and install a volunteer registry. For Internet adoptions, organize the photo gallery with separate pages for each geographic region and/or pick-up location within a 250 mile radius; arrange animals by pairs, mares, studs, and burros; include more and better pictures of the animals; allow online searching and downloading by color, age, and breed; and offer actual field trips for viewing animals. Register and link the web site with more equine-related Internet sites, search engines, directories, and organizations.
- **Drop-in ad and display ad** -- For use throughout the BLM, create a generic drop-in ad for placement in various newspapers and periodicals. Also create a display ad for use in national magazines.

Improve adoption formats -- Ensure that all adoptions use the competitive bidding procedures. Authorize credit card use at all adoptions; include more demonstrations and seminars; and add more information about the animals to the bid sheets (herd area, state of origin, height, fertility, breed association, color, etc).

Distribution system review -- Begin to review and overhaul the animal distribution system for adoptions to ensure the right animals are being presented to the right audience.

Special promotions and events:

- **Live-remote broadcasts** -- Encourage use of live remote broadcasts at future adoption events.
- **Showcase opportunities** -- Increase use of showcase opportunities like demonstrations by former adopters at adoption events.
- **Expositions** -- Continue and expand expositions like New Mexico Regional Wild Horse and Burro Expo.

6.3.2 Initiatives for First Year

State implementation plans -- With the creation of the NMIP, immediately formulate state plans to augment the national effort.

Publicity -- Appoint a national spokesperson; implement the national ad campaign; and develop 30-60 second radio and television spots.

Pilot programs -- Many activities lend themselves to pilot programs that could be split among the various state offices. They include:

- Targeting markets (by use category, ethnic groups, etc.)
- Holding adoptions along a specified route or within a certain radius around a major metropolitan area
- Creation of a mobile van
- Varying the times and locations of adoptions
- Using pricing and promotion incentives
- Using regional "hot shot" teams to put on adoptions
- Registration campaigns
- National Internet adoption
- Partnership agreements (at least one major national corporate sponsor)
- Additional expositions and competitions
- Establishing wild horse and burro state volunteer units

Outreach and Education

- Create a new, expanded fourth grade school curriculum and launch a national education campaign in the schools.
- Produce standardized informational material including fact sheets, posters, and other publications.
- Produce a traveling display.
- Develop standard exhibit/presentation materials for all existing BLM facilities.
- Create a module on the Wild Horse and Burro Program for BLM and volunteer staff training.
- Hold the first meeting of all participants in the program.
- Create a volunteer/mentor guide to assist staff in mobilizing volunteers.
- Produce a "how to" manual for new horse and burro owners that deals with care and training.

Gentling Programs

- Expand gentling program options nationwide including prison gentling programs and use of professional trainers.

Wild Horse and Burro Foundation -- Begin the process of creating a Wild Horse and Burro Foundation.

6.3.3 Initiatives For the Outyears

By the end of the first year, certain activities will have been tested. Those deemed successful can be included in the NMIP. Others, with less direct impact need to be explored in ensuing years. The outyear initiatives are not listed in any special order. They include:

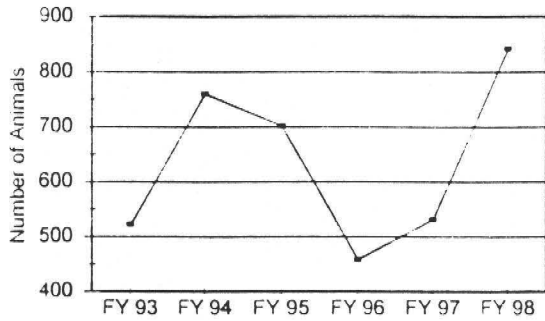
- Continue to gather additional ideas for materials.
- Continue to utilize showcase opportunities.
- Establish photo, artwork, or coloring competitions.
- Establish wild horse and burro local, regional, and national competitions.
- Working with equestrian organizations and groups, establish national events such as trail rides, endurance rides, breed events, etc.
- Through partnership with a national level sponsor or a consortium of sponsors, produce a PBS quality documentary on wild horses and burros.
- Create video presentations on success stories.
- Work with other Federal agencies to promote the wild horse and burro.

Appendix A

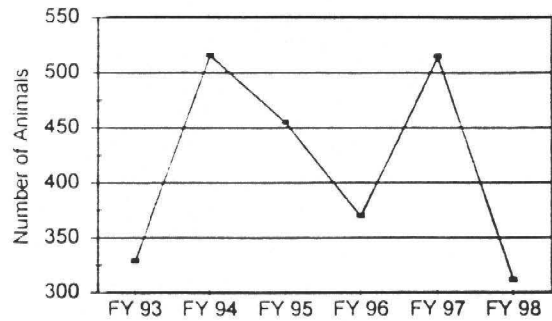
State Adoption Trends

Trends in State Adoption Levels (FY 1993 - FY 1998)

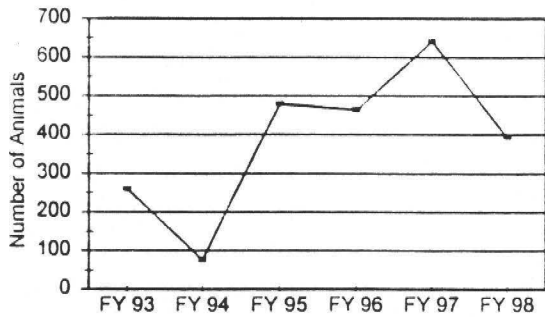
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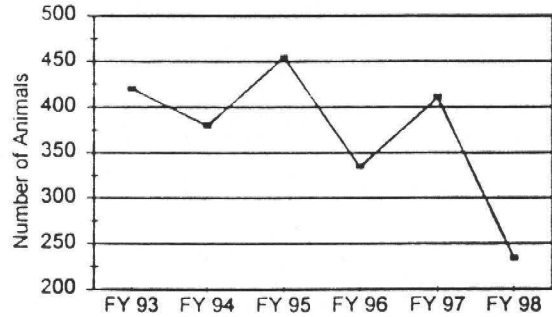
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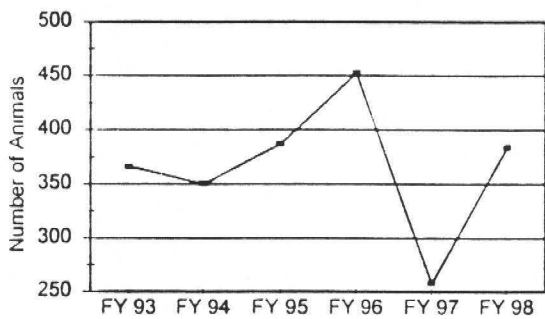
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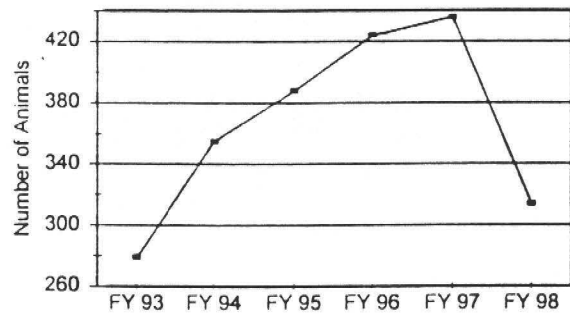
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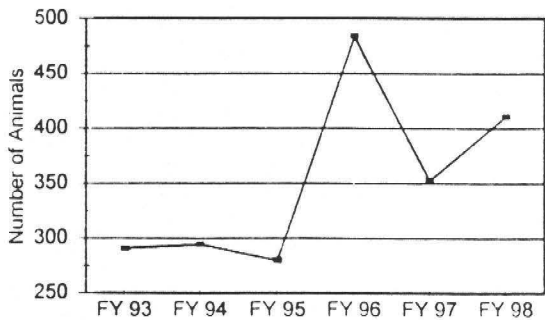
Wyoming



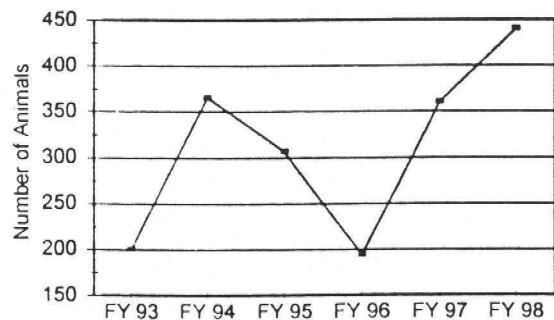
Missouri



Colorado

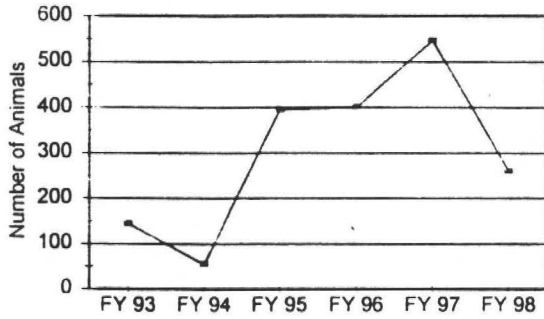


Idaho

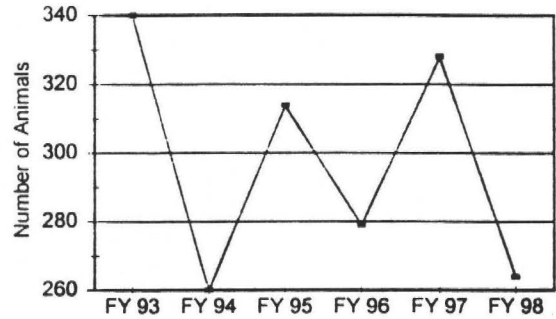


Trends in State Adoption Levels (FY 1993 - FY 1998)

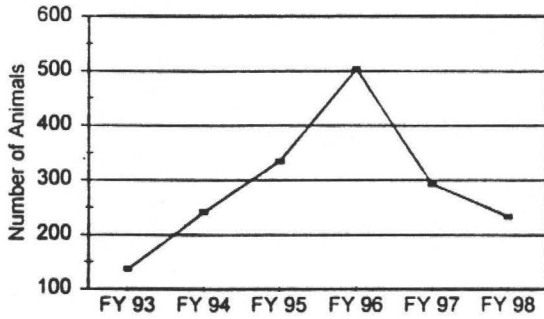
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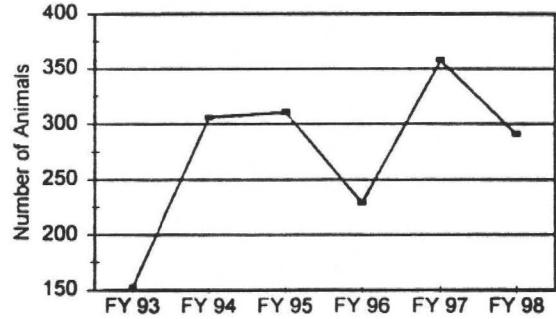
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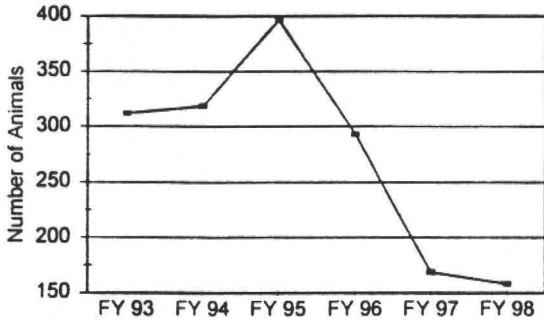
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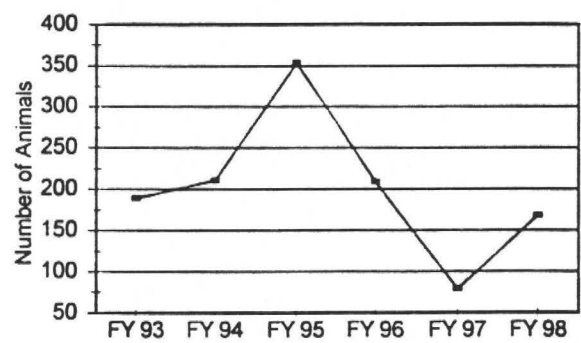
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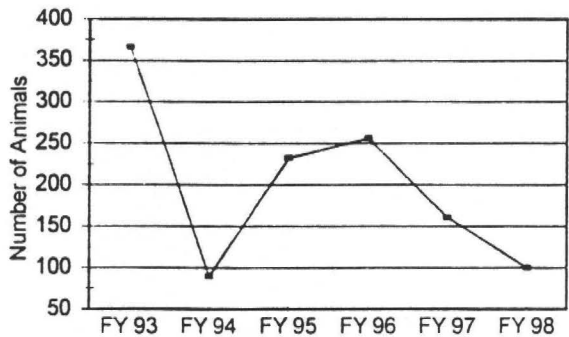
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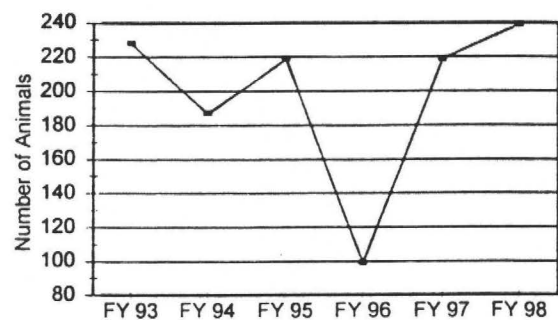
Mississippi



Montana

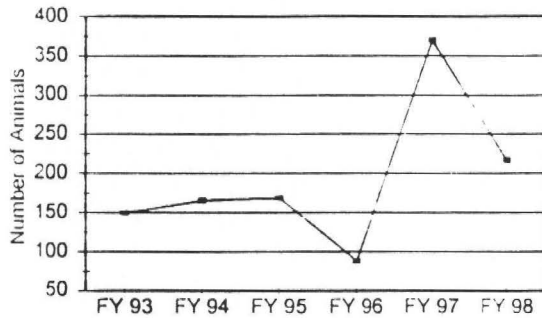


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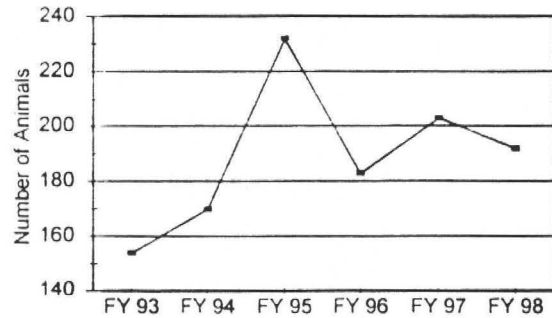


Trends in State Adoption Levels (FY 1993 - FY 1998)

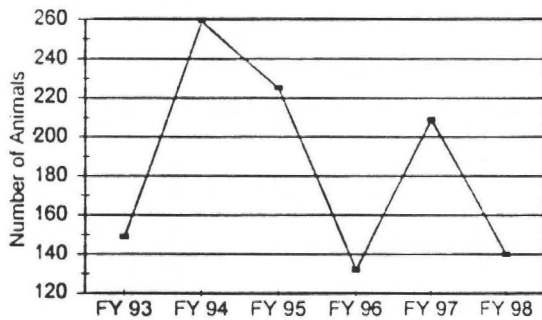
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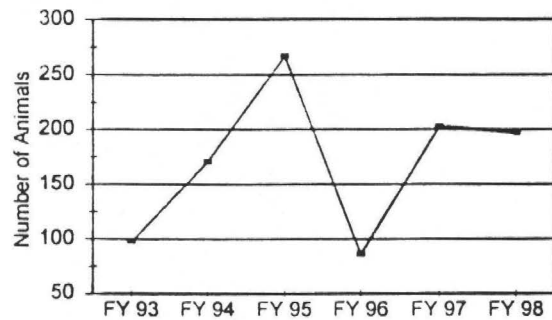
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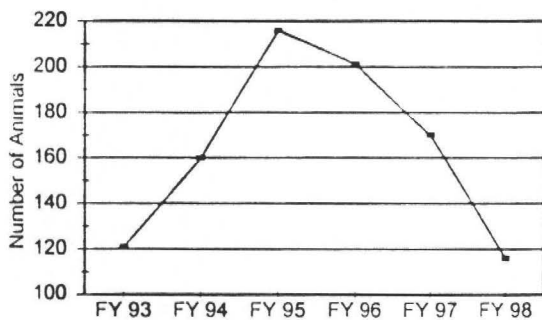
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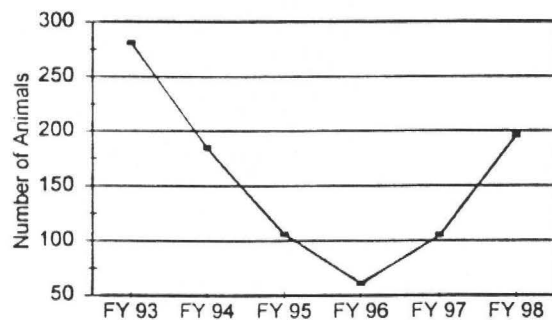
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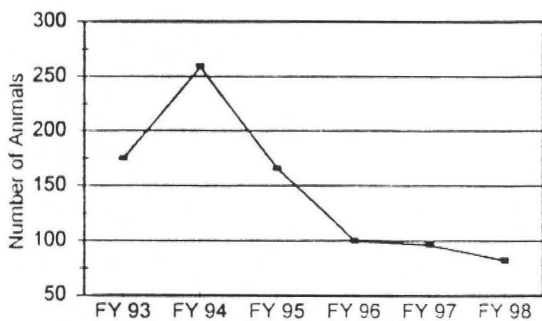
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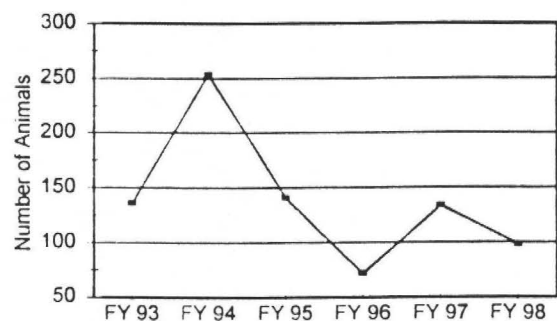
Florida



Wisconsin

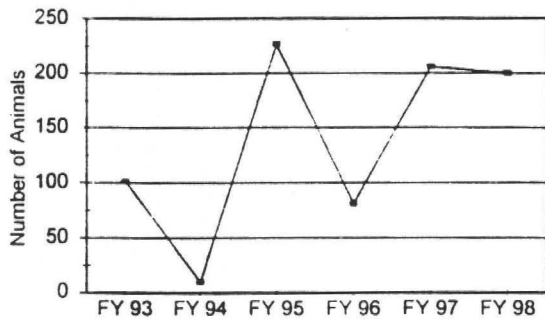


Louisiana

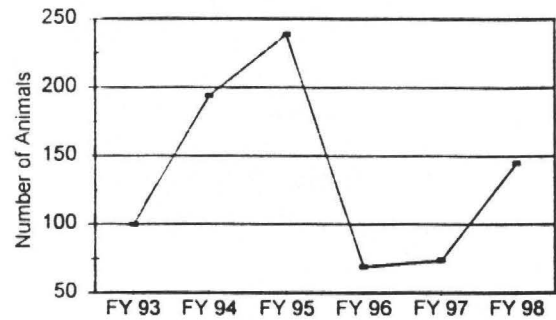


Trends in State Adoption Levels (FY 1993 - FY 1998)

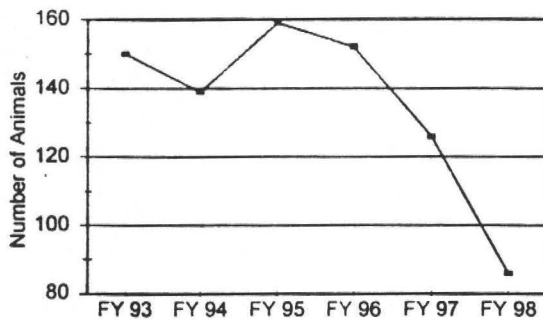
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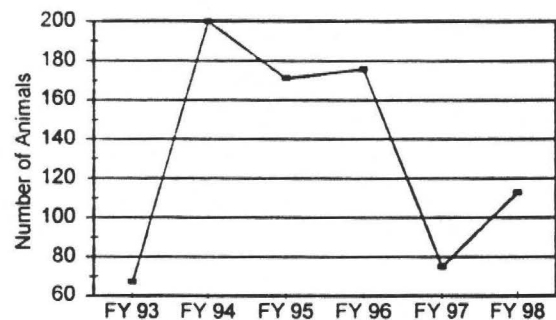
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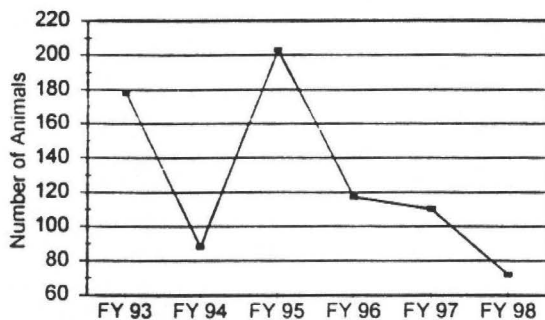
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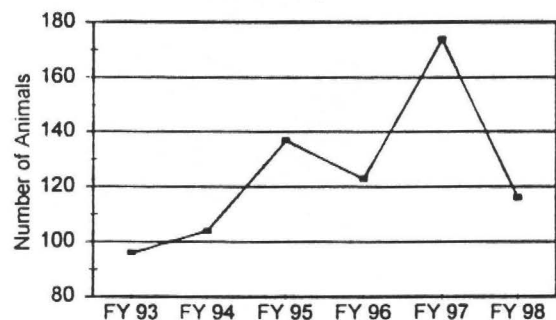
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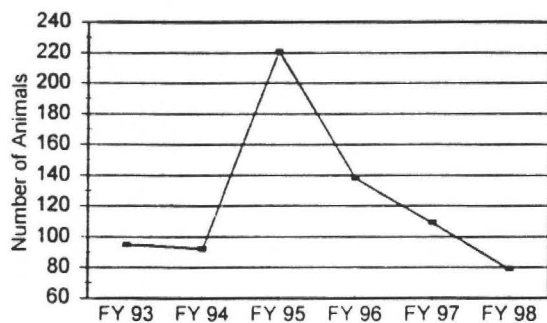
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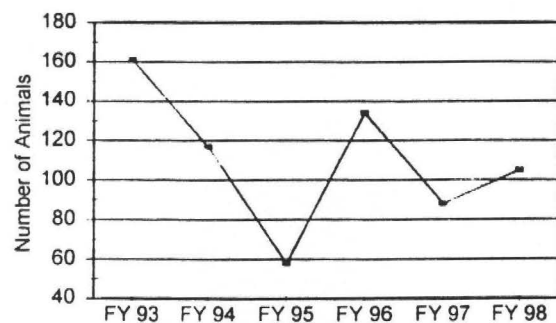
Michigan



Kansas

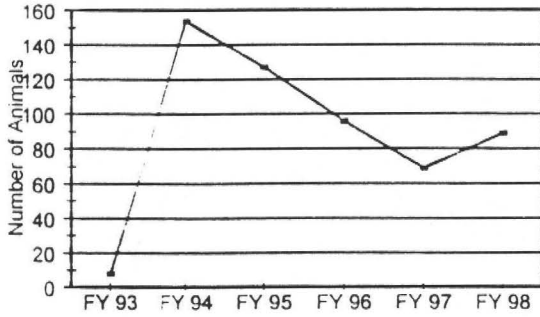


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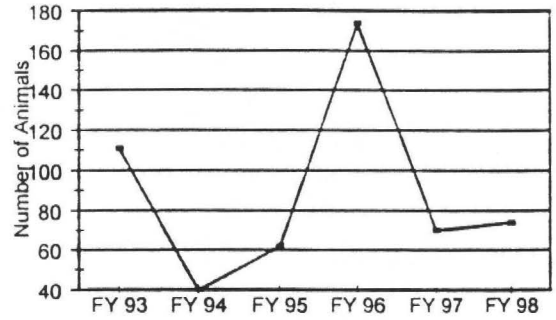


Trends in State Adoption Levels (FY 1993 - FY 1998)

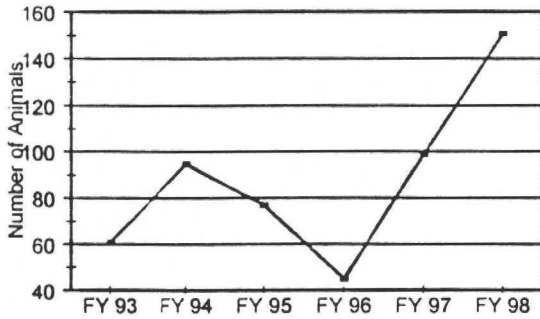
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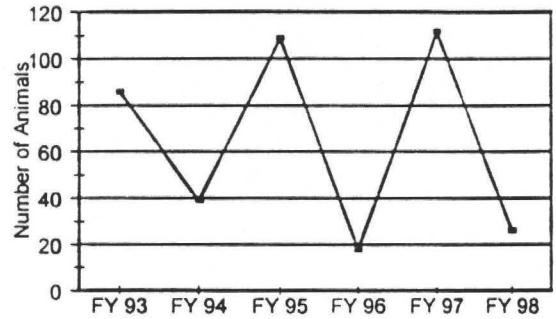
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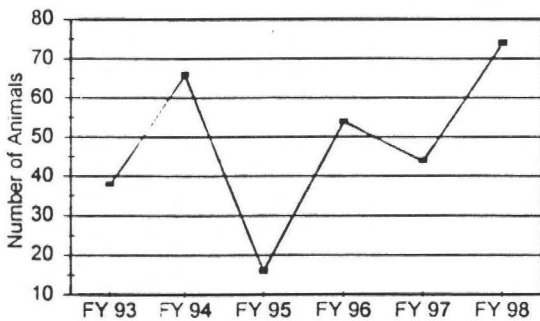
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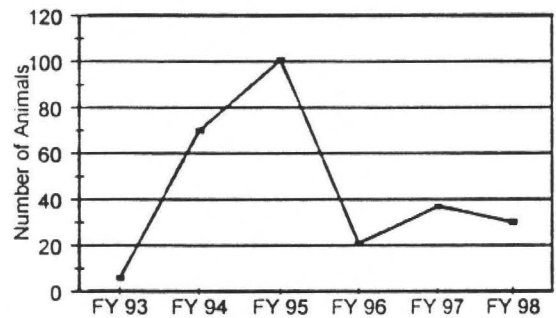
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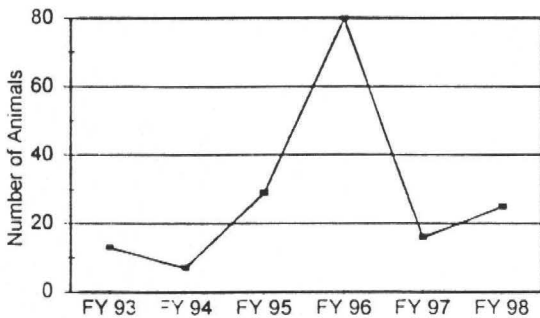
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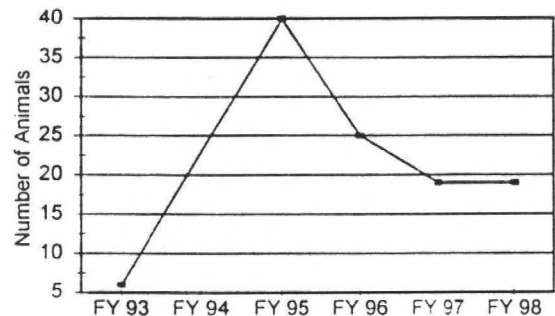
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New Mexico

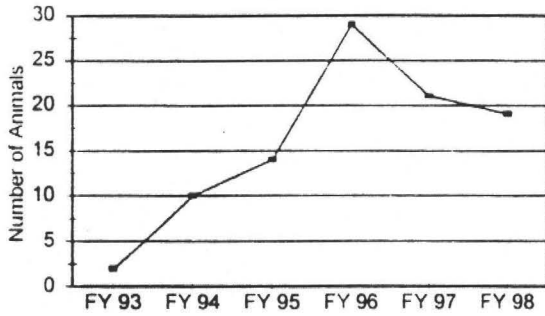


Vermont

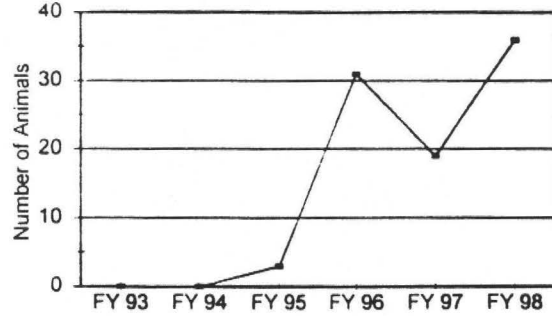


Trends in State Adoption Levels (FY 1993 - FY 1998)

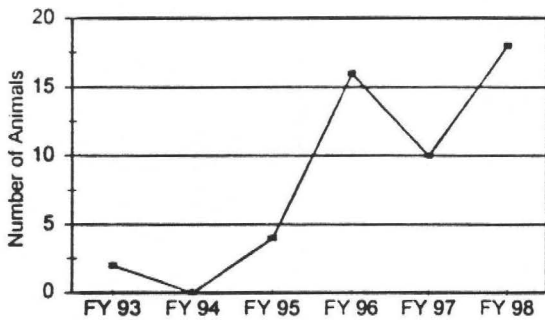
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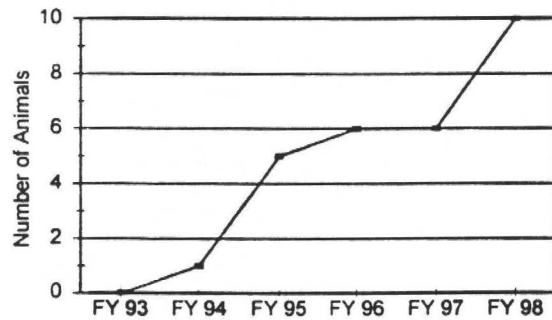
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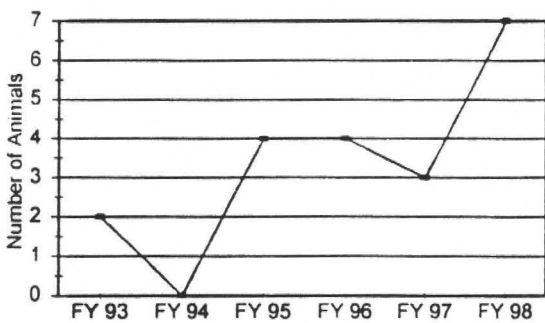
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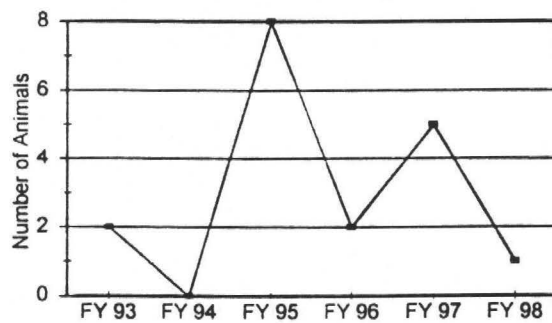
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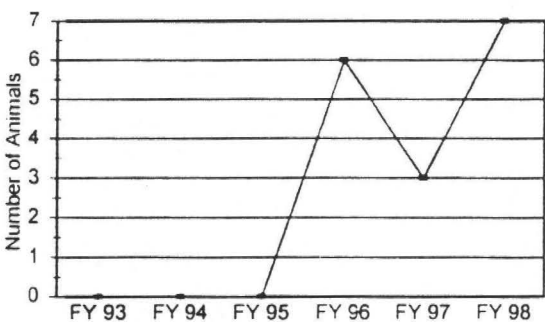
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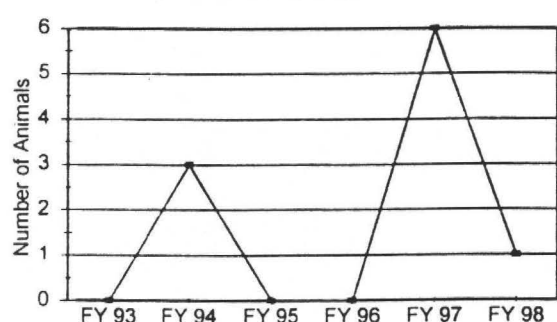
New Jersey



Maine

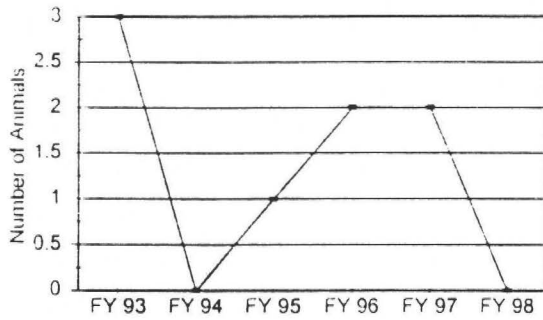


Alaska

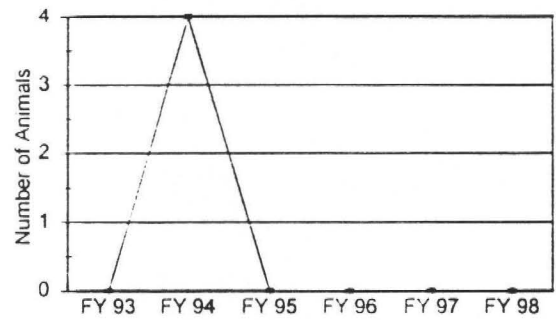


Trends in State Adoption Levels (FY 1993 - FY 1998)

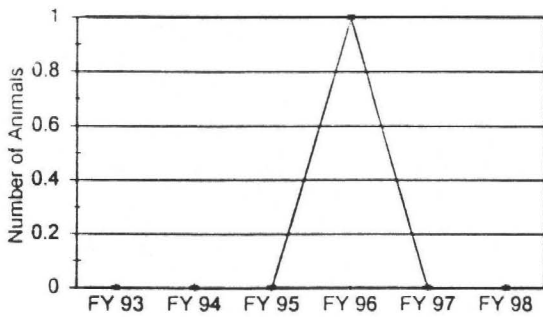
Rhode Island



District of Columbia



Hawaii



Appendix B

Mock-ups of Selected Informational and Promotional Materials Needed to Implement Marketing Strategy

Appendix B-1
Ideas for New Logo

1A



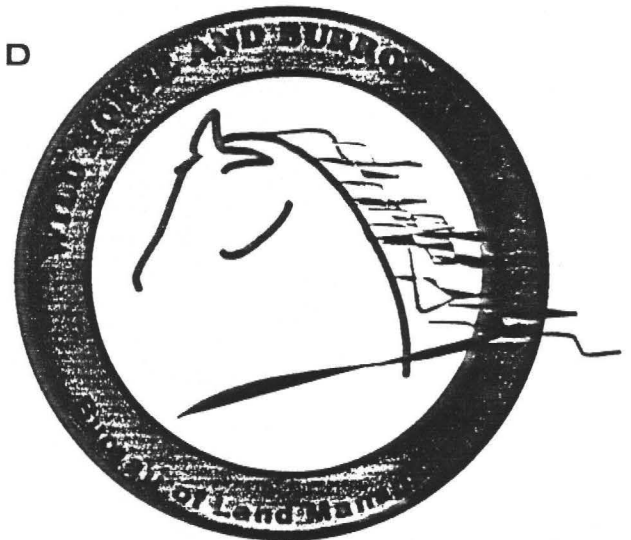
1B



1C



1D



1E



1E



2A



2B



2C



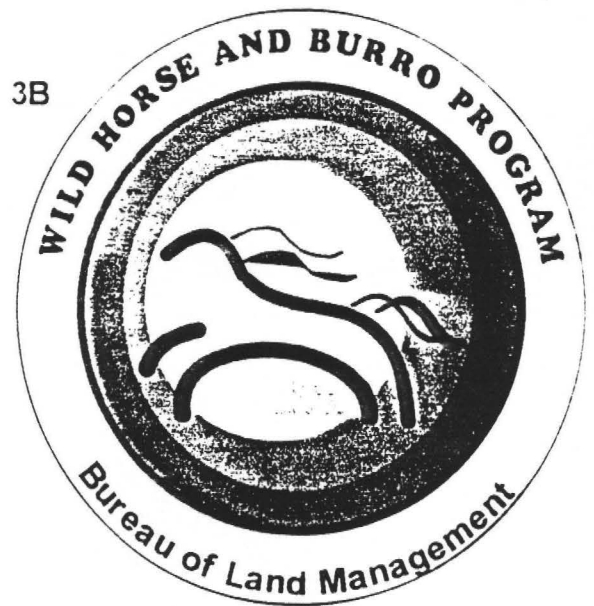
2D



3A



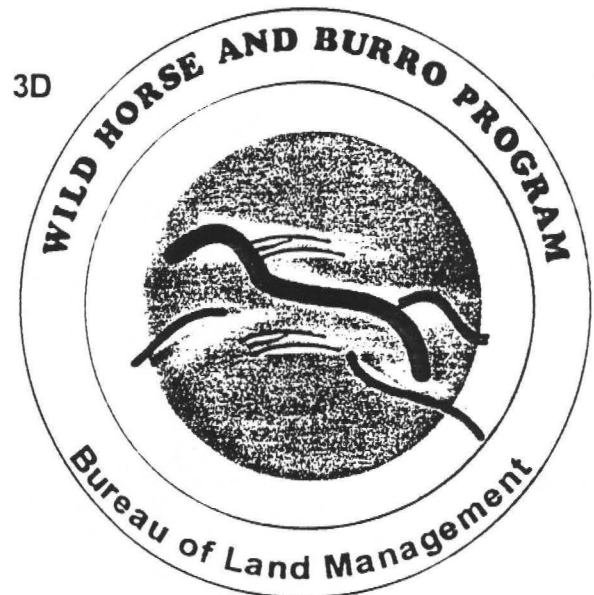
3B



3C



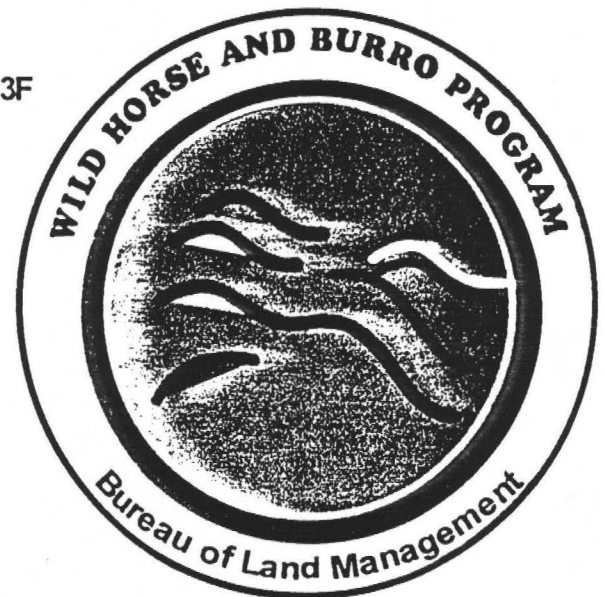
3D



3E



3F



4A



4B



4C



4D



4E



4F



Appendix B-2

Ideas for Slogans

Appendix B-2. Ideas for Slogans

- 1) Go Wild! Adopt a Horse or Burro.
- 2) Adopt a Living Legend.
- 3) Protect America's Heritage. Adopt a Horse or Burro.
- 4) Adopt a Horse or Burro. See What Happens.
- 5) America's Wild Horses and Burros...Trainable, Smart, and Surefooted. Adopt One Today.

Appendix B-3
Sample Drop-in Ad

Appendix B-3. Sample Drop-in Ad

Insert U.S. Department
of the Interior logo



Insert Bureau of Land
Management logo

Go Wild! Adopt a Horse or Burro.

Horses and burros gathered from America's public lands in the west are available for adoption to qualified individuals. These animals are known for their endurance, strength, and sure-footedness.

[Insert photograph of trained horse]

Join the thousands of satisfied adopters who enjoy their animals for a wide range of uses including:

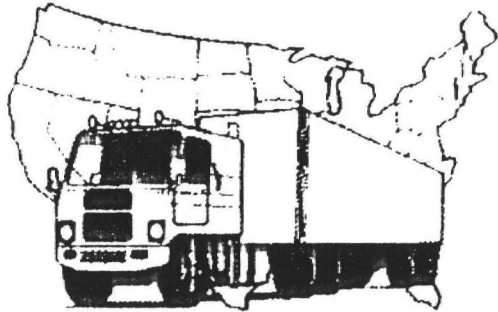
- Pleasure riding
- Back country and trail riding
- Endurance riding
- Breeding
- Farm and ranch work
- Show and competitive sports

The U.S. Department of the Interior Bureau of Land Management is holding adoptions at the following locations and times. Animals are available through a competitive bidding process with bids beginning at \$125.

[Insert adoption dates and locations]

For more information, contact the BLM Wild Horse and Burro Program at 1-800-2-GO-WILD or visit our web site at <http://www.blm.gov/whb>.

Appendix B-4
Mock-up of Mobile Van Exhibit

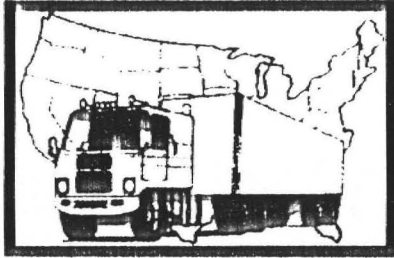


MOCK-UP Sample #1

This Mobile Unit travels around the country providing information about the Adopt-a-Horse or Burro Program. Inside the mobile truck are various kiosks that describe the program and its benefits.



Wild Horse and Burro Adoption Program Mobile Unit.



MOCK-UP Sample #2

This Mobile Unit travels around the country providing information about the Adopt-a-Horse or Burro Program. Inside the mobile truck are various kiosks that describe the program and its benefits.

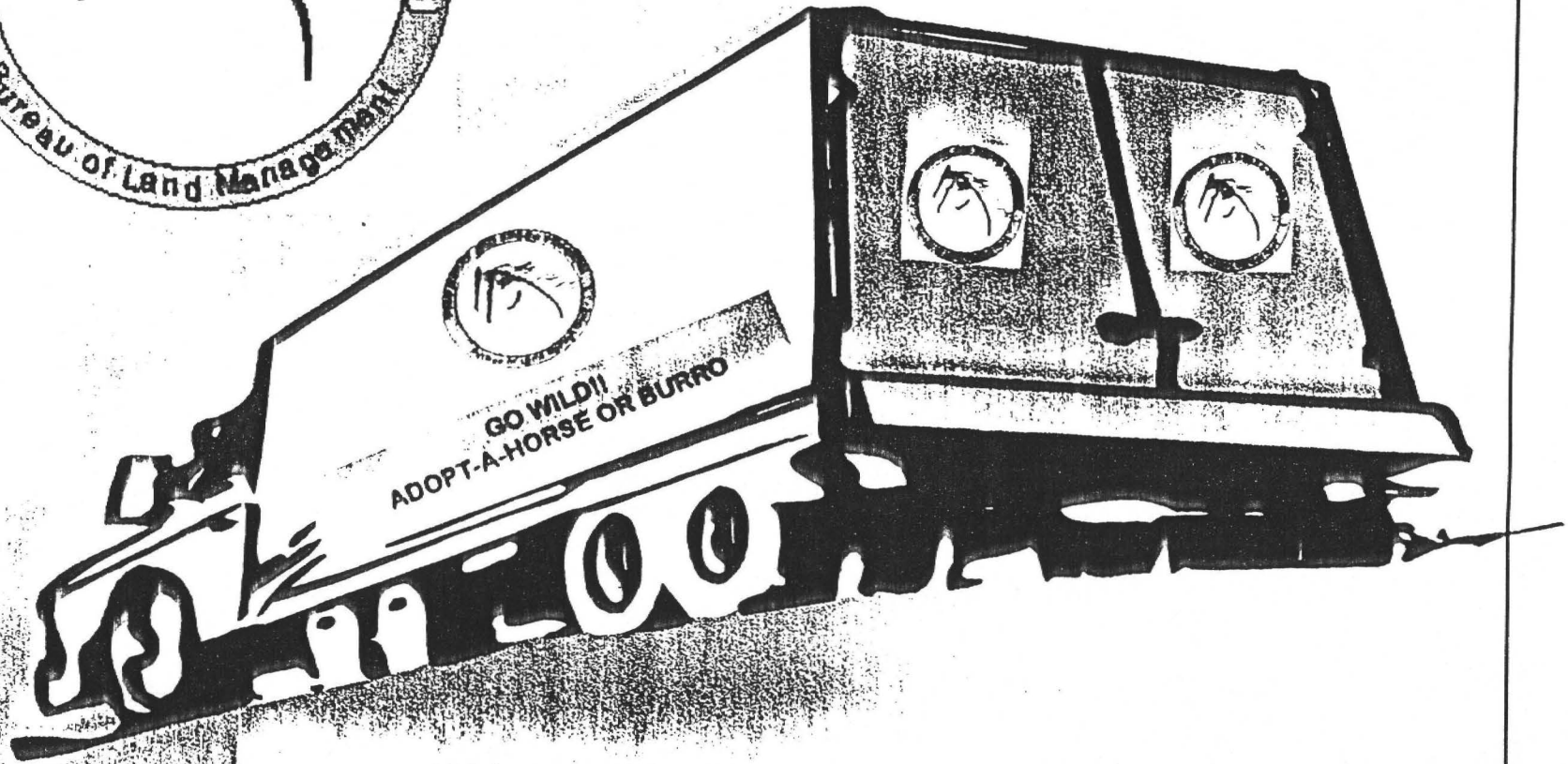


Wild Horse and Burro Adoption Program Mobile Unit.



MOCK-UP #3

The Wild Horse and Burro Program "LOGO" could be placed on the back doors of the Mobile Unit. The back doors would open so individuals could enter and learn about the various aspects of the program.

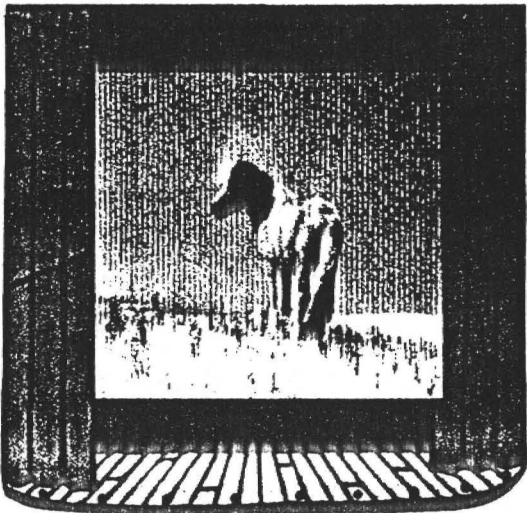


Wild Horse and Burro Adoption Program Mobile Unit

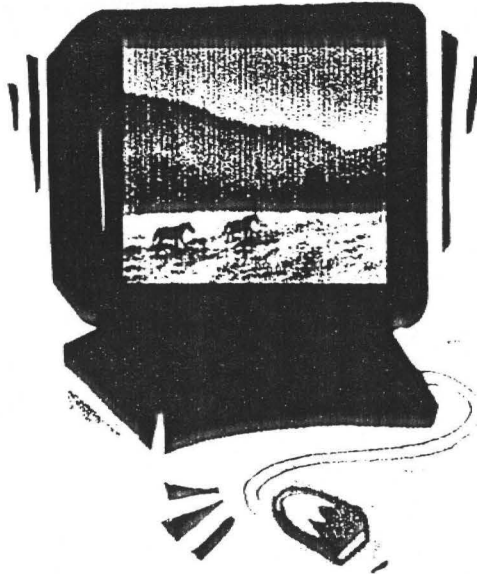
County Fair

MOCKUP #4

The Mobile Unit pulls up to a County Fair. The doors open to a wealth of information about the Adopt-a-Wild Horse or Burro Program via interactive kiosks and multimedia presentations.



Video Kiosks about the wild horse, its heritage, its beauty, "How to Adopt."



Multimedia Presentation via CD-ROM about the Wild Horse and Burro Program.

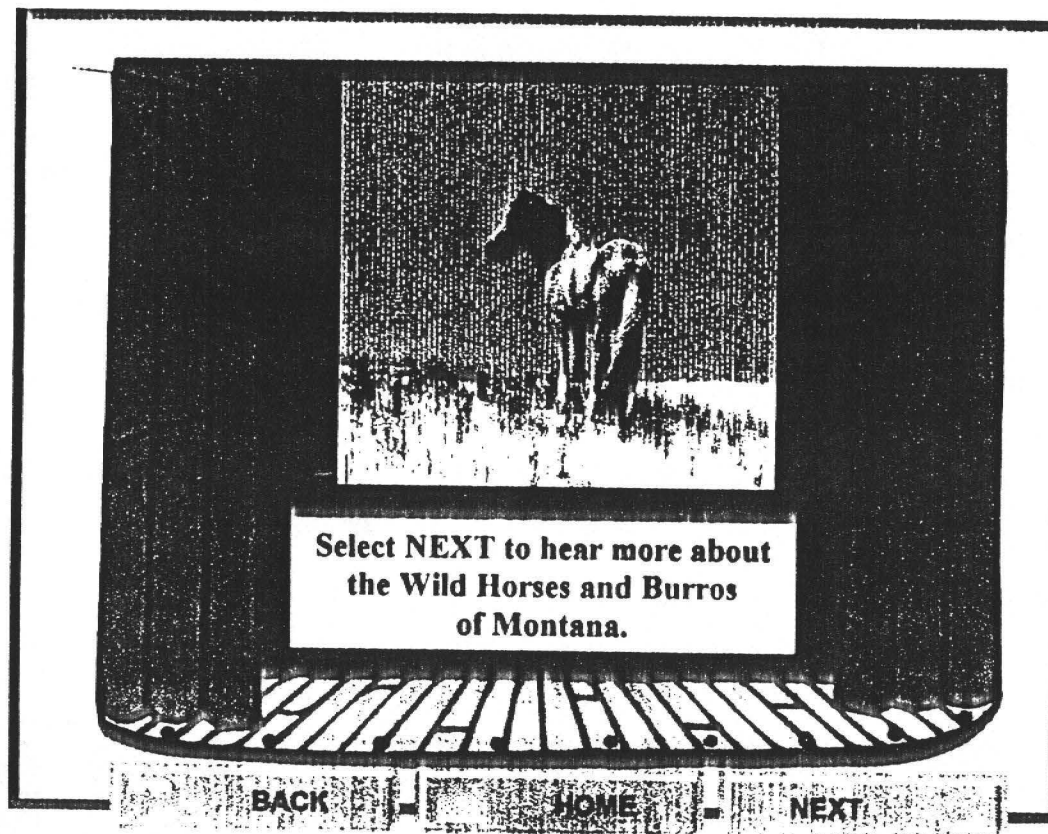


Video Kiosks about life with a newly adopted wild horse or burro.

Inside the Mobile Unit different Video and Interactive Shows can be seen.

MOCK-UP #5

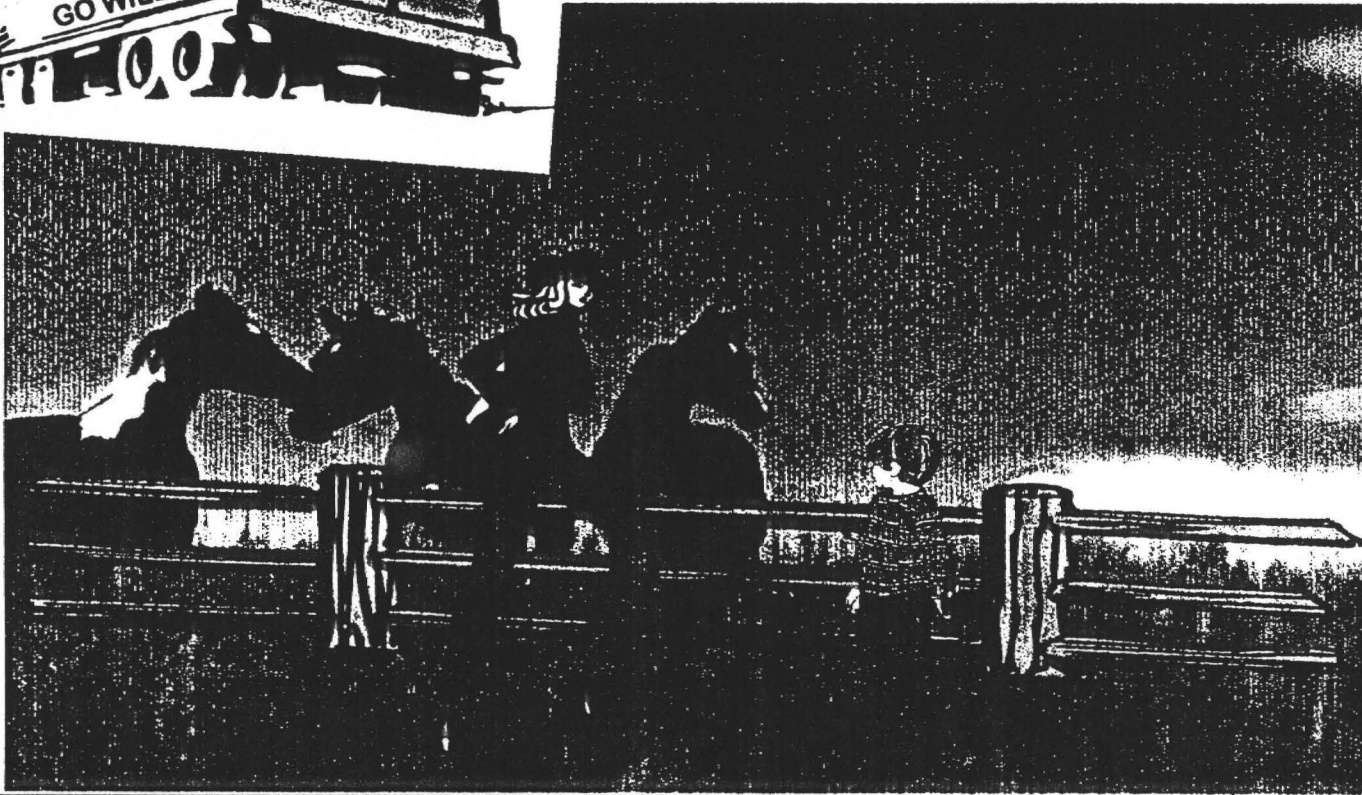
Interactive Video Kiosks would be placed inside the Mobile Unit. This would allow the audience to interact with the information—watch the video presentation, fast forward to sections of importance, print information that is relevant to take home.



Touch the button and move through the program—or touch the screen to interact with the program.



... could add a portable corral to the
Unit to showcase a mascot and other wild
horses and burros that have been tamed.



... portable corral for all to view the beauty of the tamed Wild Horse or Burro