Project Objectives

- Develop robust estimates of future demand for animals through both the adoption and sales program
- Develop an implementation strategy for efficiently and effectively placing animals into private care
Analysis of Database

15,610 adoptions/sales*
FY10 to FY15

*Slides represent WHB adoptions AND sales
Animal Profile

Species

- Horse: 88%
- Burro: 12%
- Mule: <1%

Gender

- Gelding: 47%
- Female: 44%
- Male: 9%

n=15,610
Place of Birth

<table>
<thead>
<tr>
<th>Year</th>
<th>Captured</th>
<th>Born in Captivity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>2010</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>2011</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>2012</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>2013</td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td>2014</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>2015</td>
<td>71%</td>
<td>30%</td>
</tr>
</tbody>
</table>

www.GLM.com
Adoption/Sale Month

n=15,610

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>7%</td>
</tr>
<tr>
<td>February</td>
<td>7%</td>
</tr>
<tr>
<td>March</td>
<td>8%</td>
</tr>
<tr>
<td>April</td>
<td>10%</td>
</tr>
<tr>
<td>May</td>
<td>16%</td>
</tr>
<tr>
<td>June</td>
<td>9%</td>
</tr>
<tr>
<td>July</td>
<td>8%</td>
</tr>
<tr>
<td>August</td>
<td>10%</td>
</tr>
<tr>
<td>September</td>
<td>7%</td>
</tr>
<tr>
<td>October</td>
<td>9%</td>
</tr>
<tr>
<td>November</td>
<td>7%</td>
</tr>
<tr>
<td>December</td>
<td>4%</td>
</tr>
</tbody>
</table>
Duration of BLM Custody

2009-2011 Average
520 days (1.42 years)

2012-2013 Average
647 days (1.77 years)

2014-2015 Average
882 days (2.42 years)

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4 or more years

2009 - 2011 (n=6,502)

2012 - 2013 (n=4,996)

2014 - 2015 (n=4,112)

520 days (1.42 years)

647 days (1.77 years)

882 days (2.42 years)

www.GLM.com
PMACA Site Code

2009 - 2011 (N=6,502)
- Temporary Adoption Event: 46%
- Maintenance Facility: 21%
- Preparation Facility: 16%
- Foster Care/Training: 10%
- Internet Adoption: 3%

2012 - 2013 (N=4,996)
- Temporary Adoption Event: 47%
- Maintenance Facility: 18%
- Preparation Facility: 16%
- Foster Care/Training: 8%
- Internet Adoption: 1%

2014 - 2015 (N=4,112)
- Temporary Adoption Event: 31%
- Maintenance Facility: 23%
- Preparation Facility: 18%
- Foster Care/Training: 14%
- Internet Adoption: 7%

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Adoption Outcome

For animals adopted or sold in 2013 calendar year or prior

Only 0.2% of animals were repossessed or reassigned

- Titled: 83%
- Relinquished: 3%
- Still Adopted: 14%

n=11,498
Adoption/Sales Destinations

October 2010 – September 2015

n=12,976
Equine Population

2005 AHCF Study
The map shows the percentage of WHB animals adopted in each state minus the percentage of all equine in each state. Green states have adopted more wild horses and burros than expected, while red states have adopted fewer than expected. (Example: California adopts 12.3% of all WHB animals, but only contains 7.6% of all US equine. 12.3% - 7.6% = 4.7%)
Internet Adoption Destinations

October 2010 – September 2015

n=468

49% 51%
Initial Thoughts

Insights from interviews
Market Changes

Factors to Consider

- Interest in animal ownership is waning
- No outlet exists for unwanted animals
- Animals are a long-term investment
- The skills to train wild animals are becoming more rare
- Animals are expensive
- Availability of domestic horses
- Supply exceeds demand
Holding Costs/Patterns

Factors to Consider

- The high cost of off-range pastures and corrals reduces the availability of funds for marketing
- Animals in captivity live longer lives
- Some desirable animals are in off-range pastures

Thoughts

- The cost of care should be factored into planning incentives, purchase prices, etc.
Product Perspective

Augmented

Tangible/
Physical

Benefit

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Branding

Insights from interviews
Market Position

Factors to Consider

- What is the WHB “brand?”
- What is the equity in the brand?
- How can the value exceed the additional investment?
- The market position needs clarity

Thoughts

- Need a benefit statement
- Need a Brand Guide
- Need a naming convention (wild horse vs. Mustang)
**Titling Process**

**Factors to Consider**
- The titling process could be a barrier
- Adopters lack support after adoption
- Compliance process is not optimized

**Thoughts**
- The sale option is underutilized
- The adoption process needs review
Opportunities in the East

Factors to Consider
- Need access to animals
- WHB is relatively unknown
- The “best” are not making it east

Thoughts
- **Prepare** to go East
- The opportunity exits to create the “brand”
- Need “Trusted Trainer” locations
  - Store fronts
Public Relations & Marketing
Factors to Consider

- Data are not consistently collected at adoption events, etc.
- Data are not optimized

Thoughts

- Develop and require a standard report form
- Implement feedback questionnaire process
- Talk to adopters
Adopter Development

Factors to Consider

- Adopters are not totally understood
- Adopters are not optimized
- Adopters are the best spokespeople

Thoughts

- Adopter referral program
- Adopter association
- Coordinate Mustang registry
- Adopter education and assistance programs
- LOVE THE ADOPTER!
Adoption Opportunities
Contract for Expertise

Factors to Consider
- Marketing today takes significant expertise IN EACH CATEGORY
- Internet auction sites are highly sophisticated

Thoughts
- Centralize marketing and outsource creative services
- Outsource internet auctions
- Standardize satellite adoptions
Prison Programs

Factors to Consider

- Prison programs have significant potential for positive PR
- Prison programs create interest in animals and grow primary demand

Thoughts

- A central point of contact for prison programs is needed
- Programs could be creatively expanded to include female and juvenile facilities
Next Steps

- Continue learning
- Visit sites and events
- Conduct research with BLM staff (online)
- Share findings!
Keep the conversation going

Lori Dixon
419.534.4710
Lori@GLM.com