A Decade of Delivering R3 Support to States

December 12, 2017
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10 YEARS OF WORKSHOPS
2008 vs. 2017
State Marketing Workshop Attendance

150 attendees in 2016
50 state agencies registered
Tools & Trends
RBFF State Agency Tools

2008

2017

Angler/Boater R3 Resources

State R3 Program Grants

Webinars
## Trends in Participation and Demographics

<table>
<thead>
<tr>
<th>Year</th>
<th>Participation</th>
<th>Youth Participation</th>
<th>Family's Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Participation down 7%</td>
<td>Youth participation important</td>
<td>Family plays a role</td>
</tr>
<tr>
<td>2017</td>
<td>Participation up 3%</td>
<td>Youth participation important</td>
<td>Families are changing</td>
</tr>
</tbody>
</table>
## Trends in Participation and Demographics

<table>
<thead>
<tr>
<th>2008</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 30% of participants are female</td>
<td>Women (including Moms) play an important role</td>
</tr>
<tr>
<td>4.9% Hispanics fishing participants</td>
<td>8.2% Hispanic fishing participants</td>
</tr>
<tr>
<td>Adults spend 8 hours a day on screens</td>
<td>People fitting 22 hours of media into 24-hour day with multiple devices</td>
</tr>
</tbody>
</table>
10 YEARS OF RESULTS
Fishing Participation Up in 2016!

Participation up 8.2% in the last 5 years

Participation up nearly 20% in last 10 years

Highest participation # since 1991
Boating Participation Strong in Recent Years

Source: NMMA
Fishing License Sales Up!

U.S Fishing License Sales

Source: USFWS

4.26% increase since 2005
Boat Registrations Up!

Source: USCG

1st increase since 2009
State Lapsed Angler & Boater Programs

- 766K licenses
- 271K registrations
- $25.4M in revenue for states
State License & Registration Referrals

3.54M referrals to state agency license purchase pages

440K referrals to state agency boat registration pages

$8M in revenue for states

Revenue calculated using 8% conversion rate from RBFF state agency programs, $23.76 avg. license cost and $37.42 avg. registration cost.
Education Grants

$330K
granted to state agencies in the last 3 years as part of State R3 Grants Program

$83K
granted to state agencies in the last 2 years as part of George H.W. Bush Vamos A Pescar™ Education Fund
## Total Revenue Generated for States

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>DIRECT STATE REVENUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lapsed Angler</td>
<td>$15.63 million</td>
</tr>
<tr>
<td>Lapsed Boater</td>
<td>$9.8 million</td>
</tr>
<tr>
<td>License Referrals</td>
<td>$6.7 million</td>
</tr>
<tr>
<td>Registration Referrals</td>
<td>$1.3 million</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$33.4 million</strong></td>
</tr>
</tbody>
</table>

License and registration referral revenue calculated using 8% conversion rate from RBFF state agency programs, $23.76 avg. license fees and $37.42 avg. registration cost.
ACTIVATING R3 STRATEGIES TO ACHIEVE SUCCESS