

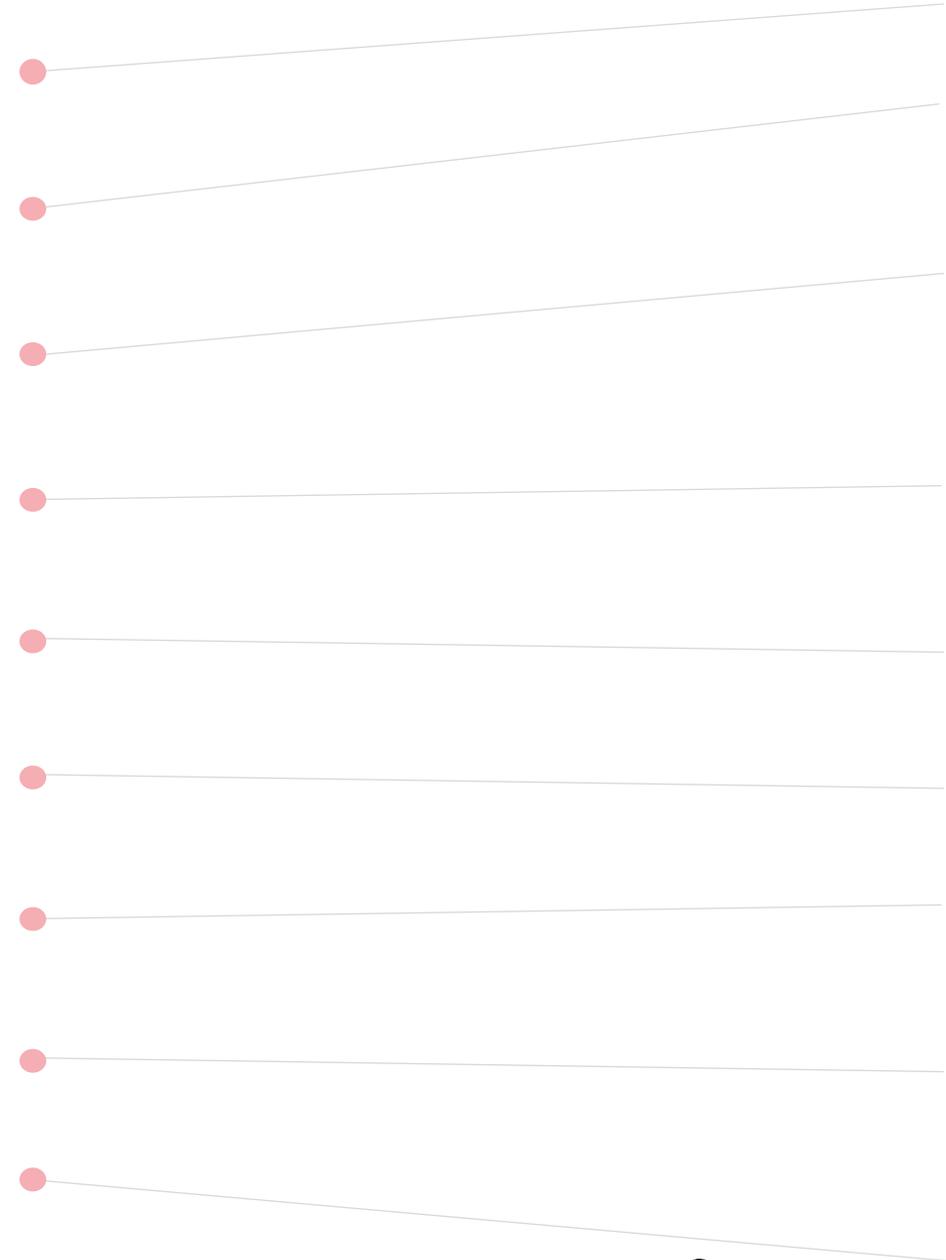
# RBFF Conservation Study Report - 2023



April 2023

# Contents

03	Background & Objectives
04	Methodology
05	Key Findings
06	Fishing & Licenses
17	Conservation
26	Media & Preferred Channels
32	Regional Fishing & Licensing Metrics
45	Key Metric Comparison
48	Appendix



# Background & Objectives



---

The Recreational Boating and Fishing Foundation aims to drive awareness of the conservation efforts that result from consumer participation in fishing.



---

Research was undertaken to understand consumers' awareness of RBFF licensing and linkage to conservation and determine how it has changed over the past 4 years.



---

Determine how conservation should continue to be messaged and what else is resonating with consumers.



---

Leverage this research to drive brand strategy.

# Methodology

## Quantitative



20 min online survey



Feb. 21 to Mar. 06, 2023



N=1,500

American Anglers

Participate in outdoor activities at least 2-3 times/year

18+

Met criteria for one of the following 3 segments\*

- Avid adventurers: N=375
- Active social families: N=750
- Family-focused relaxers: N=375

*\*Data has been weighted to reflect the population distribution across the 3 segments – 32% Avid Adventurists, 37% Active Social Families, 31% Family-focused Relaxers*

# Key findings



Although the qualifying “angler” criteria was revised in 2023, **anglers' views on the need for conservation are remarkably consistent with levels seen in 2019**. Though while important, conservation is not a driving force as to why these anglers fish. The reasons for fishing are multi-faceted but continue to focus on enjoying time spent outdoors and spending time with family and friends.



Comparable to levels seen in 2019, **4 in 5 anglers are aware of the need to purchase a license to fish and/or have done so**.  
• Awareness of this requirement is, however, lower among Active Social Families, of whom only 3 in 4 are aware.  
**Anglers' awareness that funds generated from licensing go towards conservation is strong and above levels seen in 2019**. Four in five anglers overall make this connection, yet **awareness that *all license fees* go towards conservation is more limited** with just over half of anglers aware of this direct linkage.

**Four in five anglers can cite potential benefits and beneficiaries of licensing fees** with wildlife conservation and preservation mentioned most often. **This level of recall is up from 2019, when only 2 in 3 were able to do so** and suggests elements of earlier messaging may have begun to take hold.



**Messaging should continue to target Active Social Families with a focus on “it’s the right thing to do” to reinforce the licensing requirement as well as the conservation benefits**. Emphasizing the link between license fees and conservation can be expected to continue to reap benefits as Active Social Families, most notably, exhibit an increased likelihood to fish after learning of the connection.



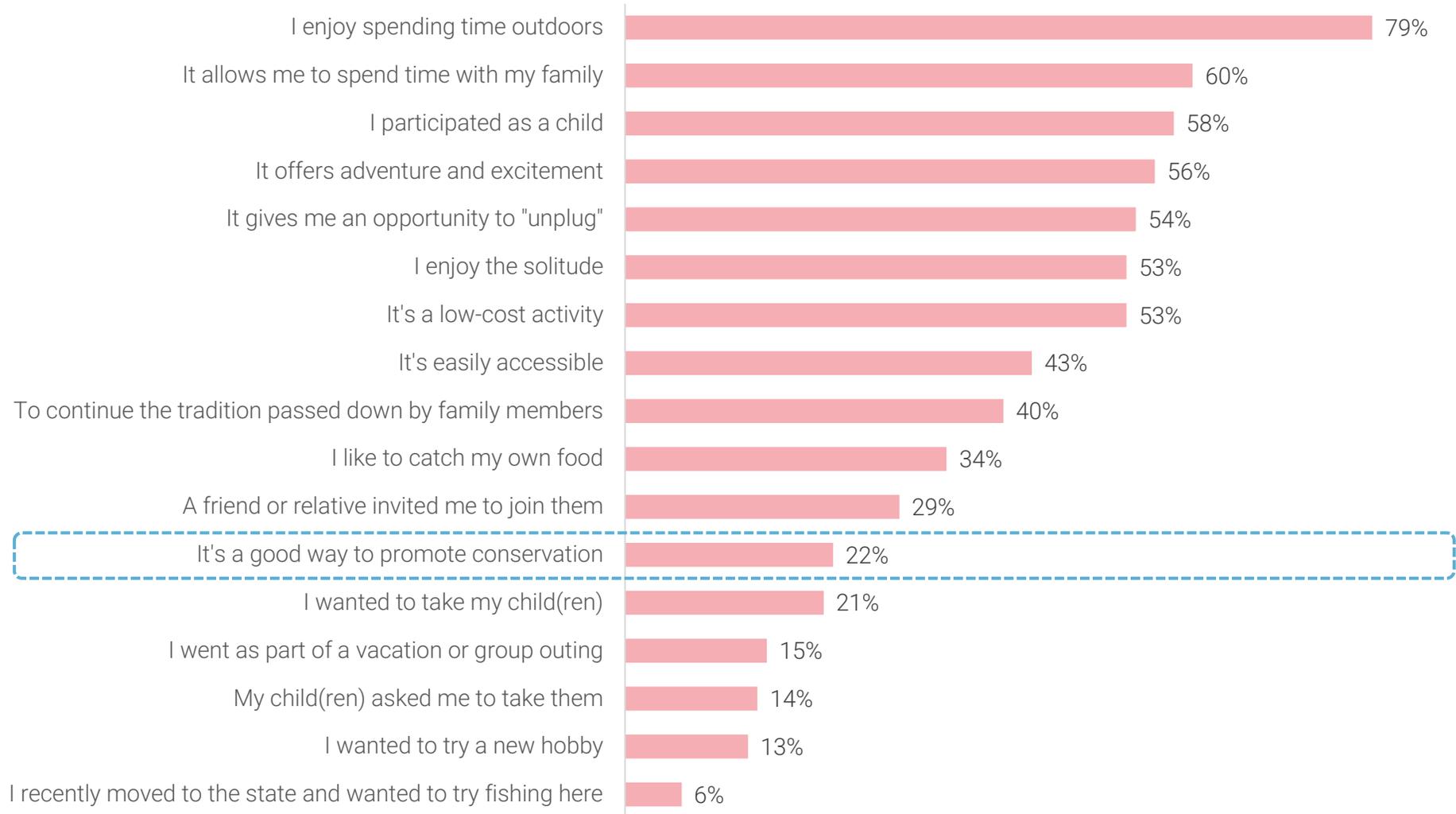
**Communications should focus on online and social media platforms**. Online articles represent a preferred source of information among most anglers, while social media, including Instagram, is particularly relevant among Active Social Families.

# Fishing & Licenses



# Enjoyment of the outdoors remains the principal motive for fishing, few anglers cite conservation as a motivation

Reasons to Fish



This was also the top reason in the 2019 wave.

Base: Total Respondents N=1500

7 Q1. Which of the following are reasons why you fish?

# While still low, conservation as a motivation does resonate more often with Active Social Families

Reasons to Fish			
	Avid adventurers (A)	Active social families (B)	Family-focused relaxers (C)
I enjoy spending time outdoors	90% BC	64%	85% B
I participated as a child	68% B	43%	66% B
It offers adventure and excitement	68% BC	51%	51%
It allows me to spend time with my family	66% B	53%	62% B
It gives me an opportunity to "unplug"	65% B	40%	60% B
I enjoy the solitude	62% BC	46%	54% B
It's a low-cost activity	61% B	42%	58% B
To continue the tradition passed down by family members	49% BC	35%	36%
It's easily accessible	47% B	38%	44%
I like to catch my own food	40% BC	33%	29%
A friend or relative invited me to join them	29%	31%	29%
It's a good way to promote conservation	22%	28% AC	16%
I wanted to take my child(ren)	22% C	24% C	15%
I went as part of a vacation or group outing	15% C	21% AC	9%
My child(ren) asked me to take them	12%	19% AC	11%
I wanted to try a new hobby	7%	23% AC	7%
I recently moved to the state and wanted to try fishing here	3%	11% AC	2%

Base: Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375

Q1. Which of the following are reasons why you fish?

A/B/C indicates significantly higher than the other group at the 95% confidence level.

# As most fish with friends and family, especially Active Social Families' young children, any messaging needs to highlight the social aspect of fishing along with conservation

Who Anglers Participate in Fishing With

		Avid Adventurists (A)	Active Social Families (B)	Family-focused Relaxers (C)
Friends	56%	59% C	59% C	49%
Spouse/Significant other	52%	57% C	51%	48%
Other family members (parents, siblings, etc.)	47%	50% B	43%	50% B
Young children (under 18)	30%	29% C	37% AC	21%
Adult children (18+)	29%	29%	25%	32% B
Business associates	5%	5% C	8% AC	1%
I typically fish alone	6%	9% B	4%	7% B

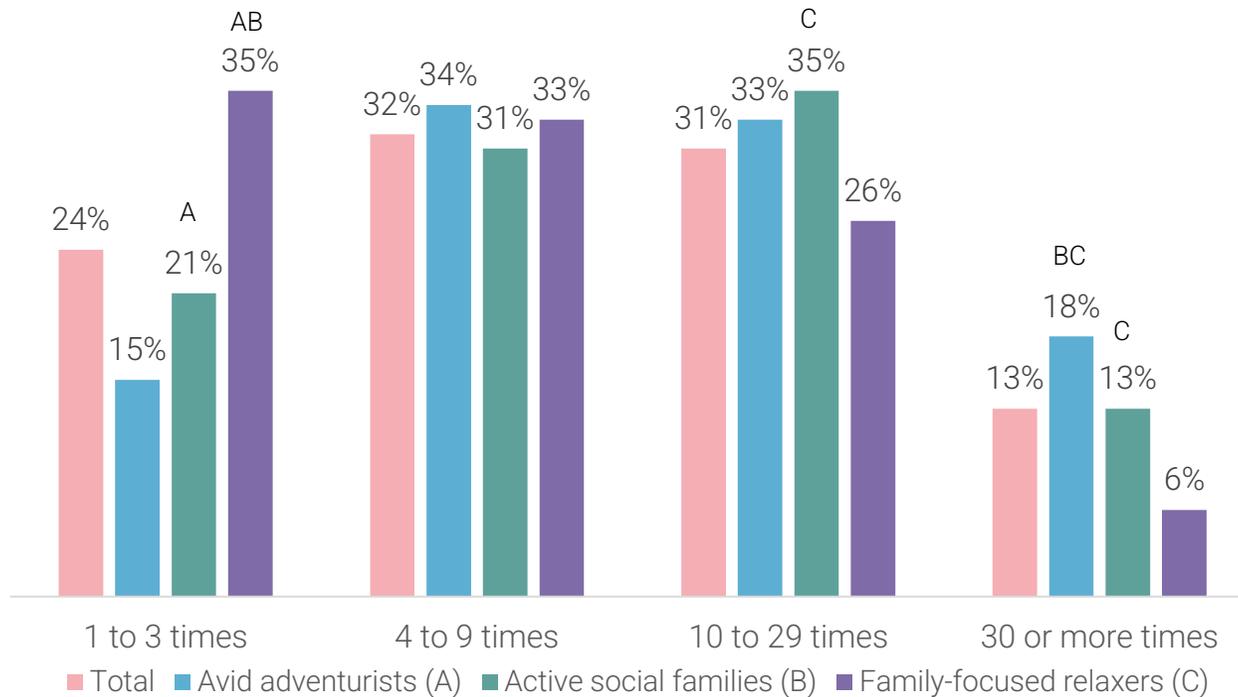
Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375

Q4. Who do you typically participate in fishing with?

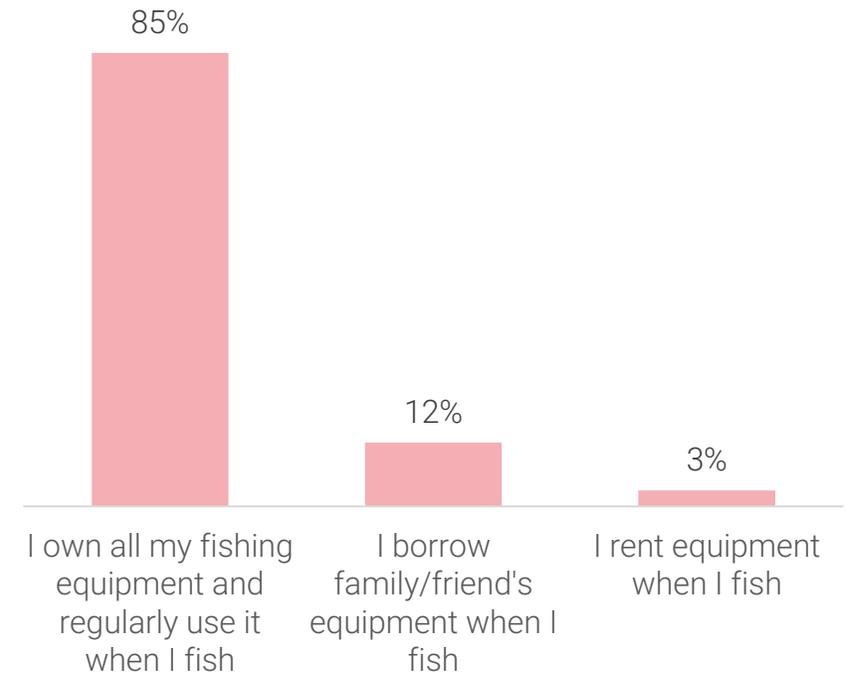
A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Roughly half of those surveyed fish 10 or more times per year; more frequently among Avid adventurers, less frequently among Family-focused relaxers

Number of Times Fish in Typical Year



Equipment Used When Fishing



Base Q2: Lapsed, Reactivated, or Angler; Total, N=1394; Avid adventurers, N=369; Active social families, N=656; Family-focused relaxers, N=369 | Base Q3: Total Respondents; N=1500

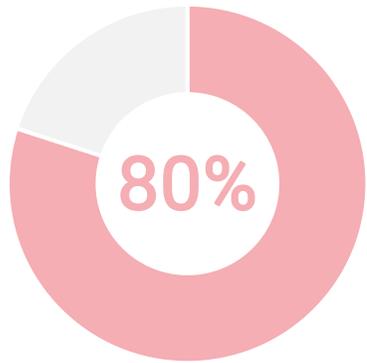
Q2. How many times do you fish in a typical year?

Q3. Which of the following best describes the equipment you use when fishing (e.g., fishing rod/reel, tackle box, etc.)?

A/B/C indicates significantly higher than the other group at the 95% confidence level.

# While overall awareness is comparable to levels seen in 2019, awareness of the need to acquire a fishing license is lowest among Active Social Families

## Fishing License Awareness & Purchase



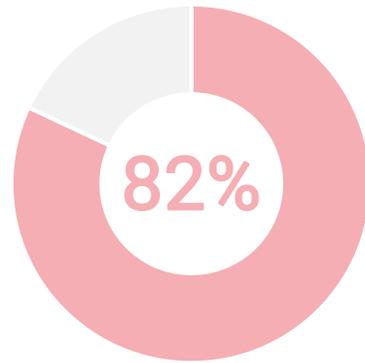
Are aware that they need a license to fish

82% of Avid adventurists

76% of Active social families

83% of Family-focused relaxers

Compared to **86%** awareness in 2019 and **85%** saying they purchased a fishing license in the past.



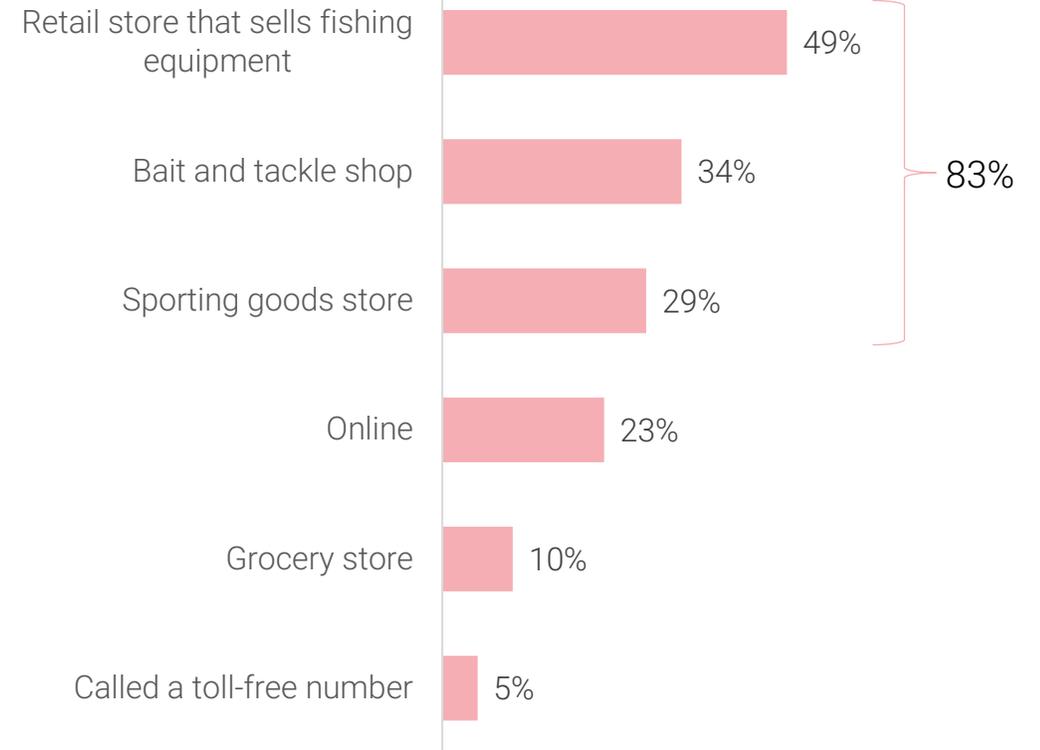
Have purchased a fishing license in the past

86% of Avid adventurists

78% of Active social families

83% of Family-focused relaxers

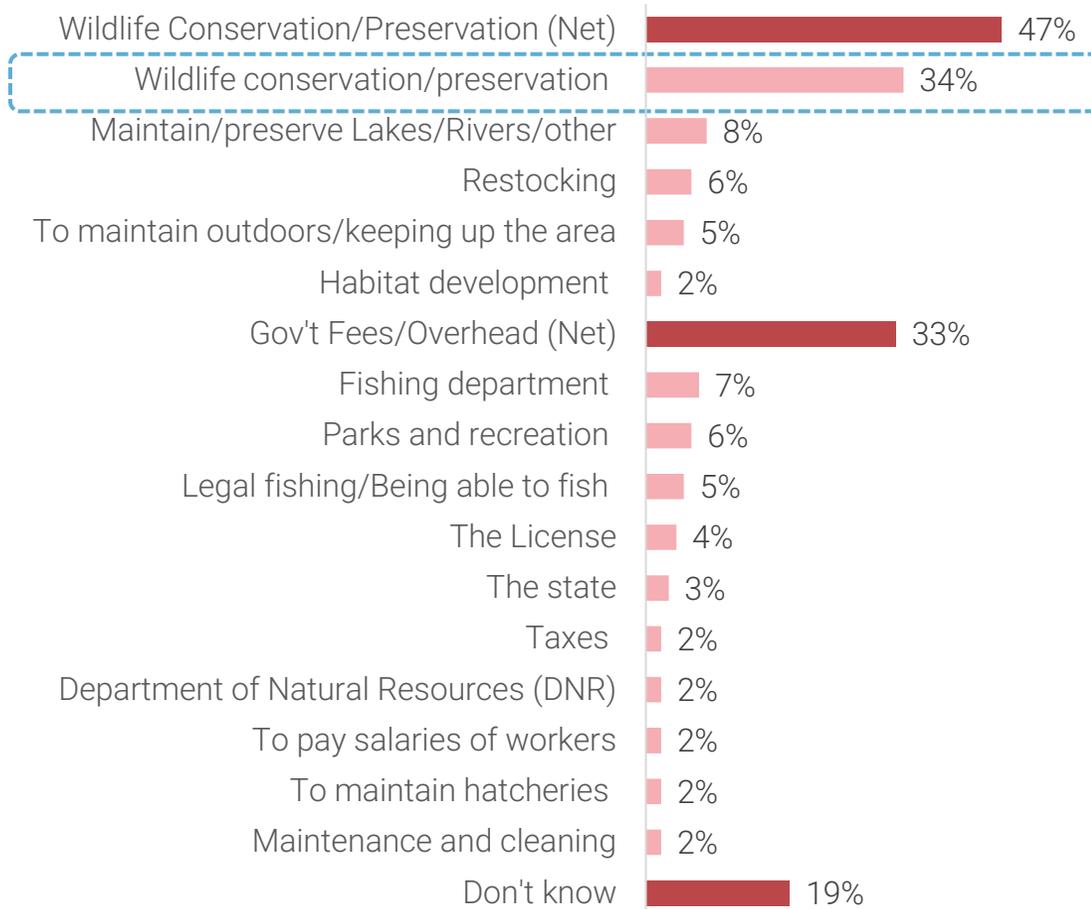
## Fishing License Purchase Location



Q6/Q7 Base: Total Respondents; N=1500; Q8 Base: If ever purchased a fishing license; N=1219  
 Q6. Do you know if you need to have a license to fish?; Q7. Have you ever purchased a fishing license?  
 Q8. Where did you purchase your fishing license from?

There is an understanding among anglers that license fees go toward wildlife conservation or government overhead, yet a fifth of all anglers have no idea

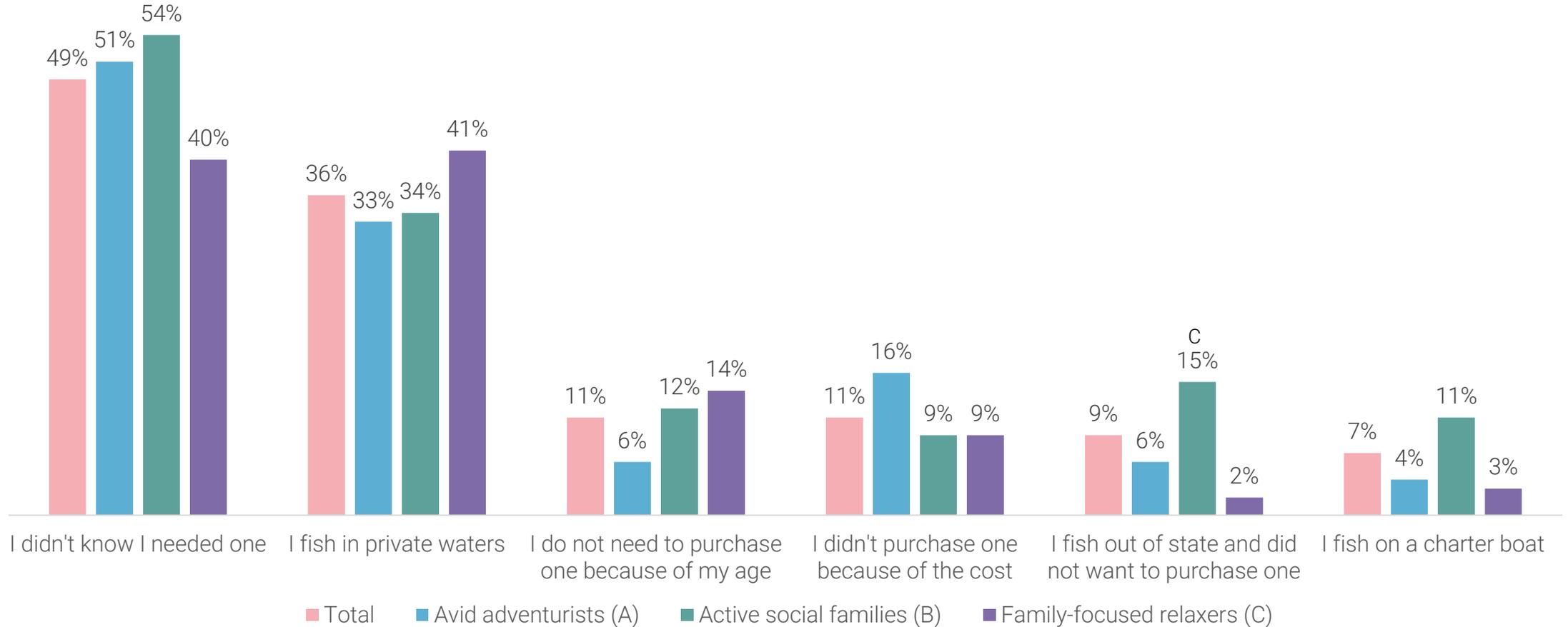
What Licensing Fees Go Towards



Base: Total Respondents; N=1500  
Q10. What do licensing fees go towards?

# Increasing awareness of licensing requirements is key for stimulating purchase

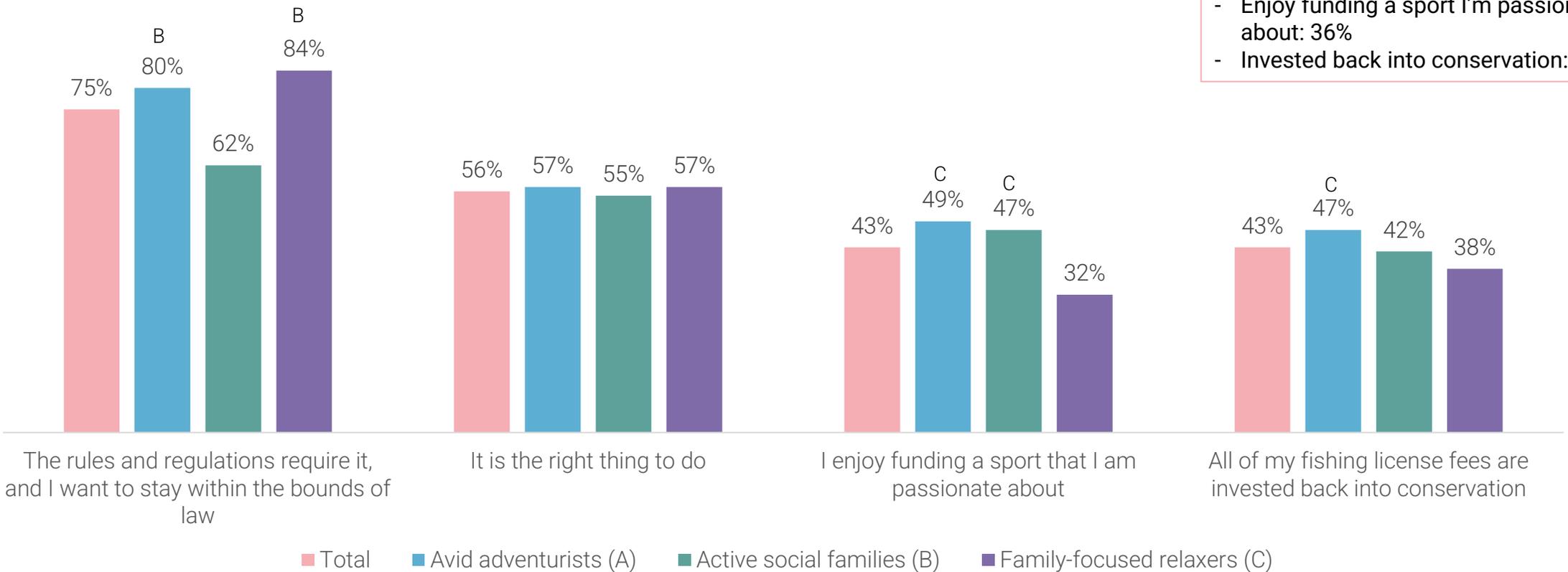
Reasons for Never Purchasing a Fishing License



Base: If never purchased a fishing license; Total, N=258; Avid adventurers, N=49; Active social families, N=151; Family-focused relaxers, N=58  
 Q9. Which of the following are reasons you have never purchased a fishing license?  
 A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Yet the purchase of fishing licenses is driven less by investing in conservation and more by staying with in the law

Reasons Why Purchased/Would Purchase a Fishing License



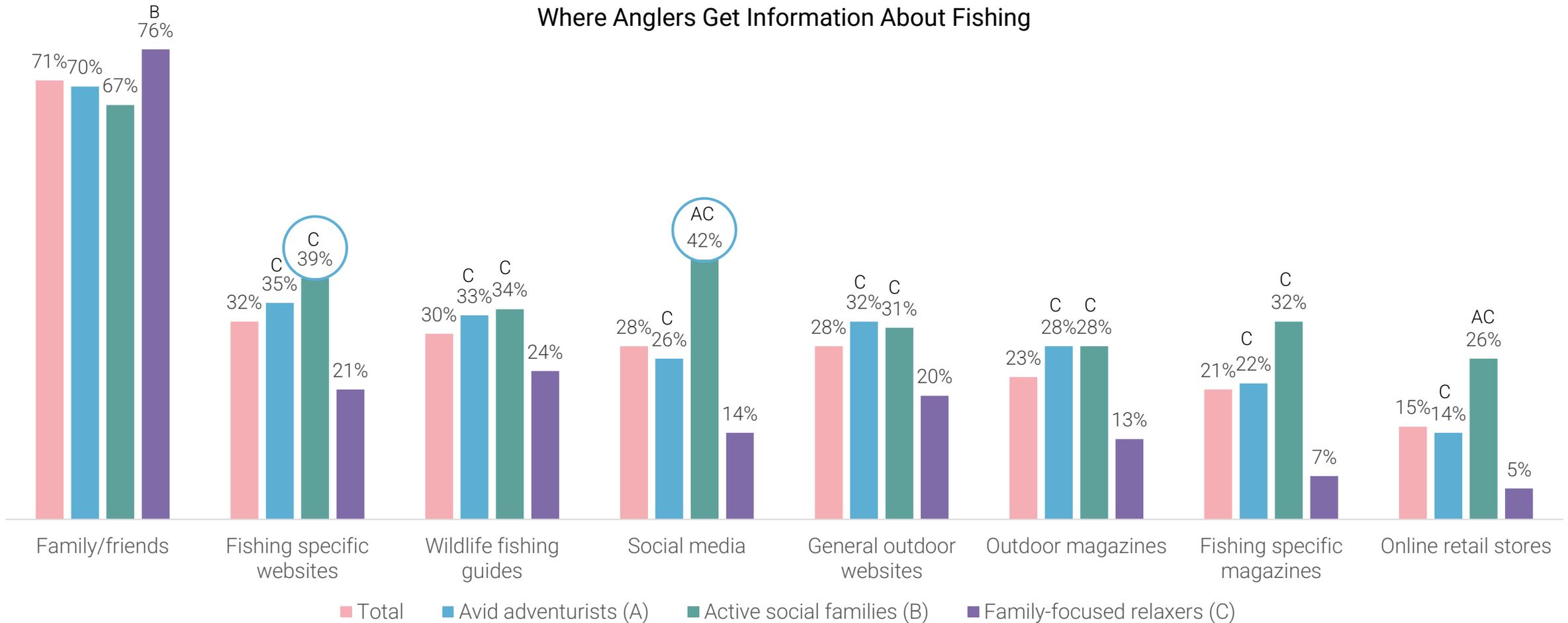
**2019 Total Numbers**

- The rules and regulations require it: 79%
- It's the right thing to do: 60%
- Enjoy funding a sport I'm passionate about: 36%
- Invested back into conservation: 40%

Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375  
 Q12. Which of the following are reasons why you have purchased/would purchase a fishing license?  
 A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Social media, as well as fishing-related websites, are key to reaching Active Social Families

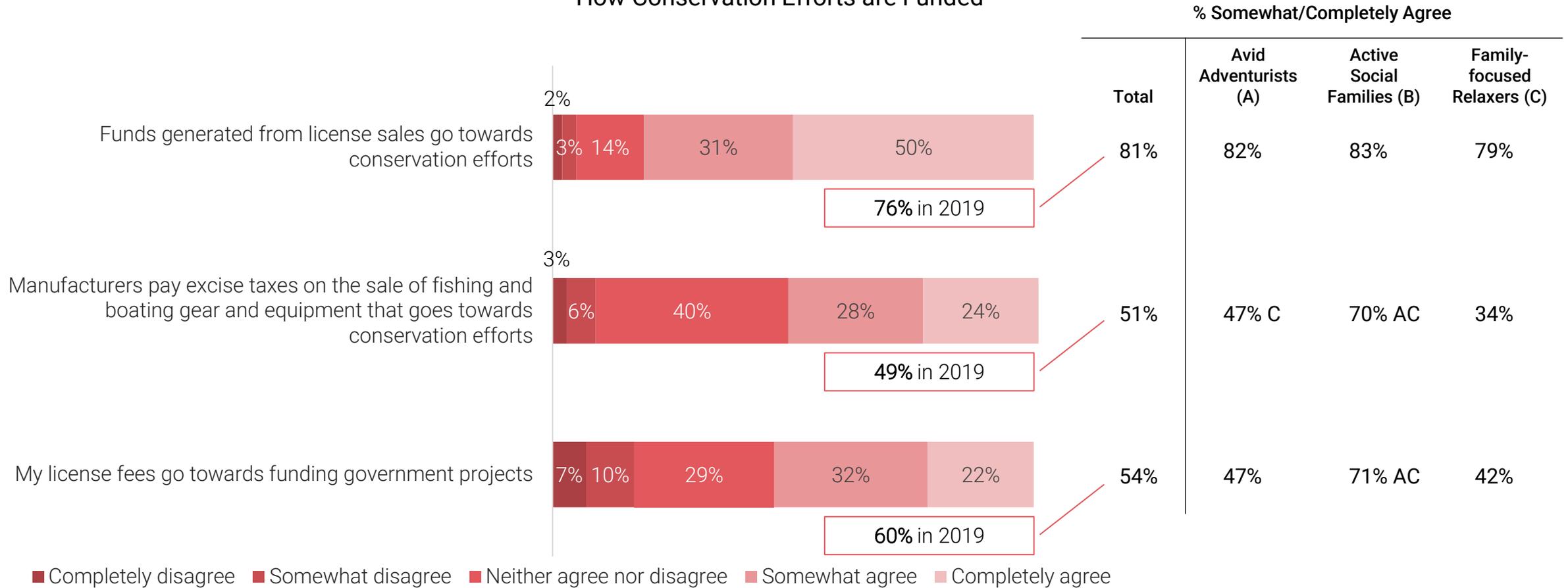
Where Anglers Get Information About Fishing



Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375  
 Q5. Where do you get your information about fishing (i.e., fish species, locations, instructions, etc.)?  
 A/B/C indicates significantly higher than the other group at the 95% confidence level.

# There is recognition that license fees go toward conservation; less so regarding the use of taxes paid by equipment manufacturers

How Conservation Efforts are Funded

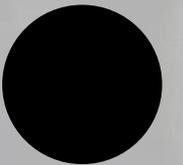


Base: Total Respondents; N=1500

Q11. To what extent do you agree or disagree with the following statements?

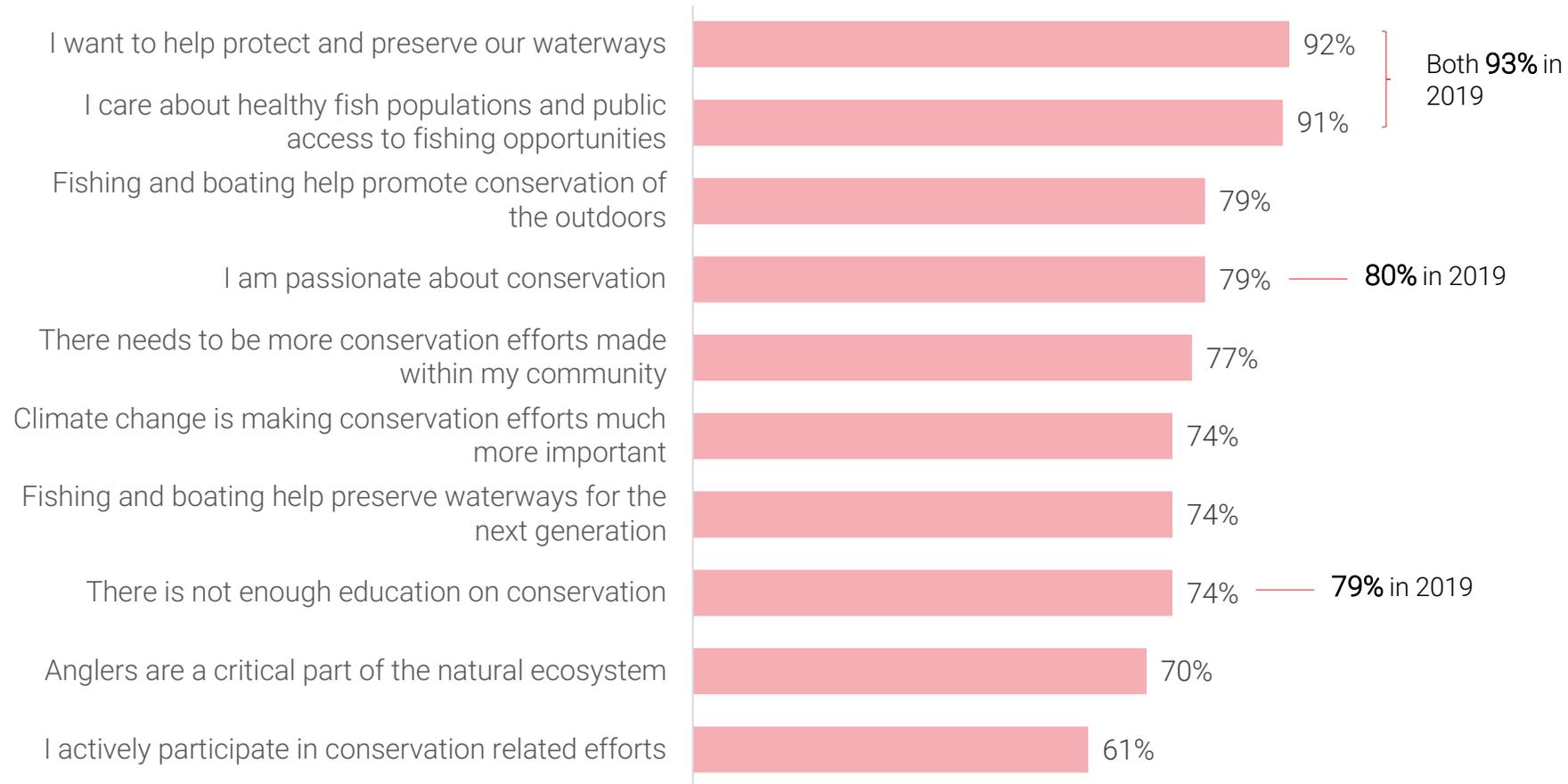
A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Conservation



# While conservation may not stand out as a driver of fishing, it consistently stands out as a concern among anglers

Attitudes Toward Conservation (Somewhat/Completely Agree)



Base: Total Respondents; N=1500

Q13. To what extent do you agree or disagree with the following statements? (Top 2 Box – Somewhat/Completely Agree)

# And conservation messages can be expected to resonate with Active Social Families who are more attuned to many aspects of conservation

Attitudes Toward Conservation (Somewhat/Completely Agree)			
	Avid adventurers (A)	Active social families (B)	Family-focused relaxers (C)
I want to help protect and preserve our waterways	94%	90%	93%
I care about healthy fish populations and public access to fishing opportunities	94% BC	90%	90%
Fishing and boating help promote conservation of the outdoors	78% C	86% AC	71%
I am passionate about conservation	82% C	84% C	68%
There needs to be more conservation efforts made within my community	73%	84% AC	74%
Fishing and boating help preserve waterways for the next generation	73% C	83% AC	66%
Climate change is making conservation efforts much more important	71%	82% AC	67%
Anglers are a critical part of the natural ecosystem	72% C	77% C	61%
I actively participate in conservation related efforts	62% C	77% AC	42%
There is not enough education on conservation	75%	72%	77%

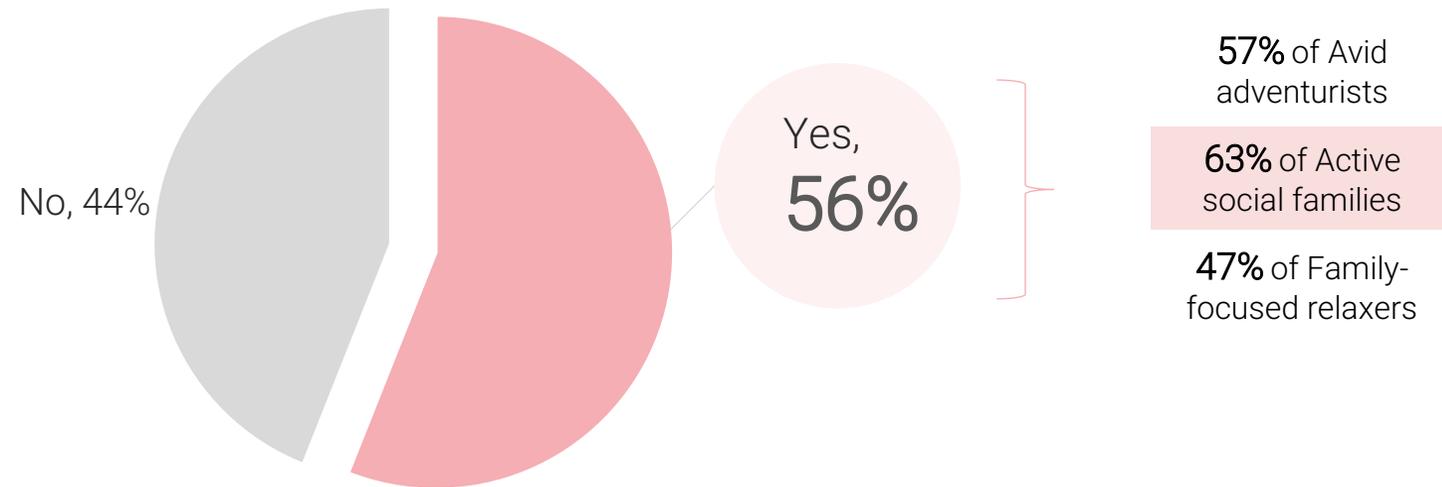
Base: Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375

Q13. To what extent do you agree or disagree with the following statements? (Top 2 Box – Somewhat/Completely Agree)

A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Yet many anglers are unaware that all license fees go toward conservation, even among Active Social Families who are most aware of this linkage

If Aware That All Fees Go Towards Conservation



# Anglers are unanimous in liking that all fees go towards conservation

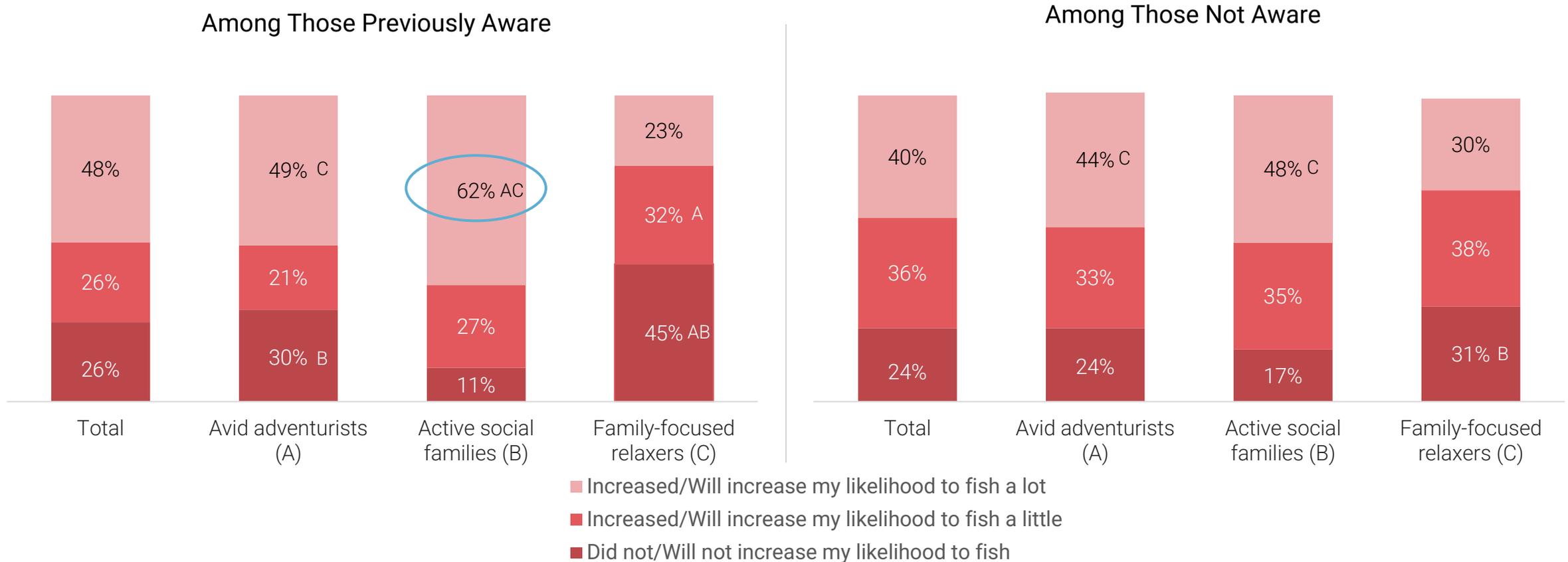
Like That All Licensing Fees Go Towards Conservation

**90%**  
like that all their  
licensing fees go  
towards conservation  
  
Similar rating in 2019 (91%)

Obeying The Law  
Love Outdoors Activities  
It's Helpful  
I'm Now Informed On Where The Fees Go  
Supports Fishing As A Sport So I Can Keep Enjoying It  
**Contributes Towards Conservation And Protection Of Nature**  
Save It For My Children And Future Generation  
Happy Knowing Money Spent For A Purpose  
Right Thing To Do Goes Back To The People And Community  
Gives More Information  
It's Safe And Secure

# And among Active Social Families, learning of the link between license fees and conservation has increased their likelihood to fish

Whether Knowledge that Fishing Contributes to Environmental Conservation Impacts Likelihood to Fish



Q16 Base: Those aware that all fees go towards conservation; N=860; Q16a Base: Those Not aware that all fees go towards conservation; N=640

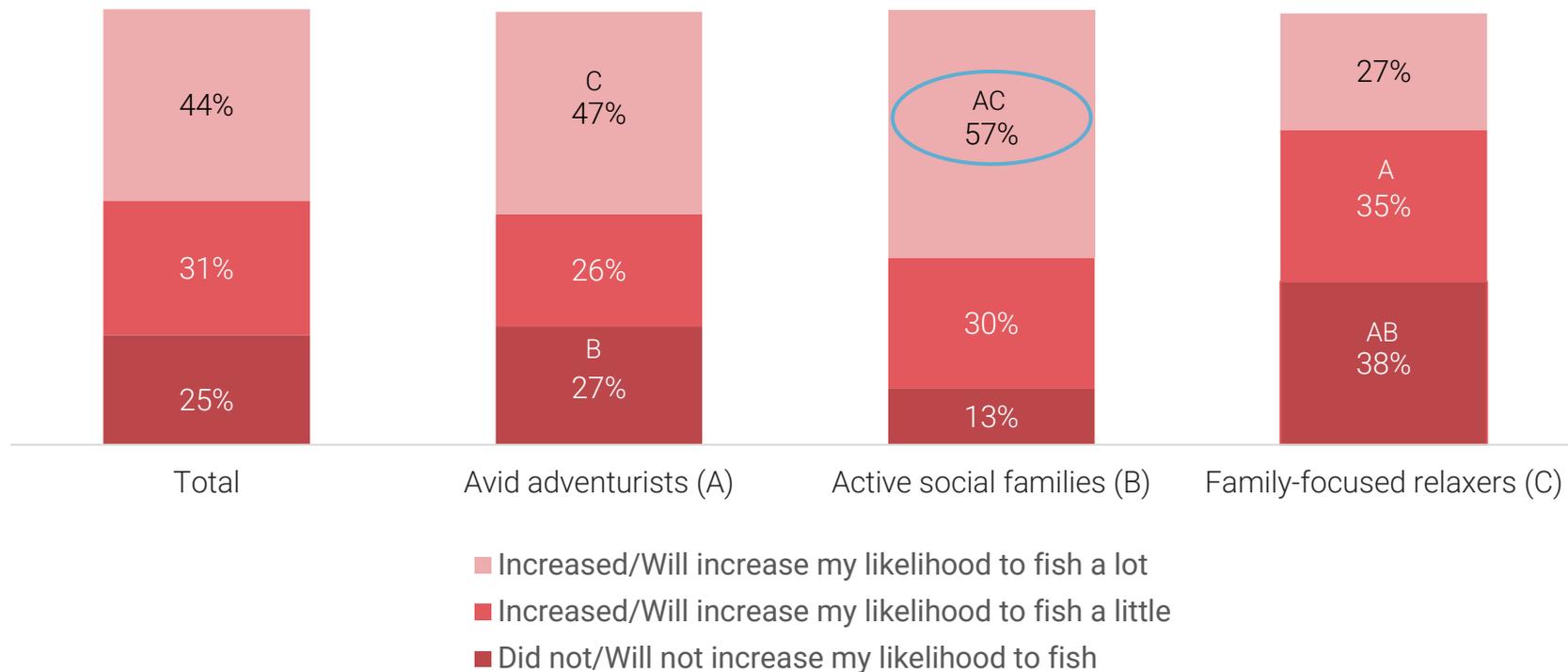
Q16. When you learned that fishing contributes to environmental conservation, did that knowledge increase your likelihood to fish?

Q16a. Does the knowledge that fishing contributes to environmental conservation increase your likelihood to fish?

A/B/C indicates significantly higher than the other group at the 95% confidence level.

# For most Active Social Families, regardless of their prior knowledge, the link between license fees and conservation has a positive impact on their likelihood to fish

Whether Knowledge that Fishing Contributes to Environmental Conservation Impacts Likelihood to Fish



Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375  
 Q16. When you learned that fishing contributes to environmental conservation, did that knowledge increase your likelihood to fish?  
 Q16a. Does the knowledge that fishing contributes to environmental conservation increase your likelihood to fish?  
 A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Despite their support of conversation, Active Social Families' engagement with fishing-related conservation efforts is mixed and needs to be encouraged

If Currently Participating in Any of the Following Conservation Efforts

		Avid Adventurists (A)	Active Social Families (B)	Family-focused Relaxers (C)
Dispose of trash properly	67%	77% B	49%	77% B
Practice catch and release	57%	67% BC	48%	59% B
Clean-up efforts in my community	46%	51% C	50% C	35%
Raise awareness among friends/family	39%	46% C	42% C	29%
Vote in local polls favoring conservation efforts	36%	43% BC	32%	35%
Sign petitions favoring conservation efforts	30%	34% B	27%	30%
Donate to organizations that help fund conservation efforts	26%	30% C	29% C	18%
Raise awareness online	18%	17% C	30% AC	6%
I do not participate in any fishing conservation efforts	11%	10%	9%	12%

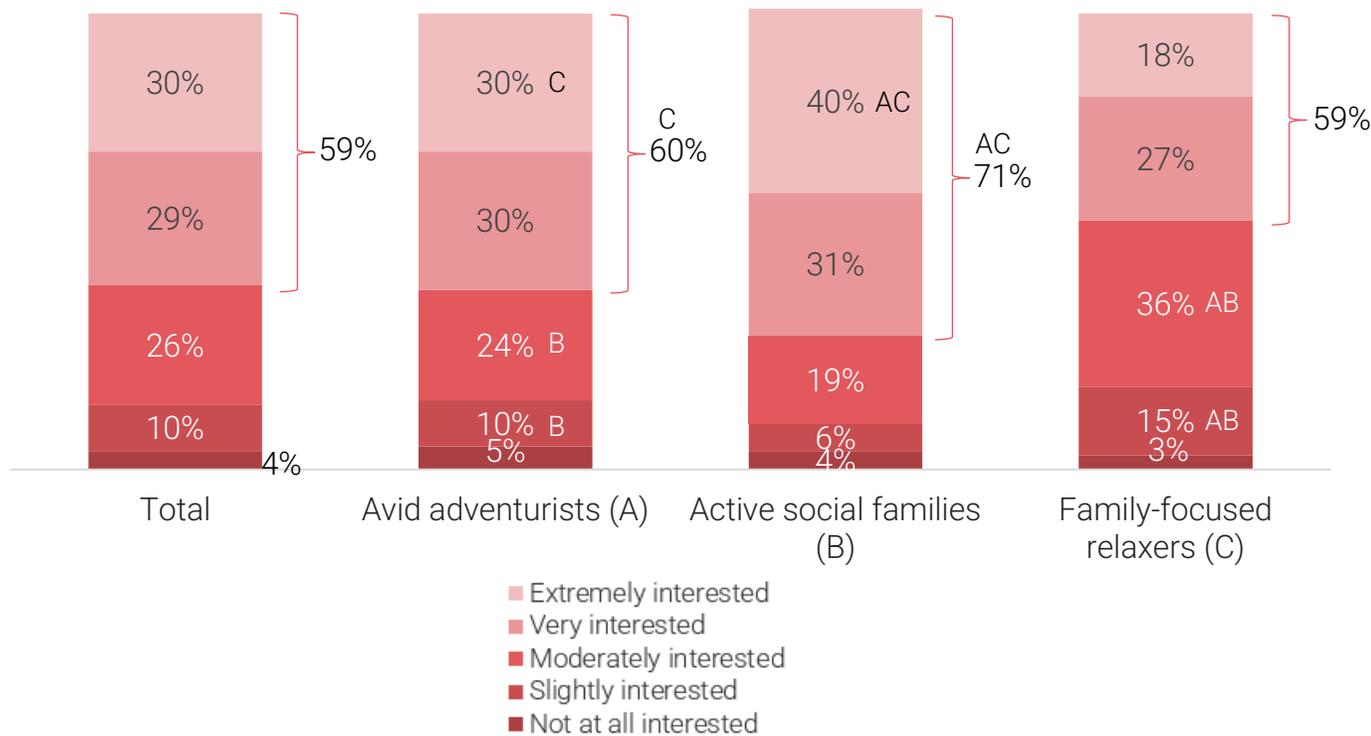
Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375

Q17. Do you currently participate in any of the following fishing conservation efforts?

A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Active Social Families are likely to be very open to learning more about conservation and sustainability efforts

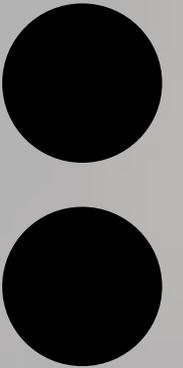
Interest in Learning About Conservation and Sustainability Efforts



**Millennials (65%) and Newbie/Beginner anglers (79%) are more likely to say they are very/extremely interested in learning about conservation and sustainability efforts.**  
Source: Top 2 Box

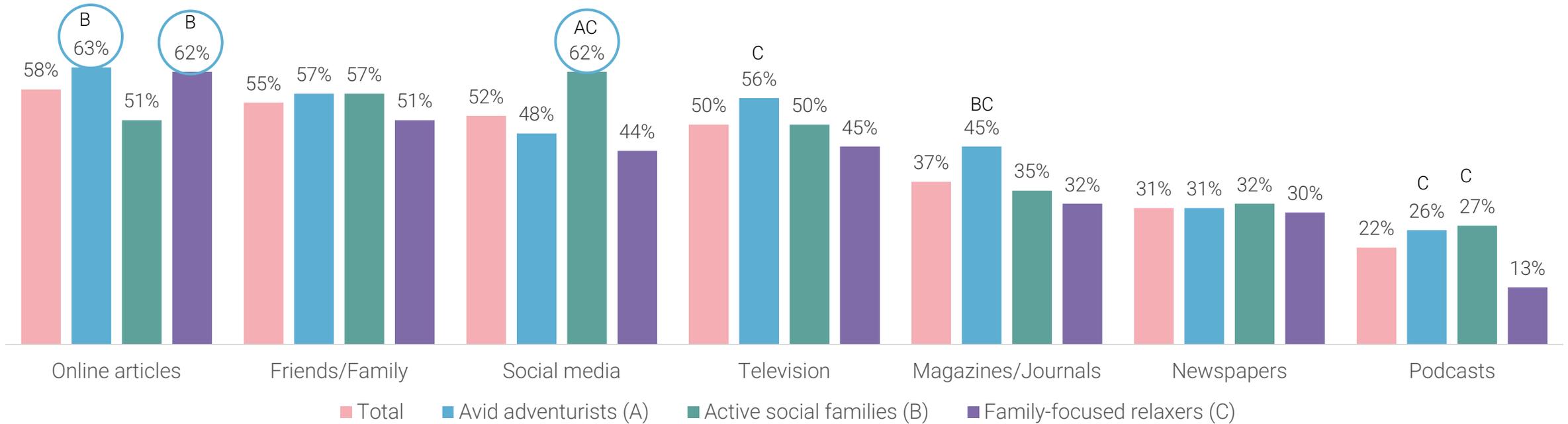
Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375  
Q18. How interested are you in learning about conservation and sustainability efforts?  
A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Media & Preferred Channels



# While Active Social Families are more likely to use social media, online articles emerge for other anglers as a key source of information regarding conservation

Platforms Used to Learn About Conservation and Sustainability Efforts

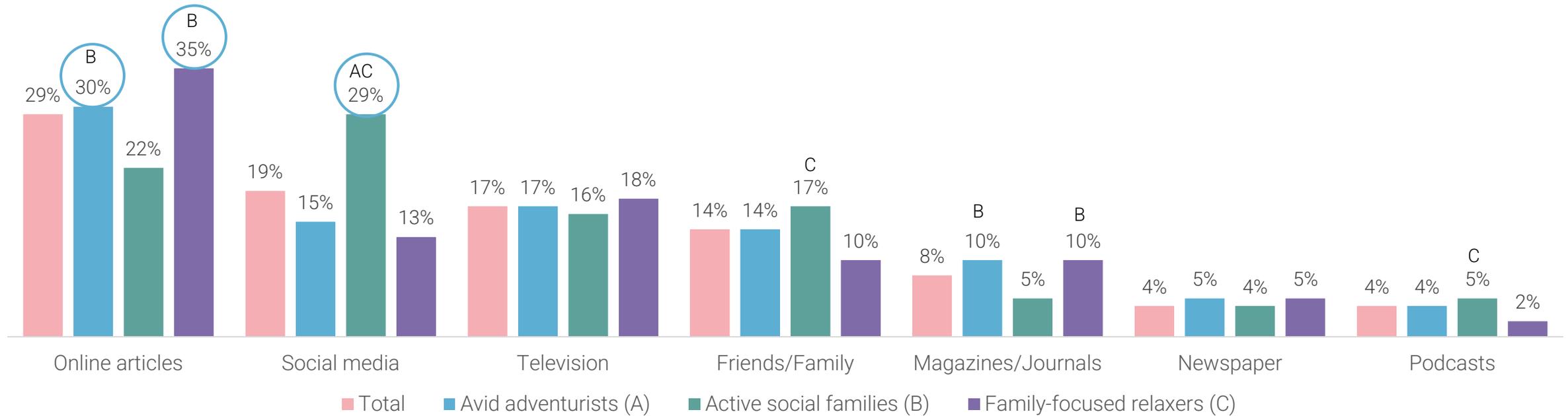


Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375; A/B/C indicates significantly higher than the other group at the 95% confidence level.

Q20. Which of the following do/would you use to learn about conservation and sustainability efforts?

# These same sources also represent the most preferred means of learning about conservation efforts

Preferred Platform to Learn About Conservation and Sustainability Efforts



Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375; A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Beyond the popular Facebook and YouTube platforms, Instagram stands out as a means of reaching many Active Social Families through social media

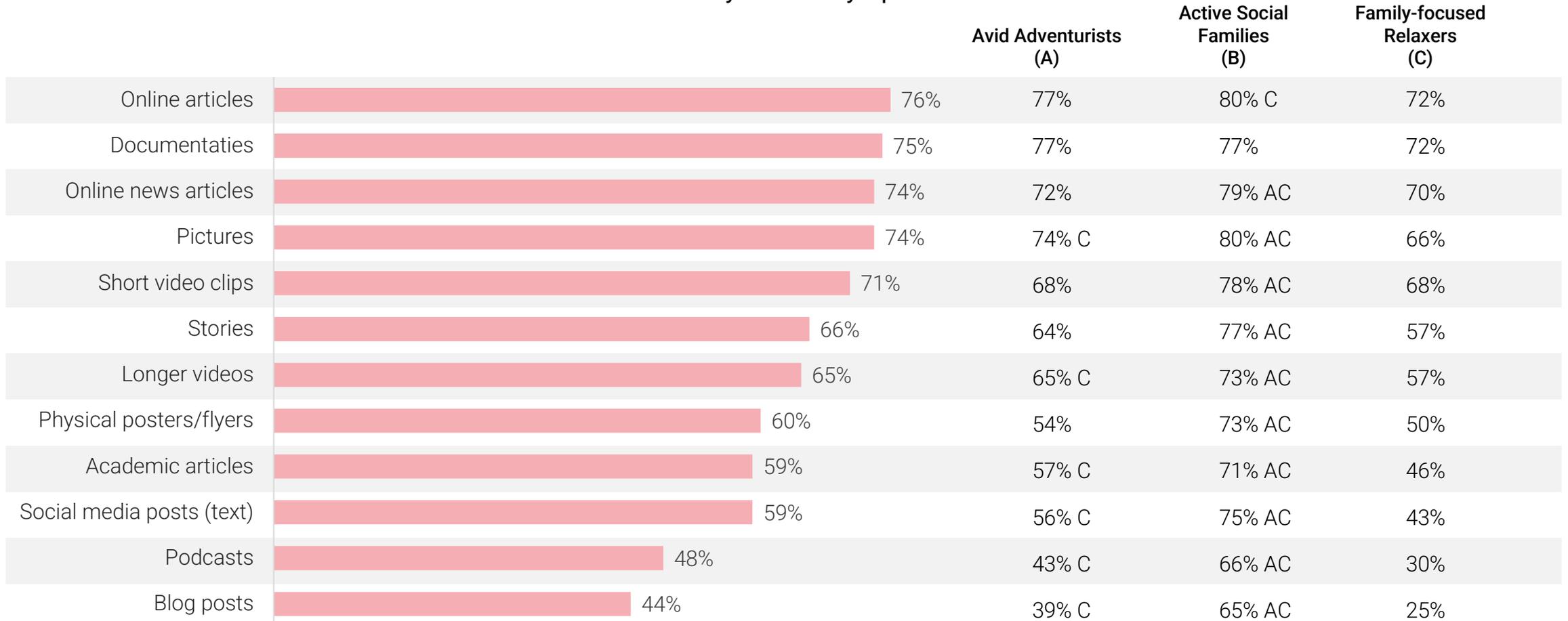
Social Media Platforms Used to Learn about Conservation

		Avid Adventurists (A)	Active Social Families (B)	Family-focused Relaxers (C)
Facebook	81%	80%	83%	77%
YouTube	75%	75%	77%	71%
Instagram	51%	46%	62% AC	39%
TikTok	38%	32%	48% AC	28%
Twitter	36%	34% C	44% AC	24%
Snapchat	24%	15%	36% AC	13%
Reddit	20%	21%	24% C	13%
WhatsApp	17%	7%	30% AC	6%
LinkedIn	17%	16%	23% AC	10%

Base: If use social media to learn about conservation and sustainability efforts; Total, N=809; Avid adventurers, N=179; Active social families, N=466; Family-focused relaxers, N=164  
 Q21. Which of the following social media platforms do/would you use to learn about conservation and sustainability efforts?  
 A/B/C indicates significantly higher than the other group at the 95% confidence level.

# While Active Social Families are open to all types of content, online news and information, documentaries, pictures, and video clips resonate best overall

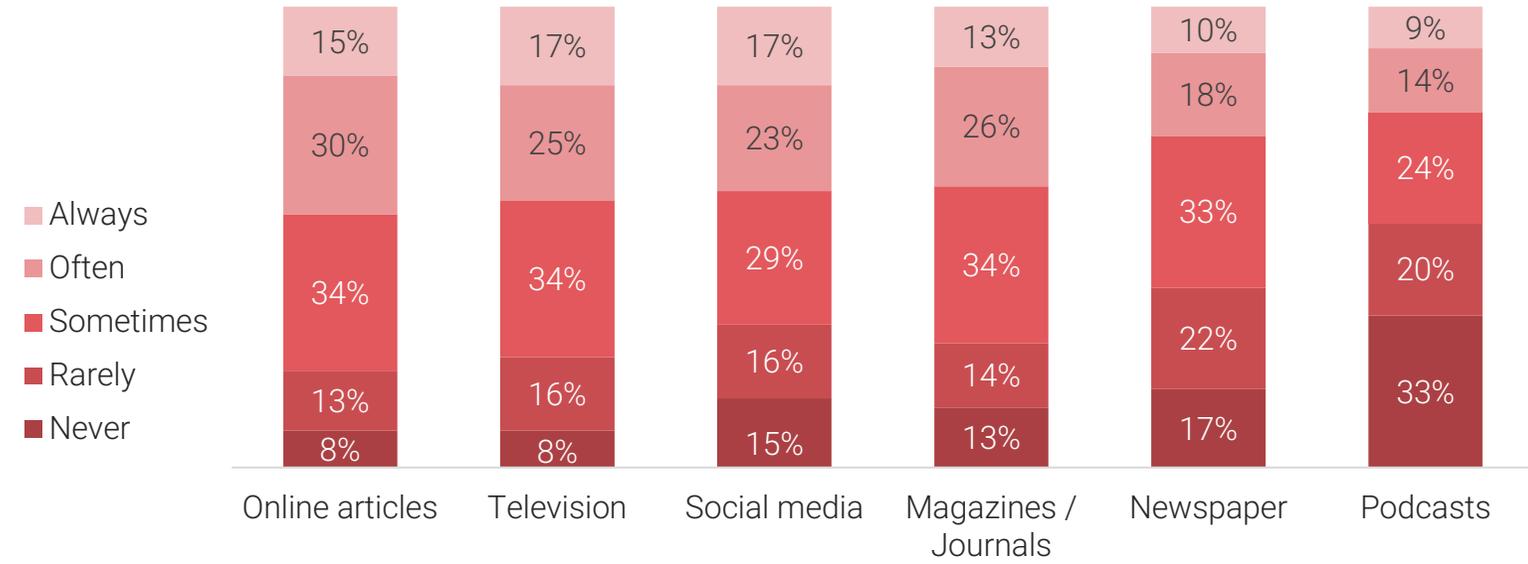
Openness To Learning About Conservation and Sustainability Through Different Types of Content  
% Very/Extremely Open



Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375;  
Q23. How open are you to learning about conservation and sustainability through each of the following types of content? – Top 2 Box  
A/B/C indicates significantly higher than the other group at the 95% confidence level.

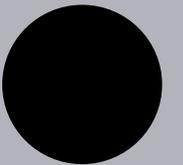
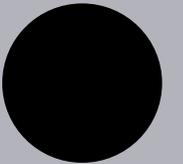
# Reflecting their preferred information sources, anglers claim to see conservation-related content most often online, least often via podcasts

Frequency of Seeing Content Related to Conservation & Sustainability



Both **Avid adventurers** and **Active social families** are more likely to see content related to conservation & sustainability on **every platform** than **Family-focused relaxers**.

# Regional Fishing & Licensing Metrics



# Anglers in the Midwest are most aware of the need for fishing licenses.

Is a License to Fish Required (% Yes)

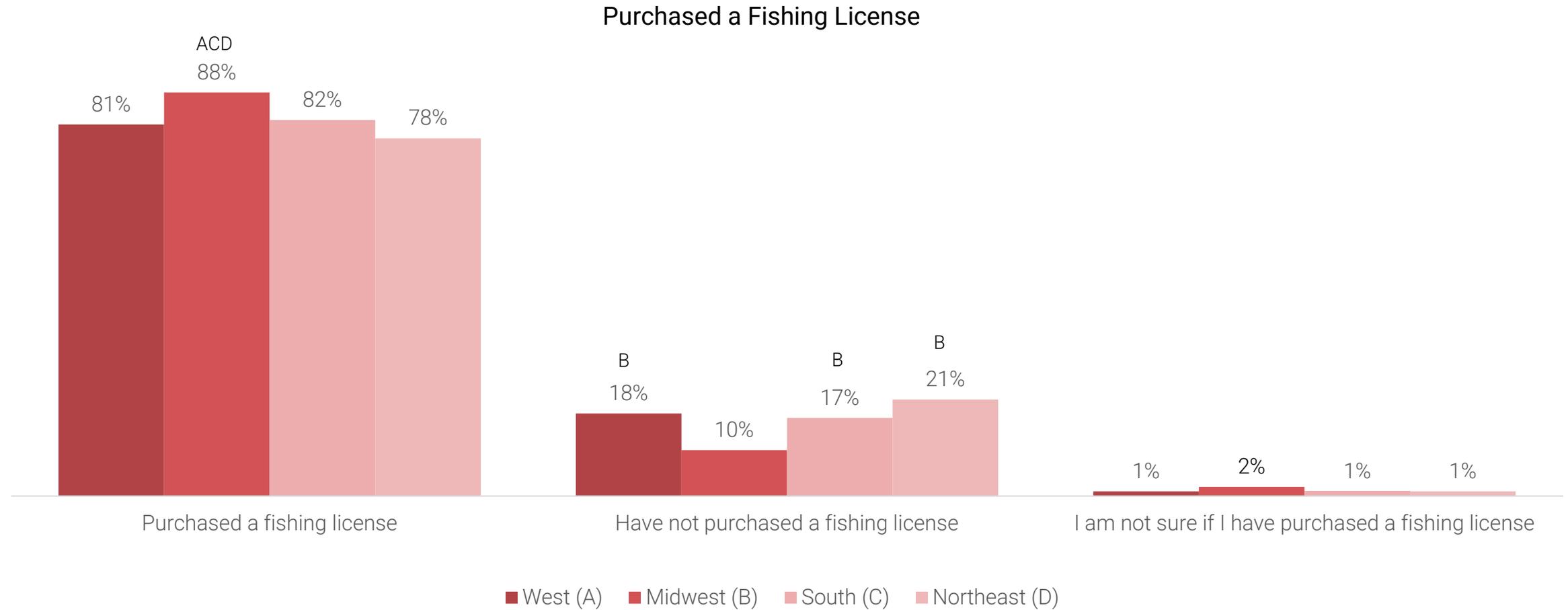


In the Midwest, both regions contribute to the high awareness of the need for fishing licenses. The broad Southern region is the most diverse, with the West South Central region most aware and the South Atlantic least aware.

Is a License to Fish Required?

Region	West		Midwest		South			Northeast
	Pacific (A)	Mountain (B)	WNC (C)	ENC (D)	WSC (E)	ESC (F)	S Atlantic (G)	NE/Mid Atlantic (H)
Yes, I need a license to fish	76%	84% G	86% AG	87% AFGH	87% AFGH	78%	72%	78%
No, I don't need a license to fish	17% ED	11%	11%	8%	9%	17% ED	21% BECD	17% ED
I am not sure	8%	5%	3%	5%	4%	4%	7%	5%

Most anglers have purchased fishing licenses; reflecting their higher awareness levels, anglers in the Midwest are most likely to have done so.



Q7. Have you ever purchased a fishing license?

Base: West, N=343; Midwest, N=306; South, N=637; Northeast, N=214

A/B/C/D indicates significantly higher than the other group at the 95% confidence level.

Anglers in the Western Pacific region are least likely to have purchased a license across the eight regions surveyed.

Purchased a Fishing License

Region	West		Midwest		South			Northeast
	Pacific (A)	Mountain (B)	WNC (C)	ENC (D)	WSC (E)	ESC (F)	S Atlantic (G)	NE/Mid Atlantic (H)
Purchased a fishing license	76%	87% AGH	92% AGH	86% AGH	85% A	85%	78%	78%
Have not purchased a fishing license	22% BCDE	12%	7%	12%	14%	15%	20% CD	21% BCD
I am not sure if I have purchased a fishing license	1%	1%	1%	3%	1%	1%	2%	1%

Most respondents purchase their license at a retail fishing or sporting goods store, or a bait & tackle shop; sporting goods stores are popular in the West while bait & tackle shops are popular in the Midwest and Northeast.

Location of Fishing License Purchase

Purchased license at sporting goods/retail store/bait & tackle			
West	Midwest	South	Northeast
82%	87%	83%	79%



While traditional outlets are popular in the broader Western region, those in the Pacific region tend also to purchase licenses online or at grocery stores.

Location of Fishing License Purchase

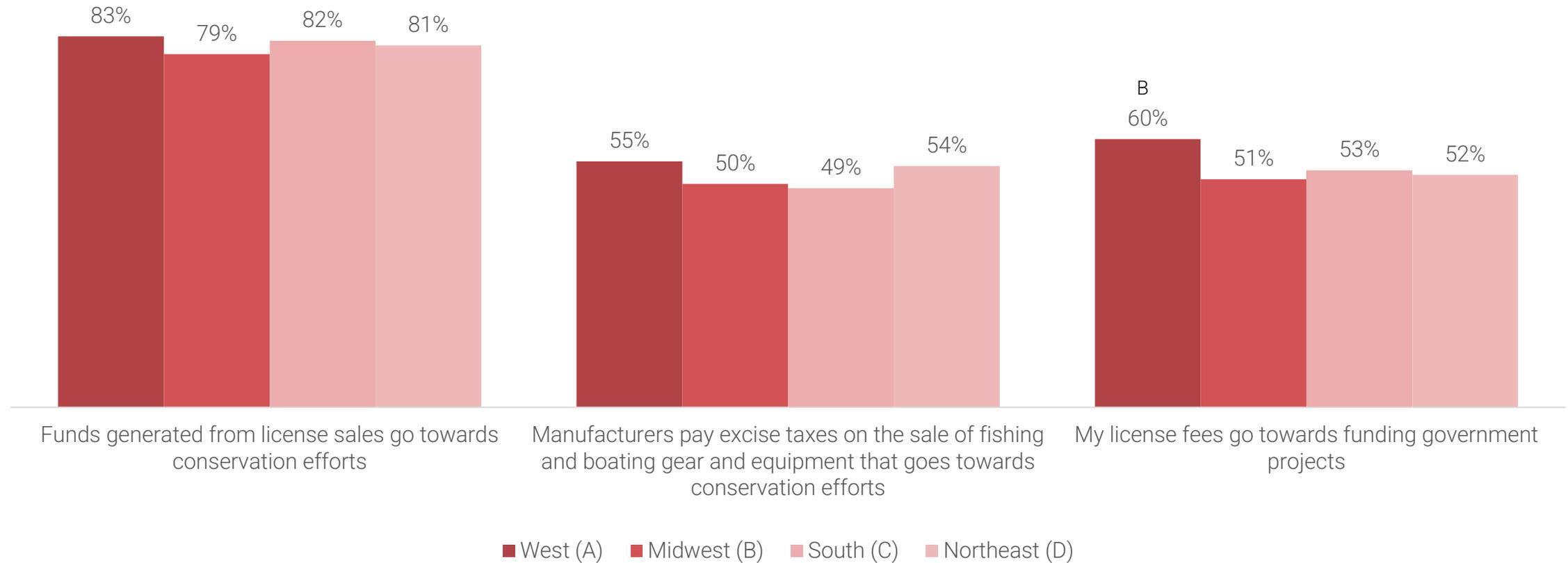
Region	West		Midwest		South			Northeast
	Pacific (A)	Mountain (B)	WNC (C)	ENC (D)	WSC (E)	ESC (F)	S Atlantic (G)	NE/Mid Atlantic (H)
Retail store that sells fishing equipment	45%	47%	50%	50%	57% AH	45%	49%	46%
Bait and tackle shop	30%	31%	41% E	41% EG	23%	41% EG	30%	39% E
Sporting goods store	40% DFG	43% DFGH	32%	21%	32% DG	27%	21%	30%
Online	33% BCDEFG	18%	16%	21%	18%	21%	23%	29% BCE
Grocery store	20% DEFGH	17% CDFG	10% G	8%	8%	6%	4%	9% G
Called a toll-free number	9% BEFG	1%	4%	7% B	2%	2%	4%	8% BEF
Other	3%	1%	6% B	3%	5%	3%	4%	7% B
<b>Net: Sporting goods/retail store/bait &amp; tackle</b>	<b>79%</b>	<b>86%</b>	<b>86%</b>	<b>87%</b> G	<b>87%</b>	<b>85%</b>	<b>79%</b>	<b>79%</b>

Q8. Where did you purchase your fishing license?

38 Base: If ever purchased a fishing license; Pacific, N=167; Mountain, N=106; WSC, N=166; WNC, N=90; ESC, N=106; ENC, N=176; S Atlantic, N=242; NE/Mid Atlantic, N=166  
A/B/C/D/E/F/G/H indicates significantly higher than the other group at the 95% confidence level.

# The majority of anglers across the broader regions are aware that license sales go toward conservation efforts.

Agreement Statements (T2B % Somewhat/Completely Agree)



Q11. Before you go fishing, you do need a license. Please indicate how much you agree or disagree with each statement.

Base: West, N=343; Midwest, N=306; South, N=637; Northeast, N=214

A/B/C/D indicates significantly higher than the other group at the 95% confidence level.

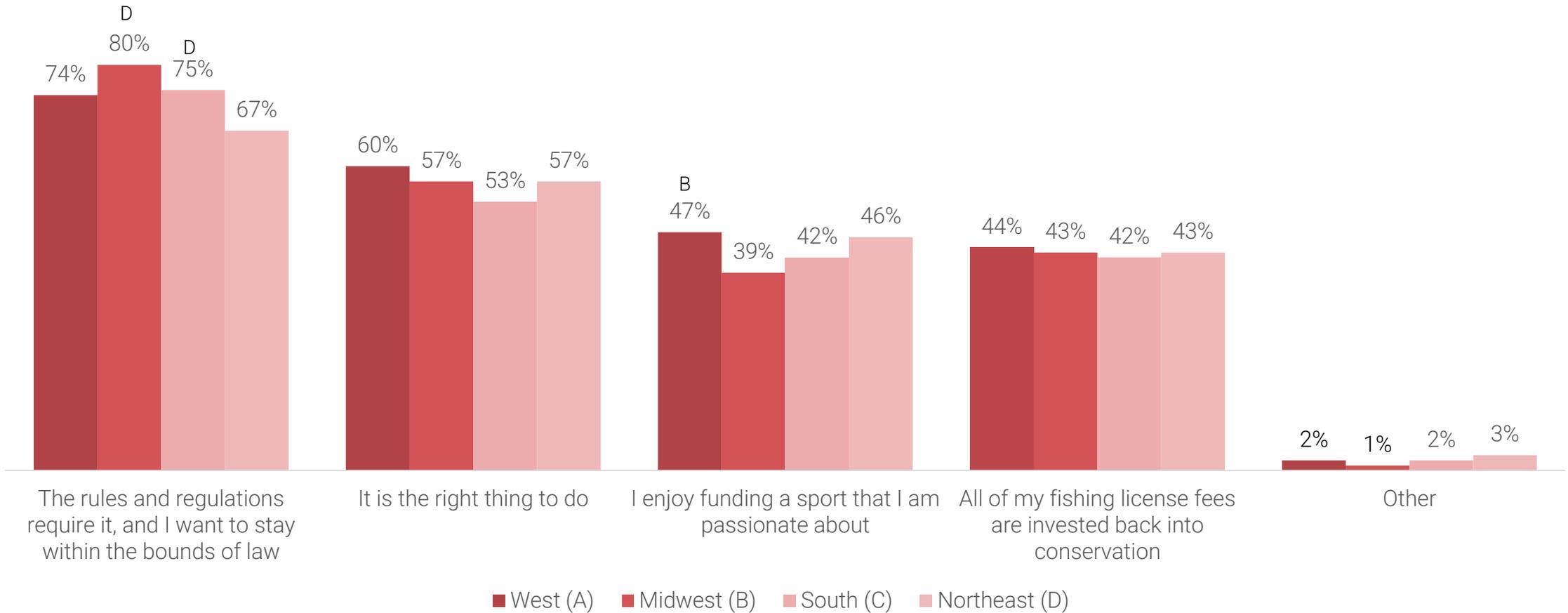
In the West, respondents in the Pacific region are more likely to believe their fishing license fees go toward funding government projects and that, in part, manufacturers fund conservation efforts through sales of fishing equipment.

Agreement Statements (T2B % Somewhat/Completely Agree)

Region	West		Midwest		South			Northeast
	Pacific (A)	Mountain (B)	WNC (C)	ENC (D)	WSC (E)	ESC (F)	S Atlantic (G)	NE/Mid Atlantic (H)
Funds generated from license sales go towards conservation efforts	82%	84%	79%	79%	85%	79%	82%	81%
Manufacturers pay excise taxes on the sale of fishing and boating gear and equipment that goes towards conservation efforts	61% BDFG	45%	52%	50%	51%	46%	50%	54%
My license fees go towards funding government projects	62% DEFH	56%	54%	50%	47%	51%	58% E	52%

# Motivations for purchasing fishing licenses are similar across regions, with rules and regulations requiring it being mentioned most often

Reasons Purchased Fishing License



Q12. Which of the following are reasons why you have purchased/would purchase a fishing license?

Base: West, N=343; Midwest, N=306; South, N=637; Northeast, N=214

A/B/C/D indicates significantly higher than the other group at the 95% confidence level.

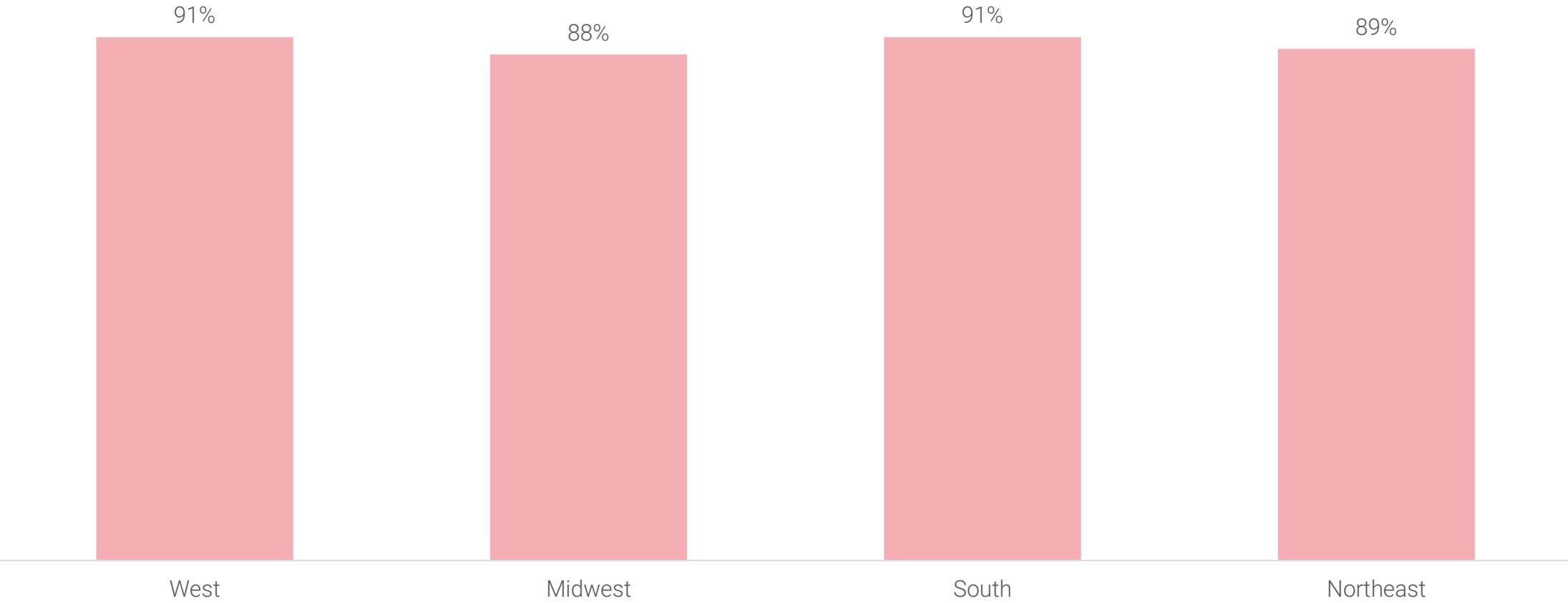
Respondents in the East North Central region hold the strongest views regarding the need to purchase a fishing license because the rules and regulations require it.

Reasons Purchased Fishing License

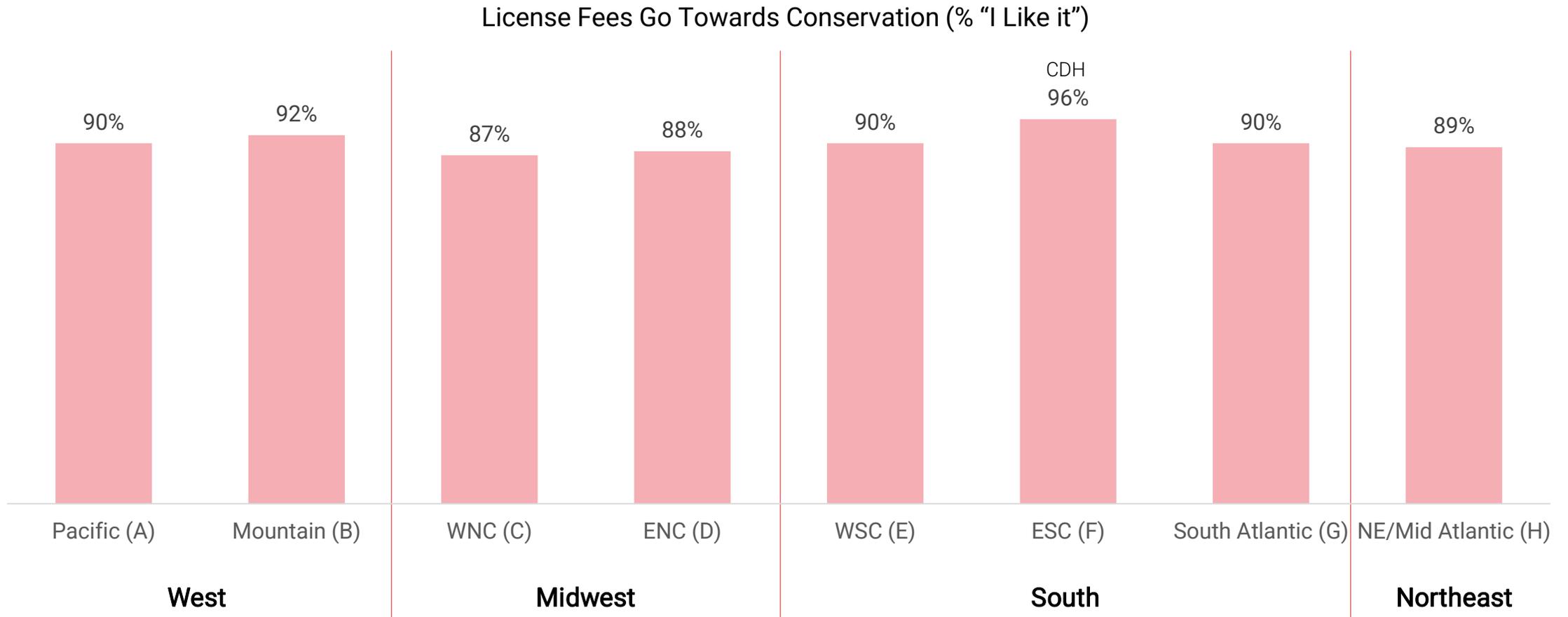
Region	West		Midwest		South			Northeast
	Pacific (A)	Mountain (B)	WNC (C)	ENC (D)	WSC (E)	ESC (F)	S Atlantic (G)	NE/Mid Atlantic (H)
The rules and regulations require it, and I want to stay within the bounds of law	76%	70%	73%	83% BCGH	80% BGH	80% GH	69%	67%
It is the right thing to do	61%	58%	60%	56%	52%	58%	52%	57%
I enjoy funding a sport that I am passionate about	49% DG	43%	41%	37%	46%	46%	38%	46%
All of my fishing license fees are invested back into conservation	46%	41%	45%	42%	39%	53% EG	39%	43%
Other	2%	2%	-	1%	2%	2%	2%	3%

Virtually all anglers, regardless of region, like knowing their license fees go towards conservation.

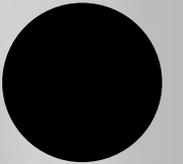
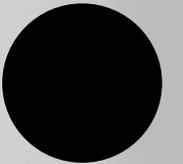
License Fees Go Towards Conservation (% "I Like it")



Anglers in the East South-Central region especially like that license fees go towards conservation.



# Appendix



# Sources Used to Access Information About Current Events

Sources Used to Access Information About Current Events				
	Total	Avid adventurers (A)	Active social families (B)	Family-focused relaxers (C)
Friends/Family	64%	67%	62%	63%
Television	58%	60%	56%	59%
Social media	58%	53%	68% AC	51%
Online articles	55%	58% B	49%	58% B
Newspapers	34%	35%	34%	32%
Magazines/Journals	30%	33%	31%	27%
Podcasts	21%	21%	26% AC	15%

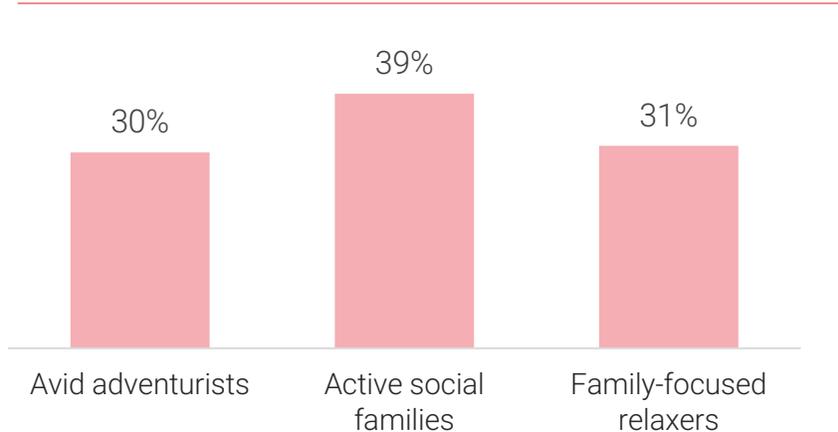
Base: Total Respondents; N=1500; Avid adventurers, N=375; Active social families, N=750; Family-focused relaxers, N=375; A/B/C indicates significantly higher than the other group at the 95% confidence level.

Q19. Which of the following do you use to access information on current events?

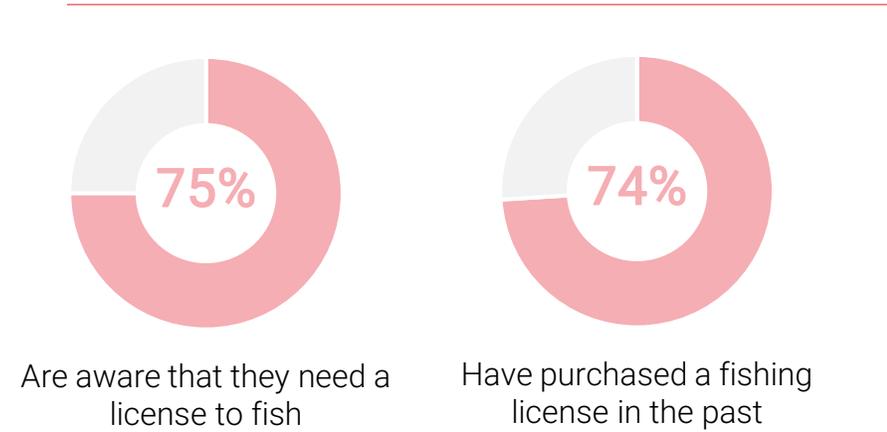
A/B/C indicates significantly higher than the other group at the 95% confidence level.

# Hispanic Spotlight: While awareness of the need to purchase licenses is slightly lower, Hispanic anglers generally mirror the behavior of all anglers

Segment Breakdown



Fishing License Awareness & Purchase



If Aware That All Fees Go Towards Conservation

**53%**  
Aware that all fees go towards conservation

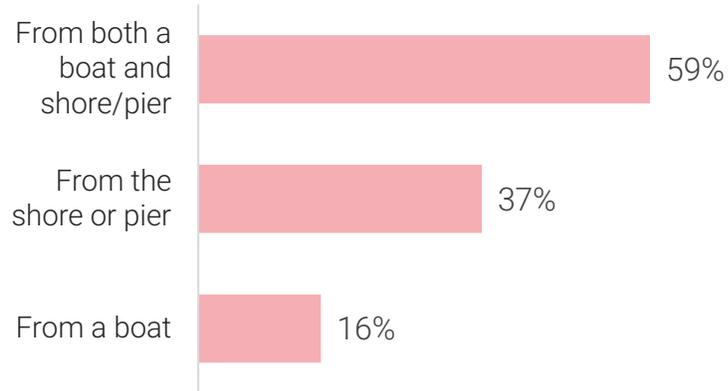
Top 3 Social Media Platforms Used to Learn about Conservation & Sustainability Efforts



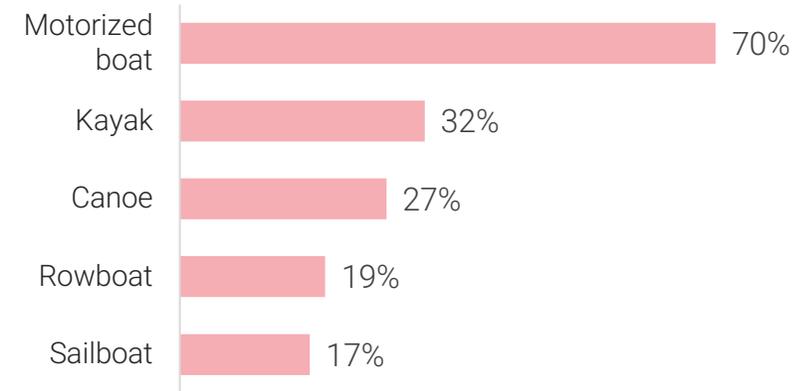
Base H13/Q6/Q7/Q14a: Total Hispanic Respondents, N=311 | Base Q21: Hispanic respondents who use social media to learn about conservation and sustainability efforts, N=182  
 H13. Segments; Q6. Do you know if you need to have a license to fish?; Q7. Have you ever purchased a fishing license? Q14a. Before today, were you aware that all the fees go towards conservation?; Q21. Which of the following social media platforms do/would you use to learn about conservation and sustainability efforts?

# Boater Profile

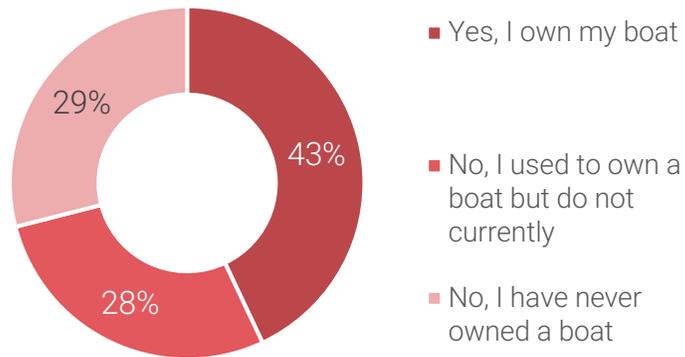
Ways Respondents Fish (Among Total)



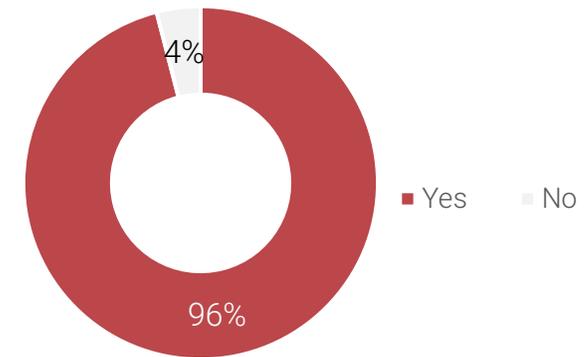
Types of Boats Owned (Among Boat Owners)



Current Boat Ownership (Among Those Participating in Boating)



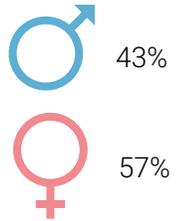
Is Boat Used to Fish? (Among Boat Owners)



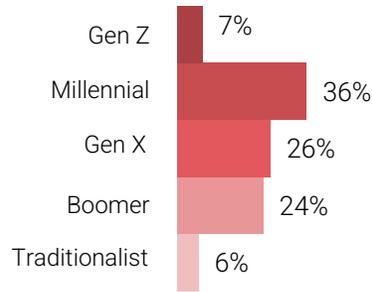
Base S15: Total Respondents, N=1500; Base S16: Participated in Boating/Canoeing or Kayaking, N=891; Base S17/S18: Currently owns a boat, N=402  
 S15. Which way do you typically fish? | S16. You previously mentioned you participate in boating. Do you currently own a boat?  
 S17. What type of boat do you own? | S18. Do you use the boat you own to fish?

# Demographic breakdown

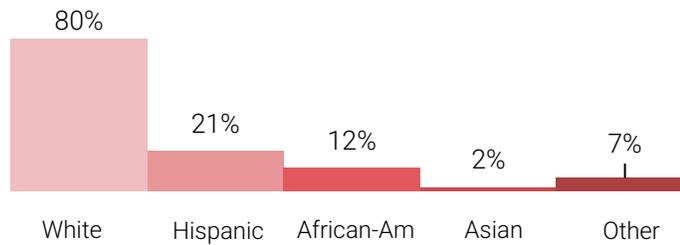
## Gender Split



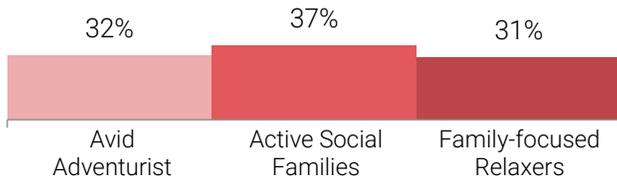
## Age Distribution



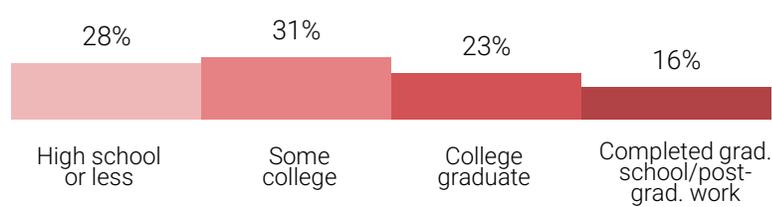
## Ethnicity



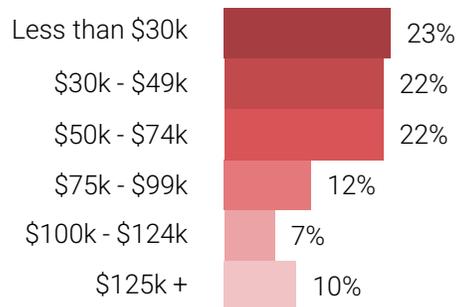
## Segments



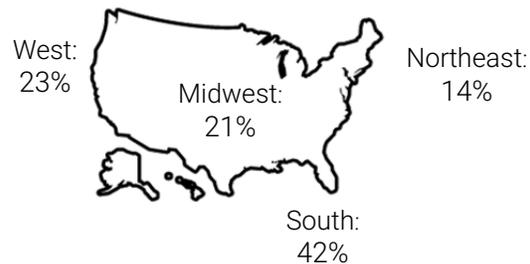
## Education Status



## Household Income



## Geography



## Living Status

Married/Partnered	46%
Single/Never married	23%
Divorced/Separated	14%
Not married but living with significant other	11%
Widowed	5%

## Number of Children Living in HH

None	59%
Have Children	41%
Children between 0-5	17%
Children between 6-11	22%
Children between 12-17	23%

## Employment Status

Full Time	47%
Retired	23%
Part Time	11%
Full-time homemaker	5%
Looking/Unemployed	4%
Student	2%
Not employed/Prefer not to answer	8%

# Key Audience Comparison

Demographics	2023 (A)	2019 (B)	2015 (C)
Total sample size	N=1500	N=1500	N=750
Avid Adventurists	32%		
Active Social Families	37%	NA	NA
Family-focused Relaxers	31%		
Family Outdoor		50%	50%
Outdoor Enthusiast	NA	50%	50%
Beginner		67%	70%
Avid	NA	33%	30%
Boater	25% B	5%	24% B
Hispanic	21% BC	14% C	8%
Male	43%	50% A	58% AB
Female	57% BC	50% C	42%
HH Income under \$75k	67% C	67% C	47%
Northeast	14%	19% A	16%
Midwest	21%	25% A	26% A
South	42%	40%	39%
West	23% BC	16%	19%

Base: Total Respondents; 2023, N=1500; 2019, N=1500; 2015, N=750

A/B/C indicates significantly higher than the other group at the 95% confidence level.