



Recreational Boating & Fishing Foundation (RBFF)

2013

Take Me Fishing

General Population  
Briefing



## *Project Scope and Objectives*

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The purpose of this research effort is to evaluate the effect of the Take Me Fishing (TMF) Integrated Marketing Campaign and includes the following components:

- ✓ General Market campaign evaluation
- ✓ Disney/TMF campaign evaluation
- ✓ Hispanic audience survey

The effect of TMF campaign was evaluated by measuring changes in:

- ✓ “Brand” awareness and perceptions of boating and fishing
- ✓ Awareness, recall and effect (e.g., future intention to go fishing, plan fishing trips) of TMF campaign advertising and marketing communications
- ✓ Category behavior and attitudes, including the purchase of a boating registration or fishing license, ownership of fishing equipment, and fishing/boating activities in past 24 months
- ✓ Influence of TMF advertising on the decision to go fishing or boating



An online survey was conducted between September 5<sup>th</sup> - September 13<sup>th</sup>, 2013.

In the same method as last year, this year's evaluation was conducted among a sample of the general public, representative of the target audience of the TMF campaign using the Survey Sampling International Panel. This sample was composed of 1,654 adults who practiced outdoor activities at least once per year and are between the ages of 25 to 54 with annual household incomes that fall within the range from \$50,000 to \$150,000. The data were weighted to ensure representation of 70% males and 30% females.

The audience included those who may be considered:

- ✓ Lapsed Anglers (n=69, 4%)
- ✓ Occasional Anglers (n=341, 21%)
- ✓ Family Outdoors (n=984, 60%)
- ✓ Outdoor Enthusiasts (n=668, 40%)



## Executive Summary: Print Campaign Effects

Exposure to the TMF print campaign was found to have a positive effect on the stated likelihood to go fishing, take someone fishing, and go boating for the purpose of fishing. Regression analysis that examined differences between those who recall the TMF print advertisements and those who did not, reveals:

- ✓ Respondents who recall a TMF **Print ad** are significantly more likely than those who do not recall a TMF **Print ad** to indicate that in the next 12 months they intend to:

Intentions in the Next 12 months	Number of Times		
	2013	2012	2011
Go fishing	1.7	1.7	2.0
Take someone else fishing	1.7	1.7	2.0
Go boating for the purpose of fishing	1.9	1.9	2.2
Visit the TMF website	1.6	1.7	1.9

*\* These results are statistically significant based on regression analysis and/or t-test.*

- ✓ The TMF print campaign appears to have a positive effect on each of the campaign's objectives. This year's print ads measures shows almost no changes compared to the 2012 impacts.



## Executive Summary: Radio and TV Campaign Effects

- ✓ Similarly, respondents who recall hearing a Disney Radio ad or a Disney Television ad are significantly more likely to:

### Disney Radio ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	1.6
Take someone else fishing	1.7
Go boating for the purpose of fishing	1.8
Visit the TMF website	1.6

### Disney Television ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	1.8
Take someone else fishing	1.7
Go boating for the purpose of fishing	1.9
Visit the TMF website	1.5

*\* These results are statistically significant based on regression analysis and/or t-test.*

- ✓ These findings show that the TMF Disney integrated marketing campaign has a positive effect on each of the campaign objectives across all advertising mediums.



## Executive Summary: Online Campaign Effects

Exposure to the TMF Online campaign was found to have a positive effect on the stated likelihood to go fishing, take someone fishing, go boating for the purpose of fishing, and visiting the TMF website. Regression analysis that examined differences between those who recall the TMF Online advertisements and those who did not, reveal:

- ✓ Respondents who recall a TMF **Online ad** are significantly more likely than those who do not recall a TMF **Online ad** to indicate that in the next 12 months they intend to:

### Disney Online ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	2.1
Take someone else fishing	2.1
Go boating for the purpose of fishing	2.1
Visit the TMF website	1.9

### General Online ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	2.3
Take someone else fishing	2.3
Go boating for the purpose of fishing	2.4
Visit the TMF website	1.9

*\* These results are statistically significant based on regression analysis and/or t-test.*

- ✓ The TMF online marketing campaign appears to have a positive effect on each of the campaign's objectives.



# Campaign Outcomes





## Campaign Outcome: Take Me Fishing Brand Awareness

Among survey respondents who recall seeing, hearing or reading an advertisement for any outdoor leisure or recreational activities within the last year, 34% recalled the phrase “Take Me Fishing” in an advertisement, as a slogan, or as the name of a website -- an increase of 3 percentage points from last year (31% in 2012 versus 34% in 2013).

- ✓ Across the different audience groups, the Family Outdoor group show the highest level of the TMF phrase recall (40%), and Occasional Anglers show the second highest level of recall (30%).

Q11. Can you recall ever seeing, hearing or reading the phrase “Take Me Fishing” in an advertisement, as a slogan or as the name of a website?

Brand Awareness	2010	2011	2012	2013
<b>Interest in outdoors</b>	<b>10%</b>	<b>18%</b>	<b>31%</b>	<b>34%</b>
Lapsed Anglers	-	-	-	14%
Occasional Anglers	-	-	-	30%
Family Outdoors	-	-	-	40%
Outdoor Enthusiasts	-	-	-	25%

While a small number of respondents provided (on an unaided basis) the name of a specific website in answer to whether they recalled seeing any boating or fishing advertisement mentioning a website, [www.takemefishing.org](http://www.takemefishing.org) was in the top three websites mentioned along with Cabela’s and Bass Pro.





## Campaign Outcome: Take Me Fishing Logo Awareness

Awareness of the TMF logo increased slightly from 2012 to 2013. Nearly half of respondents with an interest in outdoors (47%) recall the logo, a slight increase from 2012 (46%).

- ✓ Over half (53%) of the respondents in the Family Outdoors group recall the TMF logo.
- ✓ Almost half (45%) of those in the Occasional Anglers group recall the logo.

Q13. Before today, have you ever seen this logo?

Logo Awareness	2010	2011	2012	2013
<b>Interest in outdoors</b>	<b>10%</b>	<b>20%</b>	<b>46%</b>	<b>47%</b>
Lapsed Anglers	-	-	-	23%
Occasional Anglers	-	-	-	45%
Family Outdoors	-	-	-	53%
Outdoor Enthusiasts	-	-	-	38%



## Campaign Outcome: Overall Advertising Recall

At the end of the 2013 Take Me Fishing campaign the levels of TMF print, TV, radio, and banner ad advertising recall reached the following proportions:

Q15, 34, 44, 53, 59. Before today, have you ever seen this advertisement or one just like it?

Year	Advertising Recall	Print	Direct Mail	TV	Radio	General Banner Ads	Disney Banner Ads
2013	Interest in outdoors	18%	NA	19%	18%	14%	15%
2012	Interest in outdoors	14%	25%	16%	11%	15%	NA
2011	Interest in outdoors	2%	3%	4%	5%	NA	NA

NA = Not Asked

Respondents had higher recall levels in 2013 than in 2012 and 2011, with the exception of the General Online ads, which had a 1% decrease in awareness. Radio ads experienced the largest increase – from 11% recall in 2012 to 18% in 2013.



## Campaign Outcome: Advertising Recall by Segments

The Family Outdoors group shows the highest recall across all of the ad sources, and especially TV and Radio. The Online ads (both General and Disney) show the lowest recall levels among respondents.

*Q15, 34, 44, 53, 59. Before today, have you ever seen this advertisement or one just like it?*

Advertising Recall	Print	TV	Radio	General Banner Ads	Disney Banner Ads
Lapsed Anglers	4%	13%	9%	4%	4%
Occasional Anglers	15%	17%	19%	13%	14%
Family Outdoors	22%	23%	23%	18%	18%
Outdoor Enthusiasts	12%	13%	9%	9%	11%



Between 2012 and 2013, an increasing number of respondents recall seeing the phrase “Take Me Fishing” online and/or hearing the phrase in a radio advertisement. More than half of the respondents recall the phrase from television and/or the internet/online. Nearly half (48%) recall the phrase from a magazine advertisement.

Relatively few (13%) recall the TMF phrase from a postcard, despite no direct mailings in 2013. This may indicate continuity in recalling the phrase from direct mailings in previous years.

Q12. Do you recall the phrase “Take Me Fishing” from . . . ?

Source of TMF Recall	2010	2011	2012	2013	Difference 2012 to 2013
Television advertising	NA	42%	60%	60%	0%
Magazine advertising	41%	52%	55%	48%	(7%)
The internet / online	37%	52%	49%	54%	5%
Part of a campaign to promote fishing and boating activities	54%	54%	47%	49%	2%
Radio Advertising	34%	39%	30%	35%	5%
A postcard you received through the mail	13%	13%	15%	13%	(2%)
Something else?	36%	27%	14%	17%	3%



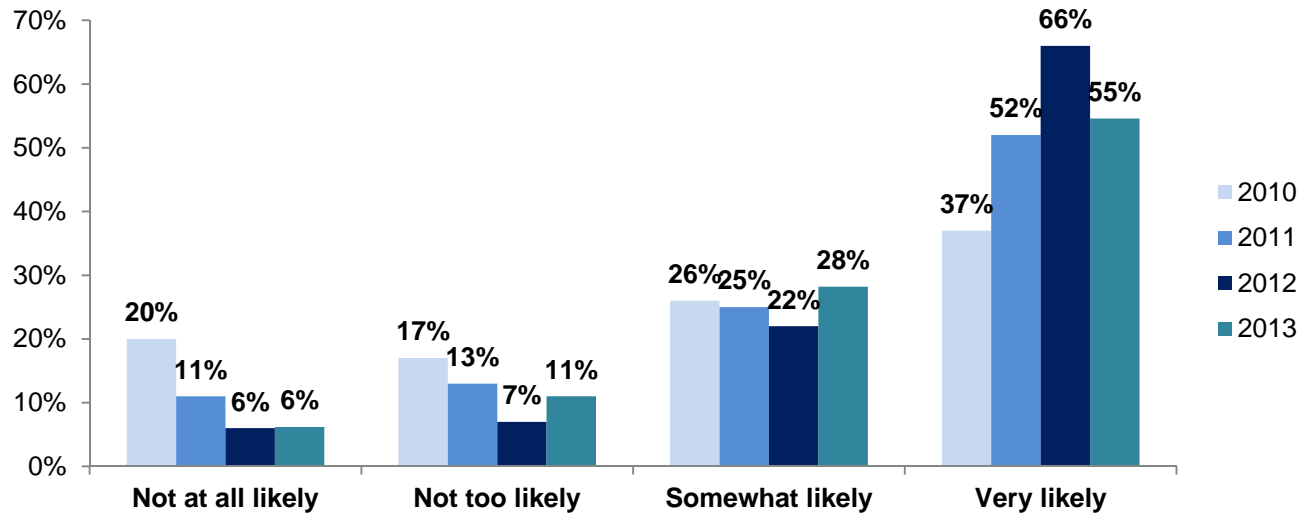
# TMF Campaign Behavioral Impact



The proportion of respondents who indicated a likelihood to go fishing anytime in the next 24 months decreased from 2012 to 2013 – especially among those indicating they are “very likely” to go fishing; however, respondents still show a much greater intention in 2013 than in 2010 or 2011.

- ✓ Almost two-thirds (64%) of respondents that participate in outdoor activities with children and/or grandchildren (Family Outdoors) indicate that they are very likely to go fishing within the next 24 months. Two-fifths (40%) of the Outdoor Enthusiasts indicate this likelihood.
- ✓ Among the Lapsed Anglers, almost a quarter (24%) indicate that they are very likely to go fishing anytime in the next 24 months. Nearly one-third (32%) of the Occasional Anglers indicate this likelihood.

Q83. Overall, how likely would you say you are to go fishing in the next 24 months?

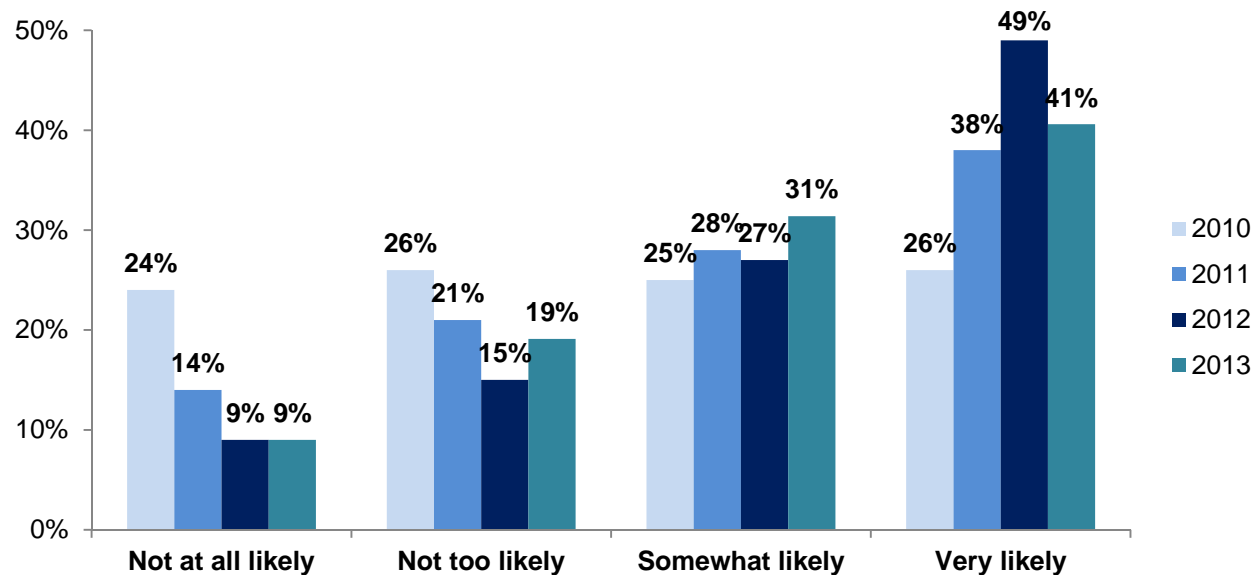


## Intention to Fish from a Boat in the Future

The proportions of respondents who indicated a likelihood to go fishing from a boat any time in the next 24 months also decreased between 2012 and 2013, although still showing a much higher intent than 2010 and 2011.

- ✓ More than two-fifths (47%) of respondents in the Family Outdoors group and nearly one-third (31%) Outdoor Enthusiasts intend to go fishing from a boat within the next 24 months.
- ✓ Only 13% of Lapsed Anglers and 20% of Occasional Anglers indicate that they are very likely to go fishing from a boat anytime in the next 24 months.

Q84. Overall, how likely would you say you are to go fishing from a boat anytime in the next 24 months?



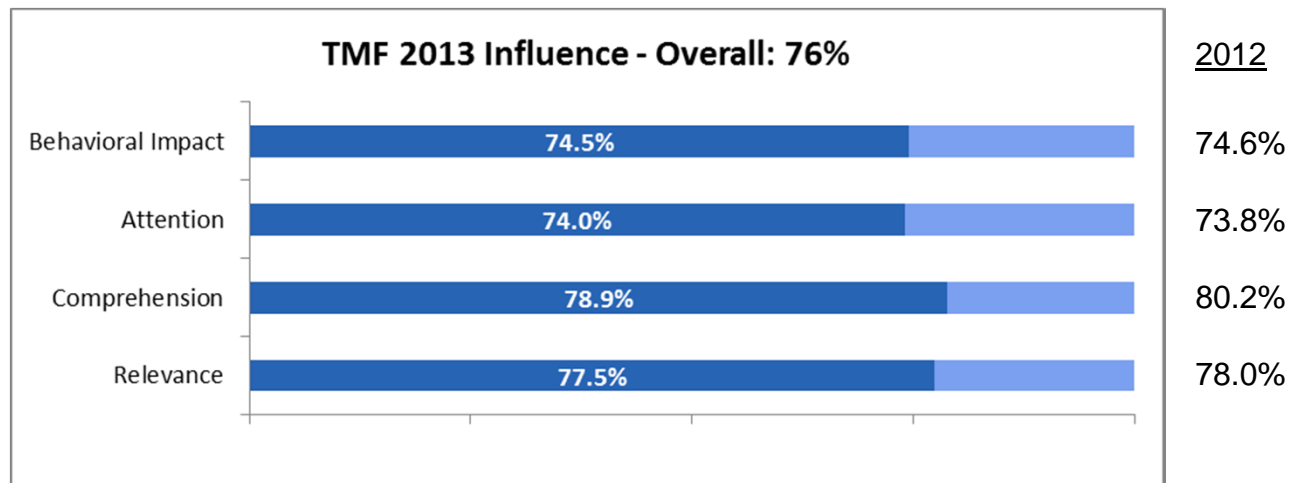


# Influence of TMF





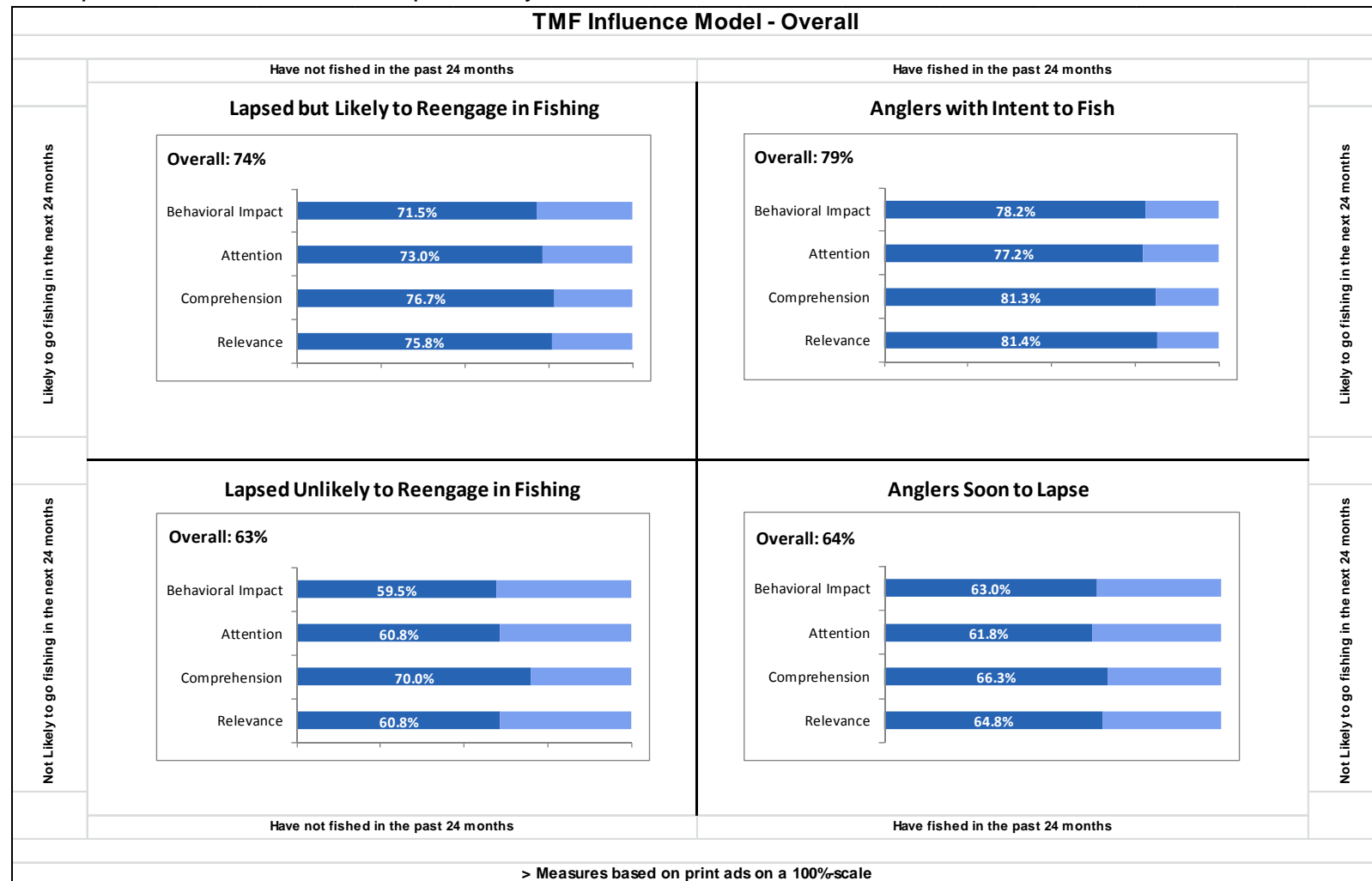
The overall influence score for the Take Me Fishing campaign as measured by the six print advertisements reveals that the campaign impacts 3 out of 4 members of the current target audience, as represented or measured through the 2013 TMF survey. The level of influence is **76%** on a 100 point scale, down only slightly from 2012 (77%). The factors of influence show the following scores:



Indicating that among this group the ad campaign:

- Successfully conveys its motivational intent (Message Comprehension)
- Is found to be highly relevant at a personal level (Message Relevance)
- Leads those who are exposed to it to express an intention to pursue fishing-related activities (Response to Message)
- Catches the attention (Attention to Message)

Compared to those who have fished within the last 24 months, the campaign is considerably less effective than among lapsed anglers who are unlikely to reengage in fishing. But within the lapsed angler group, the campaign is more impactful among those who indicate that they are likely to resume fishing activities (e.g., say that despite not having fished in the last 24 months, indicate that they intend to do so within the next 2 years). The influence results show similar pattern to the results in the previous year.





## 2013 TMF Ads Assessments - Summary

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- ✓ Overall, the TMF integrated marketing campaign has a positive effect on each of the campaign objectives across all advertising mediums (print, TV, radio, and online banners).
- ✓ The Family Outdoors group is more affected by all TMF advertisements, than the other three groups: Lapsed Anglers, Occasional Anglers, and Outdoor Enthusiast.
- ✓ Across all the advertisements examined in this report, a higher proportion of respondents who belong to the Family Outdoors segment, recalled seeing the ads, and indicated intentions to go fishing, take someone fishing, go boating for the purpose of fishing, and to visit the Take Me Fishing website. This group also showed a higher likeability toward the ads.
- ✓ The results show that the TMF campaign ads perform better among Family Outdoors group and differentiate this group from Outdoor Enthusiast group across all type of the ads sources and metrics (recall, likeability, and intent).
- ✓ Although, no direct comparison were made between the different types of advertising mediums, the print ads produced the highest level of likeability across all segments.

### Overall Summary of Print Ads Assessments By Segments

2013 Print Advertisements (Top 2 box scores)					
	Lapsed Anglers	Occasional Anglers	Family Outdoors	Outdoor Enthusiasts	Overall
Likeability	75% (n=67)	76% (n=337)	<b>80%</b> (n=974)	<b>71%</b> (n=660)	76% (n=1636)
Likelihood to go fishing in next 12 months	47% (n=69)	49% (n=336)	<b>64%</b> (n=972)	<b>43%</b> (n=657)	55% (n=1631)
Likelihood to take someone fishing in next 12 months	45% (n=68)	48% (n=336)	<b>64%</b> (n=965)	<b>42%</b> (n=658)	55% (n=1626)
Likelihood to go boating for the purpose of fishing in next 12 months	33% (n=68)	43% (n=333)	<b>56%</b> (n=972)	<b>40%</b> (n=661)	49% (n=1635)
Likelihood to visit the web site	54% (n=67)	55% (n=330)	<b>68%</b> (n=966)	<b>50%</b> (n=655)	61% (n=1623)

*\*Numbers shown in green indicate that there is a statistically significant difference between the two audience groups .*

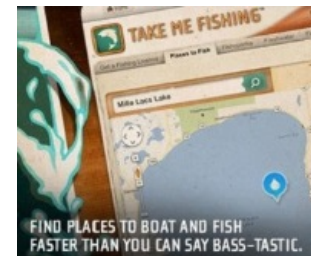


### Overall Summary of General Online Ads Assessments By Segments

2013 Online General Advertisements (Top 2 box scores)					
	Lapsed Anglers	Occasional Anglers	Family Outdoors	Outdoor Enthusiasts	Overall
Likeability	56% (n=66)	56% (n=338)	67% (n=952)	51% (n=649)	60% (n=1601)
Likelihood to go fishing in next 12 months	30% (n=68)	41% (n=338)	51% (n=949)	37% (n=648)	46% (n=1597)
Likelihood to take someone fishing in next 12 months	33% (n=68)	40% (n=334)	52% (n=945)	33% (n=646)	44% (n=1591)
Likelihood to go boating for the purpose of fishing in next 12 months	26% (n=67)	37% (n=339)	46% (n=950)	33% (n=648)	41% (n=1598)
Likelihood to visit the web site	45% (n=68)	50% (n=336)	58% (n=955)	43% (n=649)	52% (n=1604)

*n = Number of respondents exposed to each ad*

*\*Numbers shown in green indicate that there is a statistically significant difference between the two audience groups .*





TAKE ME FISHING™

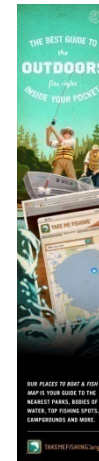
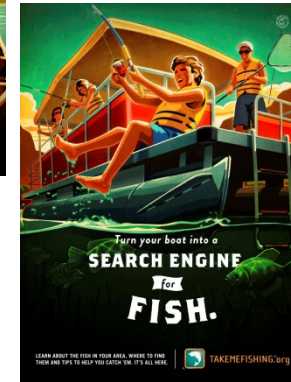
## 2012 -2013 Print Ad Targeting

The print ad images from 2012 to 2013 remained the same for three of the advertisements, but the messaging changed. While the images focus on families and children, the three new print ads have a larger focus on web and mobile access.

### 2012



### 2013

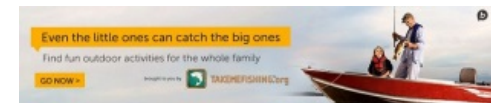


### Overall Summary of Disney Online Ads Assessments By Segments



2013 Online Disney Advertisements (Top 2 box scores)					
	Lapsed Anglers	Occasional Anglers	Family Outdoors	Outdoor Enthusiasts	Overall
Likeability	62% (n=68)	62% (n=335)	71% (n=946)	55% (n=639)	65% (n=1585)
Likelihood to go fishing in next 12 months	41% (n=68)	47% (n=337)	57% (n=949)	37% (n=647)	49% (n=1596)
Likelihood to take someone fishing in next 12 months	46% (n=67)	48% (n=337)	60% (n=947)	35% (n=650)	50% (n=1597)
Likelihood to go boating for the purpose of fishing in next 12 months	38% (n=67)	41% (n=336)	52% (n=945)	34% (n=651)	45% (n=1596)
Likelihood to visit the web site	44% (n=67)	50% (n=340)	60% (n=949)	42% (n=654)	53% (n=1603)

\*Numbers shown in green indicate that there is a statistically significant difference between the two audience groups .





TAKE ME FISHING™

## 2012 – 2013 Online Ad Targeting

Some of the banner images from 2012 to 2013 remained similar, but 2013 introduced the Disney campaign which placed more emphasis on targeting families with children.

### 2012

**MORE HOT SPOTS THAN YOU CAN SHAKE A BASS AT.**  
Find great places to boat and fish near you >

**LEARN KNOT-TYING TECHNIQUES AND OTHER FISHING TIPS >**

**FISH NOT BITING?**  
Discover new Fishing hotspots near you >

TAKEMEFISHING.org

TAKEMEFISHING.org

**FISHING**

**YOUR GUIDE TO THE GREAT OUTDOORS ON THE GO.**  
FIND EASY WAYS TO ADD FISHING AND BOATING TO YOUR NEXT ADVENTURE. >

**MAKE THE MOST OF YOUR NEXT ADVENTURE WHEN YOU DROP A LINE IN.**  
FIND BOATING & FISHING TIPS, TOOLS AND MAPS. >>

TAKEMEFISHING.org

*Fishopedia*

**WHITE MARLIN**

TAKE ME FISHING™ SEE MORE FISH NOW

### 2013

**THE GREAT OUTDOORS STARTS WITH THE GREAT ONLINE.**  
FIND BOATING & FISHING TIPS, TOOLS AND MAPS. >>

TAKEMEFISHING.org

**Reel fun for the whole family**  
Find outdoor activities for all  
**GO NOW >**

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**THE GREAT OUTDOORS STARTS WITH THE GREAT ONLINE.**  
FIND BOATING & FISHING TIPS, TOOLS AND MAPS. >>

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**TAKE ME FISHING** *Fishopedia* **WHITE MARLIN**  
SEE MORE FISH NOW

**REEL FUN**  
ENTER FOR YOUR CHANCE TO WIN A **FOUR-DAY VACATION FOR 4 TO WALT DISNEY WORLD RESORT!**  
**ENTER NOW**

TAKEMEFISHING.org

**TAKE ME FISHING** *Fishopedia* **WHITE MARLIN**  
SEE MORE FISH NOW