

2019 Take Me Fishing Campaign Evaluation – Final Report

Recreational Boating & Fishing Foundation (RBFF)



RECREATIONAL
BOATING & FISHING
FOUNDATION

Report Outline

This report presents research findings from the 2019 Take Me Fishing Campaign evaluation survey. The report is divided into the following sections:

1. Introduction and survey methodology (sampling, data collection, demographics, and target audience segments)
2. Executive summary of findings
3. Take Me Fishing (TMF) brand slogan, logo, and social media awareness/recall
4. Overall TMF campaign general ad awareness
5. Behavioral impact of the TMF campaign
6. Influence of the TMF campaign
7. TMF campaign for women – Women Making Waves (WMW) - recall, influence and behavioral impact
8. Hispanic audience awareness and overall media/brand interaction with TMF and Vamos a Pescar (VAP)
9. Influence of Spanish language (VAP) campaign
10. Impact of having fished as a child on current views of the sport
11. Discussion/Recommendations

INTRODUCTION AND METHODOLOGY

Project Scope & Research Objectives

- This research effort evaluates the effect of the 2019 Take Me Fishing (TMF) Media Campaign.
 - Also included is the Vamos a Pescar (VAP) campaign targeted towards Hispanics and Women Making Waves (WMW) campaign geared towards women.
- Impact of the TMF campaign was evaluated by measuring changes in:
 - “Brand” awareness and perceptions of boating and fishing.
 - Awareness, recall and impact of TMF campaign advertising and marketing communications (e.g., future intention to go fishing, plan fishing trips).
 - Influence of TMF advertising on the decision to go fishing or boating.
 - Awareness, recall and impact of TMF campaign creatives focused on messaging to Hispanics (VAP) and Women (WMW).

Methodology: Survey Data Collection

- The online survey was conducted October 3 – November 3, 2019.
 - This year’s evaluation was conducted among a sample of the US general public through an online panel administered by EurekaFacts using the Dynata web-based panel of survey participants.
 - The sample includes N=1,233 completes with a margin of error ± 2.8 percentage points.
 - Participants are screened for:
 - Those who practice outdoor activities at least once per year;
 - Individuals 25 to 54 years of age;
 - Quotas set for target segments by gender, Hispanic identity, and respondents in the “family outdoors” audience.
- 2019 data are weighted to known population parameters defined by the Census Bureau’s American Community Survey five-year estimates (2013-2017) to balance the sample by gender and Hispanic status. Reported N sizes are unweighted.
 - Note: The 2016 sample included a greater share of anglers with intent to fish relative to other years. This is recognized as an outlier year in the TMF evaluation. Data marked by “2016w” has been weighted to correct this overrepresentation. All source notes are for new 2019 data points unless otherwise stated.

Methodology: Survey Participants

Participants are segmented based on previous fishing experience, intention to fish, and engagement in outdoor activities among demographic subgroups of the public.

Participants are divided into the following analytical segments throughout the report:

- **Lapsed Anglers:** Those who have fished as adults, but not within the past 2 years and indicate they are likely to fish again within the next 2 years.
- **Occasional Anglers:** Those who have fished 1 or 2 times within the past 2 years.
- **Family Outdoors:** Individuals interested in one or more outdoor activities with children in the home and married.
- **Outdoor Enthusiasts:** Individuals interested in one or more outdoor activities with no children in the household.

As part of the RBFF target audience, Hispanics and women were asked dedicated question sets on advertising videos, digital media ads, and other social media content.

Sample: Sample Comparisons

Consistent Balance of Sample Composition for Types of Anglers

Angler Activity	2017		2018		2019	
Anglers with Intent to Fish	732	61%	1,066	62%	702	58%
Lapsed but Likely to Reengage in Fishing	216	18%	305	18%	228	19%
Anglers Soon to Lapse	39	3%	40	2%	41	3%
Lapsed Unlikely to Reengage in Fishing	<u>207</u>	<u>17%</u>	<u>305</u>	<u>18%</u>	<u>250</u>	<u>21%</u>
Total	1,193	100%	1,717	100%	1,221	100%

Source: Q122, Q124. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1221. Note: Inclusion requires answering both questions; therefore 12 participants are not included in calculation. Percentages read down and may not total to 100% because of rounding.

- Broken out by angler activity, the 2019 (unweighted) sample composition closely mirrors that of 2017 and 2018.
- A majority (58%) are anglers with intent to fish.
- Lapsed anglers represent 40% of the sample are nearly split between those who are likely to reengage in fishing (19%) and those unlikely to reengage in fishing (21%).
- Consistently, very few current anglers are soon to lapse, representing only 3% of the 2019 sample.

Sample: Audience Segments

Sample sizes, Margin of Error, and Percent Composition by Audience Segments			
TOTAL	N=1233	± 2.8	100%
Audience Segments*			
Lapsed Anglers	N=87	± 10.5	7%
Occasional Anglers	N=344	± 5.3	28%
Family Outdoors	N=604	± 4.0	49%
Outdoor Enthusiasts	N=461	± 4.6	37%

Source: S8, S9, Q120, Q121, Q122, Q124. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1233.

*Note: Audience segments are not exclusive categories and do not add to 100%.

- Family Outdoors represents about half (49%) of the total sample.
- Three out of the four audience segments have sample sizes placing their margins of error between plus or minus (±) 4 to 5 percentage points.
- The margin of error for Lapsed Anglers is plus or minus (±) 7%.

Sample: Demographics

The overall sample achieved a strong mix of demographics. The margin or error (MoE) ranges from ± 3.3 to 6.6 percentage points.

RBFF Target Sub-groups:

- Women represent 54% of the sample and have a MoE of ± 3.8
- Hispanics were oversampled to attain 366 participants. Their MoE is ± 5.1

Weighting the sample:

- Upon weighting to gender and ethnicity population parameters, findings from the 2019 Take Me Fishing (TMF) Media Campaign are generalizable to and representative of RBFF's overall target audience, hereafter referred to as "the public."

Sample sizes, Margin of Error, and Percent Composition by Subgroups			
TOTAL	N=1233	± 2.8	100%
Gender			
Men	N=563	± 4.1	46%
Women	N=657	± 3.8	54%
Age			
25 – 34	N=422	± 4.8	35%
35 – 44	N=467	± 4.5	39%
45 – 54	N=321	± 5.5	27%
Ethnicity			
Hispanic	N=366	± 5.1	30%
Non-Hispanic	N=860	± 3.3	70%
Education			
HS diploma / GED or less or trade school degree	N=256	± 6.1	21%
Some college, no degree or two-year degree	N=365	± 5.1	30%
Four-year college degree	N=367	± 5.1	30%
Post-graduate (some or degree)	N=233	± 6.4	19%
Income			
Under \$50,000	N=406	± 4.9	33%
\$50,000 - \$74,999	N=255	± 6.1	21%
\$75,000 - \$99,999	N=220	± 6.6	18%
\$100,000 or more	N=344	± 5.3	28%

Source: S4, S5, S6, Q126, Q127. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1233. Note: Percentages read down within each demographic category and may not total to 100% due of rounding.

EXECUTIVE SUMMARY

Executive Summary:

Core Metrics and Audience Segments

Core Metrics

- The public's intention to fish in the next two years remains very high. Currently, 76% say they are very or somewhat likely to fish in the next 24 months, but intention is down slightly from 80% a year ago. Intention to fish is now on par with 2017 (79%) and within the margin of error.
- On brand awareness measures, close to half (45%) recall the TMF logo, about a third recall the TMF slogan (35%). Social media awareness is lowest and almost two-in-ten recall the hashtags #FirstCatch and #GetYourFishOn (17% and 16%, respectively).
- Awareness/recall of the TMF logos hashtags are on par with 2018, while recall of the slogans ("Take me Fishing" and/or "Vamos a Pescar") is down five points from 40% in 2018 to 35% for this year.
- Independent of modest variation in intention to fish and awareness of brand, the overwhelming majority (90+%) of those who recall the RBFF brand (either slogan or logo) or TV/video ads, say they intend to fish in the next 24 months, which is 20-30 points high than those who are not aware.

Audience Segments

- The drop in brand awareness is mostly attributable to a decline among the Family Outdoors segment. This segment experienced a decline of seven to nine points for the aspects of brand awareness tested.
- Outdoor Enthusiasts and Lapsed Anglers report slightly elevated levels in all three measures of brand awareness. Both of these segments report three to five-point increases in slogan, logo, and hashtag awareness/recall.
- Despite slight dip in brand awareness, the Family Outdoors segment has the highest recall of the general TMF advertisement campaign.
- Like the general public, the Hispanics Family Outdoors segment has the greatest awareness of the "Take Me Fishing"/ "Vamos a Pescar" brand and logos, followed closely by Hispanic Occasional Anglers. Recall of the VAP slogan and logos increased among all segments, especially for Occasional Anglers and Outdoor Enthusiasts.

Executive Summary:

Advertising – Venues, Influence, Target Audience

Advertising Venues and Influence

- Most of the public encounters the RBFF brand in multiple places, especially through the video/TV venue. Family and friends are about as common a source as magazines and social media.
- The video ads (average of three ads), Disney video ad, and print content garner similarly high influence scores. The static digital advertisements, while also eliciting high scores, have less impact on the public.
- All ads consistently get their highest influence scores for “comprehension” – indicating the advertisements are effective at communicating positive messages about fishing. On the hand, the public gives their lowest scores for “behavior” and “attention” (usually for digital ads).
- Age and gender have only slight affect on an ad’s impact (higher for men and younger public). Those with certain lifestyle characteristics, such as having children and fishing intention and behavior, are more likely to respond positively than others.

Target Audience Awareness and Advertising

- Women have similar recall and reaction to all three digital banner advertisements (influence scores and intention). Like the general public, women express greatest behavioral impact for the TV/video (Women Making Waves) compared to the women-focused digital banners.
- Although women have a low recall rate of the TMF hashtag - #WomenMakingWaves – those who do recall it are more likely to say they intend to fish. This represents the very engaged audience among women.
- Overall, Hispanic awareness/recall of the brand/slogan and logos and visitation of the Spanish website – vamosapescar.org – has increased in the past year. Most encounter the brand in multiple places, and nearly all who recall it are likely to fish in the next 24 months.
- Hispanics give about equally high influence scores for both the TV/video and digital banner ads. After viewing the ads, especially the TV/video ad, most (about two-thirds) say they are likely to fish (a similar pattern to women and public overall).

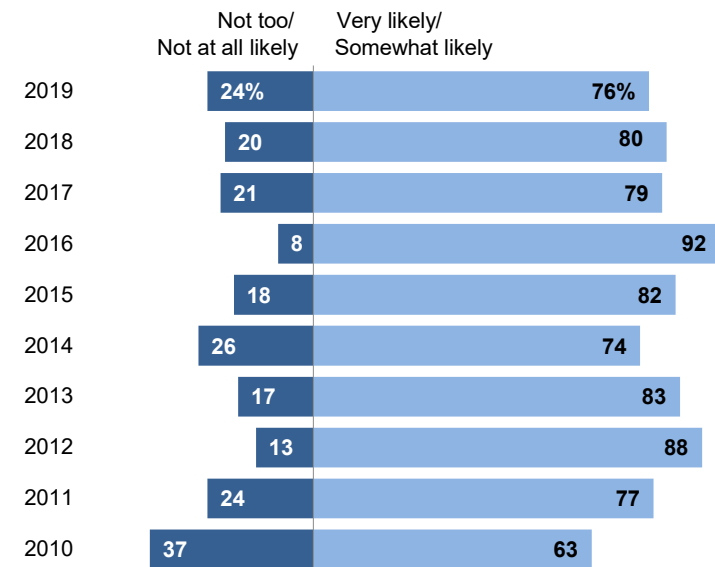
Intention

To Fish in the Next 24 Months

- Overall, about three quarters (76%) of the public report that they are “very” or “somewhat likely” to fish in the next 24 months, while just 26% say they are “not too” or “not at all likely” to engage in fishing.
- This is a modest **4-point drop from 2018 (80%)**, making this year’s reported intention on par with that of 2017 (79%).

Three-quarters are Very/Somewhat Likely to Fish in Next 24 Months

Intention to fish in next 24 months ... (%)



Source: Q124. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and may not add to 100% due to rounding. N=1221

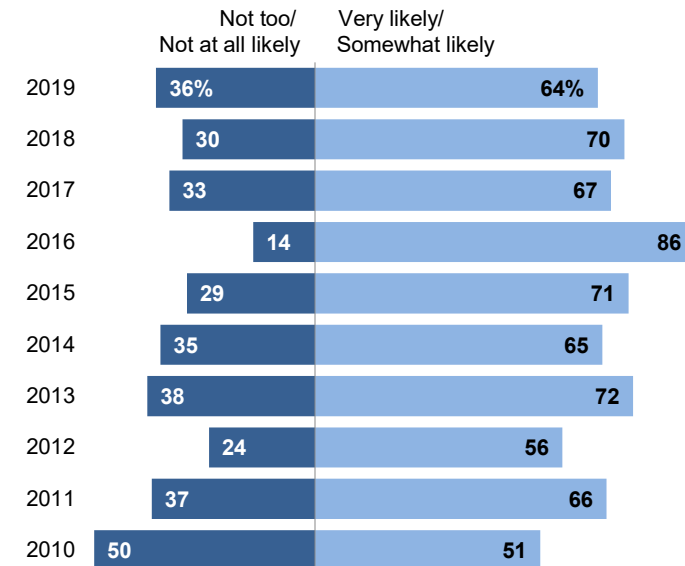
Intention

To Fish from a Boat in the Next 24 Months

- In line with overall intention to fish, intention to fish from a boat has also declined slightly from a year ago.
- About two-thirds (64%) of participants report that they are very or somewhat likely to fish from a boat in the next 24 months, while slightly more than one-third (36%) say they are not too or not at all likely to do this.
- This represents a **6-point decrease** in intention to fish from a boat compared with 2018. The current likelihood to fish is roughly equivalent to that of 2017 (67%) and 2014 (65%).

Nearly Two-thirds are Very/Somewhat Likely to Fish from a Boat in Next 24 Months

Intention to fish from a boat in next 24 months ... (%)



Source: Q125. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and may not add to 100% due to rounding. N=1219

**OVERALL BRAND, LOGO,
AND SOCIAL MEDIA
AWARENESS**

Brand Awareness/Recall

Slogans

Slight Drop in Overall Awareness of Slogan/Brand

	2010	2011	2012	2013	2014	2015	2016	2016w	2017	2018	2019
Overall	10%	18%	31%	34%	43%	41%	64%	54%	36%	40%	35%
Lapsed Anglers	-	-	-	14%	10%	40%	9%	N/A	29%	12%	16%
Occasional Anglers	-	-	-	30%	41%	38%	18%	N/A	31%	40%	36%
Family Outdoors	-	-	-	40%	52%	51%	88%	N/A	43%	51%	40%
Outdoor Enthusiasts	-	-	-	25%	31%	29%	8%	N/A	28%	24%	27%

Source: Q4,Q5, Q8, Q9. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages do not add to 100%. N=1233

- Among those who recall seeing, hearing or reading an advertisement for any outdoor leisure or recreational activities within the last year, **35%** recall the phrase “Take Me Fishing” and/or “Vamos a Pescar” in an advertisement as a slogan, or as the name of a website.
 - This is a 5-point drop from 2018 (40%), but roughly equivalent to 2017 (36%).
- Overall, those who report visiting any RBFF social media (SM) channel are more likely to recall the slogan, than non-visitors.
 - Two-thirds (66%) of those who visit one or two sites and fully 85% who visit three or four sites recall the slogan. By contrast, only 20% of participants who visited none of the RBFF social media platforms recall either slogan.
- Among audience segments, Family Outdoors and Occasional Anglers are most likely to recall either slogan (40% and 36%, respectively). These segments are also most likely to have visited at least one RBFF social media channel (31% of Family Outdoors and 29% of Occasional Anglers) compared to the Outdoor Enthusiast (21%) or Lapsed Anglers (7%).

Brand Awareness/Recall Logos

About Half Recall “Take Me Fishing” and/or “Vamos a Pescar” Logos

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Overall	10%	20%	46%	47%	43%	52%	44%	47%	48%	45%
Lapsed Anglers	-	-	-	23%	32%	47%	33%	41%	11%	16%
Occasional Anglers	-	-	-	45%	47%	49%	33%	45%	52%	50%
Family Outdoors	-	-	-	53%	54%	62%	60%	54%	59%	51%
Outdoor Enthusiasts	-	-	-	38%	32%	40%	15%	37%	31%	36%

Source: Q7, Q11. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages do not add to 100%. N=1233

- Slightly less than half (**45%**) of participants recall seeing either the TMF or VAP logos, which is **consistent with the past four years**. (since 2016).
- The Family Outdoors segment is the only segment to have declined in their logo awareness, dropping eight points from 59% in 2018 to 51% in 2019.
- Family Outdoors and Occasional Anglers are now about equally likely to recall the logo (51% and 50%, respectively).
- The remaining segments are overall stable in their awareness from a year ago, with slightly more Outdoor Enthusiasts (31% in 2018 vs. 36% in 2019) and Lapsed Anglers (11% in 2018 vs. 16% in 2019) recalling the logo.

All participants were asked about these 4 logos.

Q: Before today, have you seen any of these logos?



Get your fish on at  TAKEMEFISHING.org

Get your fish on at



TAKEMEFISHING.org



TAKEMEFISHING.org

Hispanic participants were additionally asked about the following logos.

Q: Before today, have you ever seen one or both of these logos?



Brand Awareness/Recall

Sources of TMF Recall

TV Advertising Continues to be the Strongest Source of Recall

Slogan Recall	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Television advertising	-	42%	60%	60%	52%	53%	63%	59%	61%	67%
Magazine advertising	41%	52%	55%	48%	48%	47%	59%	36%	47%	46%
Social media	37%	52%	49%	54%	53%	53%	74%	61%	56%	50%
Elsewhere online	-	-	-	-	-	-	-	-	-	32%
Radio advertising	34%	39%	30%	35%	34%	36%	39%	30%	36%	41%
News stories/Non-ad TV content*	-	-	-	-	-	-	-	-	31%	42%
A postcard / E-mail	13%	13%	15%	13%	17%	17%	31%	14%	27%	-
Talking with family or friends	-	-	-	-	-	-	-	-	-	44%
Event	-	-	-	-	-	-	-	-	-	33%
Somewhere else	36%	27%	14%	17%	19%	19%	30%	17%	26%	32%

Source: Q6. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=356. Percentages do not add to 100% as question was select all that apply.

*Note: 2018 only asked about news stories while 2019 asked about all TV content that was not paid advertisement; both are earned media and are grouped together for reporting and trend comparison.

Half (50%) of those who recall the phrase "Take Me Fishing" name three sources of recall.

- Two-thirds (67%) recall TMF from TV advertising, an increase of 6 points from 2018.
- Half recall TMF from social media – down 6 points compared to 2018 (56%) and 11 points since 2017 (61%).
- Recall from radio (41%) is now at its highest.
- Between 2017 and 2019, recall through magazine and radio advertising have both increased.
 - Recall through magazines increased by 10 points from 36% in 2017 to 46% in 2019.
 - Recall through radio increased by 11 points from 30% in 2017 to 41% in 2019.
- More than four-in-ten affirm hearing "Take Me Fishing" through family or friends, a new category in understanding how the public learns about the TMF campaign.
- Only 5% of those who recall TMF do not recall the source of the phrase – whether a specifically listed source or somewhere else.

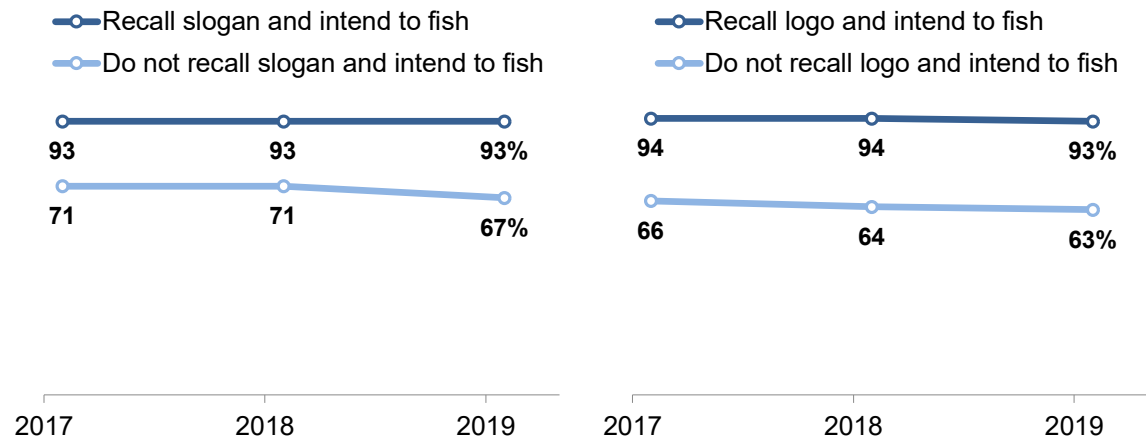
Recall of TMF Campaign and Overall Intention to Fish 2017 – 2019 Trends

Despite a modest drop in overall intention to fish and in recall of the brand, the trend between 2017 and 2019 consistently shows that the overwhelming majority of those who recall the TMF slogan and TMF logo are “very” or “somewhat” likely to fish in the next two years.

- Intention to fish among those who recall the slogan or logo exceeds 90%.
- Moreover, the trend also shows that those who recall the TMF brand (logo or slogan) are 20% to 30% points more likely to say they intend to fish than are those unexposed to the ad campaign.

Intention to Fish is Consistently High Among Those Exposed to TMF Brand

% who intend to fish in the next 24 months based on awareness of brand



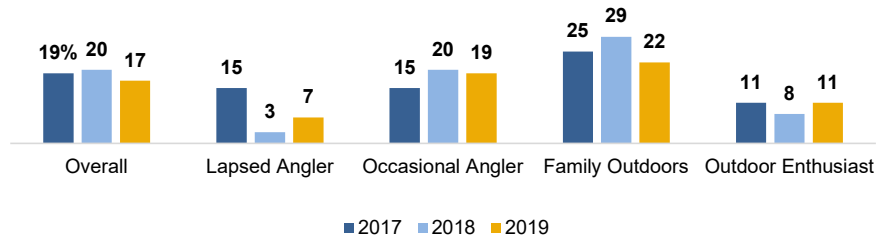
2019 Source: Q124 by (Q4,Q5, Q8, Q9) & Q124 by (Q7, Q11). RBF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1233
 2018 Source: Q83 by (Q7,Q8, VAP1, VAP2) & Q83 by (Q11, VAP4). RBF 2018 TMF Campaign Evaluation Survey, Oct 3 – Oct 11, 2019. N=1717.
 2017 Source: Q83 by (Q7, Q8, 253) & Q83 by Q11. RBF 2017 TMF Campaign Evaluation Survey, Sept 20 – Sept 26, 2019. N=1200

Brand Awareness/Recall

#FirstCatch and #GetYourFishOn

Recall of #FirstCatch on Social Media, 2017 - 2019

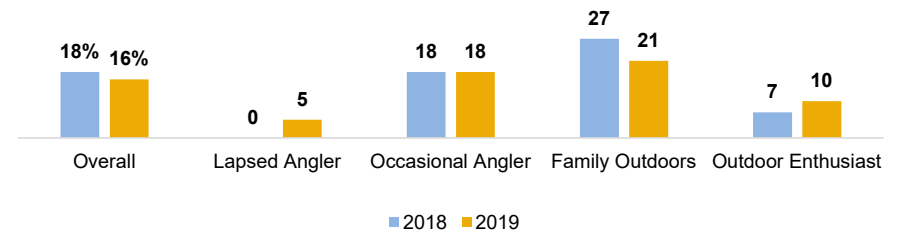
% who recall #FirstCatch ...



Source: Q109. RBF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages do not add to 100%. N=1221

Recall of #GetYourFishOn on Social Media, 2018 - 2019

% who recall #GetYourFishOn ...



Source: Q116. RBF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages do not add to 100%. N=1227

Awareness of each RBF’s social media hashtags is nearly identical and represents the is much lower compared to the slogans and logos

- Awareness of RBF’s main social media hashtag, #FirstCatch, remains stable since 2017, with **17%** recognizing the hashtag.
- Recall of #GetYourFishOn is overall unchanged in the past year, with **16%** recognizing the hashtag.
- Family Outdoors are most likely to recall #FirstCatch and #GetYourFishOn out of the four audience segments; however this segment experienced a drop in recall for each hashtag over the past year.
- Among the remaining segments, Outdoor Enthusiasts and Lapsed Anglers experienced slight increases in recall (by 3% points and 5% points, respectively) while Occasional Anglers are unchanged from 2018.

2019 TMF ADVERTISING AND OVERALL AWARENESS

General 2019 Ads Summary by Ad Venue

Video/TV	Disney Video	Print – ESPN Cover Wrap	Digital Banners
 <p>All participants</p>	 <p>All participants</p>	 <ul style="list-style-type: none">• Women and Hispanics randomly saw this or one digital ad• Shown and queried of all others	 <ul style="list-style-type: none">• Women and Hispanics randomly saw one digital ad or the print ad• All banners shown and queried of others

General 2019 Ads

Overall Awareness

Overall TMF Ad Awareness by Venue and Audience Segment

	TV ¹	Digital ²	Disney ³	Print ⁴
Overall 2018	28%	21%	18%	*
Overall 2019	24%	14%	16%	24%
Lapsed Anglers	8%	5%	5%	**
Occasional Anglers	26%	12%	16%	24%
Family Outdoors	29%	19%	20%	29%
Outdoor Enthusiast	19%	9%	12%	16%

¹Source: Q17. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=824

²Source: Q67, Q74, Q81, Q88. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=645

³Source: Q29. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1085

⁴Source: Q60. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=625

*Print ads not tested in 2018.

**Lapsed Anglers not reportable due to small N size.

TV and print tied for top venue of awareness by one-quarter of the public (24%). Disney and digital ads recalled by fewer than two-in-ten.

- Wild Child Anthem most likely to be recalled out of the three TV spot ads shown. Wild Child Anthem recalled by 29% compared to 27% who recall Telepathy and 18% who recall Stories of Anglers (see slide 36 for reference).
 - Men more likely to recall TV ad compared to women (30% vs. 19%, respectively).
- Digital ads have the lowest recall (14%).
 - No Touch Screen/Boat has the highest recall rate of all digital ads, with 22% of the public affirming seeing this ad before (see slide 38 for reference).

Similar to overall brand recall, there is a slight decrease in advertisement recall across ad venues.

- The most notable drop is the 7-point dip in digital ad awareness. TV and Disney ad recall declined only modestly.
- Among audience segments, highest recall consistently among the Family Outdoors, like past years.
 - Family Outdoors and Occasional Anglers most similar in their recall rates across ad venues.
 - Lapsed Anglers consistently have the lowest recall rates.

BEHAVIORAL IMPACT

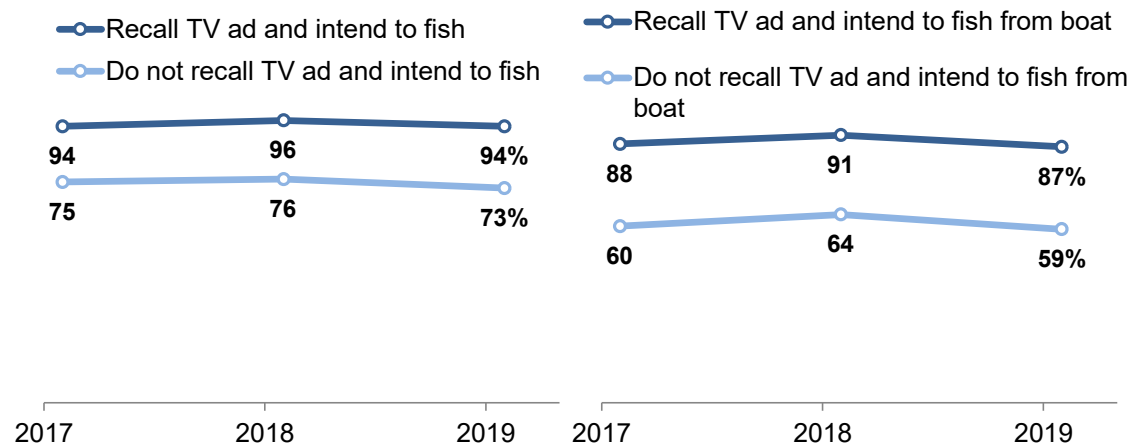
Recall of TV Ad Campaign and Overall Intention to Fish 2017 – 2019 Trends

Despite a modest drop in overall intention to fish and recall of TV ads, the trend between 2017 and 2019 consistently shows that the overwhelming majority of those who recall any TMF TV ad are “very” or “somewhat” likely to fish or fish from a boat in the next two years.

- Similar to those who have brand awareness, intention to fish among those who recall TV ad exceeds 90%.
- Moreover, the trend also shows that those who recall a TV ad are more than 20 percentage points more likely to say they intend to fish or fish from a boat than are those unexposed to the ad campaign.

Intention to Fish is Consistently High Among Those Exposed to TMF TV Ads

% who intend to fish or fish from a boat in the next 24 months based on TV ad recall



2019 Source: Q124 by Q17 & Q125 by Q17. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1077.
 2018 Source: Q83 by Q15 & Q84 by Q15. RBFF 2018 TMF Campaign Evaluation Survey, Oct 3 – Oct 11, 2019. N=1554.
 2017 Source: Q83 by Q22a & Q84 by Q22a. RBFF 2017 TMF Campaign Evaluation Survey, Sept 20 – Sept 26, 2019. N=1092

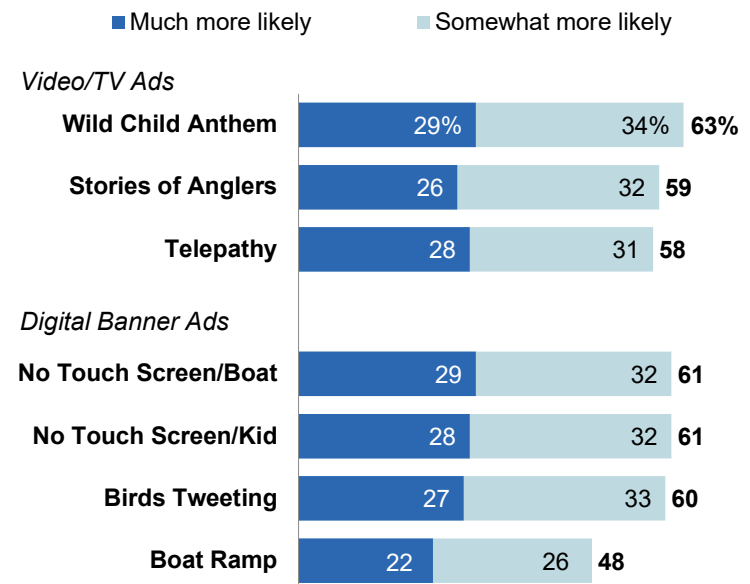
Exposure to TV Ad Campaign Effect on Intention to Fish

Videos and digital ads exposure similarly motivate the public to fish in the next year.

- About six-in-ten (58%-63%) who view any of the videos report that they are likely to fish in the next year.
 - Wild Child Anthem is slightly more motivating, which is in-line with it having the highest influence scores and overall greatest personal appeal (81%) compared to other two videos (70% and 68%).
- Exposure to three of the four general digital ads motivate six-in-ten (ranging 60%-61%) of the public to say they are “much more” or “somewhat more” likely to fish in the next year.
 - The Boat Ramp ad is the least motivating.
- The public is roughly split on how much more likely these ads are to make them go fishing, with about half of those people say they are “much more likely” to go fishing (22%-29%) and the other half only “somewhat more likely” (26% - 34%).

General TMF Ads Motivate About Six-in-Ten of the Public to Fish in the Next Year

% who are likely to fish in next 12 months...



Source: Q16a/b/c by Q23a; Q73a, Q80a, Q87a, Q94a. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=360 (WCA), 357 (SoA), 365 (Telepathy), 505 (Screen/Boat), 494 (Birds), 509 (Screen/Kid), 500 (Boat Ramp)

INFLUENCE OF GENERAL TMF ADVERTISING

Creation of Influence Scores

Question Composition for Each Ad

Relevance – relevance of message at a personal level	Message Comprehension – degree of success in conveying motivational impact	Attention – how attention-grabbing the ad is	Behavioral Response – how motivational it is in pursuing fishing-related activities	Overall score is a measure of the overall impact on target audience (the public) - created from average of all 4 scores
<ul style="list-style-type: none">• How much would you say you liked this advertisement?• How much does this ad appeal to you personally?• How much does this ad make you feel that fishing is a good fit for you?	<ul style="list-style-type: none">• In looking at this ad, how much do you agree or disagree that this ad communicates the following:<ul style="list-style-type: none">a. Fishing is a fun activity to dob. Fishing is a great way to make memoriesc. Fishing is a good way to spend time with my friends and familyd. Fishing is a good way to enjoy nature and spend time outdoorse. Fishing is a way to experience something new and different	<ul style="list-style-type: none">• Using a scale from 1 to 10 where 1 means not at all and 10 means extremely, how would you rate this ad in terms of the following:<ul style="list-style-type: none">a. How memorable it isb. How interested you are in this adc. How unique this ad is	<ul style="list-style-type: none">• Based on this advertisement, how likely are you to do the following:<ul style="list-style-type: none">a. Go fishing in the next 12 monthsb. Take someone fishing in the next 12 monthsc. Go boating for the purpose of fishing in the next 12 monthsd. Visit the website that was mentionede. [Variable] Click on the advertisement/Use the hashtag/Open content to learn more	

Influence Scores

Overall by Ad Venue

“Take Me Fishing” Advertising Campaign has Overall High Impact on Target Audience

Ad Venue*	Relevance	Comprehension	Attention	Behavior	OVERALL
TV/Video Spots	78%	84%	76%	74%	78%
Digital Banners	72%	76%	70%	71%	72%
Disney Video	76%	82%	76%	73%	77%
Print (ESPN Cover)	76%	80%	72%	74%	76%

Source: RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1096 (TV), 1074 (digital), 1092 (Disney), 625 (print)

*English advertisements and ad venues only.

- Advertising sources have high overall impact. The highest overall influence score (78%) belongs to video advertisements with the overwhelming majority finding these types of ads to best convey the motivations to fish (84%) and be the most relevant to them personally (78%).
- Overall, more than three-quarters of the target audience are impacted by the Disney video advertisements (77%) and the print advertisement through the ESPN cover wrap (76%).
 - Both receive high scores in comprehension (82% and 80%, respectively) and relevance (76% each).
 - Disney video garners more attention (76%) compared to the print advertisement (72%).
- Even with the lowest scores among sources tested, general digital advertisements/banners still have high overall impact, affecting at least seven-in-ten of the target audience. Digital banner ads do have less overall impact (72%) compared to the other three types of ads, especially for comprehension (76%) and relevance (72%).
- All ad venues are similar in their behavior scores, which are lower and less variable compared to other influence scores.

General 2019 Ads

Video/TV Ads



“Telepathy” Fishing License National Public Service Announcement :60



Wild Child Anthem: #FirstCatch :30 TV Spot 2017



Stories of Anglers: Slang Magic :30

Influence Scores

Video/TV Ads

Overall Influence Model of Three Take Me Fishing Video/TV Advertisements

Video	Relevance	Comprehension	Attention	Behavior	OVERALL
Overall	78%	84%	76%	74%	78%
Wild Child Anthem	82%	86%	80%	75%	81%
Telepathy	77%	83%	76%	74%	78%
Stories of Anglers	75%	84%	74%	73%	76%

Source: RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N= 1096 (Overall), 365 (Child), 373 (Telepathy), 358 (Stories)

- Each video advertisement has an overall impact score of more than three-quarters (range 76%-81%), showing the ads to be very influential in each metric category.
- High influence scores were seen overall (78%) across all video advertisements, especially for message comprehension (84%) and relevance (78%).
- The “Wild Child Anthem” video ad has the numerically highest overall impact score of 81%. This ad also has the highest score in each of the four categories compared to the other two videos.
- These scores are consistent with “Wild Child Anthem” slightly outdoing “Telepathy” and “Stories of Anglers” in motivating the public to fish and being overall more appealing.
- Across all three ads comprehension scores are the highest. Relevance scores are several points lower and followed very closely by attention scores. Behavior scores are consistently the lowest, ranging from 73%-75%.

General 2019 Ads Digital Banners

**I DON'T NEED A TOUCH SCREEN.
I NEED TO FEEL SOMETHING REAL.**

Get your fish on at  TAKEMEFISHING.org

No Touch Screen/Boat



**FIND A BOAT
RAMP NEAR YOU.**

Get your fish on at  TAKEMEFISHING.org

Boat Ramp

**I DON'T NEED A
TOUCH SCREEN.
I NEED TO FEEL
SOMETHING REAL.**



Get your fish on at



TAKEMEFISHING.org

No Touch Screen/Kid

**LET THE
BIRDS
DO THE
TWEETING.**



Get your fish on at



TAKEMEFISHING.org

Birds Tweeting

Influence Scores

General Digital Banners

Overall Influence Model of Four Take Me Fishing Digital Banners/Advertisements

Digital Ad	Relevance	Comprehension	Attention	Behavior	OVERALL
Overall	72%	76%	70%	71%	72%
No Touch Screen/Kid	76%	80%	73%	74%	76%
No Touch Screen/Boat	76%	79%	73%	74%	76%
Birds Tweeting	74%	77%	72%	73%	74%
Boat Ramp	67%	70%	65%	69%	68%

Source: RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N= 1074 (Overall), 645 (Screen/Kid), 638 (Screen/Boat), 625 (Birds), 631 (Boat Ramp)

- Among general English digital banner advertisements, “No Touch Screen/Kid” and “No Touch Screen/Boat” are tied for the highest overall impact (76%).
 - Each have near identical scores, with “No Touch Screen/Kid” only 1 point higher in comprehension.
- The “Birds Tweeting” ad also shows near identical influence, though slightly lower scores for all categories.
- The “Boat Ramp” ad, the only general digital advertisement that does not display any people or scenery, has the lowest scores among influence categories, registering at 68% overall and 65%-70% for all other scores.
- As with the video ads, comprehension scores are consistently the highest. However, relevance, attention, and behavior scores are more similar.

Influence Scores Disney Video



*This video ad for Disney Family is **recalled by 16%** of the public. It depicts a family fishing day where the teenage daughter is initially uninterested, but after reminiscing on her past joy of fishing with her mom, she joins the others and experiences the fun again!*

Overall, the ad impacted more than three-quarters (**77%**) of the target audience and received strong scores across all measures.

- Solid majorities agree with the videos messaging intent (82%), report that the video has relevance for them personally (76%), and say it gets their attention (76%), especially for being memorable (81%) and unique (78%).
- Behavioral response is also strong at 73% audience impact, including 61% of the audience who are at least “somewhat more” likely to take someone fishing in the next year.

Among audience segments, those with children are more positively impacted.

- Those with children are more likely to be affected across all measures than those without children (79% vs 73%, respectively). This aligns to the audience segment with children (Family Outdoors) and those without children (Outdoor Enthusiasts).
- Frequency of fishing does not affect impact on audience as even Occasional Anglers (79%) and Lapsed Anglers (78%) offer high scores.

Slight gender gap observed.

- By gender, slightly more men responded positively across all measures compared to women (79% vs 75%).

Source: Q28 thru Q35. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N= 1084

Influence Scores

Print – ESPN Cover Wrap



June issue of *ESPN The Magazine* cover wrap featuring baseball commentator and avid angler, Jessica Mendoza, and her family

Source: Q60 thru Q66. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N= 480

The family-oriented nature of the print content garnered similar responses from the target audience as the Disney video and is recalled by 24% of the public.

Overall, the ad impacted more than three-quarters (76%) of the target audience and received strong scores across all measures.

- Strong majorities agree with the videos messaging intent (80%), report that the video has relevance for them personally (76%), and say it gets their attention (76%), and have high interest in this content (77%).
- Behavioral response is also strong, with 74% audience impact, including 61% who would take someone to fish in the next year and 57% who would open the content to learn more.

Among sub-groups, those with children are more positively impacted.

- Those with children are more likely to be affected across all measures (79% vs 73%, respectively). Accordingly, 79% of Family Outdoors give the video positive score compared to 72% of Outdoor Enthusiasts.

Gender and frequency of fishing had slight impact on content receptiveness.

- Occasional Anglers are slightly more responsive compared to Lapsed Anglers (79% vs 74%, respectively).
- By gender, slightly more men responded positively across all measures compared to women (77% vs 73%).

**INFLUENCE OF TMF/WMW
ADVERTISING TOWARDS
WOMEN**

Women Focused 2019 Ads TV/Video and Digital Banners



Women Making Waves! :60



I Don't Wait
for Respect



I'm the Captain
of My Ship



I'm Not Afraid

Exposure to Women-Focused Advertisements

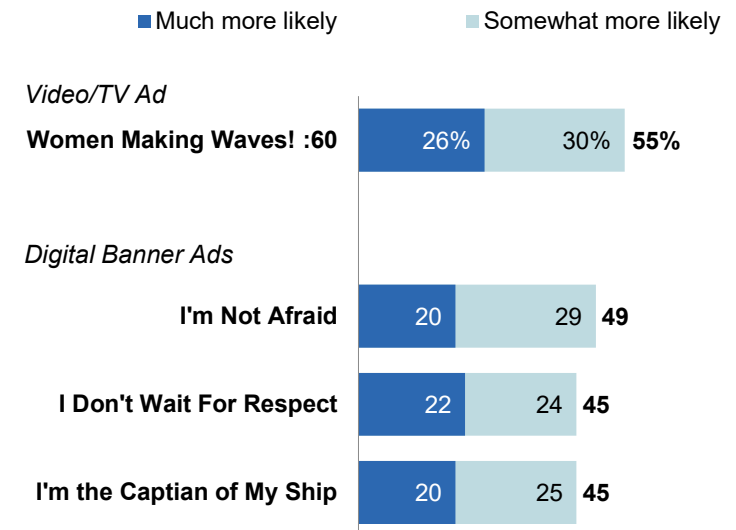
Effect on Intention to Fish

After viewing either the video or digital ads, about half of women say they are likely to fish in the next year.

- After seeing the “Women Making Waves!” video advertisements, more than half (**55%**) of women indicate intention to fish in the next 12 months, with about equal proportions say they are “much more” (26%) or “somewhat more” likely (30%).
- Half of all women who saw the digital advertisement “I’m Not Afraid” report that they are more likely to fish in the next year (49%). The other two ads, “I Don’t Wait For Respect” and “I’m the Captain of My Ship,” receive similar reactions (45% each).
- For each digital ad, about two-in-ten say they are “much more” likely to fish due to the ad (20%-22%). Slightly more express this intense opinion for the digital ad (26%).
- Compared to 2018, the ranking of ads did not change order. Notably, the “Captain” ad rose by 10 points (from 35% to 45%) while other ads only shifted by a point.

Video and Digital Advertisement Motivates About Half of Women to Fish in the Next Year

% who are likely to fish in next 12 months...



Source: Q27a, Q98a, Q102a, Q106a, Q94a. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=562 (Video), 653 (Afraid), 649 (Respect), 652 (Captain)

Influence Scores

Videos/Digital Ads Geared to Women

All women-targeted ads have low recall rates, with about one-in-ten recalling an individual ad.

- Only 11% of women recall seeing the “Women Making Waves” video ad. Similarly, only 10%-12% recall seeing and of the digital ads.

While not widely consumed, all ads geared toward women demonstrate moderately high influence scores.

- The video ad shows the highest influence scores for attention (78%) and behavioral response (72%).
- All digital ads receive very similar, though slightly lower, influence scores (68%-70%) compared to the video ad, with the “I’m Not Afraid” digital banner scoring highest by a few points.
 - Scores for behavioral response are very similar for all digital ads (ranging 68%-69%) and only a few points lower than the video ad.
- More than half of women say they personally liked each of the digital ads.
 - “I’m the Captain of My Ship” is liked the most (58%) followed by only a few points by “I’m Not Afraid” (54%) and “I Don’t Wait for Respect” (53%).

Influence Scores of Women-Focused Ads

Ad	Attention	Behavior
Video Ad		
Women Making Waves :60	78%	72%
Digital Ads		
I’m Not Afraid	70%	69%
I Don’t Wait for Respect	68%	68%
I’m the Captain of My Ship	68%	68%

Source: RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=564 (Video), 651 (Respect), 646 (Captain), 645 (Afraid)

Social Media

Recall and Engagement Among Women

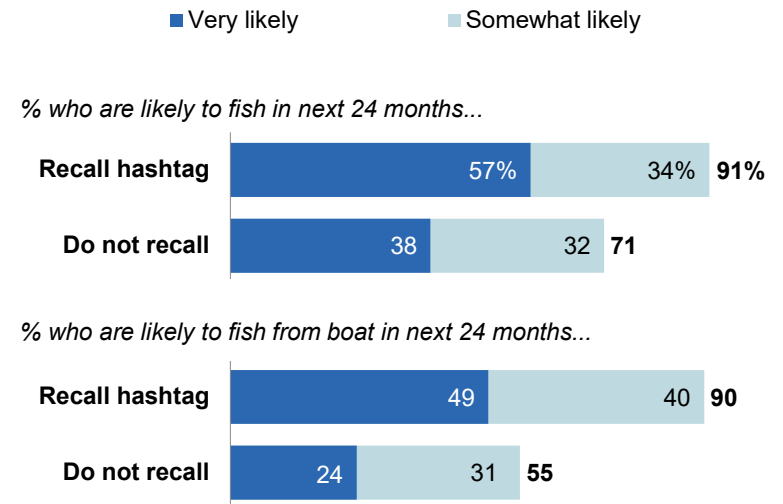
Unchanged from past years, women express low recall rates of social media hashtags.

- Fewer than one-in-ten women (**9%**) who used social media outlets in the last month recall seeing the hashtag #WomenMakingWaves, which is unchanged from the 2018 hashtag #MakingWaves.¹
- Likewise, **12%** of women recall the more established hashtag - #FirstCatch – which is also on par with 2018 (13%).²
 - Overall, 17% of the public recall seeing #FirstCatch, driven in part by higher rates among men (22%). This is very similar to 2018.²

Nearly all women who recall #WomenMakingWaves express intention to fish and/or fish from a boat in the next two years.

- About **nine-in-ten** of those who recall the hashtag say they intend to fish (90%) and fish from a boat (91%).
 - These are 20% points (fish) and 45% points (fish from a boat) more compared with those who do not recall the hashtag. This demonstrates a very engaged audience.

Most Women Who Recall #WomenMakingWaves Intend to Fish in Next 24 Months



Source: Q124 by Q113 & Q125 by Q113. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=649

¹ Source: Q107 by Q113. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=655

² Source: Q107 by Q109. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=1209

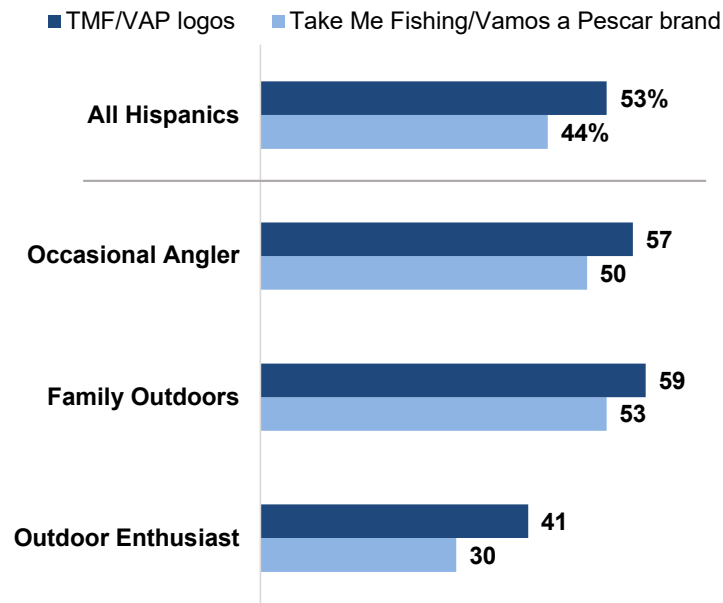
**INFLUENCE OF TMF/VAP
ADVERTISING TOWARDS
HISPANICS**

Hispanic Awareness

TMF/VAP Brand and Logos, Audience Segments

Hispanic Awareness of All “Take Me Fishing” Branding and Logos

% who recall any of “Take Me Fishing”/“Vamos a Pescar” brands and logos among ...



Source: Q4-5,Q7,Q8-9,Q11. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Based on N=366 Hispanic respondents Too few cases to report on the lapsed angler segment among the Hispanic market.

Logo recognition among Hispanics for the combined TMF/VAP is higher than the slogan recognition across all core market segments.

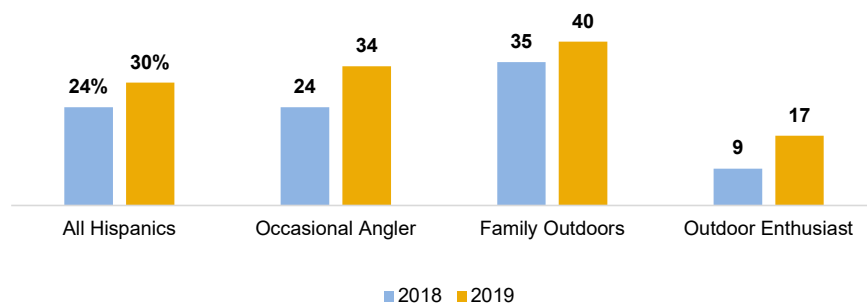
- The Hispanic Family Outdoors and Hispanic Occasional Anglers have similar patterns of awareness, with half or slim majorities recognizing the TMF/VAP slogans and logos.
- Like the public overall, awareness of brand slogans and logos are lower among the Outdoor Enthusiast segment.
- Hispanic men are more likely than women to be aware of the slogans (49% vs. 38%), while the logos are recognized about equally by gender (56% vs. 50%).
- Those ages 25-34 are more likely than older age cohorts to have seen both slogans and logos.

Hispanic Awareness

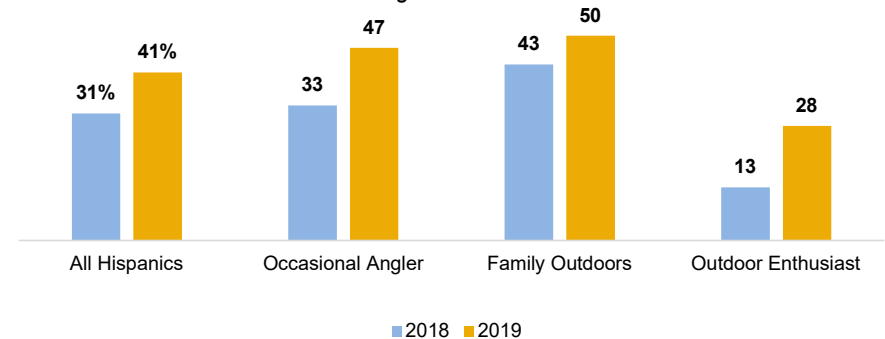
VAP Trend Among Audience Segments, 2018 -2019

Hispanic Awareness of “Vamos a Pescar” Brand/Slogan and Logos Increased Overall and Among All Segements from 2018

% who recall the “Vamos a Pescar” brand/slogan ...



% who recall the “Vamos a Pescar” logos...



Source: Q8-9,Q11. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Based on N=366 Hispanic respondents.

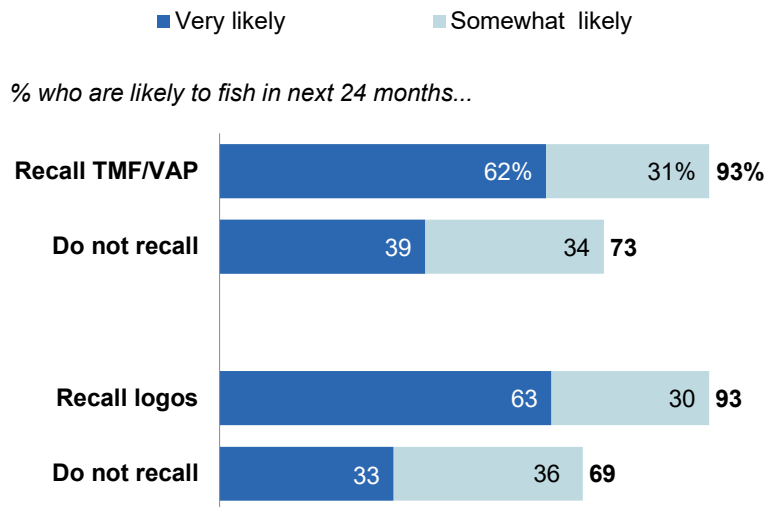
Compared with a year ago, Hispanic awareness of both the VAP slogan and logo have increased, overall and among all audience segments.

- Hispanic familiarity with “Vamos a Pescar” is **up 6 points** from 2018 (24% to 30%), and logo awareness **up 10 points** (31% to 41%).
- For the VAP logo, recall increased 14 points among Occasional Anglers (33% to 47%), up 7 points among Family Outdoors (43% to 50%), and up 15 point among Outdoor Enthusiasts (13% to 28%).
- For the VAP slogan, recall grew slightly less. Occasional Anglers increased by 10 points among (24% to 34%), Family Outdoors are up 5 points (35% to 40%), and Outdoor Enthusiasts are up 8 point (9% to 17%).
- For the Spanish specific VAP slogan logo the patterns by core audience segments mirror those of the overall Hispanic recognition of TMF and VAP.
 - For example, about half of both Hispanic Family Outdoors and Hispanic Occasional Anglers have seen the VAP logo (50% and 47%).

Hispanic Recall of TMF/VAP Brand and Logos

Effect on Intention to Fish

Overwhelming Majority of Hispanics Previously Exposed to the TMF/VAP Brand are Likely to Fish in the Next Two Years



Source: Source: Q4-5, Q7, Q8-9, Q11 by Q124. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=366. Based on N=366 Hispanic respondents.

As with the public overall, those exposed to the TMF/VAP brand are highly likely to plan on fishing in the next two years and are significantly more likely to register their intent to fish than those who have not been exposed to the brand.

- The overwhelming majority of Hispanics who recall the TMF/VAP slogans or the logos (93% each) are “very/somewhat” likely to fish in the next 24 months. Those unfamiliar with the brand also hold strong intent, but by contrast, about seven-in-ten of those unaware of the slogans (73%) or who can not recall the logos (69%) say that they intend to fish in the next two years.
- Looking at intense opinion, 62% of those aware of the slogans are “very likely” to fish, compared with 39% of those who do not recall TMF/VAP.

Hispanic Awareness of TMF Brand

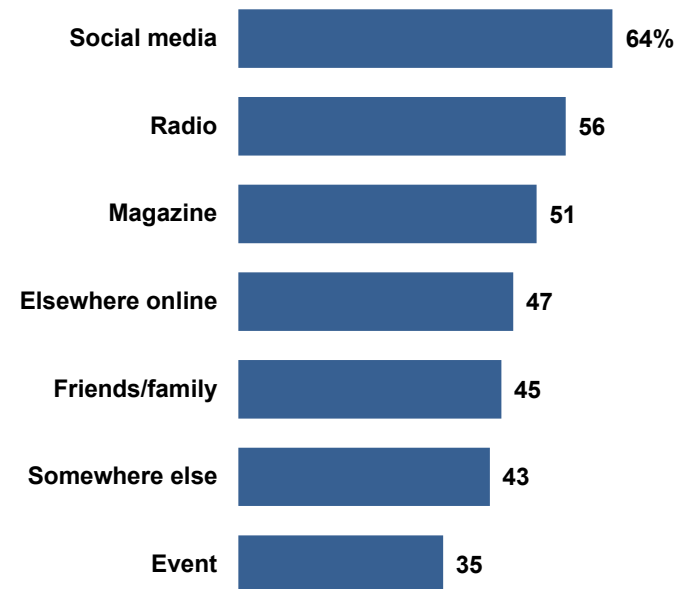
Sources of Awareness

Hispanics recall “Vamos a Pescar” in an advertisement as a slogan or the name of a website from a variety of different sources.

- Half (49%) say they have encountered VAP from one, two or three media sources. About three-in-ten Hispanics (29%) recall VAP from five or more of the information sources tested
- Majorities of Hispanics learn about VAP from social media (64%) or from radio advertising (56%). About half know VAP from magazines (51%) or elsewhere on the internet, independent of social media (47%).
- Sizeable minorities recall VAP from talking with friends/family (45%), or other places they encounter news and information (43%).
- Finding VAP on social media varies by gender: 73% of Hispanic men vs. 52% of Hispanic women recall VAP from social networking sites.
- Higher income Hispanics and older Hispanics are the most likely to say that they recall VAP from an event they attended.

Social Media Tops List of Sources Where Hispanics Hear About Vamos a Pescar

From where do you recall the phrase "Vamos a Pescar"?



Source: Q10a-g. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Based on N=102 Hispanic respondents. Percentages do not add to 100% as question was select all that apply.

Hispanic Online Engagement

Usage of Vamosapescar.org, Trend 2018-2019

2018-2019: Uptick in Web Visits to vamosapescar.org

% who have visited vamosapescar.org	2018 ¹	2019 ²	2018 to 2019 Difference
All Hispanics	15	19	+4
<i>Target Segments</i>			
Occasional Anglers	20	19	-1
Family Outdoors	22	27	+5
Outdoor Enthusiasts	6	11	+5
<i>Gender</i>			
Men	14	22	+8*
Women	18	15	-3
<i>Income</i>			
<\$50,000	--	12	--
\$50,000 - \$99,999	16	24	+8*
\$100,000+	16	21	+5
<i>Age</i>			
25-34	23	22	-1
35-44	12	20	+8*
45-54	9	9	+1

¹Source: VAP5. RBFF 2018 TMF Campaign Evaluation Survey, Oct 1 – Oct 11, 2018.
²Source: Q12 RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Based on N=364 Hispanic respondents.
Asterisks (*) indicate significant difference.

Today, **19%** of Hispanics report having visited the vamosapescar.org website. The share going online to the Spanish language VAP site is **up 4 points** from a year ago.

- More male Hispanics are visiting the site in 2019 (22%) than in 2018 (14%). Likewise, more middle-income Hispanics are going to vamosapescar.org to learn about fishing (16% in 2018 and 24 today).
- By age, those 35-44 (i.e., older Millennials and younger Gen X) are now visiting vap.org in comparable to numbers that of their younger cohort ages 25-34 (20% and 22%, respectively).
- There is only modest change in Hispanic visits to the Spanish VAP website by core audience segments. More than a quarter (27%) of Hispanic Family Outdoors are going to VAP online, more than any other Hispanic target audience segment.

**OVERALL BRAND AND
MEDIA AWARENESS AND
INTERACTION OF HISPANIC
AUDIENCE**

Spanish Media 2019 Ads TV/Video and Digital Banners



¡Vamos a Pescar! :15 – 2018 / Let's go fishing!

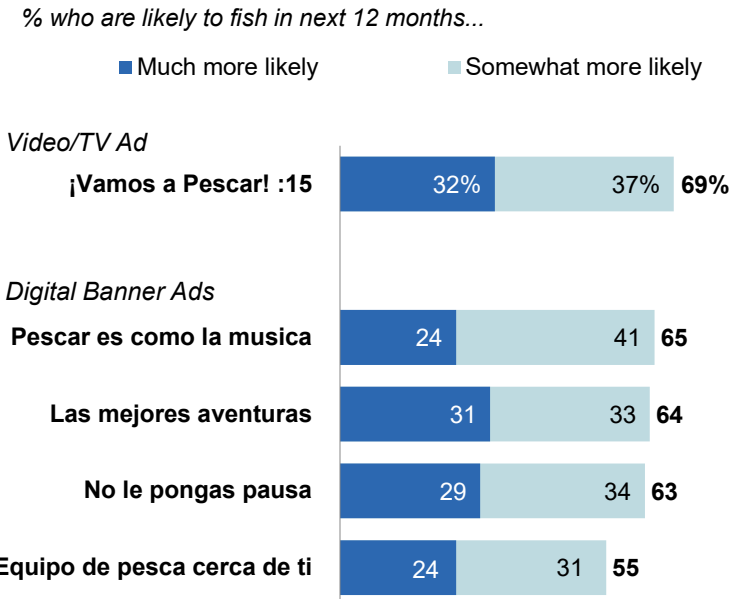


Exposure to Spanish Ads Effect on Intention to Fish

The video ad is most successful at motivating the Hispanic audience to fish in the next year.

- From exposure to the video ad “¡Vamos a Pescar! :15,” the majority (69%) report motivation to fish in the next year, which is higher compared to all digital banner ads shown.
 - About one-third (32%) who saw the video ad express they are much more likely to fish in the next year.
- About two-thirds of Hispanics who saw the digital ads “Pescar es como la musica,” “Las mejores aventuras,” and “No le pongas pausa” are much or somewhat more likely to fish in the next 12 months (65%, 64%, and 63% respectively).
 - However, “Las mejores aventuras” and “No le pongas pausa” have a greater proportion who say they are “much more likely” to fish (31% and 29%, respectively) compared to “Pescar es como la musica” (24%).
- Only the ad “Equipo de pesca cerca de ti,” has a significantly smaller proportion indicating their intention to fish in the next year after viewing it (55%).

Hispanic Audience Intention to Fish in the Next Year Based on Spanish Advertisements



Source: Q39a, Q43a, Q47a, Q51a, Q55a. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019.
Percentages read across and are rounded. N=241 (Video), 274 (Musica), 274 (Aventuras), 274 (Pausa), 271 (Equipo)

Influence Scores

Videos/Digital Spanish Ads

Spanish language video and digital advertisements receive comparable, highly positive influence scores on each platform for the attention measures.

- Overall, the rates of recall for Spanish video advertisements (23%) and digital banner advertisements (range 20-24%) are very similar.¹
- Both influence scores for the Spanish video are 76%.
- The top three digital ads, the same three that ranked similarly for influencing intention to fish, range from 73%-76%.
- Only “Equipo de pesca cerca de ti” scored noticeably less than the video and all banner ads, with 69% of the target audience’s attention and behavior impacted.
- Overall, behavioral impact scores are comparable to attention scores across all ads.

Similar Influence Scores Across Spanish Ads

Ad	Attention	Behavior
Video/TV Ad		
¡Vamos a Pescar! :15	76%	76%
Digital Banner Ads		
No le pongas pausa	76%	74%
Las mejores aventuras	75%	73%
Pescar es como la musica	76%	73%
Equipo de pesca cerca de ti	69%	69%

Source: Q173a, Q80a, Q87a, Q94a. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=242 (Video), 267 (Pausa), 274 (Aventuras), 274 (Musica), 273 (Equipo)

¹ Source: Q36, Q40, Q44, Q48, Q52. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and are rounded. N=231 (Video), 263 (Pausa), 270 (Aventuras), 270 (Musica), 269 (Equipo)

EFFECTS OF HAVING FISHED AS A CHILD

Fishing as a Child

Frequency by Sub-Group

Fishing as a Child by Segments and Target Demographics

% who...	Has gone fishing as a child	Has <u>not</u> gone fishing as a child	Total
Overall	83	17	=100
<i>Target Segments</i>			
Lapsed Anglers	92	8	=100
Occasional Anglers	92	8	=100
Family Outdoors	85	15	=100
Outdoor Enthusiasts	80	20	=100
<i>Gender</i>			
Men	88	12	=100
Women	78	22	=100
<i>Ethnicity</i>			
Hispanic	74	27	=100
Non-Hispanic	85	15	=100
<i>Age</i>			
25-34	79	21	=100
35-44	84	16	=100
45-54	85	15	=100

Source: Q120, RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read across and may not add to 100% due to rounding. N=1225

Strong Link Between Fishing as Child and Adult

	Has gone fishing as a child	Has <u>not</u> gone fishing as a child
Has gone fishing as an adult	87%	38%
Has <u>not</u> gone fishing as an adult	14%	62%
	100	100

Source: Q120 by Q121. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read down and may not add to 100% due to rounding. N=1210

Most of the public fished during childhood, and this has a profound impact on fishing behavior as an adult.

- Overall, 83% went fishing as a child compared to not (17%), similar to 2018.
- Audience segments express high rates of childhood fishing behavior, especially among Occasional Anglers and Lapsed Anglers (92% each).
- As in 2018, the overwhelming majority of those who fished as kids have also done so as adults (87%), compared with only 38% who did not fish during childhood engaged in fishing as adults, a difference of 49 points.

Need for early outreach to target demographics.

- Hispanics are less likely to have fished as children compared to non-Hispanics by a margin of 11 points (74% vs 85%, respectively).
- Additionally, women are less likely to have fished as a child compared to men by 10 points (88% vs 78%, respectively).
- Older age cohorts of the target audience are also more likely to have fished as a child by 5 to 6 points, compared to the 25-34 age cohort.

Fishing as a Child

Intention to Fish in 24 Months

Intention to Fish Twice as High if Fished as Child

Intention to fish in next 24 months	Has gone fishing as a child	Has <u>not</u> gone fishing as a child
Not too likely	7%	18%
Not at all likely	13%	27%
Somewhat likely	28%	28%
Very likely	<u>53%</u>	<u>27%</u>
	=100	=100

Source: Q120 by Q124. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read down and may not add to 100% due to rounding. N=1216

Higher Intent to Fish from Boat if Fished as Child

Intention to fish from boat in next 24 months	Has gone fishing as a child	Has <u>not</u> gone fishing as a child
Not too likely	12%	19%
Not at all likely	22%	27%
Somewhat likely	30%	31%
Very likely	<u>36%</u>	<u>22%</u>
	=100	=100

Source: Q120 by Q125. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. Percentages read down and may not add to 100% due to rounding. N=1213

- By a ratio of almost two-to-one, those who fished as children are much more inclined to say they are “very likely” to go fishing in the next 2 years compared with those who never fished as kids (53% vs 27%).
- Similarly, two-thirds (66%) of those who fished as children express intent to fish from a boat compared to about half (53%) of those who did not fish as kids who say the same, a difference of 13 points.
- Results hint at fishing during childhood as being one of the largest contributors to fishing in adulthood.

DISCUSSION AND CONCLUSIONS

Discussion:

Other Minor Findings

- The shift in brand awareness (from 40% in 2018 to 35% in 2019) is found mainly among Family Outdoors (-11 points), those ages 35-44 (-9 points) and non-Hispanics (-6 points).
- Engagement with hashtags is mostly unchanged from last year, including that there is slightly more engagement with #GetYourFishOn compared to #FirstCatch.
- The 3-year trend of the main general TMF ad categories shows a consistent impact on the majority of the target audience, with no influence score under 70%. TV ads experience a slight decrease due to lowered relevance and behavioral scores. Digital ads have decreased a few points on all measures. Only Disney video experience an upward trend, with scores in line with general TV ads.
- Influence of the TMF campaign by angler activity shows those with intent to fish in the next two years are more receptive to ads across all influence measures compared to anglers who do not intend to fish.
- General ad influence by age reveals high impact to all ages; however, the oldest cohort (45-54) is more receptive to the video ads (TV and Disney) than the static digital and print ads.

Discussion:

Conclusions and Recommendations

- Overall, recall and intention measures have slightly dropped compared to 2018; however, they are still holding at high levels often comparable to 2017. In fact, impact of targeted campaigns (women and Hispanics) have made gains in some areas.
- TV ads continue to be the most recalled venue and most well-received and influential media advertising for all campaigns.
- Influence scores continue to be extremely positive for legacy material and have the most impact on those with intent to fish. Notably, advertisements on average are still impactful for the majority of those without intention to fish.
- Those with intention to fish in the next 24 months (regardless if they recently fished) have higher brand awareness and are most receptive to the advertising campaign, giving higher scores, compared to those who do not intend to fish.
- On the likelihood of fishing after seeing an ad, most of the general TMF ads and Spanish ads are comparably persuasive, with the Spanish ads being slightly more convincing to Hispanics (usually around two-thirds) than TMF ads are to the general public (usually around six-in-ten). Ads geared towards women receive the lowest scores for intention to fish (about 50%).

Recommendations

- Most of the public do not recall the general or campaign-specific ads but give high scores for many of them. This affirms the immediate impact these ads on first-time viewers and the need to spread the most impactful ads as widely as possible.
- Fishing as a child is an important indicator for fishing as an adult, yet women and Hispanics are less likely to fish as children. This indicates the continuing need to reach these demographics early in age.
- Public opinion only provides part of the picture in understanding the Take Me Fishing advertisement campaign. In order to fully explain the advertising impact, analysis of media allocation is necessary to understand all predicative variables.

THANK YOU

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This study was conducted in conformance with ISO 20252 international standard for market, opinion and social research.

