



Recreational Boating & Fishing Foundation (RBFF)

2013

Take Me Fishing

Hispanic Audience
Report





Project Scope and Objectives

The purpose of this research effort is to establish baseline brand awareness levels and effects of the Take Me Fishing (TMF) Integrated Marketing Campaign within a Hispanic/Latino audience by measuring:

- ✓ “Brand” awareness and perception of boating and fishing
- ✓ TMF Campaign effects and outcomes
- ✓ Brand awareness and recall of TMF print, TV, radio, and online banner advertising.
- ✓ Behavioral Impact of TMF campaign
- ✓ Overall Ad Assessment (likability and four key intent metrics)

In addition, Hispanic audience characteristics were explored by measuring :

- ✓ Media usage
- ✓ Acculturation level
- ✓ Country of origin

These metrics were captured at the national level and at two regional levels: Texas and Florida states.

An online survey was conducted between September 11th - September 24th, 2013.

This evaluation was conducted among a sample of the Hispanic population, representative of the target audience of the TMF campaign, that was drawn in a largely similar fashion as the general sample using the Survey Sampling International Panel. However, in order to obtain a robust sample of the target Hispanic population, an additional oversampling was obtained for Texas and Florida.

This Hispanic sample was composed of 1,933 Hispanic males and females who practiced outdoor activities at least once per year. Based on demographic information from Lopez Negrete regarding the Hispanic population in the United States, it was determined that in order to capture a more representative sample, the age and income ranges should be broadened from the ranges used to draw the sample for general market survey. The Hispanic sample was selected among a target audience within the age range of 16 to 64 and with annual household incomes from \$25,000 to \$150,000.

The survey sample included the target audience from:

- ✓ Texas (n = 441, 23%)
- ✓ Florida (n = 438, 23%)
- ✓ Remaining states (n = 1054, 55%)



Executive Summary: Print Campaign Effects

Exposure to the TMF print campaign had a positive effect on the stated likelihood to go fishing, take someone fishing, and go boating for the purpose of fishing for the Hispanic population. Regression analysis 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	2013
Go fishing	1.7
Take someone else fishing	1.7
Go boating for the purpose of fishing	2.0
Visit the TMF website	1.6

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



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	1.7
Take someone else fishing	1.7
Go boating for the purpose of fishing	1.9
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	1.8
Go boating for the purpose of fishing	2.0
Visit the TMF website	1.8

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



Executive Summary: Online Campaign Effects

- ✓ 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:

General Online ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	2.2
Take someone else fishing	2.1
Go boating for the purpose of fishing	2.4
Visit the TMF website	1.9

Disney Online ad

Intentions in the Next 12 months	Number of times more likely
Go fishing	1.9
Take someone else fishing	1.8
Go boating for the purpose of fishing	1.9
Visit the TMF website	1.6

** 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.



Overall Campaign Outcomes





Campaign Outcome: Take Me Fishing Brand Awareness

Among those survey respondents who recall seeing, hearing or reading an advertisement for any outdoor leisure or recreational activity within the last year, 24% recalled the phrase “Take Me Fishing” in an advertisement, as a slogan, or as the name of a website.

Two-fifths (40%) of Hispanic respondents recalled seeing the TMF logo.

Brand Awareness	2013
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?	24%
Q13. Before today, have you ever seen this logo?	40%

While a small number provided (on an unaided basis) the name of a specific website in answer to whether they recalled seeing any boating or fishing advertisement mentioned on a website, www.takemefishing.org was one of the top four websites mentioned along with Bass Pro, Cabela’s, and Fishing.com.



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 among Hispanic respondents reached the following proportions:

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

Advertising Recall	2013
Television	18%
Radio	17%
Disney Online Banners	15%
Print	14%
General Online Banners	12%

Respondents had higher recall rates for television and radio advertisements than the print and online advertisements. Among the online advertisements, respondents recalled the Disney banners slightly more often than the General banners.



More than half of the Hispanic respondents recall seeing the phrase “Take Me Fishing” in a television advertisement, online, or in a magazine. Almost one-third (28%) of respondents recall the phrase from a radio advertisement.

Some (14%) 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	2013
Television advertising	54%
The internet / online	53%
Magazine advertising	51%
Part of a campaign to promote fishing and boating activities	43%
Radio Advertising	29%
A postcard you received through the mail	14%
Something else?	20%

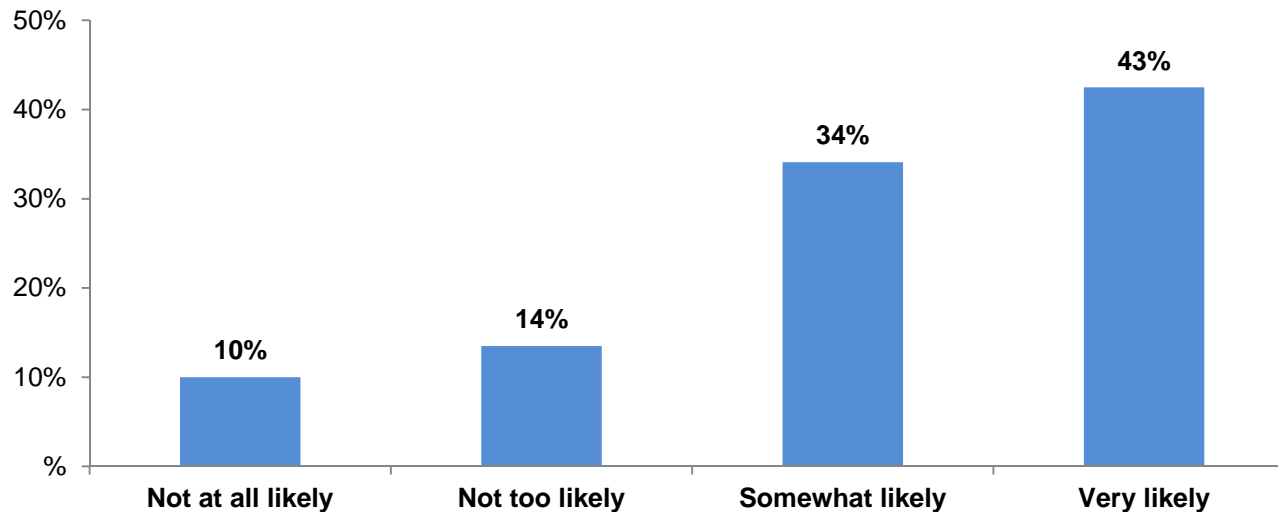


Overall TMF Campaign Behavioral Impact



More than two-fifths (43%) of Hispanic respondents indicate that they are very likely to go fishing within the next 24 months and more than one-third (34%) indicate they are somewhat likely, meaning more than three quarters (77%) indicate some level of likelihood to go fishing.

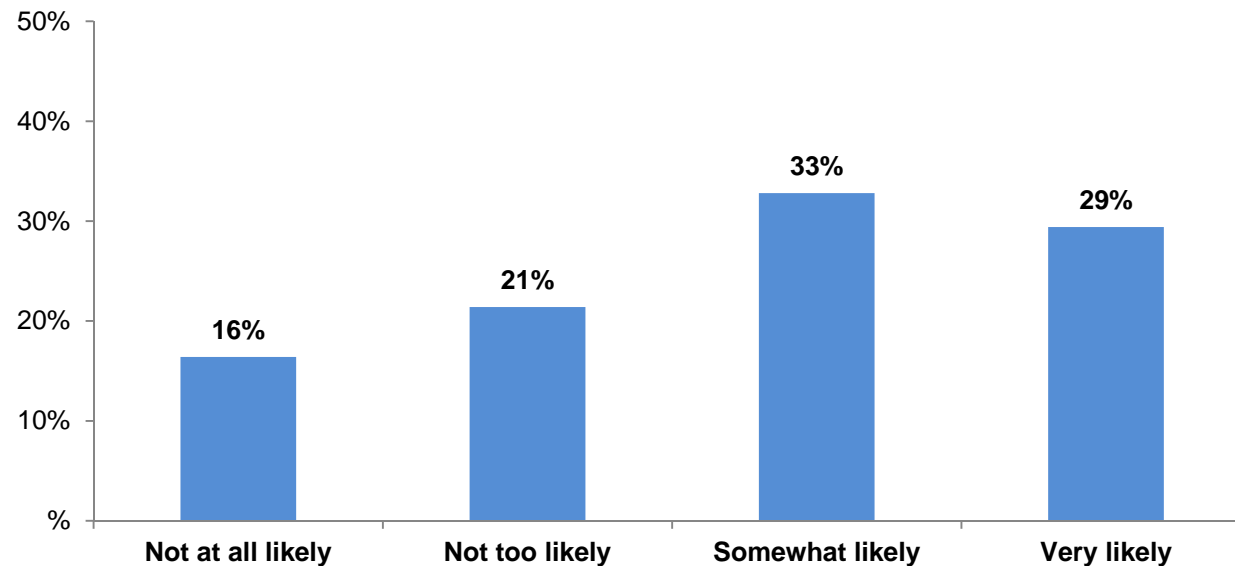
Q83. Overall, how likely would you say you are to go fishing in the next 24 months?



Intention to Fish from a Boat in the Future

One-third (33%) of Hispanic respondents indicate that they are somewhat likely to go fishing from a boat within the next 24 months and almost one-third (29%) indicate they are very likely. Thus, more than three-fifths (62%) of respondents intend to go fishing from a boat within 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?





TMF Campaign Overall Assessments





- ✓ Print ads, Radio ads, and Television ads were most liked, however, the radio advertisements produced the highest likelihood that Hispanic respondents would go fishing, take someone fishing, go boating, and visit the Take Me Fishing website than the other types of advertisements.
- ✓ The television advertisements produced the second highest likelihood to go fishing, take someone fishing, go boating, and visit the website, followed by the print ads.

2013 Advertisements (Top 2 box scores)			
	Print Ads	Radio Ads	Television Ads
Likeability	71% (n=1901)	72% (n=603)	71% (n=587)
Likelihood to go fishing in next 12 months	52% (n=1898)	59% (n=604)	57% (n=586)
Likelihood to take someone fishing in next 12 months	52% (n=1901)	60% (n=600)	58% (n=582)
Likelihood to go boating for the purpose of fishing in next 12 months	46% (n=1896)	53% (n=602)	50% (n=588)
Likelihood to visit the web site	57% (n=1896)	59% (n=595)	58% (n=586)

Note: A smaller number respondents that answered the questions associated with the radio/tv ads due to inability to view the video or hear the audio on their computer.



- ✓ The General and Disney online banners were the least liked and had the least impact on intent compared to other types of advertisements.
- ✓ While the General online banners were liked by more than half of respondents, they did not have as much of an effect on the intent metrics measured as the other types of advertisements.

2013 Advertisements (Top 2 box scores)		
	General Banners	Disney Banners
Likeability	57% (n=1869)	65% (n=1864)
Likelihood to go fishing in next 12 months	43% (n=1867)	50% (n=1856)
Likelihood to take someone fishing in next 12 months	43% (n=1872)	48% (n=1856)
Likelihood to go boating for the purpose of fishing in next 12 months	39% (n=1872)	44% (n=1853)
Likelihood to visit the web site	48% (n=1873)	53% (n=1867)



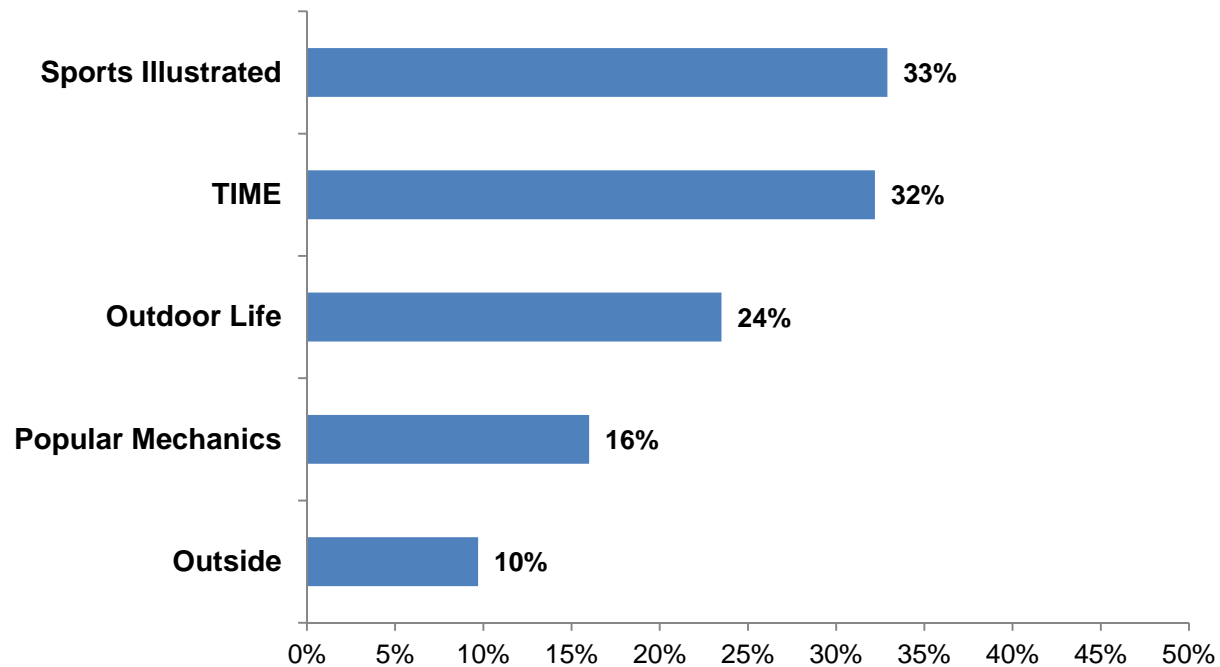
Overall Media Usage



Magazine readership was compared across five magazines that were tracked in the past TMF campaign evaluations. The 2013 TMF campaign print ads were placed only in two magazines: *Sports Illustrated* and *Popular Mechanics*.

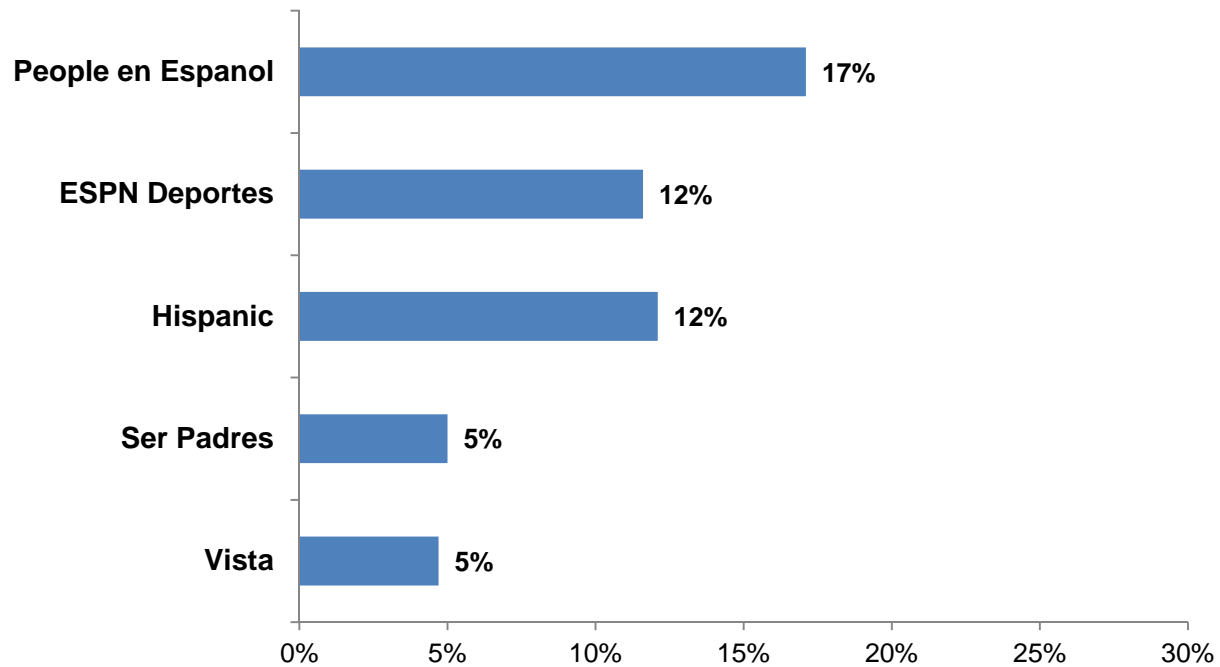
The results show that among Hispanic respondents *Sports Illustrated* and *TIME* have the highest readership level, with 33% and 32% of respondents respectively indicating reading them in the past three months.

Q85. Please indicate whether you have read any of the following magazines in the past three months by selecting them below.



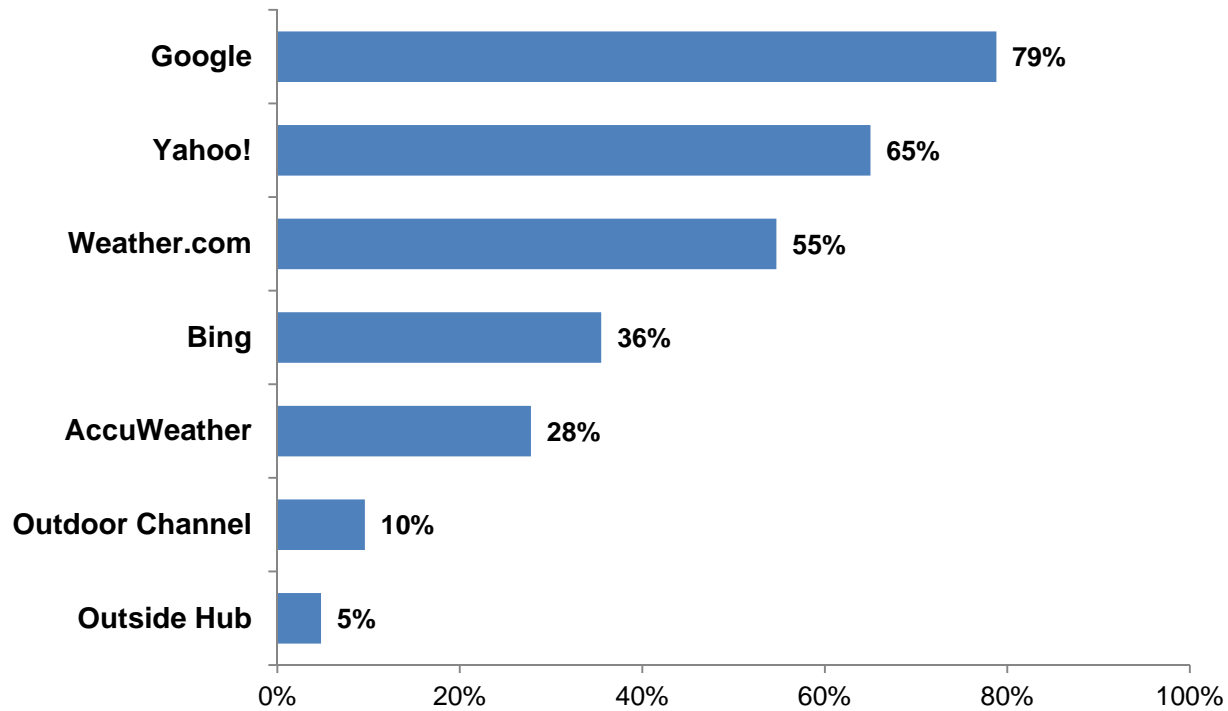
Magazine readership was compared across five major Hispanic publications, however, respondents indicate a general low readership, with *People en Español* showing the highest readership at only 17%.

Q93g. Please indicate whether you have read any of the following magazines in the past three months by selecting them below.



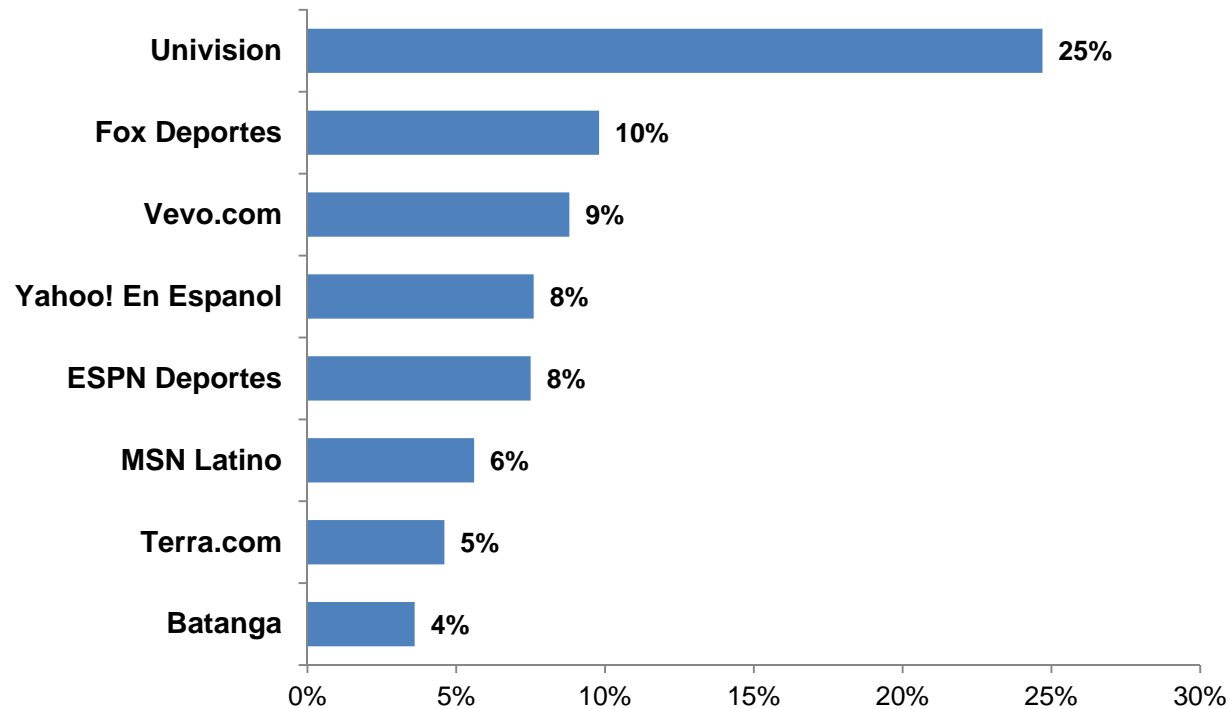
More than half of respondents indicate accessing Google, Yahoo!, and Weather.com in the past three months, with the vast majority (79%) visiting Google.

Q86. Please indicate whether you have accessed any of the following websites in the past three months by selecting them below. (Select all that apply)



Respondents were asked about their visits to Hispanic websites in the past three months, and one-quarter of respondents (25%) indicated visiting Univision.com; however, visitation to the other listed sites is relatively low ($\leq 10\%$).

Q93h. Please indicate whether you have accessed any of the following websites in the past three months by selecting them below. (Select all that apply)





Overall Acculturation Level



Acculturation levels of Hispanic respondents were determined based on an algorithm developed by Lopez Negrete.

More than half of Hispanic respondents (52%) are considered bi-cultural while 43% are considered acculturated. Only 6% fall into the un-acculturated group.

Acculturation Level	2013
Un-acculturated	6%
Bi-cultural	52%
Acculturated	43%



Campaign Outcomes – Test Markets





Campaign Outcome: Take Me Fishing Brand Awareness

Among Hispanic respondents who recall seeing, hearing or reading an advertisement for any outdoor leisure or recreational activities within the last year, 24% of respondents from all states recalled the phrase “Take Me Fishing” in an advertisement, as a slogan, or as the name of a website -- 20% in Texas and 19% in Florida.

Two-fifths of respondents from all states (40%) recall the TMF logo with 36% in Texas and 39% in Florida.

Brand Awareness	Texas	Florida	All States
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?	20%	19%	24%
Q13. Before today, have you ever seen this logo?	36%	39%	40%



Campaign Outcome: Overall Advertising Recall

At the end of the 2013 Take Me Fishing campaign the recall rate among Hispanic audiences of TMF print, TV, radio, and banner ad advertising presented is below:

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

Advertising Recall	Texas	Florida	All States
Print	9%	11%	14%
Radio	16%	9%	17%
Television	16%	11%	18%
General Banners	11%	9%	12%
Disney Banners	13%	12%	15%

While overall, television and radio ads show the highest recall, respondents in Texas show same recall rate for both TV and radio ads whereas in Florida, respondents recall the Disney banners the most, followed closely by TV and print ads.

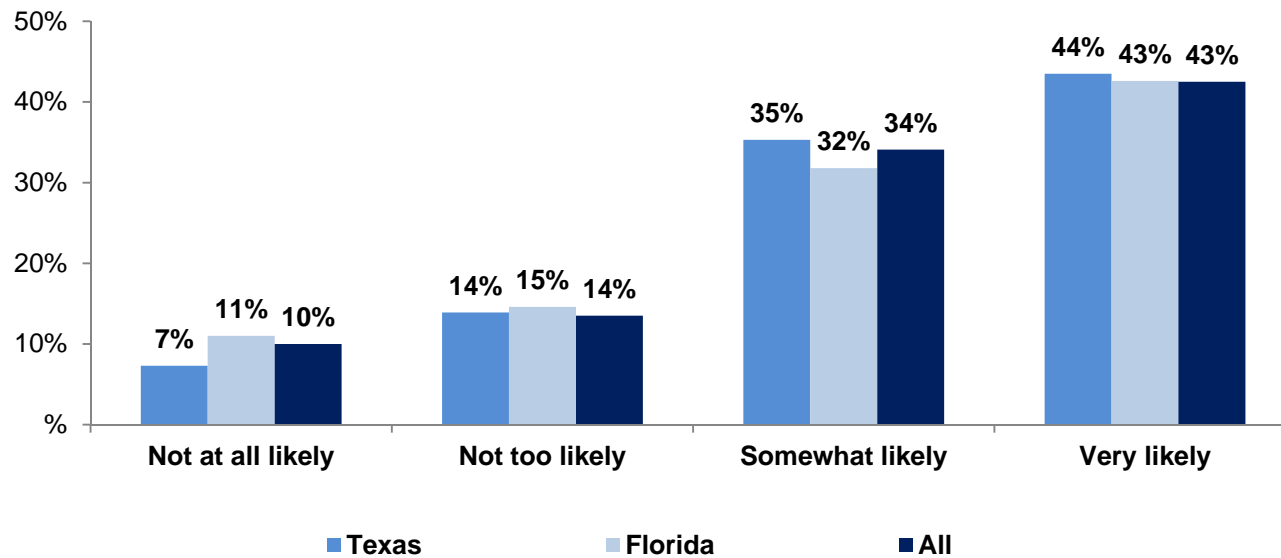


TMF Campaign Behavioral Impact – Test Market



Respondents in both Texas and Florida show a similar likelihood to go fishing in the next 24 months, with those in Texas showing a slightly higher likelihood.

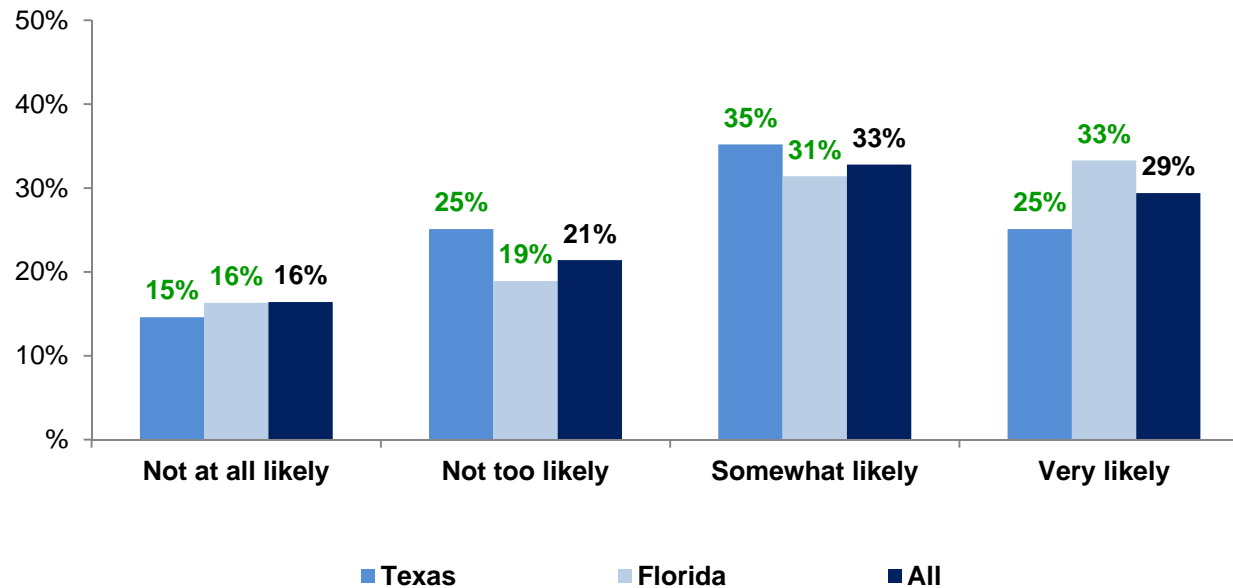
Q83. Overall, how likely would you say you are to go fishing in the next 24 months?



Intention to Fish from a Boat in the Future

Respondents in Texas and Florida differ significantly in their likelihood to go fishing from a boat in the next 24 months, with Florida respondents indicating they are very likely much more than those in Texas.

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



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



TMF Campaign Assessments – Test Markets





- ✓ While Hispanic respondents rated the radio advertisements as the most liked at the national level, respondents in Texas like the print ads most, followed by the TV ads, then the radio ads. Respondents in Florida like the TV ads the most, followed by the print ads, then the radio ads.
- ✓ Overall, the radio ads have the biggest effect on intent metrics. This is also found to be true for respondents in Texas; however, the television advertisements have the biggest impact on intent metrics for respondents in Florida.

2013 Advertisements (Top 2 box scores)									
	Print Ads			Radio Ads			Television Ads		
	TX	FL	All	TX	FL	All	TX	FL	All
Likeability	71%	67%	71%	69%	65%	72%	70%	72%	71%
Likelihood to go fishing in next 12 months	53%	54%	52%	56%	58%	59%	53%	59%	57%
Likelihood to take someone fishing in next 12 months	55%	50%	52%	56%	58%	60%	56%	59%	58%
Likelihood to go boating for the purpose of fishing in next 12 months	44%	48%	46%	50%	57%	53%	45%	53%	50%
Likelihood to visit the website	56%	53%	57%	58%	54%	59%	57%	56%	58%



- ✓ The General online banners are the least liked ads and have the lowest impact on intent to go fishing, take someone fishing, go boating, and visiting the website for Texas, Florida, and all states combined.
- ✓ While there are some differences in perception of the TMF ads between respondents in Texas and Florida, these differences are not statistically significant.

2013 Advertisements (Top 2 box scores)						
	General Banners			Disney Banners		
	TX	FL	All	TX	FL	All
Likeability	57%	58%	57%	65%	62%	65%
Likelihood to go fishing in next 12 months	44%	42%	43%	49%	46%	50%
Likelihood to take someone fishing in next 12 months	46%	43%	43%	49%	46%	48%
Likelihood to go boating for the purpose of fishing in next 12 months	38%	41%	39%	43%	44%	44%
Likelihood to visit the website	48%	46%	48%	55%	51%	53%



Acculturation Levels – Test Markets





Hispanic groups in Texas and Florida differ significantly regarding the country where they were born. While more than three-quarters (78%) in Texas were born in the US, less than half (44%) in Florida were born in the US. A larger proportion of Hispanic respondents in Florida indicate they were born in the Caribbean or South America than compared to respondents in Texas.

Q93b. Where were you born?

Country of Origin	Texas	Florida	All States
United States	78%	44%	68%
Mexico	11%	2%	7%
Central America (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama)	3%	5%	4%
South America (Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, Venezuela)	4%	15%	8%
Caribbean (Cuba, Dominican Republic, Puerto Rico)	2%	31%	11%
European (Portugal, Spain)	1%	1%	1%

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



Acculturation levels of Hispanic respondents were determined based on an algorithm developed by Lopez Negrete.

Hispanic respondents in Texas and Florida differ significantly in their level of acculturation. Respondents in Texas are more acculturated than those in Florida who are mostly bi-cultural or un-acculturated.

Acculturation Level	Texas	Florida	All States
Un-acculturated	3%	14%	6%
Bi-cultural	44%	67%	52%
Acculturated	54%	19%	43%

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

- Based on the 2013 TMF Hispanic audience survey, we propose a set of benchmarks for measurement and tracking of the TMF campaign evaluations within Hispanic target audience.

Benchmark	Metrics	Definition/Question
Brand Awareness	Recall of the phrase "Take Me Fishing"	Can you recall ever seeing, hearing or reading the phrase "Take Me Fishing" in an advertisement, as a slogan, or as a name of website?"
	Recall of the TMF logo	"Before today, have you ever seen this logo?"
Behavioral Impact	Intent to go fishing	"Overall, how likely would you say you are to go fishing in the next 24 months?"
Behavioral Outcome	Fishing rate in past 12 months	Have gone fishing in the last 12 months at least once
	Fishing license ownership	"Do you currently have a valid fishing license?"

- The key benchmarks should be measured across the three acculturation levels:
 - Acculturated
 - Bicultural
 - Non acculturated



Baseline measures

2013 TMF Hispanic audience survey baseline measures for the proposed benchmarks

Benchmark	Metrics	Non-acclulturated	Bicultural	Acculturated
Brand Awareness	Recall of the phrase "Take Me Fishing"	19.8%*	26.7%	22.3%
	Recall of the TMF logo	7.5%*	13.7%	10.4%
Behavioral Impact	Intent to go fishing in next 24 months	39.6%*	42.1%	44%
Behavioral Outcome	Fishing rate in past 12 months	59.4%*	63.4%	62.5%
	Fishing license ownership	32.1%*	37.8%	36.9%

**Due to the small sample size, the margin of error is 9.49%*