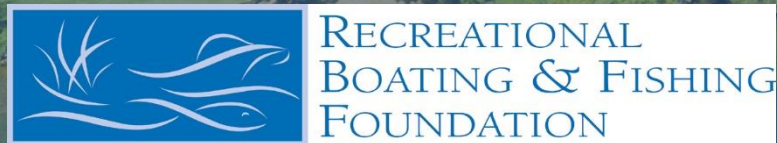


2021 Take Me Fishing Campaign Evaluation – FINAL REPORT

Recreational Boating & Fishing Foundation (RBFF)
April 2022



Report Outline

This report presents research findings from the 2021 Take Me Fishing Campaign evaluation survey. The report is divided into the following sections:

1. Project scope and introduction (summary of sampling and data collection, participant segmentation definitions)
2. Executive summary of findings, including main intention measures, intention models, and a summary of the Active Social Family segment, especially compared to the Family Outdoors segment
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 general TMF campaign
7. Influence of the TMF campaign for women – recall, influence and behavioral impact
8. Hispanic audience awareness and overall media/brand interaction with TMF and Vamos a Pescar (VAP) and corresponding behavioral impact of TMF general campaign
9. Impact of having fished as a child on current views of the sport
10. Appendix: Statistical methodology and sample characteristics (sub-group sizes and margins of error)

PROJECT SCOPE AND INTRODUCTION

Project Scope & Research Objectives

- This research effort evaluates the effect of the 2021 Take Me Fishing (TMF) Media Campaign.
 - This year's overall TMF campaign (main video and static ads) are the same as last year's revamped content.
 - As with last year, there is no specific campaign for women (beyond a tailored video) or a renewed Vamos a Pescar (VAP) campaign targeted towards Hispanics. The impact on women and Hispanics will continue to be evaluated through the general TMF campaign.
 - There are new specialty advertisement content and collaborative video ads.
- Impact of the TMF campaign is evaluated by intensity and trends 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, take someone fishing, etc.).
 - This includes impact of video ads on decision to fish this year.
 - Influence of TMF advertising on the decision to go fishing, fish from a boat and/or to engage with TMF media.
 - Awareness, recall and impact of TMF campaign creatives on the general public and sub-groups of interest, including Hispanics and women.

Methodology:

Survey Data Collection

- The 15-minute online survey was conducted October 29 – November 8, 2021.
 - The survey was programmed online for web-based administration (available 24/7) and delivered by email.
 - The sample frame of respondents included web-panel participants nationwide from third party vendors. Each respondent is assigned a unique ID to sign into the survey to ensure a single response per sampled individual.
 - Participants are screened for:
 - Those who practice outdoor activities at least once per year;
 - Individuals 18 to 64 years of age;
 - Quotas set for target subgroups by gender and Hispanic identity.
- The final sample includes **N=1,233 completes** where the margin of error for survey estimates using a 95% confidence interval is plus or minus 2.8 percentage points.
- The 2021 survey data are weighted to balance the sample by age and educational attainment as defined by the Census Bureau's American Community Survey 2019 estimates. 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 2021 data points unless otherwise stated.

Methodology:

Survey Participant Segmentation Definitions

*For information about sample sizes and margins of error, see appendix at end of report

New Angler Group, 2021

- A new audience segmentation not present in past year trends. This aligns with a specified marketing group that RBFF is now targeting.
- **Active Social Family:** Parents of any marital status with children 6-17, They must participate in multiple (at least 2 of 10) outdoor activities/sports related to or including fishing. They must also think it's important to spend time with family and try or learn new things.

Angler Groups, 2010-current

- Segmentation of groups that are present all year's data, but with less emphasis in 2021.
- These groups are based on family/ household makeup and activity (marital status and presence of children).
 - **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.
- These groups are exclusive to each other but not inclusive of the whole sample.

New Angler Types, 2020 - current

- Segmentation of groups not present prior to 2020, based only on prior fishing behavior.
 - **Newbie:** Fished for the first time this year, since childhood or in over 5 years.
 - **Reactivated Lapsed:** Fished this year and at least once within the last 5 years, but not last year.
 - **Consistent Angler:** Fished consistently over past years or most of their life.
 - **Lapsed:** Had not fished in past 2 years but did fish 3-5 years ago or had not fished in 6+ years.
 - **Never Fished:** Self-explanatory
 - These groups are exclusive to each other and inclusive of the whole sample.

Methodology:

Survey Participant Segmentation Definitions

Previous Angler Groups, 2010-2019

- Segmentation of groups that are present only in past year trends, but not in 2020 data forward.
- These groups were based on prior and future fishing behavior. They are exclusive to each other but not inclusive of the whole sample.
 - **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, independent of future intention.

EXECUTIVE SUMMARY

Executive Summary:

Core Metrics

Core Metrics

- The public's intention to fish in the next two years remains very high, and moreover the year-over-year trend has hit a 5-year high. Currently, 88% say they are "very" or "somewhat" likely to fish in the next 24 months, up significantly from 79% a year ago. Fishing intentions have increased 12% points in just the last 3 years, with 2021 interest in the sport outpacing 2020 (79%) and 2019 (76%).
- On brand awareness measures, recall for the TMF logo (50%) and slogan/brand (40%) are both at 3-year highs and both are up significantly from last year (logo 43% and slogan 31% in 2020).
- The social media hashtags this year are the same as last year's and all saw an increase in recall. More than a third (35%) can recall seeing at least one of the three 2021 campaign hashtags compared to 27% last year. Last year, about two-in-ten of the public individually recalled each hashtag, which has risen to about a quarter able to recall the hashtags #GetOnBoard (26%), #TheWaterIsOpen (28%), and #RecreateResponsibly (24%) this year. Additionally, recall of these hashtags on a friends' social media and those personally posting these hashtags is up modestly from a year ago.
- Independent of modest variation in intention to fish and awareness of brand, the overwhelming majority (93+%) of those who recall the RBFF brand (either slogan or logo) or TV/video ads continue to say that they intend to fish in the next 24 months. These proportions have somewhat shrunk but still outpace the intention of those who are not aware of campaign assets.
- The strongest independent indicators of the likelihood to fish in the next 24 months include: having fished as a child (by a factor of more than 3), belonging to an "Active Social Family" (by a factor of more than 2), the ability to recall the TMF logo, or living in the Midwest (by a factor of almost 2). In 2021, the Active Social Family and Midwestern residents are new standout factors in predicting intention to fish.

Executive Summary:

Audience Segments

Audience Segments

- On par with last year, “Newbies” and “Reactivated Lapsed” anglers show great engagement and awareness of the TMF ad campaign, with increased metrics this year. As illustrations, among the Newbies and Reactivated Lapsed, 70% can recall the TMF slogan and a majority also recall the brand (59%). Fully, half (51%) of these groups have seen at least one of the three new TMF hashtags (#GetOnBoard, #TheWaterIsOpen, or #RecreateResponsibly). Newbies and Reactivated Lapsed are among the most likely to have seen the main TMF 2020 TV spot (45%) and to have seen at least one digital ad (55%). Consistent Anglers have much lower recall of these media assets, and therefore, recall of the RBFF branding and media campaign. The least engaged segments are still the Lapsed and Never Fishers.
- All angler types and audience segments (Family Outdoors and Outdoor Enthusiasts) demonstrated an increase in recall across brand awareness metrics, especially Family Outdoors who had a 15-point gain in slogan recall (42% in 2020 to 57% in 2021) and a 12-point gain in logo recall (54% to 66%).
- The new audience type this year, Active Social Family, is very similar to Family Outdoors in their high rates of logo recall (67%) and slogan recall (55%), as well high overall recall compared to the non-ASF audience with overall hashtag recall (47% vs 30%), main TV spot recall (43% vs 22%), and digital ad recall (51% vs 32%). [See slide 13 for details about how ASF compares to the Family Outdoors segment].

Executive Summary:

Advertising – Venues & Influence

Advertising Venues and Influence

- The public is still encountering the RBFF brand in multiple places, with television advertising being most common. In alignment with increased recall and engagement across all brand and recall measures, there is increased recall across all sources.
- Boosts in recall across multiple digital platforms correlates with increases in awareness and engagement with hashtags and TMF social media site visits and modest gains in TMF campaign recalls of main video and digital ads compared to last year. There are 12-point increases in recall from digital video platforms (now 53%) and online searches (59%), an 11-point increase from other online sources (48%), a 7-point increase on music streaming platforms (41%), and a 5-point increase for social media (64%).
- Friends and family have increased participation in the sport, as they are the top reason Newbie and Reactivated Lapsed fished this year (43%). Over half (54%) of those who recall the RBFF brand heard it from friends/family, which is a significant jump from 2020 (47%) and 2019 (44%).
- The same main TV spot and digital banners ads from last year's general campaign were maintained for this year. Overall recall, likeability, and influence on likelihood to fish increased for all these ads. Additionally, the influence scores for the general campaign are also at a 3-year high for all measures: main TV spot overall increased from 78% in 2019 to 81% in 2021 and general digital ads increased overall from 72% to 78%. The new collaborative videos and specialty advertisements with Hulu and Holey Moley also garnered high influence scores for attracting attention and motivating viewer behavior.
- In terms of the main TV spot impact on people's motivation to fish, 23% of the public recall the ad and fished this year and nearly all of them (95%) were influenced "a great deal" by it. Additionally, the main TV spot motivates most (70%) of the public to fish in the next year, including 39% who are much more likely to do so.

Executive Summary:

Target Audiences

Target Audience Awareness and Advertising

- Women are equally motivated to fish by both the main “Get on Board - Family” TV spot and by the “Get on Board - Women” video solely featuring women anglers. Two-thirds of women (67%) say they are “much more likely” (38%) or “somewhat more likely” (29%) to fish in the next 12 months after viewing the spot women’s tailored ad.
- There is an increase from last year of women’s visitation to the TMF website (10% to 18%) and recall (15% to 22%) and engagement (7% to 13%) with *#TheWaterIsOpen* on social media. Appeal of the “Get on Board – Women ” video continues to motivate women to engage in the TMF campaign. After viewing the spot, 66% say that they are “much more likely” or “somewhat more likely” to visit the “TakeMeFishing.org” and 46% would be more likely to post *#TheWaterIsOpen* on social media.
- Overall, Hispanic awareness/recall of the brand/slogan, logos and visitation to TMF/VAP remain strong and stable. Most encounter the brand in multiple places, and nearly all who recall it are likely to fish in the next 24 months. This year, Hispanics and non-Hispanics equally recall the TMF/VAP brand (40% each).
- For Hispanics, exposure to the campaign is a strong driver to participate in fishing. Among Hispanics who are aware of TMF/VAP, 97% say that they are likely to fish in the next 24 months, compared to only 78% of those who cannot recall the campaign. The gap between these two groups (19% points) is more pronounced compared to the public overall (9% points).

Active Social Family Summary

Comparative Analysis

The Active Social Family audience segment is extremely similar to the Family Outdoors segment and stands as viable and successful substitution for analyzing the main RBFF target audiences.

- The Active Social Family segment is a refined audience of the Family Outdoors group and focuses on having a narrower age range of children with an emphasis of participating in multiple outdoor activities and trying new things.
- Both segments are very similar in their overall recall and response to the TMF campaign. The two segments both demonstrate higher recall and response compared to the target audience overall and are only a few points different from each other on many measures.
 - For example, 40% of the public recall the TMF/VAP slogan compared to a majority of the Family Outdoors (57%) and Active Social Family (55%) segments.
- The main difference between the groups is that the Active Social Family segment demonstrates significantly lower online engagement with the TMF brand and campaign compared to the Family Outdoors audience.
 - The ASF audience is less likely to have accessed one of the TMF social media pages (54% vs 60%) or recall one of the digital ads (51% vs 58%) or hashtags (47% vs 54%). Still, they do engage in posting and commenting about the sport at near equal rates.

Comparison of Family Outdoors and Active Social Family Audience Segments

| % who ... | TOTAL | Family Outdoors | Active Social Family | Difference |
|--|-------|-----------------|----------------------|------------|
| | % | % | % | % pts. |
| <i>Recall the following brand/campaign elements...</i> | | | | |
| Slogan/brand | 40 | 57 | 55 | +2 |
| TMF logos | 50 | 66 | 67 | +1 |
| At least one hashtag | 35 | 54 | 47 | -7* |
| Main TV spot | 28 | 47 | 43 | -4 |
| At least one digital ad | 37 | 58 | 51 | -7* |
| Hulu | 32 | 48 | 50 | +2 |
| Holey Moley | 28 | 46 | 41 | -5 |
| <i>Responded to ads ...</i> | | | | |
| Overall influence score of main video | 81 | 86 | 84 | -2 |
| Overall influence score of digital ads | 78 | 85 | 83 | -2 |
| Much more likely to fish after viewing video | 39 | 51 | 49 | -2 |
| <i>Engaged with brand online ...</i> | | | | |
| Accessed at least 1 TMF social media | 41 | 60 | 54 | -6* |
| Engaged in at least one social media posting behavior | 69 | 81 | 80 | -1 |
| 2021 Source: RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233 (total), 636 (FO), 474 (ASF). Asterisks (*) indicate significant difference. | | | | |

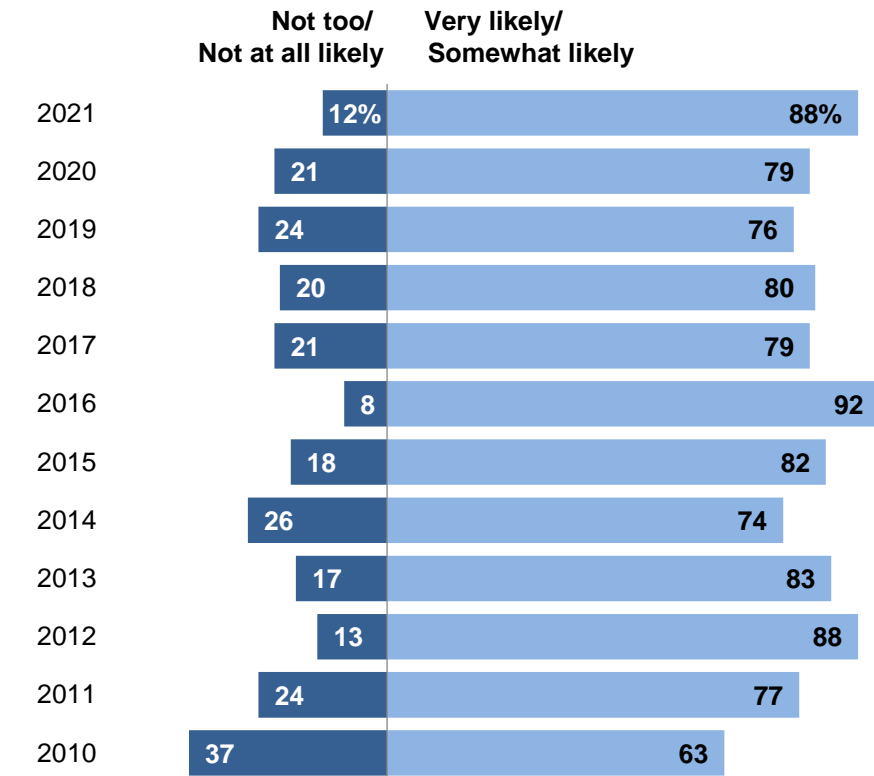
INTENTION MEASURES AND MODELING

Intention To Fish in the Next 24 Months

- Overall, **88%** of the public report that they are “very” or “somewhat likely” to fish in the next 24 months, while just 12% say they are “not too” or “not at all likely” to engage in fishing.
- This is a **9 percentage points from 2020** (79%), making this a new 5-year high in a 3-year upward trend.

Most of the target audience are very/somewhat likely to fish in next 24 months

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



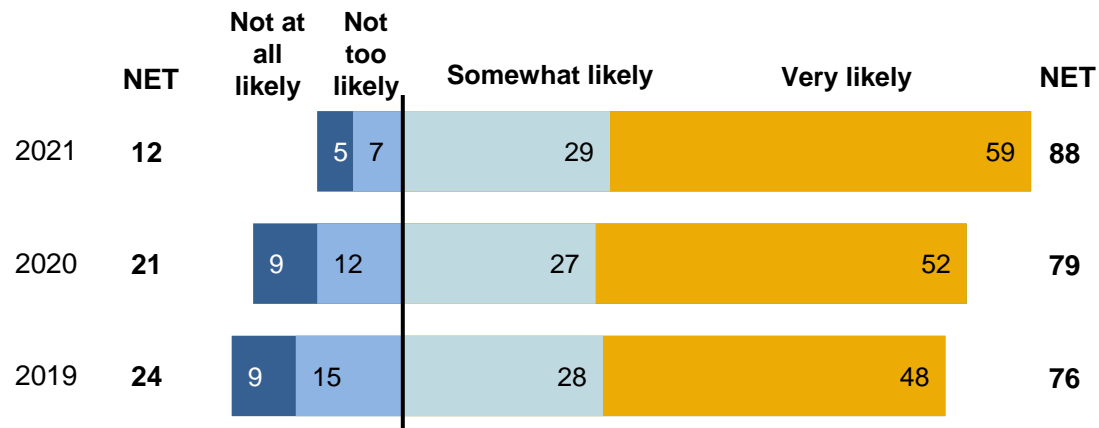
Source: Q124. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and may not add to 100% due to rounding. N=1233

Intention to Fish in the Next 24 Months

Intense Opinion

Three-year detailed trend of intention to fish in the next 24 months, 2019-2021

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



Source: Q124. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and may not add to 100% due to rounding. N=1233

The three-year uptick in intention to fish is most demonstrated in the growth in the intense opinion.

- In 2019, just under half of the public (48%) said they were “very likely” to fish in the next 24 months. This increased several points to just over half of the public in 2020 (52%).
- In 2021, six-in-ten (59%) say they are “very likely” to fish in the next 24 months.
- As a result, those with no/minimal intention has dropped dramatically from 21% in 2020 to 12% in 2021.
- Those who say they are “somewhat likely” to fish has been stable over the last three years.

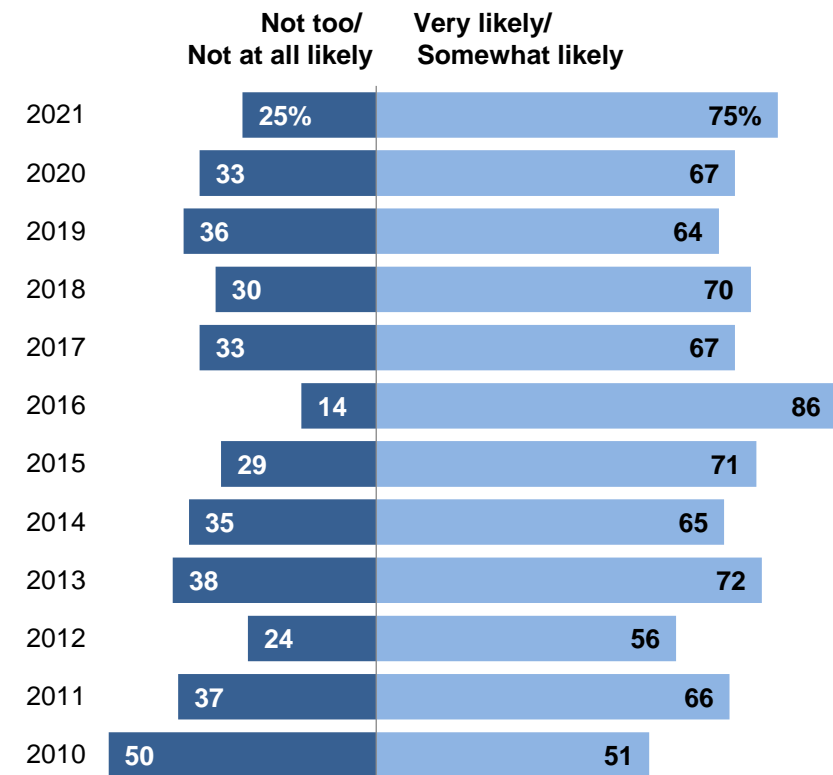
Intention

To Fish from a Boat in the Next 24 Months

- In line with overall intention to fish, intention to fish has also reached a new 5-year high.
- Three-fourths (**75%**) now say that they are very or somewhat likely to fish from a boat in the next 24 months, while the remaining quarter (25%) say they are not too or not at all likely to do this.
- This represents a **9%-point increase** in intention to fish from a boat compared with 2020.

Three-fourths of the public are very/somewhat likely to fish from a boat in next 24 months

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



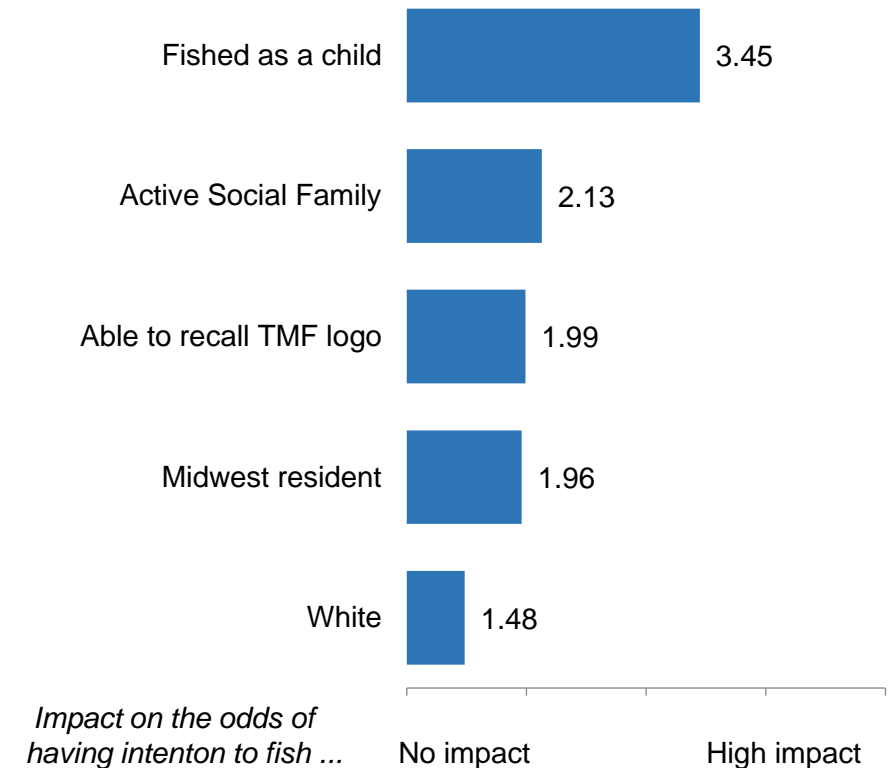
Source: Q125. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 –Nov 8, 2021. Percentages read across and may not add to 100% due to rounding. N=1233

Drivers of Intention to Fish

The strongest independent predictors of intent to fish:

- Understanding the independent impact of demographic, behavioral and media consumption habits is important to clarifying what drives intention to fish. An analysis of the 2021 TMF surveys finds that each of the following factors, holding all other variables constant, contributes a net positive impact on reporting that the someone is “very” likely to fish in the next 24 months.
- The strongest independent predictor of intention to fish is having adopted the sport as a child (amplifying the chances of being “very likely” to fish by a factor of more than 3).
- Being a member of an Active Social Family, the ability to recall the TMF logo, and being a Midwest resident relative to other U.S. regions (by factors of about 2) are other very strong independent indicators of being “very likely” to fish in the next two years.
- Behavioral factors, including social media activity, were not significant independent drivers of intense intentions to fish in the current year campaign evaluation.

Top characteristics for predicting those “very likely” to fish in the next 24 months



Source: RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. . Lines represent the probability that each factor increases the likelihood of the public to say that they are “very likely” to fish in next 24 months.

Based on the results of this analysis, in multiple repeated samples, we could expect that 67% of the time this model (using these same variables) would correctly predict the public’s intentions as “very” likely to fish in the next 24 months.

OVERALL BRAND, LOGO, AND SOCIAL MEDIA AWARENESS

Brand Awareness/Recall

Slogans

Awareness of slogan/brand at four-year high

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2016 w | 2017 | 2018 | 2019 | 2020 | 2021 |
|------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Overall | 10% | 18% | 31% | 34% | 43% | 41% | 64% | 54% | 36% | 40% | 35% | 31% | 40% |
| 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% | 42% | 57% |
| Outdoor Enthusiasts | - | - | - | 25% | 31% | 29% | 8% | N/A | 28% | 24% | 27% | 20% | 29% |
| Newbie/ Reactivated | - | - | - | - | - | - | - | - | - | - | - | 55% | 59% |
| Consistent Angler | - | - | - | - | - | - | - | - | - | - | - | 32% | 41% |
| Lapsed/Never Fished | - | - | - | - | - | - | - | - | - | - | - | 13% | 17% |
| Active Social Family | - | - | - | - | - | - | - | - | - | - | - | - | 55% |

Source: Q4,Q5, Q9. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages do not add to 100%. N=1233

- Among the public, **40%** recall the phrase “Take Me Fishing” and/or “Vamos a Pescar” in an advertisement as a slogan, or as the name of a website in the last year.
 - This is a **9-point increase** from 2020 (31%).
- Anglers newest to the sport (Newbie and Reactivated Lapsed) are most likely to recall the TMF brand (59%) compared to Consistent Anglers (41%). Few of the Lapsed/Never Fished audience recalls the slogan (17%).
- Exposure and engagement with TMF marketing materials and online presence positively influences recall of the TMF slogan/brand.
 - Nearly all of those who affirm seeing the Main TV Spot ad recall the slogan (90%) compared to only 20% who do not recall seeing the ad.
 - At least three-quarters (79%) of those who recall at least one of the TMF digital banner campaign ads recall the slogan compared to 16% who don’t recall seeing any of the digital ads.
 - Likewise, those who report visiting at least one TMF social media channel are more likely to recall the slogan than non-visitors (73% vs 16%, respectively).

Brand Awareness/Recall

Slogan Recall by Demographics, Trend 2020-2021

Currently, 40% recall the phrase “Take Me Fishing” and/or “Vamos a Pescar” – a significant 9-point increase from 2020 (31%).

- Significant increases in awareness levels are found among Family Outdoors, both genders, all age groups, and non-Hispanics.
 - Slogan recall among Family Outdoors increased 15% points to 57% in 2021.
 - Men and women experienced a significant jump in recall (47% and 34%, respectively).
 - Recall among all age groups is significantly up from 2020, but still the oldest cohort is significantly less likely to recall the slogan compared to the other two cohorts. Just under half of those 18 to 34 and 35 to 44 recall the slogan (45% each). Recall for those 45 to 64 increased the most from 22% in 2020 to 32% in 2021.
 - Non-Hispanic recall increased 12 points from 28% in 2020 to 40% in 2021, and is now in line with Hispanic recall (also at 40%).
- The Active Social Family segment recall is nearly the same as Family Outdoors (55% and 57%, respectively).
- Despite minimal VAP marketing, year-over-year, Hispanic recall is largely unchanged.

Increase in brand awareness across key segments, 2020-2021

| % who recall TMF and/or VAP slogan... | 2020 | 2021 | 2020 to 2021 Difference |
|---|------|------|-------------------------|
| Overall | 31% | 40% | +9* pts. |
| <i>Other Audience Segments</i> | | | |
| Family Outdoors | 42 | 57 | +15* |
| Outdoor Enthusiasts | 20 | 29 | +9* |
| Active Social Family | - | 55 | - |
| <i>Gender</i> | | | |
| Men | 40 | 47 | +7* |
| Women | 24 | 34 | +10* |
| <i>Ethnicity</i> | | | |
| Hispanic | 42 | 40 | +2 |
| Non-Hispanic | 28 | 40 | +12* |
| <i>Age**</i> | | | |
| 18-34 | 36 | 45 | +9* |
| 35-44 | 39 | 45 | +6* |
| 45-64 | 22 | 32 | +10* |
| <small>2021 Source: Q4,Q5, Q9. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233 2020 Source: Q4,Q5, Q9. RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1274 Asterisks (*) indicate significant difference.</small> | | | |

Brand Awareness/Recall

Logos

Half of the public recalls “Take Me Fishing” logos

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Overall | 10% | 20% | 46% | 47% | 43% | 52% | 44% | 47% | 48% | 45% | 43% | 50% |
| 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% | 54% | 66% |
| Outdoor Enthusiasts | - | - | - | 38% | 32% | 40% | 15% | 37% | 31% | 36% | 31% | 37% |
| Newbie/Reactivated | - | - | - | - | - | - | - | - | - | - | 67% | 70% |
| Consistent Angler | - | - | - | - | - | - | - | - | - | - | 51% | 54% |
| Lapsed/Never Fished | - | - | - | - | - | - | - | - | - | - | 20% | 24% |
| Active Social Family | - | - | - | - | - | - | - | - | - | - | - | 67% |

Source: Q8. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages do not add to 100%. N=1233.

Overall recall of seeing at least one of the TMF logos also shows a three-year downward trend.

- Half (50%) of the public recall the TMF logo, which is a 7-point increase from 2020 (43%), and a new high since 2015.
- Sources of logo recall is mostly social media (61%) or TV ads (49%).
- The Family Outdoors segment has increased significantly in their logo awareness from 2020 by 12% points (54% to 66%).
- Two-thirds of both the Family Outdoors (66%) and Active Social Family (67%) segments recall the TMF logo.
- As with recall of the TMF slogan, Newbie and Reactivated Lapsed are most likely to recall the logo compared to other angler types.
 - Most (70%) of Newbie/Reactivated Lapsed recall the TMF logo compared to 54% of Consistent Anglers and 24% of Lapsed/Never Fished.

All participants were shown these 3 logos.

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



Brand Awareness/Recall

Sources of TMF Recall

TV advertising continues to be the strongest source of slogan recall

| Slogan Recall | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------|------|------|------|------|------|------|------|------|------|------|------|------------|
| Television advertising | - | 42% | 60% | 60% | 52% | 53% | 63% | 59% | 61% | 67% | 74% | 77% |
| Magazine advertising | 41% | 52% | 55% | 48% | 48% | 47% | 59% | 36% | 47% | 46% | - | - |
| Social media | 37% | 52% | 49% | 54% | 53% | 53% | 74% | 61% | 56% | 50% | 59% | 64% |
| Elsewhere online | - | - | - | - | - | - | - | - | - | 32% | 37% | 48% |
| Radio advertising | 34% | 39% | 30% | 35% | 34% | 36% | 39% | 30% | 36% | 41% | 44% | 47% |
| News stories/Non-ad TV content* | - | - | - | - | - | - | - | - | 31% | 42% | 40% | 46% |
| A postcard / E-mail | 13% | 13% | 15% | 13% | 17% | 17% | 31% | 14% | 27% | - | - | - |
| Talking with family or friends | - | - | - | - | - | - | - | - | - | 44% | 47% | 54% |
| Event | - | - | - | - | - | - | - | - | - | 33% | - | - |
| Music streaming platforms | - | - | - | - | - | - | - | - | - | - | 34% | 41% |
| Digital video platforms | - | - | - | - | - | - | - | - | - | - | 41% | 53% |
| Online search | - | - | - | - | - | - | - | - | - | - | 47% | 59% |
| Somewhere else | 36% | 27% | 14% | 17% | 19% | 19% | 30% | 17% | 26% | 32% | 33% | 41% |

Source: Q6. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages from a check all that apply list and do not add to 100%. N=569.

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

Those who recall the phrase “Take Me Fishing” most commonly recall it from 2 to 4 sources.

- In conjunction with increased brand recall, there is an increase in recall across advertising sources.
- Word-of-mouth continues to be an effective method of spreading the TMF brand. More than half (54%) recall hearing “Take Me Fishing” from family or friends, a 7-point increase from 2020 (47%).
- TV is still the most popular source of TMF recall (77%), an increase of 3% points from 2020.
- Recall has increased across a variety of online and digital sources.
 - Majority (53%) recall TMF from digital video platforms like YouTube, an increase of 12% points from 2020.
 - Recall from online searches (59%) and elsewhere online (48%) also saw double-digit increases compared to 2020.
 - Recall of TMF from social media (64%) had a 5-point increase from 2020 (59%).
 - While less common, four-in-ten (41%) who recall TMF note music streaming platforms as a source.
- Recall from radio (47%) continues to climb a few points each year since 2017.

Recall of TMF Campaign and Overall Intention to Fish

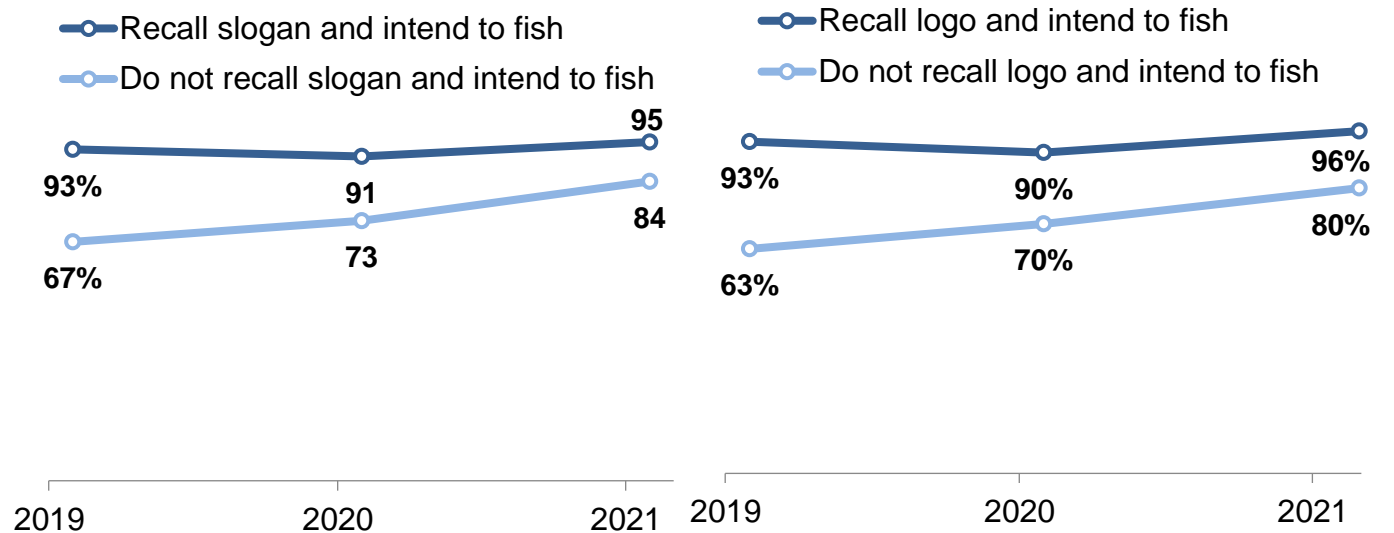
2019 – 2021 Trends

Even with the slight variations with stated intention to fish and in recall of the brand, the trend between 2019 and 2021 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%.
- This past year, the gap has narrowed between those who intend to fish and do not recall the TMF slogan (11-pt different) and logo (16-pt different).

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



2021 Source: : Q124 by (Q4,Q5, Q9) & Q124 by (Q7). RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1227

2020 Source: : Q124 by (Q4,Q5, Q9) & Q124 by (Q7). RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1274

2019 Source: Q124 by (Q4,Q5, Q8, Q9) & Q124 by (Q7, Q11). RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1233

Brand Awareness/Recall Hashtag Campaigns

More than one-third (35%) recall at least one of the hashtags, with about one-quarter recalling each of the three hashtags.

- The three hashtag campaigns are comparable overall and by sub-group recall.
- Overall, the majority (51%) of Newbie and Reactivated Lapsed recalled at least one of the hashtag campaigns compared to 36% of Consistent Anglers and 15% of the Lapsed/Never Fished segment.
- Those in the Active Social Family segment are more likely to recall a hashtag (47% vs 30%).
- Two-thirds (66%) of those who accessed at least one of the TMF social media channels recalled a hashtag, compared to about one-in-ten (12%) who never visited TMF social media.
- The younger cohorts were more likely to recall the hashtags (41% and 40%) compared to those 45-years-old and older cohort (26%).
- Non-Hispanics and Hispanics how have equal recall rates.
 - Last year, Hispanic were more likely to recall at least one hashtag than non-Hispanics (33% vs 25%).

Comparable recall overall and by sub-groups across three hashtag campaigns

| % who recall ... | #GetOnBoard | #TheWaterIsOpen | #RecreateResponsibly | At least one hashtag |
|-------------------------------------|-------------|-----------------|----------------------|----------------------|
| Overall | 26% | 28% | 24% | 35% |
| <i>Angler Types</i> | | | | |
| Newbie/ Reactivated | 43 | 44 | 40 | 51 |
| Consistent Anglers | 24 | 29 | 23 | 36 |
| Lapsed/ Never Fished | 8 | 9 | 9 | 15 |
| <i>Active Social Family Segment</i> | | | | |
| ASF | 40 | 42 | 36 | 47 |
| Not ASF | 20 | 22 | 20 | 30 |
| <i>Accessed TMF Social Media</i> | | | | |
| Yes, at least one channel | 54 | 56 | 51 | 66 |
| No, none | 6 | 7 | 5 | 12 |
| <i>Ethnicity</i> | | | | |
| Hispanic | 28 | 28 | 25 | 34 |
| Non-Hispanic | 25 | 29 | 24 | 35 |
| <i>Age</i> | | | | |
| 18-34 | 30 | 30 | 29 | 41 |
| 35-44 | 33 | 33 | 30 | 40 |
| 45-64 | 18 | 23 | 18 | 26 |

Source: Q109, Q112, Q115. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2020. Percentages read down and do not add to 100%. N=1233.

Other Social Media Engagement

Fishing Related Posting and Comments

Most of the target audience interacted with fishing/boating posts on social media, even though a minority recall TMF hashtags.

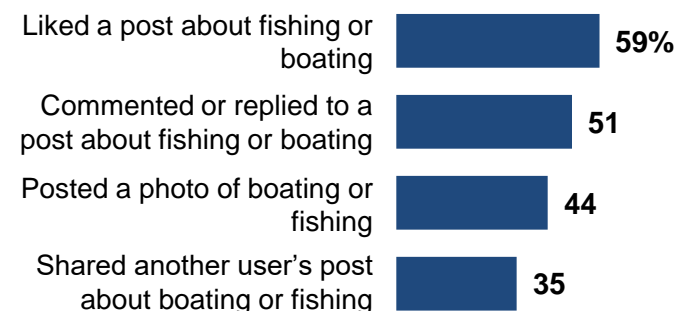
- About seven-in-ten (69%) saw and interacted with posts about fishing or boating. Most commonly, 59% liked a post about the sport.
- Those who engage in this content often engage in more than one way. The public was more likely to engage in at least three activities (41%) than one or two (28%). Only 11% engaged in only one.

Those who engaged in general social media content about fishing or boating are more likely to recall TMF hashtags.

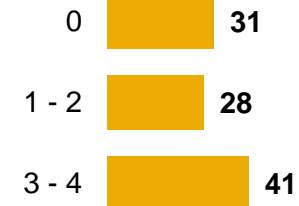
- The about half of those who engaged in at least one of these general social media behaviors also accessed a TMF social media site (55%) and recall at least one of the TMF hashtags (48%). Contrastingly, few of those who did not engage in these types of posting behavior visited TMF social media (10%) or recall any of the hashtags (4%).

General interaction with fishing and boating posts are common among the public

% who ...



% who did ___ social media posting behaviors/ acts ...



Source: Q07. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages at top are from a check all that apply list and do not add to 100%. Percentages at bottom may not add to 100% because of rounding. N=1233

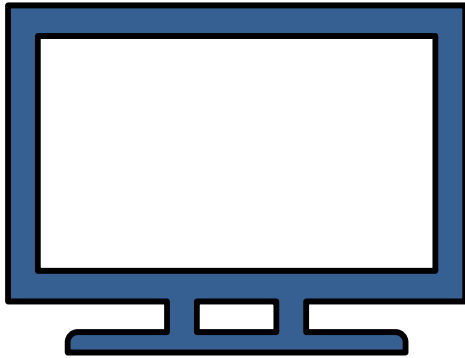
2020 TMF ADVERTISING AND OVERALL AWARENESS

General English TMF 2021 Ads

Summary by Ad Venue

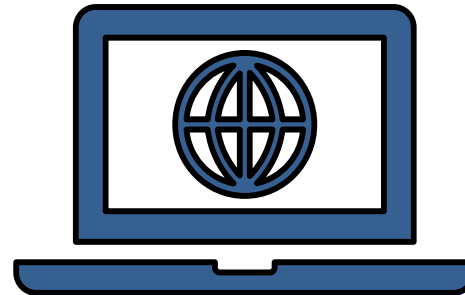
Note that the *collaborative TV ads*, *Hulu ads* and ABC's *Holey Moley content* were part of a limited or specialized marketing campaign; therefore, participants were asked a shortened question set about those pieces.

Video/TV



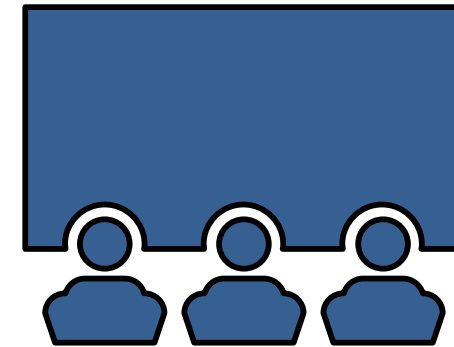
- All participants saw the TMF Main TV Spot ad
- All participants randomly saw one of three collaborative video ads made by RBFF and Hearst

Digital Banners



- All participants randomly saw three of four digital ads

Specialty Ads



- All participants received still images of Hulu interactive/ video ads
- All participants shown screenshots of RBFF sponsored Holey Moley mini-golf course

General 2021 Ads

Overall Awareness

Overall awareness of widely-distributed TMF ads by venue and key segments, 2020-2021

| % who recall... | Main TV Spot Ad | | At least one digital ad | |
|-------------------------------------|-------------------|-------------------|-------------------------|-------------------|
| | 2020 ¹ | 2021 ² | 2020 ³ | 2021 ⁴ |
| Overall | 22% | 28% | 32% | 37% |
| <i>Angler Types</i> | | | | |
| Newbie/ Reactivated Lapsed | 46 | 45 | 56 | 55 |
| Consistent Angler | 20 | 24 | 34 | 34 |
| Lapsed/ Never Fished | 6 | 10 | 14 | 21 |
| <i>Active Social Family Segment</i> | | | | |
| ASF | - | 43 | - | 51 |
| Not ASF | - | 22 | - | 32 |

¹Source: Q17. RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1269.
²Source: Q17. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1179.
³Source: Q60, Q67, Q74, Q81. RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1274.
⁴Source: Q60, Q67, Q74, Q81. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233.


The wide-release general ad marketing campaign is recalled by sizable portion of the public, mostly by Newbie/Reactivated Lapsed anglers. While overall recall is up, it is not different by subgroup from last year.

- This year, the public was most likely to recall seeing one of the digital ads compared to The Main TV Spot ad (37% vs 28%, respectively).
 - The digital ads are near equally recalled, ranging from 27-29% recall.
- Recall is up slightly for both ad venues compared to last year, which aligns with higher recall of the branding and comparable sources of awareness.
- Newbie and Reactivated Lapsed are most likely to recall the Main TV Spot ad (45%) and at least one digital ad (55%) compared to other anglers.
- The Active Social Family segment is more likely to recall the TV or digital ads compared to the rest of the public.

BEHAVIORAL IMPACT

Exposure to Main Ad Campaigns

Effect on Fishing This Year



| | |
|--|--|
| Among public | <ul style="list-style-type: none">• One quarter (23%) fished this year and recall Main TV Spot ad.• Most of them (16%) were influenced a “great deal” and the rest (6%) a “fair amount” (22% total). |
| Among Newbie and Reactivated Lapsed anglers | <ul style="list-style-type: none">• Top reason they went fishing this year is because friends/ family invited them (43%).• Influence of media campaigns aligns with public overall (16% influenced by TV, 14% by online ad/social media). |
| Among those who fished this year and recall Main TV Spot | <ul style="list-style-type: none">• Nearly all (95%) said ad contributed a “great deal” (69%) or “fair amount” (26%) to decision to fish this year. |
| | |
| | |

Source: Q24, IP2. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233 (public overall), 529 (among Newbie/Reactivated), 399 (fished and saw video)

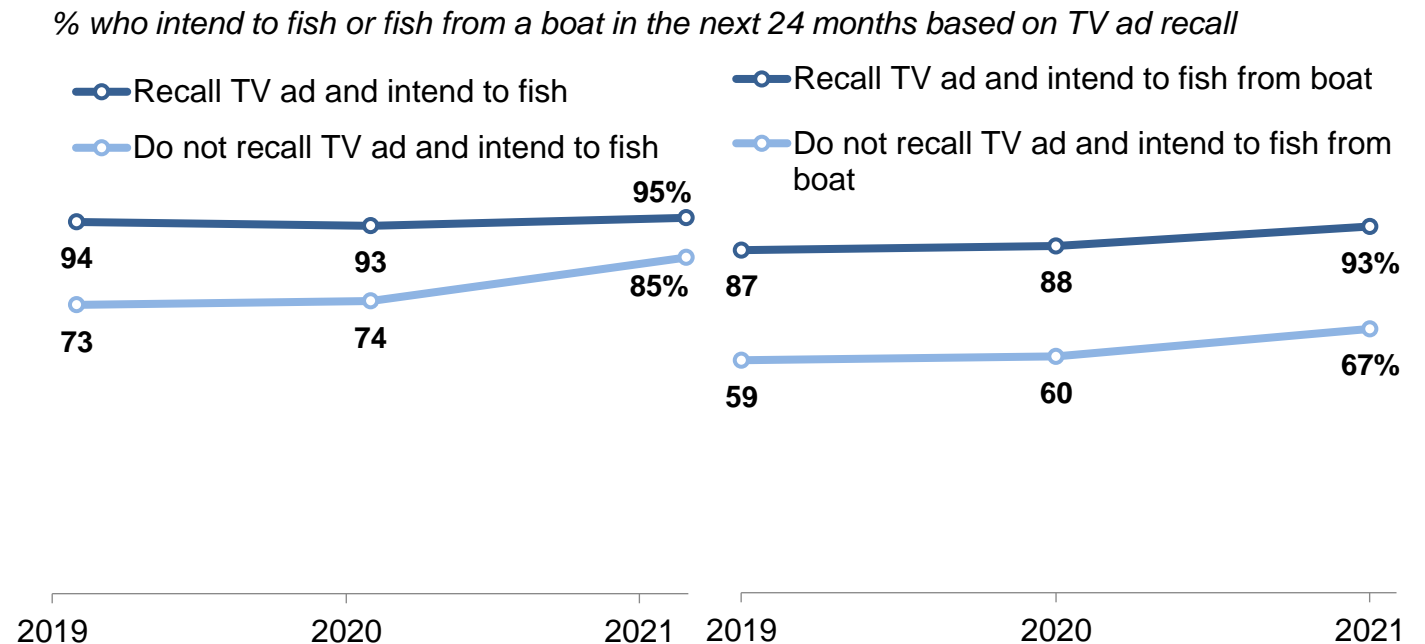
Recall of TV Ad Campaign and Overall Intention to Fish

2019 – 2021 Trends

Even with the slight variations with stated intention to fish and in recall of the general campaign TV ad(s), the trend between 2019 and 2021 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 the general TMF TV ad(s) exceeds 90%.
- While there are sizable gaps between those exposed and unexposed to the ad campaign, the gap this year has shrunk in how that affect intention. This points towards other factors affecting intention.

Intention to fish is consistently high among those exposed to TMF TV ads



2021 Source: : Q124 by Q17 & Q125 by Q17. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233
2020 Source: : Q124 by Q17 & Q125 by Q17. RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1274
2019 Source: Q124 by Q17 & Q125 by Q17. RBFF 2019 TMF Campaign Evaluation Survey, Oct 3 – Nov 3, 2019. N=1077.

Exposure to Main TV Ad Campaign

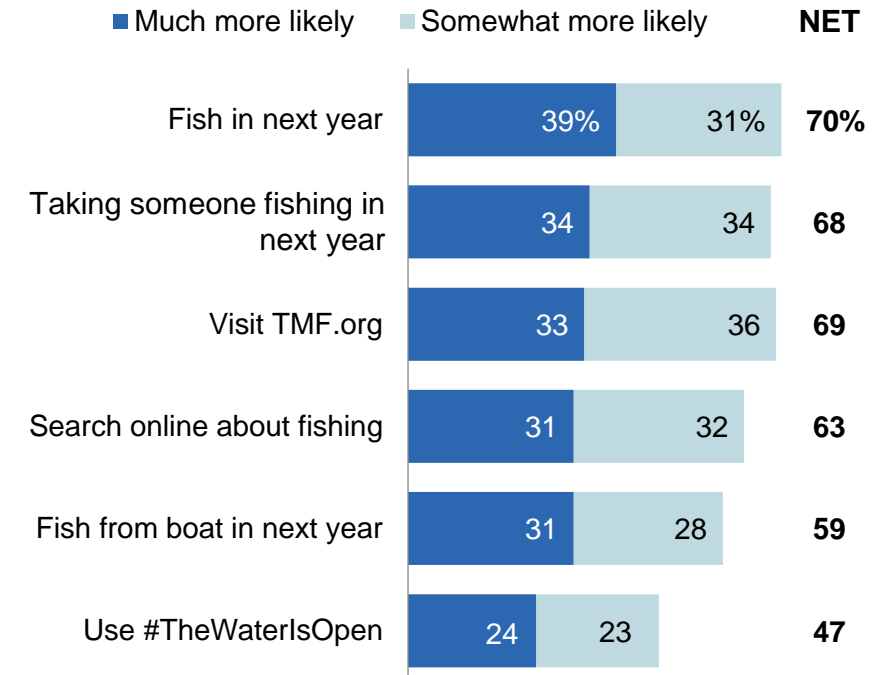
Overall Behavioral Response

The Main TV Spot, “Get on Board! Family” video, is highly liked and very motivating for the majority of the public to engage directly in fishing and engage in other TMF content.

- Most (84%) of the public like this video ad, including a majority (52%) who “like it very much.”
- Fully 70% who view the video report that they are likely to fish in the next year, including one-third (39%) who are “much more” likely to do so. Additionally, 68% would take someone fishing.
 - This is an increase from last year where the same video motivated 60% of the public to want to fish in the next year and 59% to take someone fishing.
- The video is equally as motivating to the public to look up additional fishing information. This includes 69% who would visit the TMF website (TakeMeFishing.org) and 63% who would conduct additional online searches for information about fishing.
- The public is comparatively slightly less likely to be motivated to engage in behaviors that demonstrate higher engagement with the sport or TMF brand.
 - About six-in-ten (59%) of the public say they are likely to fish from a boat in the next year. This represents a greater commitment to the sport.
 - Almost half of public (47%) would be motivated to use the hashtag. This behavior demonstrates a very high level of engagement.

Main TV Spot is motivating to majority of public to fish in the next year and engage in fishing content

% who are likely to __



Source: Q23. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and are rounded. N=1188

Exposure to Digital Banner Ad Campaign

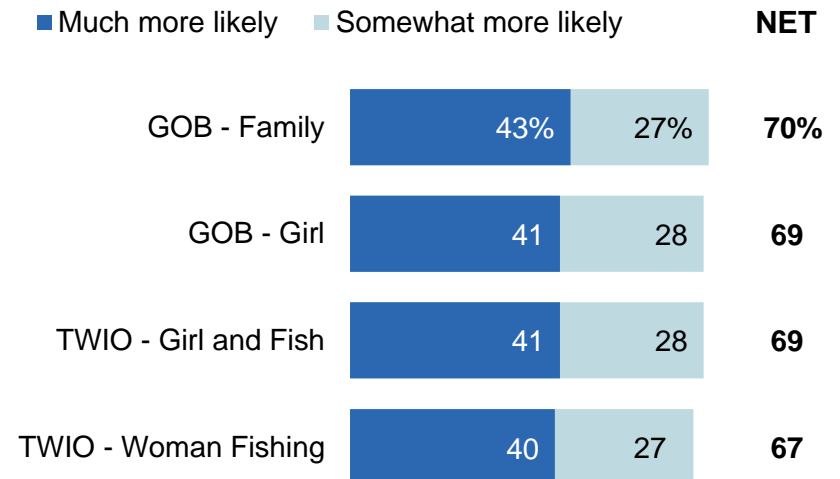
Effect on Intention to Fish

The four digital ads are similarly motivating for the public to fish in the next year.

- Exposure to any of the four general digital ads motivate about seven-in-ten (67-70%) of the public to say they are “much more” or “somewhat more” likely to fish in the next year.
 - The “Get on Board – Family” ad is the overall most motivating (70%).
 - This is an increase from last year where each of these same ads motivated 55-60% of the public.
- For all four ads, the public is more likely to feel intensely motivated to fish because of the ad.
 - About four-in-ten say they are “much more” likely to fish (ranging from 40-43%) compared to just over one quarter who say they are “somewhat more” likely to fish (ranging from 27-28%).
- The majority of the public like the digital banner ads.
 - At least seven-in-ten like the “Get on Board – Girl” (76%), “The Water is Open – Girl and Fish” (76%), and “Get on Board – Family” (74%), “The Water is Open – Woman Fishing” (70%),
 - The overall likability of the ads minimally affects fishing motivation.
 - The overall likability of the digital banner ads is lower than the Main TV spot ad (84%).

All four digital banner ads motivate majority of the public to fish in the next year

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



Source: Q66a, Q73a, Q80a, Q87a. RBFF 2020 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021.
N=892 (GoB Girl), 958 (GoB Family), 892 (TWIO Girl and Fish), 939 (TWIO Woman)

INFLUENCE OF GENERAL TMF ADVERTISING

Creation of Influence Scores

Question Composition for Each Ad

Relevance – relevance of message at a personal level

- 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?

Message Comprehension – degree of success in conveying motivational impact

- In looking at this ad, how much do you agree or disagree that this ad communicates the following:
 - a. Fishing is a fun activity to do
 - b. Fishing is a great way to make memories
 - c. Fishing is a good way to spend time with my friends and family
 - d. Fishing is a good way to enjoy nature and spend time outdoors
 - e. Fishing is a way to experience something new and different

Attention – how attention-grabbing the ad is

- 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:
 - a. How memorable it is
 - b. How interested you are in this ad
 - c. How unique this ad is

Behavioral Response – how motivational it is in pursuing fishing-related activities

- Based on this advertisement, how likely are you to do the following:
 - a. Go fishing in the next 12 months
 - b. Take someone fishing in the next 12 months
 - c. Go boating for the purpose of fishing in the next 12 months
 - d. Visit the website that was mentioned, [TakeMeFishing.org](https://www.TakeMeFishing.org) [videos/specialty] / Click on the advertisement (redirects to [TakeMeFishing.org](https://www.TakeMeFishing.org)) [static ads]
 - e. Search online for information about fishing [videos and static ads only]
 - f. Use the hashtag [#TheWaterIsOpen](https://twitter.com/TheWaterIsOpen) to post on social media [videos only]

Overall score
is a measure of
the overall
impact on
target audience
(the public) -
created from
average of all 4
scores

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 |
|---------------------------|-----------|---------------|-----------|----------|---------|
| Main TV Spot | 83% | 87% | 80% | 76% | 81% |
| Digital Banners (average) | 79% | 82% | 76% | 76% | 78% |
| Hearst Videos (average) | - | - | 77% | 73% | - |
| Hulu | - | - | 77% | 76% | - |
| Holey Moley | - | - | 79% | 76% | - |

Source: RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1188 (Main Spot), 1233 (digital), 1192 (Hearst videos), 1233 (Hulu), 1233 (Holey Moley)

- Advertising sources have high overall impact. The highest overall influence score (81%) belongs to Main TV Spot advertisement with the overwhelming majority finding the video ad to best convey the motivations to fish (87%), be the most relevant to them personally (83%) and be an attention-grabbing ad that remains memorable (80%).
- The target audience is also impacted by the digital banner advertisements overall (78%), which garner high scores for personal relevance (79%) and message comprehension (82%), only a few points lower than the TV ad.
 - Both the Main video and digital banners are the same as last year and scored marginally higher this year.
- The remaining advertisement content were only tested for attention and behavior.
 - The overall scores of the Hearst videos and the Hulu ad received attention scores similar to the digital banners (77% each vs 76%).
 - The Holey Moley content performed similarly high on attention to the Main TV Spot (79% vs. 80%)
- All ad venues are similar in their behavior scores, which are lower and less variable compared to other influence scores, with the average of the Hearst videos being the lowest (ranging from 73-76%).

Influence Scores

Overall by Angler Activity

Overall influence model for wide-release TV and digital “Take Me Fishing” media campaign

| Angler Activity | Relevance | Comprehension | Attention | Behavior | OVERALL |
|--|------------|---------------|------------|------------|------------|
| Overall | 79% | 82% | 76% | 76% | 76% |
| Anglers with Intent to Fish | 84% | 86% | 81% | 81% | 83% |
| Lapsed but Likely to Reengage in Fishing | 76% | 81% | 72% | 71% | 75% |
| Anglers Soon to Lapse | * | * | * | * | * |
| Lapsed Unlikely to Reengage in Fishing | 58% | 66% | 55% | 56% | 59% |

Source: RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N= 1233 (Overall), 850 (Angler/intent), 247 (lapsed/likely), *31 (Angler/lapse – too small to report), 91 (lapsed/unlikely)

- The overall influence score for the Take Me Fishing campaign, as measured by the Main TV Spot and digital banner ads, reveals that the campaign has an impact on **76%** of the current target audience.
- Anglers with an intent to fish are most responsive to the campaign followed closely by lapsed anglers who are likely to reengage in fishing (83% and 75%, respectively).
- Even though lapsed anglers who are unlikely to reengage in fishing are overall far less impacted by the campaign, the majority are positively responding overall (59%) and across the four categories (55-66%).
- Comprehension scores are the highest rated category among all groups, with 86% of anglers with intent, 81% of lapsed anglers likely to reengage, and two-thirds (66%) of lapsed anglers unlikely to reengage responding.
- Attention and behavior scores are overall lower across the groups; however, most anglers with intent to fish (81%) and lapsed but likely to reengage anglers (72%) as well as the majority (55%) of the lapsed unlikely to reengage audience positively respond to fishing-related activities.

General 2021 Ads

Video/TV Ads

Main TV Spot – Viewed by All

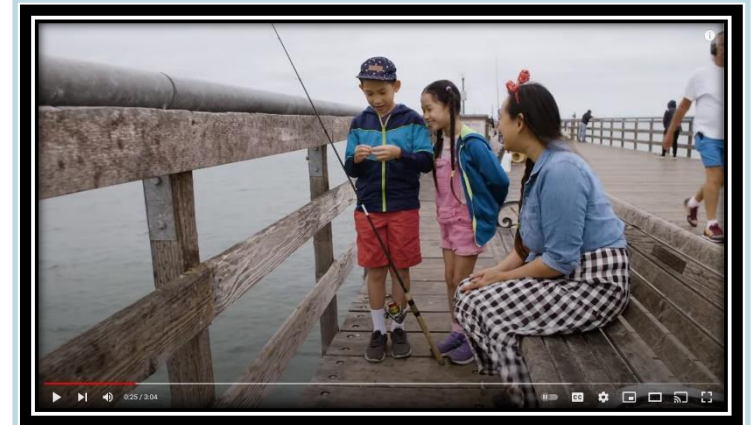


Get on Board! Family :30

RBFF and Hearst Custom Content Videos – each viewed one



Overheard while Fishing with Jordan Norwood (2:09) – 2021 Hearst video



What's your Fishing Style? (3:04) – 2021 Hearst video



Fishing for a New Adventure (2:08) – 2021 Hearst video

Influence Scores

Video/TV Ads

Overall influence model of all “Take Me Fishing” video/TV advertisements

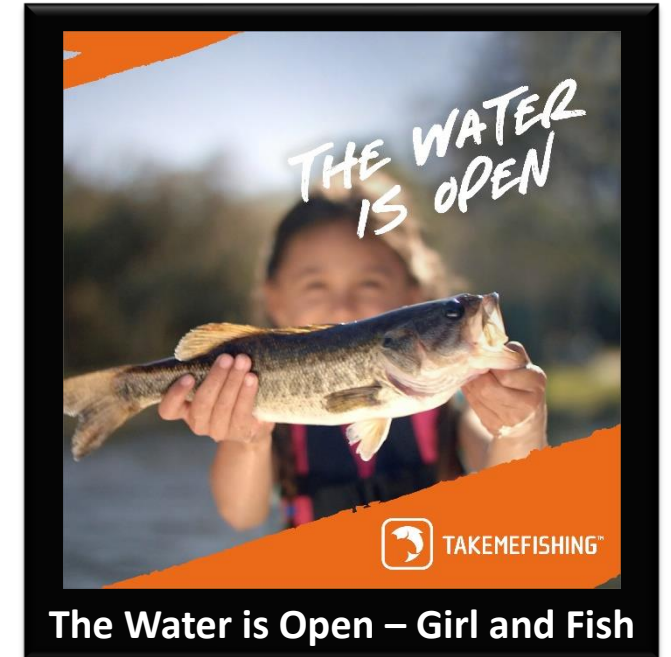
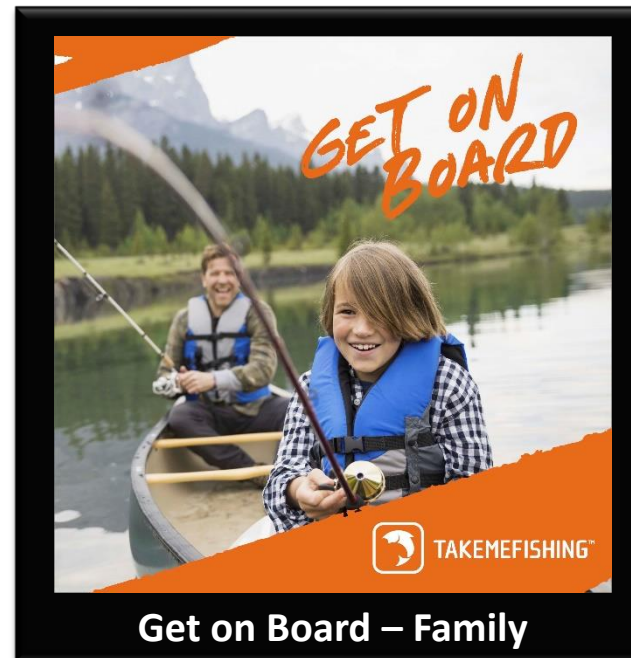
| Video | Relevance | Comprehension | Attention | Behavior | OVERALL |
|--|------------|---------------|------------|------------|------------|
| Main TV Spot | 83% | 87% | 80% | 76% | 81% |
| Hearst Videos Overall | - | - | 77% | 73% | - |
| <i>Overheard while Fishing with Jordon Norwood</i> | - | - | 79% | 74% | - |
| <i>What’s your Fishing Style?</i> | - | - | 79% | 74% | - |
| <i>Fishing for a New Adventure</i> | - | - | 73% | 71% | - |

Source: RBFF 2020 TMF Campaign Evaluation Survey, Oct 3 – 22, 2020. N=1188 (Main Spot), 1192 (overall Hearst videos), 387 (Jordon Norwood), 400 (Fishing Style), 405 (New Adventure)

- Two of the three Hearst custom content videos comparably performed to the Main TV Spot on attention and behavior measures – *Overheard while Fishing with Jordon Norwood* and *What’s your Fishing Style?*.
 - Both Hearst videos scored 79% on attention and 74% on behavior, only marginally below the Main TV Spot.
- *Fishing for a New Adventure* scored the lowest on attention (73%) and behavior (71%) of all video content.
- Behavior scores are more consistent across all video ads, where *Fishing for a New Adventure* ranging scored lowest (71%), followed by the other two Hearst videos (74% each) and the Main TV spot scoring highest (76%).

General 2021 Ads

Digital Banners



Influence Scores

General Digital Banners

Overall influence model of four Take Me Fishing digital banner advertisements

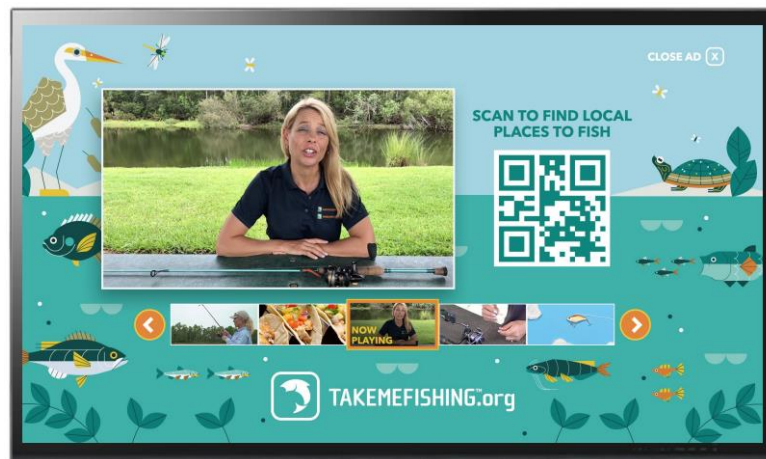
| Digital Ad | Relevance | Comprehension | Attention | Behavior | OVERALL |
|-----------------------------------|-----------|---------------|-----------|----------|---------|
| Overall | 79% | 82% | 76% | 76% | 78% |
| Get on Board - Family | 81% | 84% | 77% | 77% | 79% |
| The Water is Open – Girl and Fish | 80% | 82% | 76% | 76% | 79% |
| Get on Board - Girl | 79% | 82% | 76% | 76% | 79% |
| The Water is Open – Woman Fishing | 77% | 80% | 74% | 75% | 77% |

Source: RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233 (Overall), 944 (GoB Family), 895 (TWIO Girl and Fish), 904 (GoB Girl), 956 (TWIO Woman)

- This year's TMF digital banner advertisements are the same as last year's and continue to have consistent influence scores across all measures, varying only by a few points.
 - "Get on Board - Family", "The Water is Open – Girl and Fish" and "Get on Board - Girl" are tied for the highest overall impact (79%).
- The "The Water is Open – Woman Fishing" ad has the lowest scores among influence categories, registering at 77% overall and 74-80% for all other scores. This is only a few points lower compared to the other ads.
- As with the video ads, comprehension and relevance scores are consistently the highest, while attention and behavior scores are noticeably lower.

General 2021 Ads Specialty Ads/Content

Hulu Ads

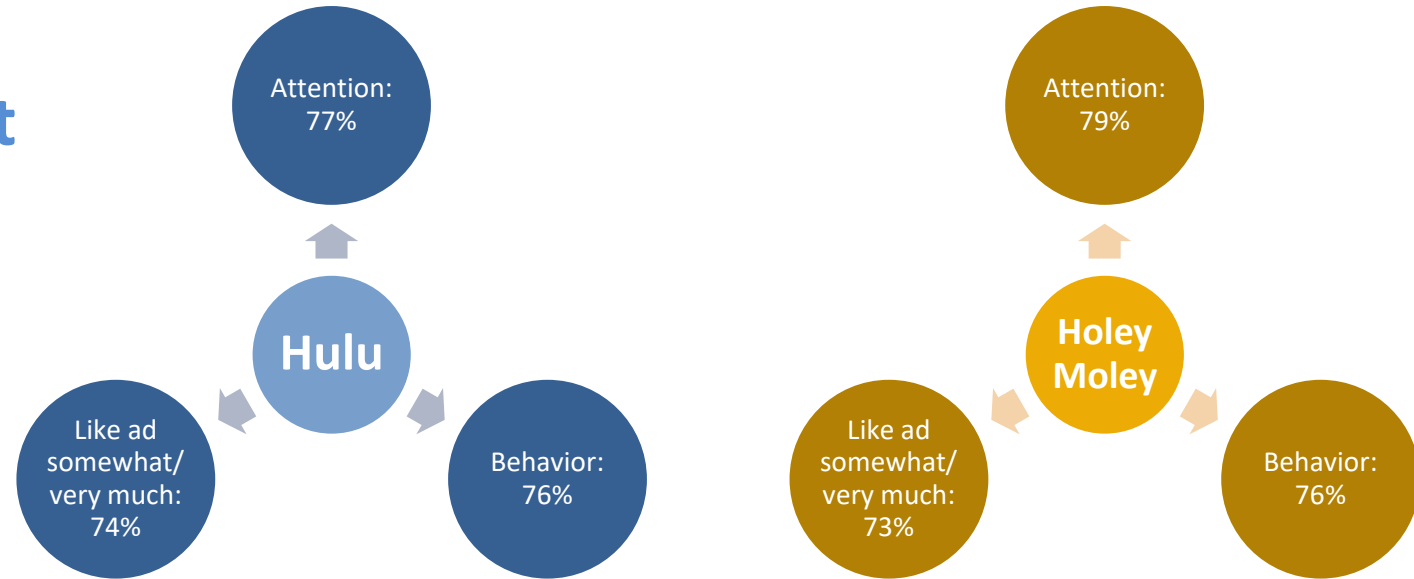


Holey Moley Screenshots



Influence Scores

Specialty Ads/Content



Source: Q89-91, Q97-99. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=1233

- The Hulu ads have various styles, show videos, and have interactive content. The screenshots on the previous slide for *Holey Moley*, an extreme mini-golf competition series on ABC, shows “The Fishing Hole” course which promotes the Take Me Fishing brand and spirit of fishing and water activity.
- Of those who use Hulu, 32% recall seeing one of these ads or something similar. Of the public, 28% recall seeing the TMF sponsored course on Holey Moley or in advertisements or promotions for the show.
- About three-quarters of the target audience like the Hulu and Holey Moley ads (74% and 73%) , including 41% who like each on “very much.”
- The two influence scores for each of these specialty ads, attention and behavior, are similar and closely align with influence scores for the general ads of the TMF campaign (Main TV Spot and digital ads).
 - The attention impact is highest for both Hulu (77%) and Holey Moley (79%).
 - Likewise, 76% have a positive behavioral response for fishing activities to both ads.

INFLUENCE OF TMF ADVERTISING TOWARDS WOMEN

Women Focused 2021 Ads

TV/Video Ad

Variation of Main Spot TV Ad only featuring women engaging in the sport



Get on Board! Women :30

NOTE: Because of the unification of the TMF marketing campaign, there are no digital banner ads with language specifically targeted to women.

The general ads will be evaluated based on their effectiveness on women specifically.

Exposure to “Get on Board! Women” Video

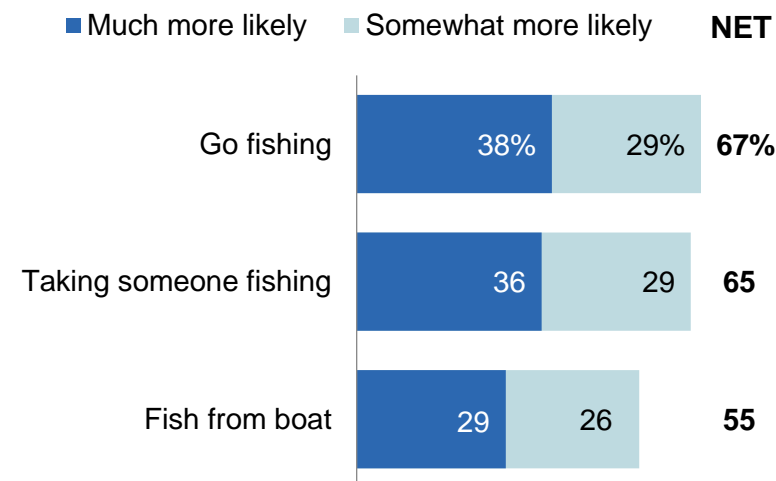
Behavioral Impact

The video featuring all women is equally effective at encouraging women to fish compared to the general TV ad.

- After seeing the “Get on Board! Woman” video advertisement, two-thirds (**67%**) of women intent to fish in the next 12 months, with 38% saying they are “much more likely” and 29% “somewhat more likely” to do so.
 - This is an increase of 7% pts. overall compared to the same video last year (60% in 2020).
 - This is an equivalent response to the Main Spot Ad where 66% of women say they are likely to fish in the next year, including 38% who are “much more” likely to do so.
 - Similarly, 65% of women are likely to take someone fishing, and increase of 12% points compared to last year (57% in 2020).
- Additionally, the majority of women are also likely to fish from a boat in the next year (55%).

Video advertisement motivates two-thirds of women to fish in the next year

% who are likely to ___ in the next 12 months...



Source: Q29a/b/c. RBFF 2020 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and may not sum because of rounding. N=590

Exposure to “Get on Board! Women” Video

TMF Online Engagement Impact

Video ad significantly influences engagement with online TMF content

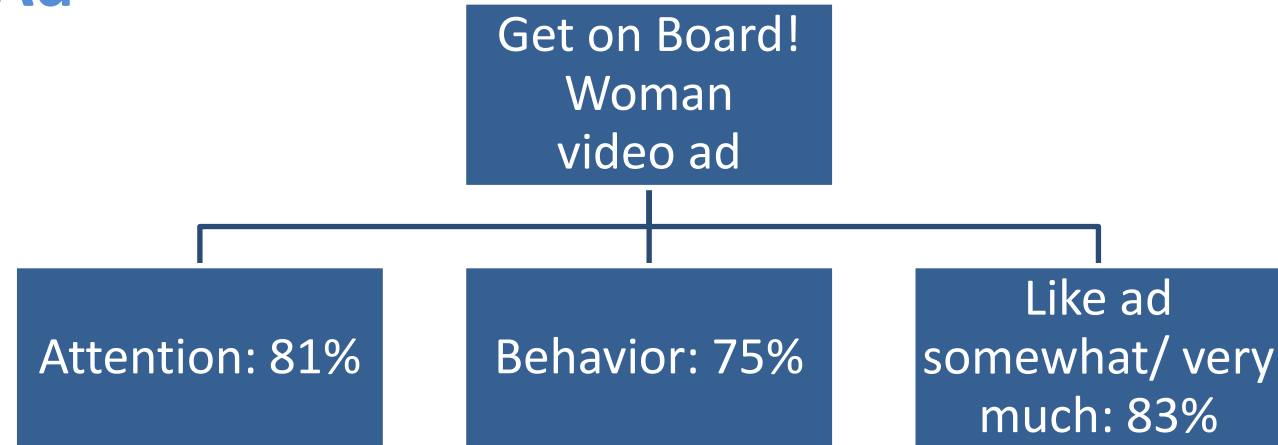
| % of women who ... | Previously visited or used | NET somewhat/much more likely to use because of video | <i>Much more likely to use</i> | Potential increase of engagement |
|---|----------------------------|---|--------------------------------|----------------------------------|
| Visit TakeMeFishing.org | 18% | 66% | 32% | +48 pts. |
| Use #TheWaterIsOpen on social media | 13 | 46 | 25 | +33 |
| Source: Q12, Q29d, Q29f, Q114. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and are separate questions and do not add to 100%. N=590 | | | | |

The video ad significantly increases women's' interest in engaging with the TMF brand online.

- Just under two-in-ten (18%) of women have previously engaged with TMF by visiting TakeMeFishing.org. After viewing the “Get on Board! Women” video, two-thirds (66%) of women are likely to go the website. This is potentially a 48%-point increase in women engagement with the TMF brand.
 - This parallels with 62% of women saying they are likely to search online for information about fishing because of this ad.
- The hashtag also received a significant increase in interest because of the ad. About 13% of all woman have personally used #TheWaterIsOpen on their own social media account (22% recall it), but this ad is motivating to 46% of women who say they are likely to use this hashtag on social media in the future.
- Encouragingly, women’s online engagement did rise in these metrics compared to last year. Notably, visitation to TMF.org increased 8% pts. (10% in 2020), #TheWaterIsOpen recall increased 7% pts. (15% in 2020) and usage by 5% pts (7% in 2020).

Influence Scores

Women Video Ad



Source: Q27- Q29. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. N=590

- The “Get on Board! Women” video ad is the same as last year and only varies from the “Get on Board! Family” (Main Spot) ad in that it only features women, otherwise it uses the same song and animation blended with live-action shots.
- The influence scores for the women video ad similarly increased by a few points compared to last year.
- Most (83%) women like the video, including 53% who like it “very much.”
- The two influence scores for this ad, attention and behavior, closely align with influence scores of the other video ads.
 - The Women video ad attention impact is 81%, which is comparable to the Main Spot Family ad (80%) and the average of the three Hearst video ads (77%).
 - Likewise, 75% have a positive behavioral response for fishing activities, which is also similar to Main Spot TV ad (76%) and the average of the three Hearst video ads (73%).

EFFECTS OF HAVING FISHED AS A CHILD

Fishing as a Child

Frequency by Sub-Group

Fishing as a child by target demographics

| % who... | Has gone fishing as a child | Has <u>not</u> gone fishing as a child | Total |
|---------------------|-----------------------------|--|-------|
| Overall | 86% | 14% | =100% |
| <i>Angler Types</i> | | | |
| Newbie/Reactivated | 88 | 12 | =100 |
| Consistent | 96 | 4 | =100 |
| Lapsed/Never Fished | 75 | 25 | =100 |
| <i>Gender</i> | | | |
| Men | 88 | 12 | =100 |
| Women | 84 | 16 | =100 |
| <i>Ethnicity</i> | | | |
| Hispanic | 76 | 24 | =100 |
| Non-Hispanic | 90 | 10 | =100 |
| <i>Age</i> | | | |
| 18-34 | 86 | 14 | =100 |
| 35-44 | 85 | 15 | =100 |
| 45-64 | 86 | 14 | =100 |

Source: Q120. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read across and may not add to 100% due to rounding. N=1233

Strong link between fishing as a child and adult

| | Has gone fishing as a child | Has <u>not</u> gone fishing as a child |
|---|-----------------------------|--|
| Has gone fishing as an adult | 92% | 49% |
| Has <u>not</u> gone fishing as an adult | 8% | 51% |
| | 100 | 100 |

Source: Q120 by Q121. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read down and may not add to 100% because to rounding. N=1233

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

- Overall, 86% went fishing as a child compared to 14% of those who did not.
 - This is in line with last year where 83% fished as a child.
- As in prior years, the overwhelming majority of those who fished as kids have also done so as adults (92%), compared with only 49% who did not fish during childhood engaged in fishing as adults, a difference of 43% points.
 - This is also evident in the 21-point difference between Consistent Anglers (96% fished as a child) and those who are Lapsed or Never Fished (75% fished as a child).

Need for early outreach to target demographics.

- Hispanics are less likely to have fished as children compared to non-Hispanics by a margin of 16% points (76% vs 90%, respectively).
- This year, there are only a few points differences by gender and age cohorts.
 - In previous years, women and younger cohorts demonstrated lower levels of fishing as a child, thus it is still important to outreach and market to these groups.

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 | 6% | 15% |
| Not at all likely | 3% | 18% |
| Somewhat likely | 27% | 38% |
| Very likely | <u>64%</u> | <u>29%</u> |
| | 100 | 100 |

Source: Q120 by Q124. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read down and may not add to 100% due to rounding. N=1233

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 | 17% | 17% |
| Not at all likely | 7% | 23% |
| Somewhat likely | 30% | 42% |
| Very likely | <u>47%</u> | <u>18%</u> |
| | 100 | 100 |

Source: Q120 by Q125. RBFF 2021 TMF Campaign Evaluation Survey, Oct 29 – Nov 8, 2021. Percentages read down and may not add to 100% due to rounding. N=1233

- By a ratio of about two-to-one, those who fished as children are much more inclined to say they are “very likely” to go fishing in the next two years compared with those who never fished as kids (64% vs 29%).
- Similarly, about three-quarters (77%) of those who fished as children express intent to fish from a boat compared to about 60% of those who did not fish as kids who say the same, a difference of 17% points.
- Results hint at fishing during childhood as being one of the largest contributors to fishing in adulthood.

THANK YOU



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



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