



ENGAGING THE HISPANIC AUDIENCE: INSIGHTS TO ACTIONS



RECREATIONAL
BOATING & FISHING
FOUNDATION

LOPEZ
NEGRETE

Increasing Participation in Boating and Fishing



- Independent, not-for-profit 501(c)(3) organization
- Established in 1998
- Headquartered in Alexandria, VA

Mission:

- Increase participation in recreational boating and fishing
- Engaging audiences through the Take Me Fishing campaign

- Established in 1985
- Headquartered in Houston, with offices in Los Angeles & New York
- Largest Hispanic owned and operated agency in the United States
- Passionate about the Hispanic community and the opportunity it represents for our clients

Before We Start...

Latino or Hispanic? Don't Panic!

What term is most appropriate? “Hispanic” or “Latino”?

- A recent Pew Hispanic Center says half (51%) polled have no preference.
- When preference is expressed, “Hispanic” is chosen over “Latino” by more than a two-to-one margin—33% versus 14%.

How are the terms Hispanic and Latino normally used?

- Latino tends to be more related to culture.
- Hispanic more often with demographics.

Our advise: both are acceptable, but it's best to be consistent.

What Of Regional Differences, Country of Origin

Hispanics are not monolithic, much cultural diversity exists.

- Ethnic sub-groups, Mexican vs. Cuban vs. Puerto Rican etc. can be very different
- How do you approach the Hispanic market from a regional perspective.

On a national level, we look to Walter Cronkite.

- Focus on the similarities that exist, words, phrases, symbols we have in common.
- We call this the “Pan-Hispanic” approach.

Sub-group nuances can be executed in more locally-focused initiatives.

- In Miami, be more Cuban. In San Antonio, Dallas, Mexican. New York – Caribbean.



THE HISPANIC OPPORTUNITY

Why Hispanics Matter: Size, Growth and Youth



53 MM strong, 17% of population, largest minority; majority in key DMAs



Hispanics accounted for 55% of all population growth 2000 – 2010



Projected to reach 65 MM (20%) by 2020



Median age of 28 vs. 42 Non-Hispanic White

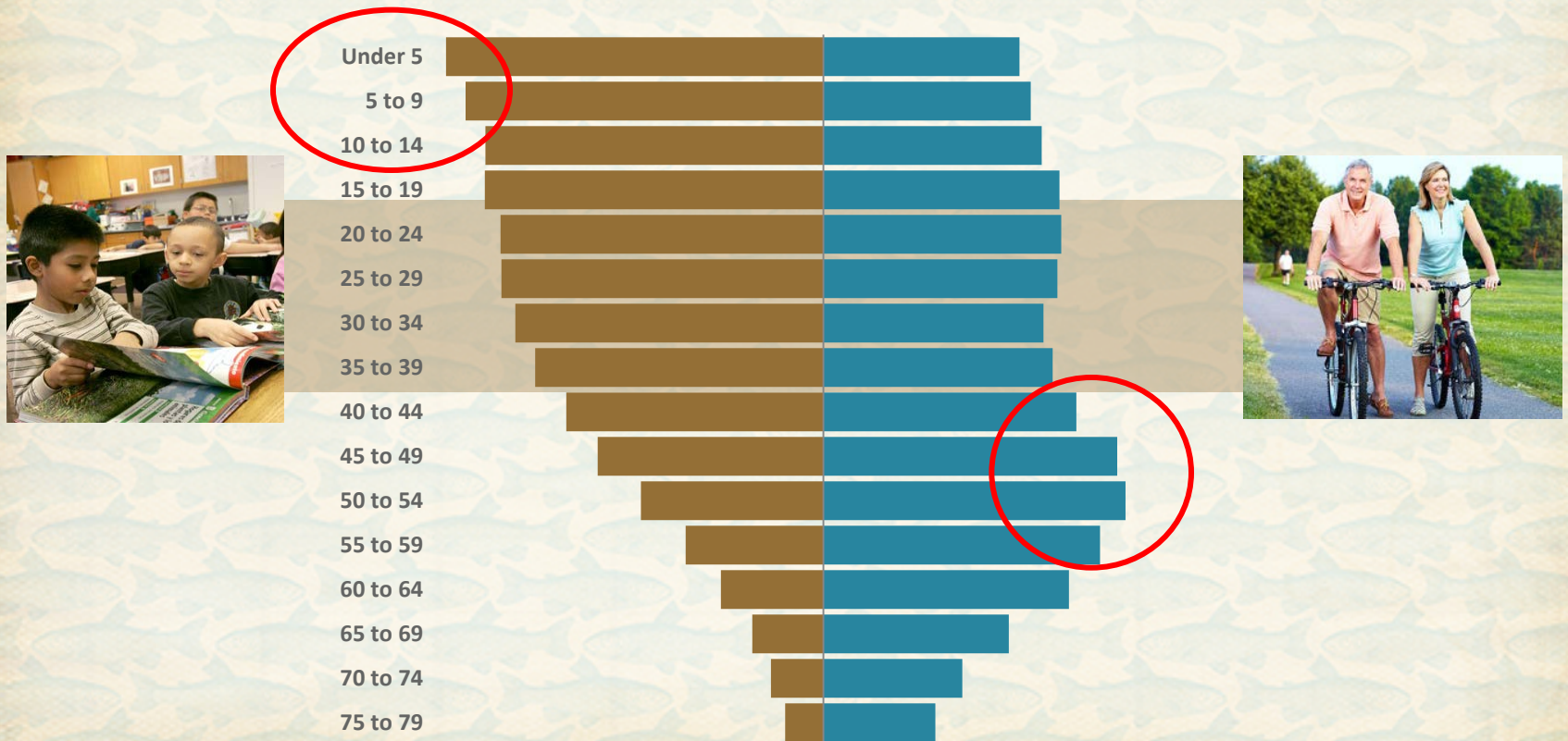


23% of Kids under the age of 18, 26% of kids 0 - 5

Source: U.S. Census 2010

Hispanic Growth Driven by Younger Population

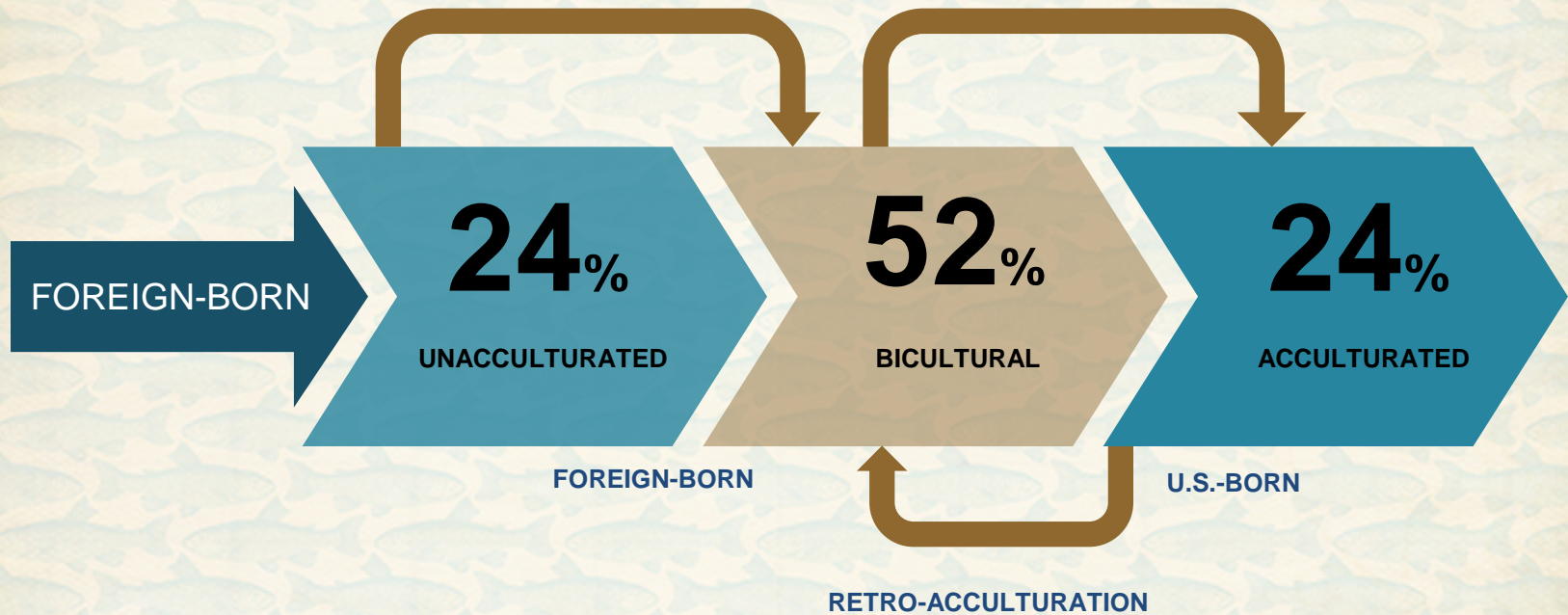
Hispanic Baby Boom vs. Non-Hispanic Baby Boomers



Sources: U.S. Census Bureau, 2010 Census & 2008 Population Projections; Pew Hispanic Center

Biculturals Are Center of Gravity For The Market

Acculturation is dynamic, with major convergence in the middle.



Sources: U.S. Census Bureau, 2010 Census & 2008 Population Projections; Pew Hispanic Center

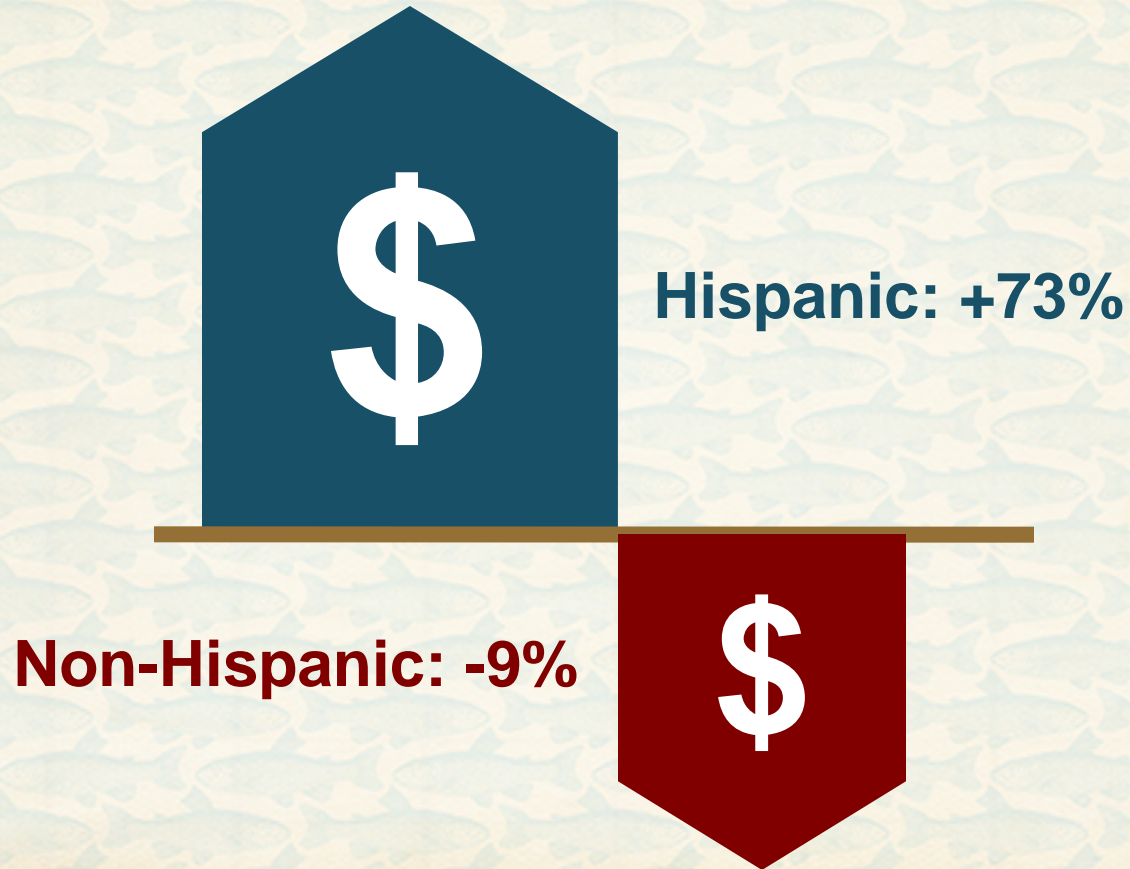
Hispanics Drive Retail Spending Growth

*“100% of the growth in sales
is going to come from
multicultural customers”*



*Tony Rogers
SVP Brand Marketing
Walmart
October 31, 2012*

Hispanic Spending on Outdoors Has Increased



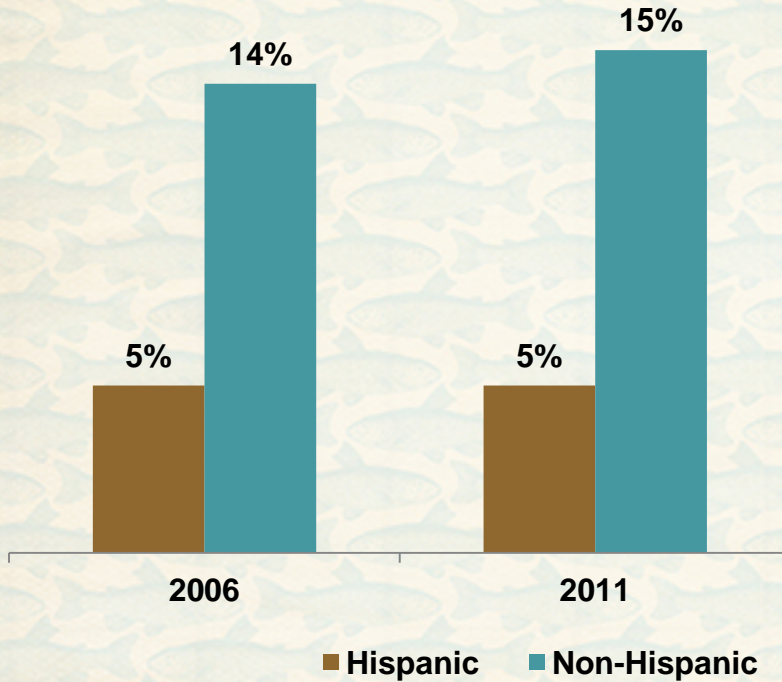
Source: U.S. Census National Survey of Fishing, Hunting and Wildlife 2011



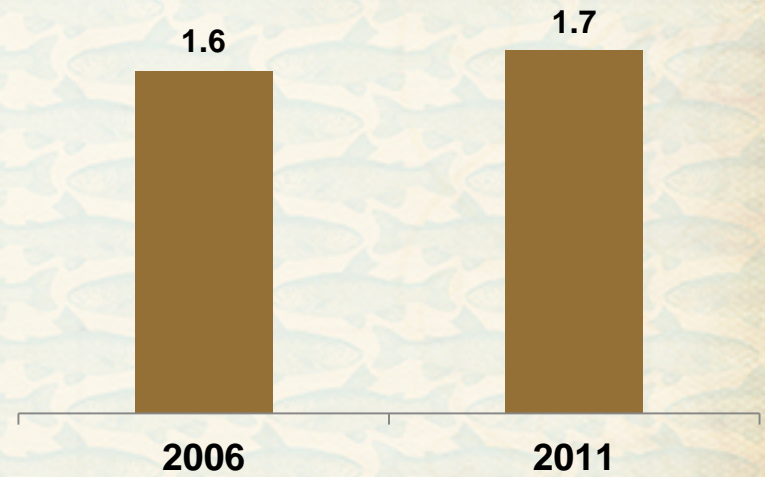
SITUATION ANALYSIS

The Fishing Future Isn't Looking So Bright

Fishing Incidence is Low

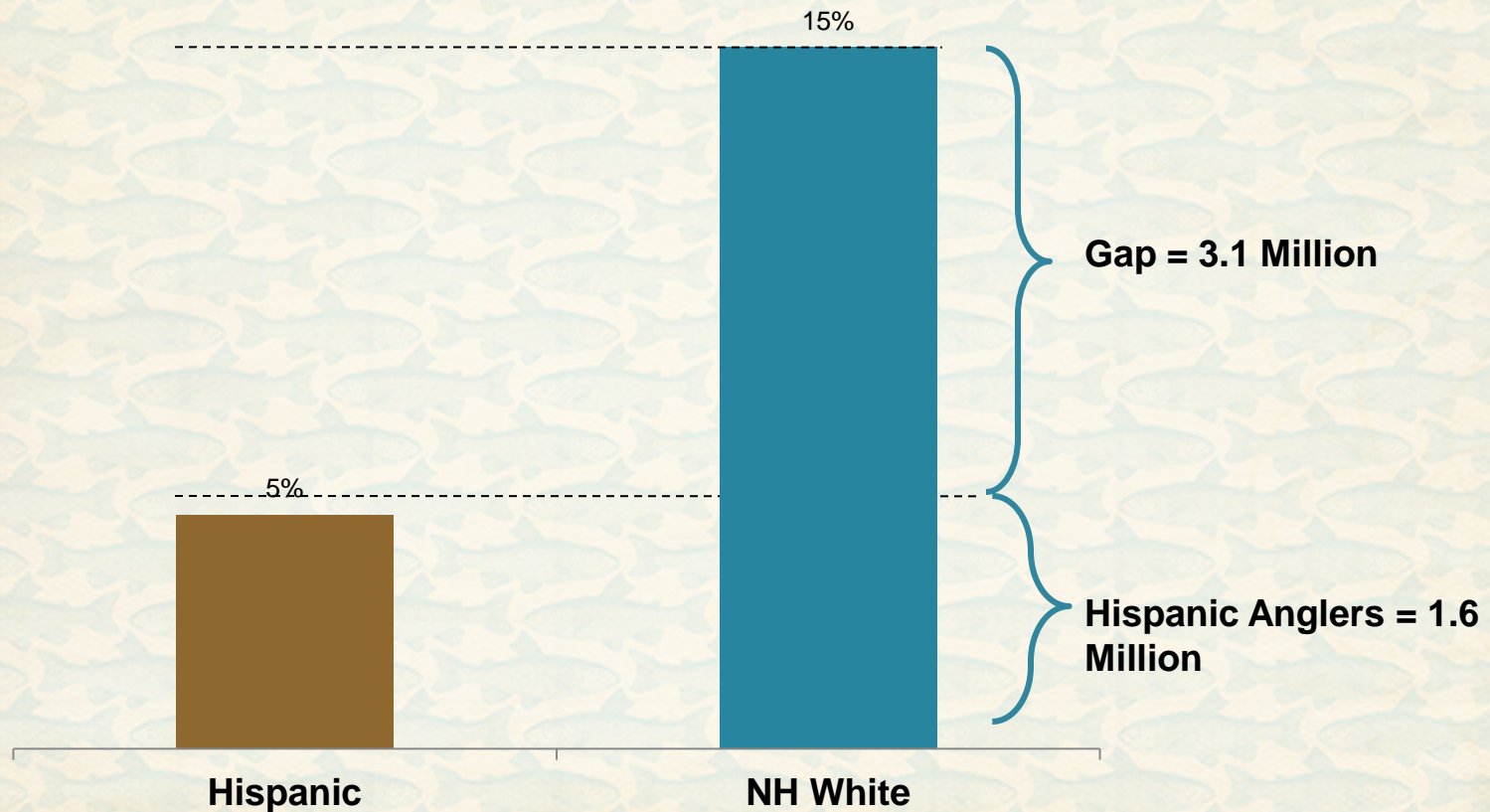


Total Hispanic Anglers are Flat



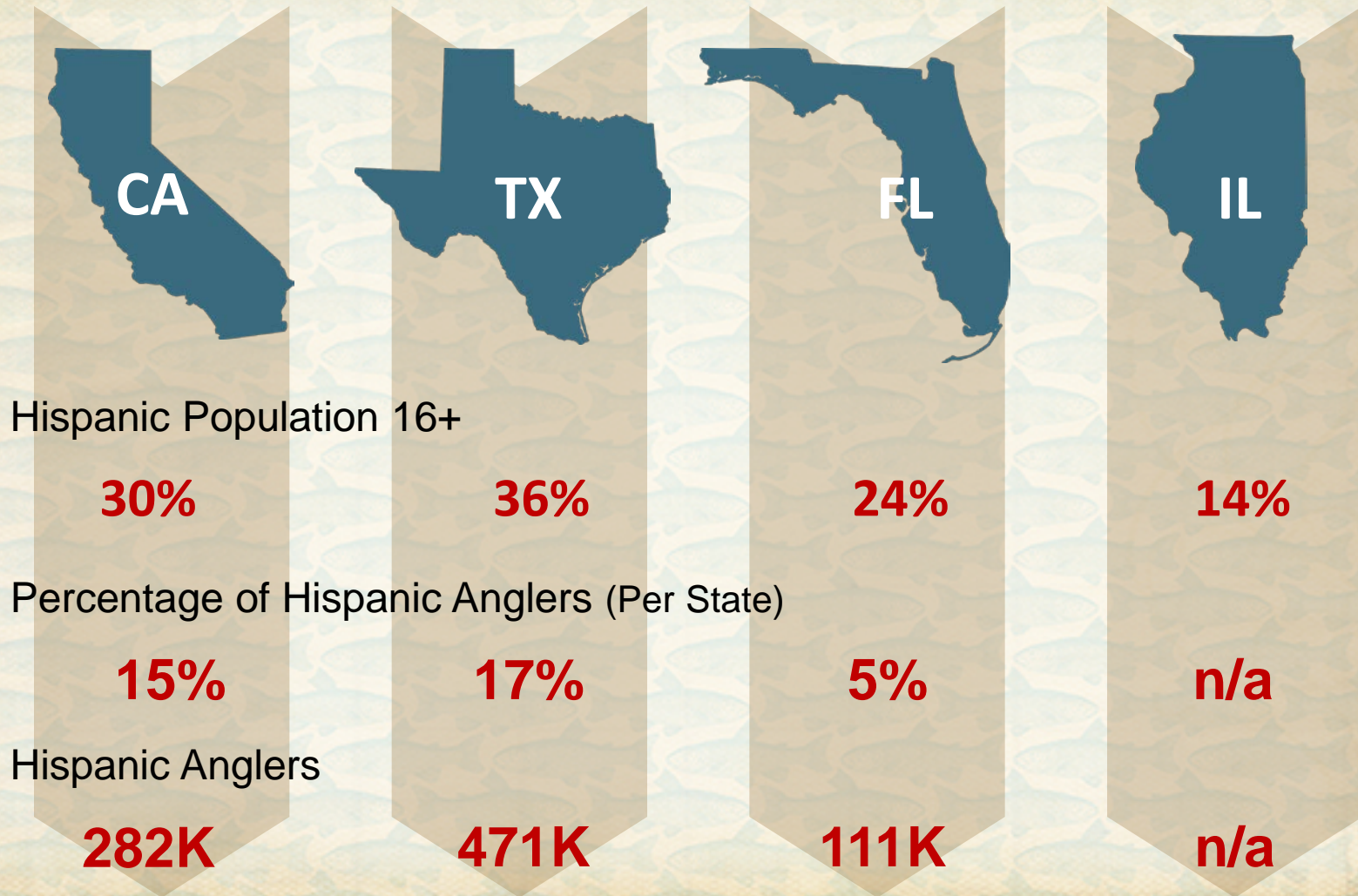
Source: U.S. Census National Survey of Fishing, Hunting and Wildlife 2011

Closing the Gap Could Yield Three Million Anglers



Source: U.S. Census National Survey of Fishing, Hunting and Wildlife 2011

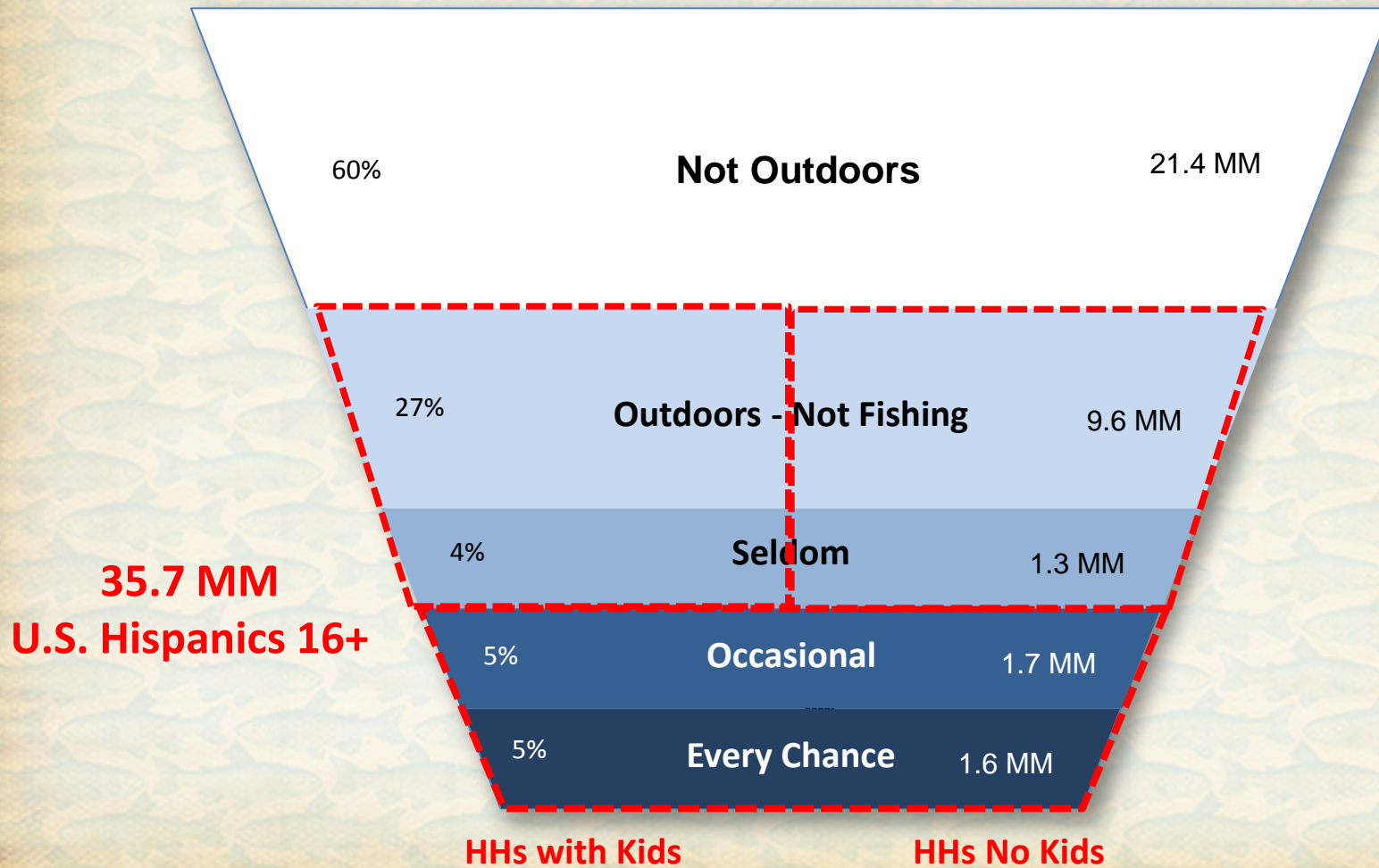
Key Geographies for Hispanic Focus





SEGMENTATION

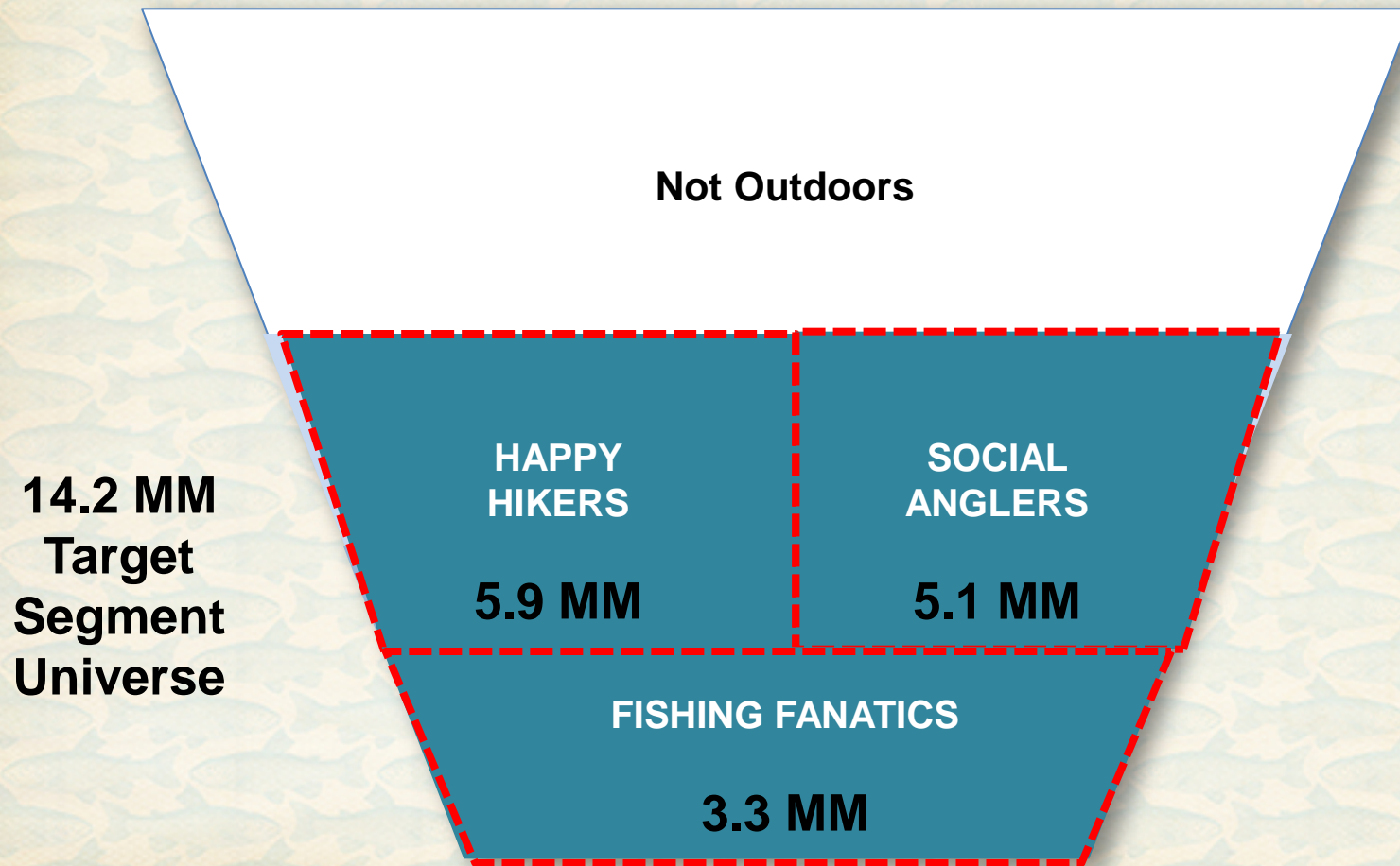
The Hispanic Fishing Continuum



Sources: Simmons NCHS Adult Winter 2012 2-year Study; NCS Teens Study Fall 2012



Our Analysis Yields Three Distinct Targets



Sources: Simmons NCHS Adult Winter 2012 2-year Study; NCS Teens Study Fall 2012

In-Depth Profiles Were Created for Target Segments



HAPPY HIKERS

Family-oriented nature lovers whose lives revolve around their kids. They plan activities around budget and time constraints, with fishing rarely, if ever, making the short list.



SOCIAL ANGLERS

Highly active recreation-minded singles and couples. They fish on occasion, but it's activities like hiking, camping, tubing and mountain biking that deliver the active thrills they seek.



FISHING FANATICS

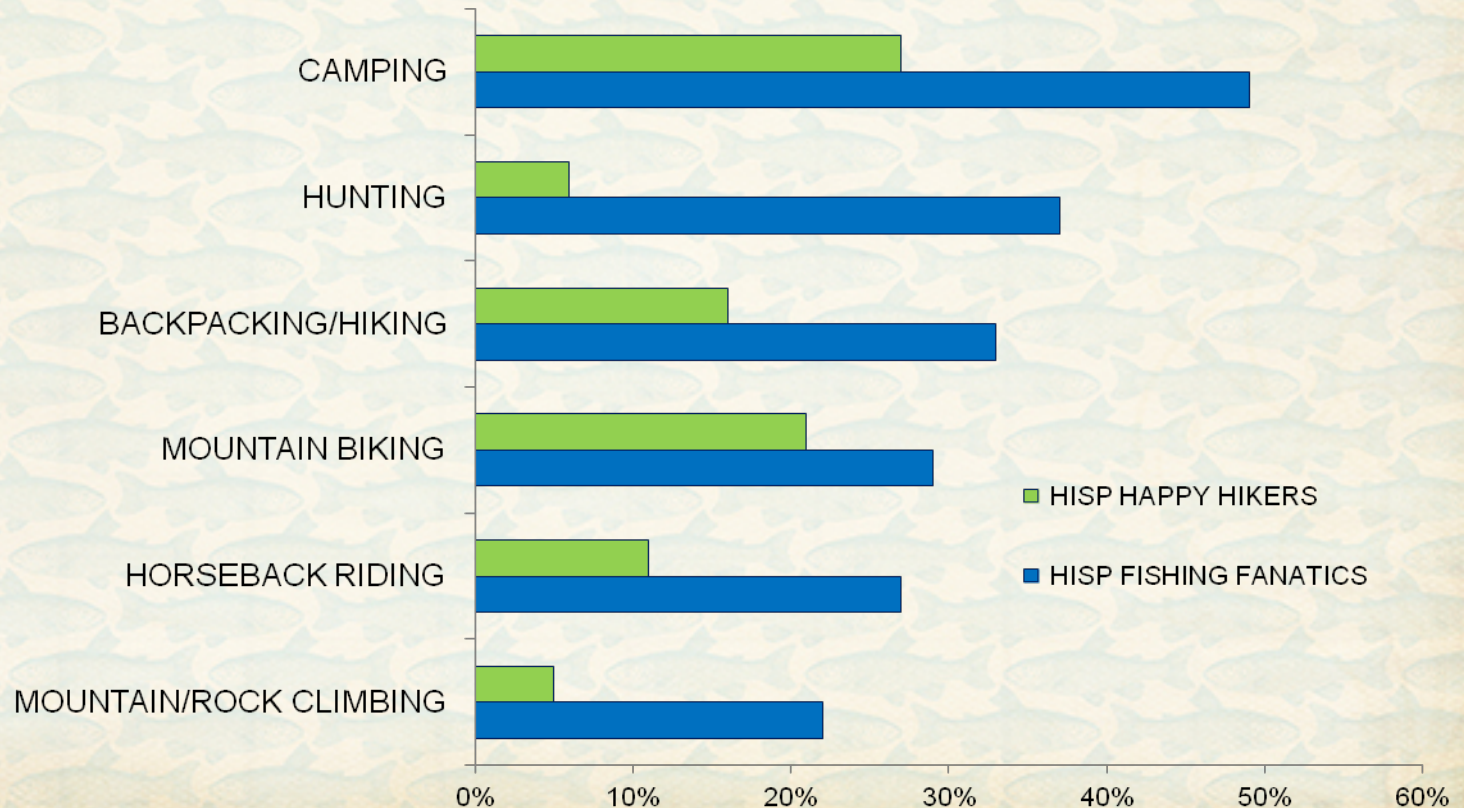
Avid anglers who adamantly believe fishing is more a religion than a sport, and their shrine's in the garage. They get out on water to drop a line every chance they get.

Source: Simmons NCHS Adult Study, Winter 2012

Happy Hikers Are Critical for Growing Fishing

Fishing Fanatics over-index on all outdoor activity categories

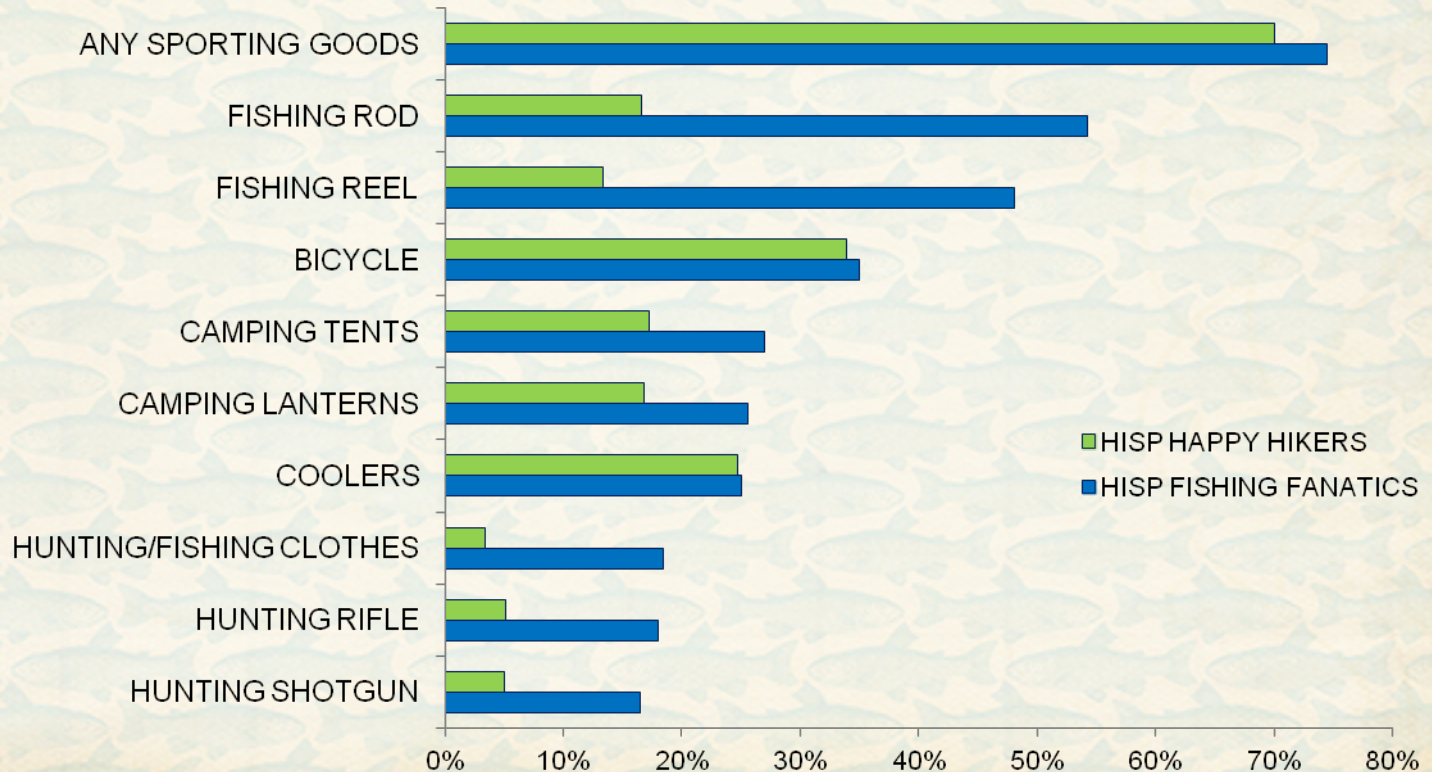
- With strong outdoors interests, Happy Hikers steps away from “dropping a line.”



Source: Simmons NCHS Adult Study, Winter 2012

Hispanic Fishing Fanatics Love Their Outdoor Gear

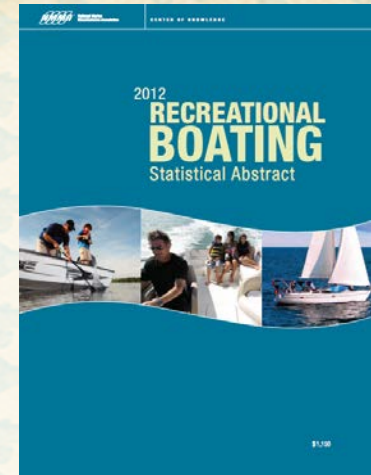
Turning Happy Hikers into Fishing Fanatics has sales benefits well beyond fishing and boating.



Source: Simmons NCHS Adult Study, Winter 2012

NMMA Hispanic Boating Numbers

- 8.4% of boating participants are Hispanic
 - vs. 15.3% of the adult population
 - i.e. almost half of fair share



- 7.7% of current boat owners
 - 2.4% of past boat owners
 - i.e less of a past involvement in boating

Need to establish awareness of boating as a relevant outdoor activity

Source: NMMA, 2012 Recreational Boating Statistical Abstract

Hispanic watercraft owners tend to be successful young professionals

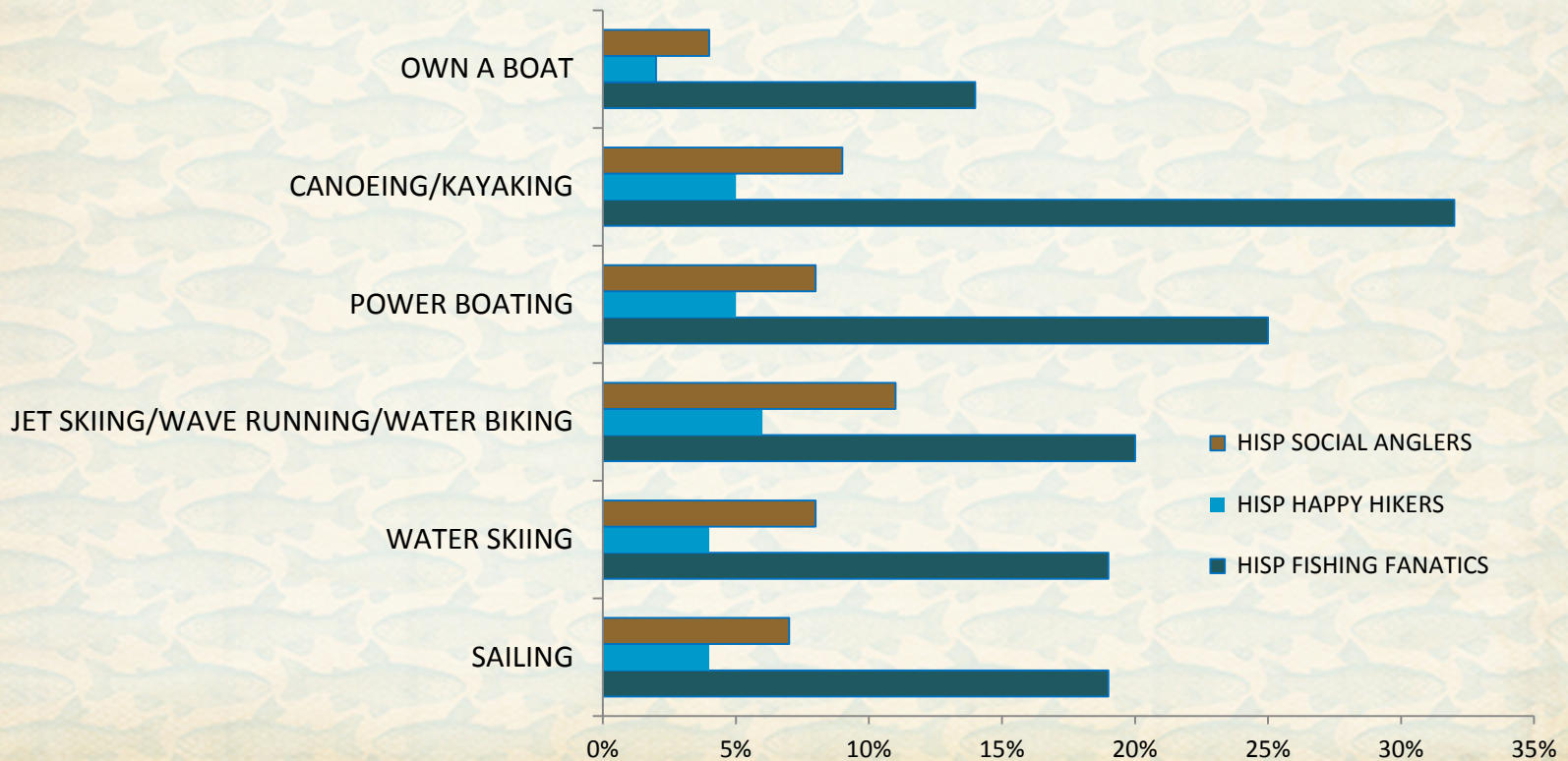
- Younger
 - Median age 33
- Higher HHI
 - Median \$57k
- Less likely to be married
- Employed
 - Very high incidence of full time employment
- Tech savvy
 - 75% smartphone penetration (vs 54% GM)
- Adventurous
 - High incidence of trying out new products
 - Into innovation, fashion and design



Sources: Simmons NCHS Adult Winter 2012 2-year Study; NCS Teens Study Fall 2012

Outdoor Activities Requiring a Boat

- Boat ownership may be limited, but is not limiting to boat-related activities.



Source: Simmons NCHS Adult Winter 2012 2-year Study, Base = CA, FL and TX.



RESEARCH INSIGHTS

Findings Show Hispanics Are Outdoors but ...



... Why Aren't They Boating and Fishing?



Key Barriers to Boating and Fishing



Lack of exposure and experience



Fishing perceived as a passive, waiting game



Full family participation is often difficult



Outdoor activities in general are waning



Money is a major issue, whether real or perceived



State licenses, regulations are problematic



Culturally relevant invitation is missing





OVERCOMING BARRIERS

New Latino Mindset is Changing the Game

Empowered

Beyond acceptance, culture now embraced

New tech provides info access, levels playing field

Fusionist

Preserving cultural core, blending to improve, grow

Explorer driven by upward mobility legacy

Confident

Bicultural skills open doors, expand opportunities

Being cultural ambassador increases social currency

Evolving

Redefining self identity, what it means to be Latino today

Raising expectations for self, others, brands

Overcoming Barriers Requires Three Key Steps

Exposure

Top of Mind
Fun, Family, Exciting
Relevant, Relatable

Experience

How to Fish, Boat
Rules, Regulations,
Guidelines
Help/Resources

Invitation

Experience for Self
Live the Thrill of the
Catch, Rush of the Water
Feel Fun, Excitement

Overcoming Barriers: Hispanic Top 10

Hispanic 10 TOP Ten

10. Assume Hispanic customers have limited experience
9. Don't assume Hispanics have limited spending
8. Create family-friendly environment
7. Offer sensory experiential - activities to see, feel, play
6. Provide in-language resource – company site/FB page
5. Build database identifying ethnicity, language preference
4. Consider Hispanic brand ambassador - relevance, credibility
3. Make fun and exciting – younger mindset, action oriented
2. Utilize the power of invitation
1. Commit for the long run

Retailers Keys to Success

Retailer's

5 TOP Five

5. Prioritize your stores based on Hispanic density
4. Have bilingual/bicultural staff with knowledge
3. Build database identifying ethnicity, language preference
2. Provide educational comfort zone, demos
1. Make the store part of the community

Manufacturer's Keys to Success

Manufacturer's

5 TOP Five

5. Make basic, necessary product information bilingual
4. Don't translate product/brand names
3. Focus on lower price-point products
2. If lifestyle imagery used, include diverse talent/casting to demonstrate product is "for me"
1. Leverage Fishing Fanatics, facilitate sharing success stories to increase cultural relevance



State/Federal Agencies' Keys to Success

State Agency

5 TOP Five

5. Understand misperception and distrust of institutional organizations
4. Emphasize positives of natural resource conservation vs. restrictions and law enforcement
3. Focus on impact to future generations as a primary motivator for Hispanics
2. Make licensing as simple as possible
1. Leverage opportunities to better publicize experiential events (retailers, radio personalities, etc.)



SO WHAT'S NEXT?

RBFF 5-year Plan





GRACIAS!