



# **RECREATIONAL BOATING & FISHING FOUNDATION**

**Hispanic Marketing Initiatives Update**

*December 15, 2016*



TAKEMEFISHING.org



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# HISPANICS BY THE NUMBERS



57 MM strong, 18% of population, largest minority; majority in key DMAs



Hispanics accounted for 48.3% of all population growth 2010 to 2015



Projected to reach 65 MM (20%) by 2020



Median age of 29.3 vs. 44.6 for Non-Hispanic Whites

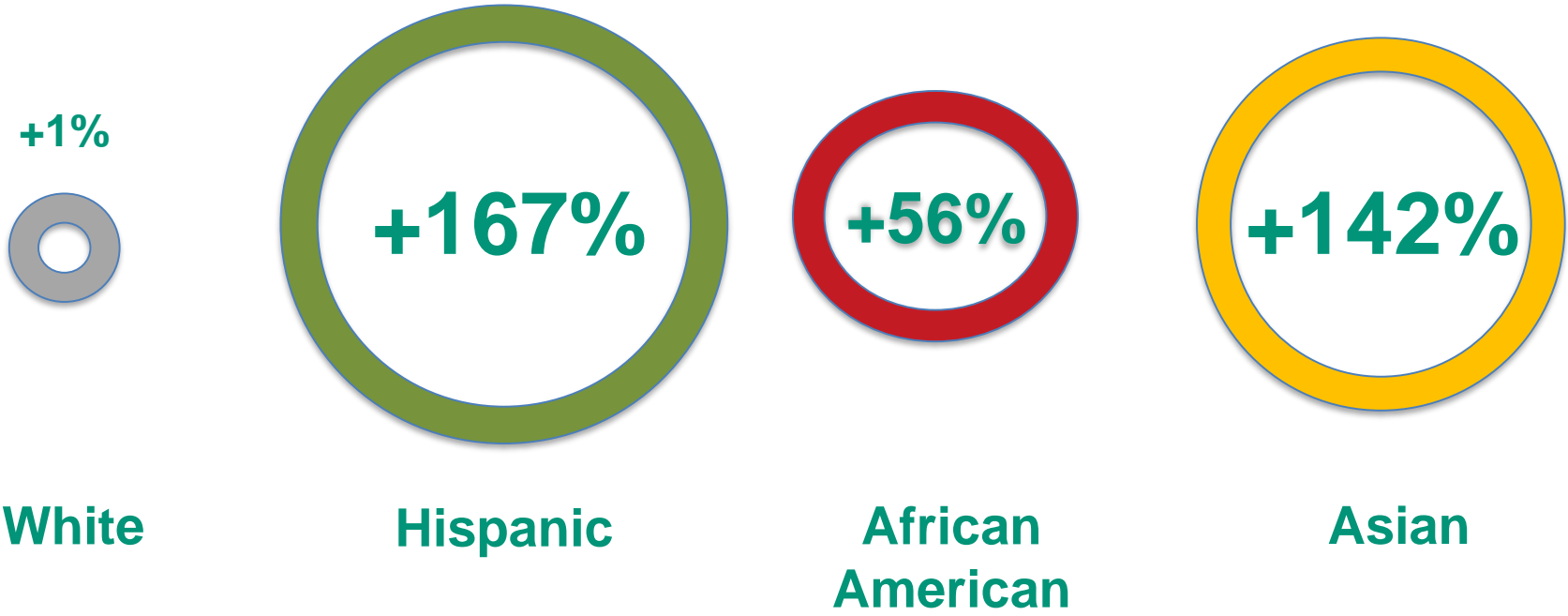


24% of kids under the age of 18, 26% of kids under 5 yrs. old

Source: U.S. Census Bureau, 2016

# HISPANICS LEADING DIVERSITY GROWTH

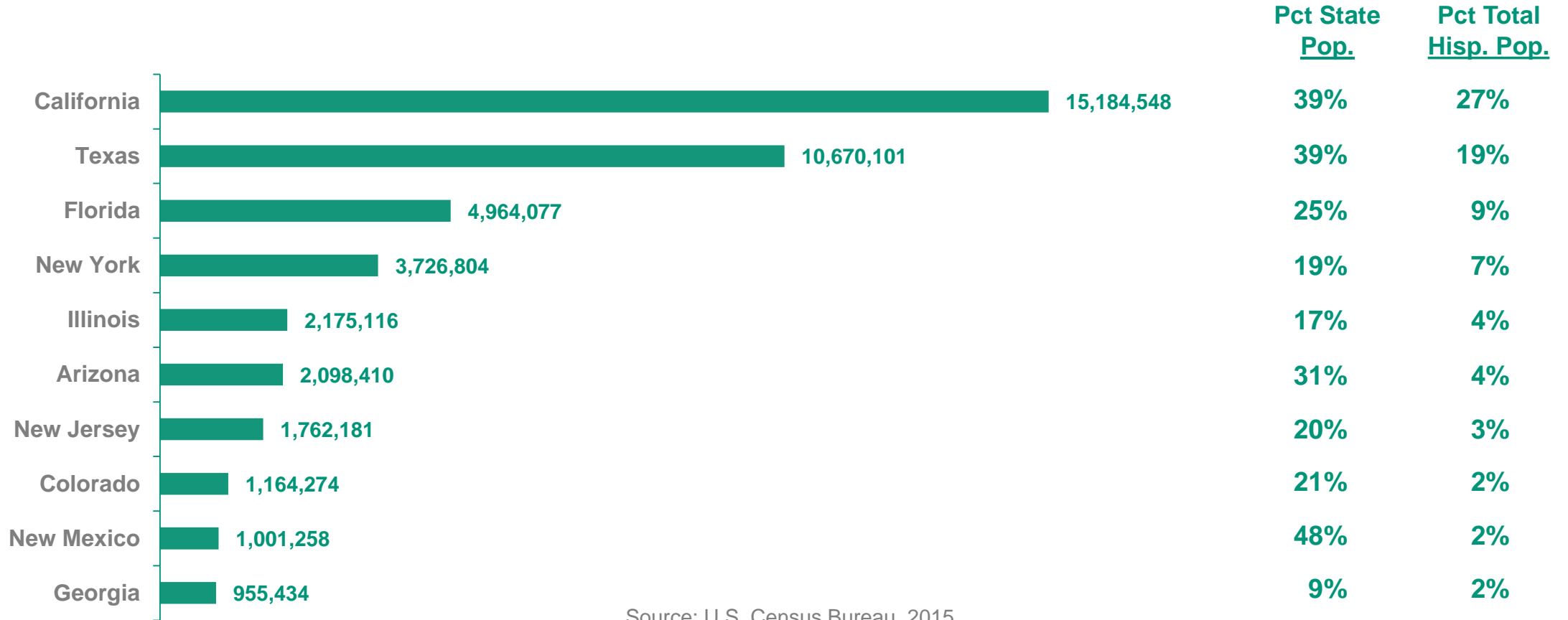
America's population growth, and increasing diversity, through 2050 will continue to be led by Hispanics.



Note: Excludes American Indian, Alaska Native, Hawaiian & Other Pacific Islander  
Sources: U.S. Census Bureau, Population Projections, and Nielsen Media

# HISPANICS STATES WELL ESTABLISHED

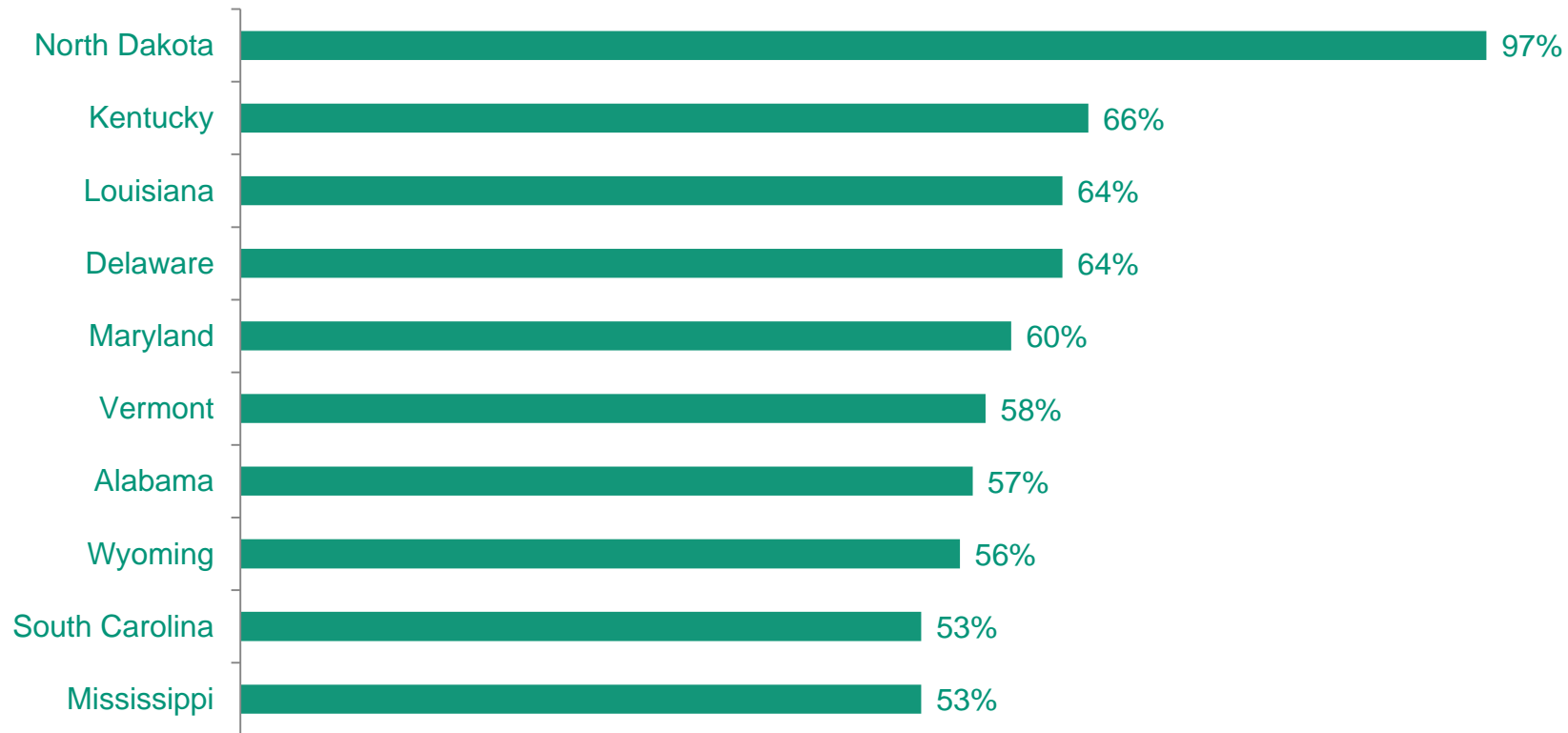
Three-fourths (77%) of US Hispanics reside in the top ten States.



Source: U.S. Census Bureau, 2015.

# HISPANIC GROWTH CONTINUES ROLL OUT

Often, States reporting highest Hispanic growth tend to be the least expected.



Source: U.S. Census Bureau, State population growth 2007 to 2014.

# TOP METRO AREAS HIGHLY HISPANIC

Urban areas have dense Hispanic clusters with strong immigrant and youth segments.

Rank	Metro Area	Hispanic Population	% Hispanic Among Total Pop.	Among Hispanics, % Foreign Born	Among <18, % Hispanic
1	<a href="#">Los Angeles</a>	5,979,000	45.1%	40.3%	54.5%
2	<a href="#">New York</a>	4,780,000	23.9%	42.1%	32.2%
3	<a href="#">Miami</a>	2,554,000	43.3%	60.7%	44.0%
4	<a href="#">Houston</a>	2,335,000	36.4%	39.5%	45.4%
5	<a href="#">Riverside, CA</a>	2,197,000	49.4%	30.3%	33.4%
6	<a href="#">Chicago</a>	2,070,000	21.8%	36.1%	30.8%
7	<a href="#">Dallas-Fort Worth</a>	1,943,000	28.4%	37.8%	37.7%
8	<a href="#">Phoenix</a>	1,347,000	30.1%	28.6%	42.6%
9	<a href="#">San Antonio</a>	1,259,000	55.7%	16.0%	65.1%
10	<a href="#">San Diego</a>	1,084,000	33.3%	33.6%	45.6%

Source: PEW Research Center, Hispanic Trends 2015.

**HISPANIC IMPACT,  
INFLUENCE GROWING**

# HISPANICS INTEGRATING INTO MAINSTREAM

Increasingly finding avenues exceed previous, negative expectations, build influence.

- Leveraging social tendencies, better sharing with purpose
- Highly connected, leveling playing field
- Bridging gaps, finding options, resources



Source: PEW Research Center, Hispanic Trends 2015.

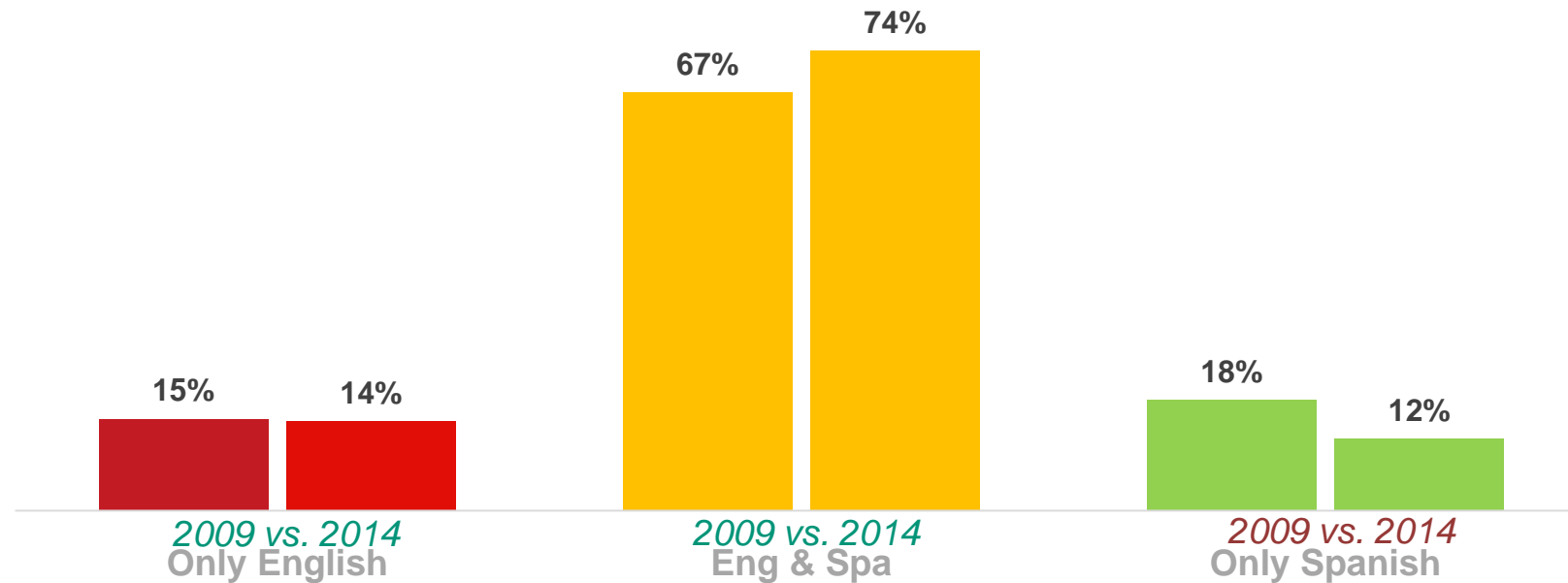


# HISPANICS MAINTAINING CULTURAL TIES

Language usage, serving as strong proxy for cultural connection, demonstrates Hispanic bicultural millennials are choosing to speak BOTH English and Spanish.

## *Bicultural Millennial Language Usage*

*2009 vs. 2014*



Source: Simmons NHCS Spring, 2015.

# DRIVING RETAIL CATEGORY GROWTH

Hispanic consumer spending is gaining momentum, outpacing all segments.

**GROCERY**  
\$61 B



HA: +12%  
GM: +6%

**CONSUMABLES**  
\$17 B



HA: +7%  
GM: -1%

**ENTERTAINMENT**  
\$17 B



HA: +2%  
GM: -4

**HEALTH/ WELLNESS**  
\$5 B



HA: +17%  
GM: +2%

**HARDLINES**  
\$11 B

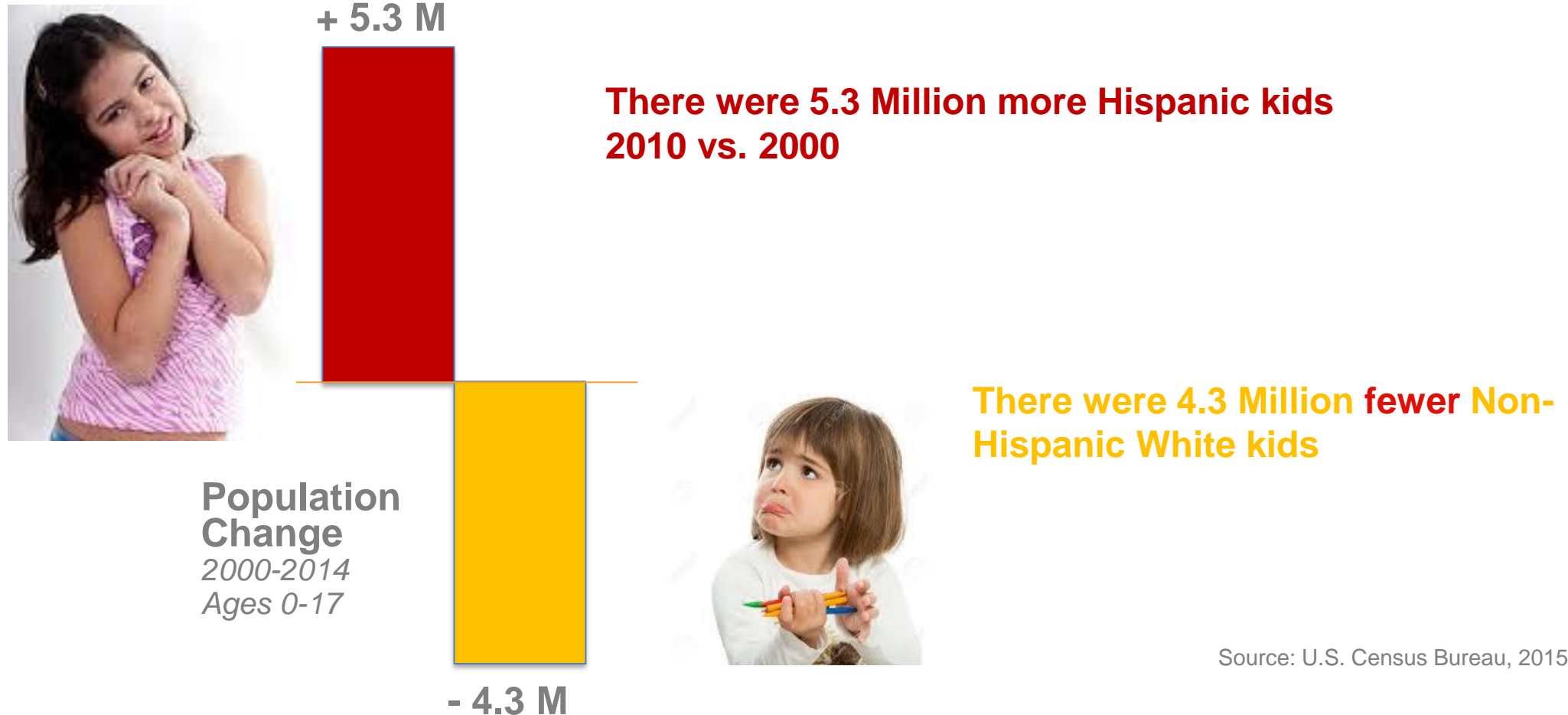


HA: +12%  
GM: -1%

Source: Consumer Expenditure Survey, Bureau of Labor & Statistics, 2009-2014

# LITERALLY CHANGING FACE OF AMERICA

One of every four kids under six is Hispanic... and growing!



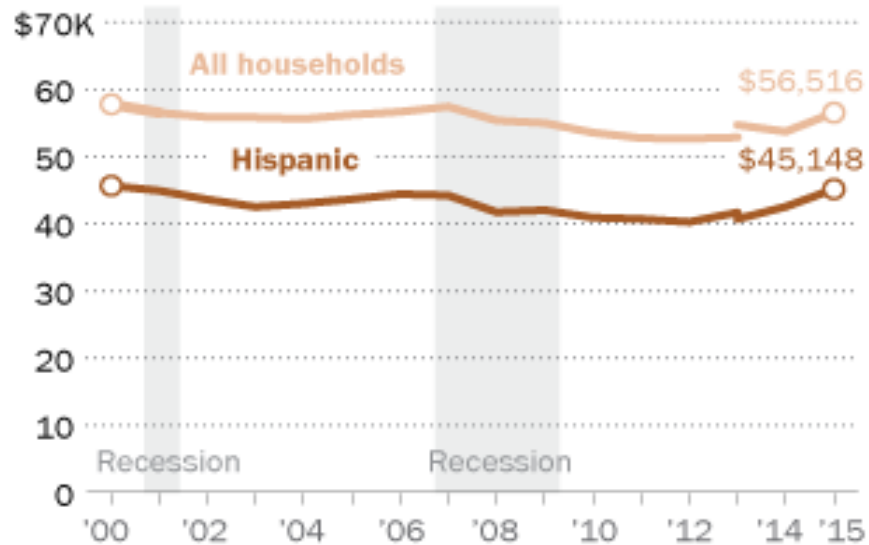
Source: U.S. Census Bureau, 2015.

# HISPANIC SOCIO-ECONOMICS ON THE RISE

Latinos have steadily been making progress on household income, poverty and jobs.

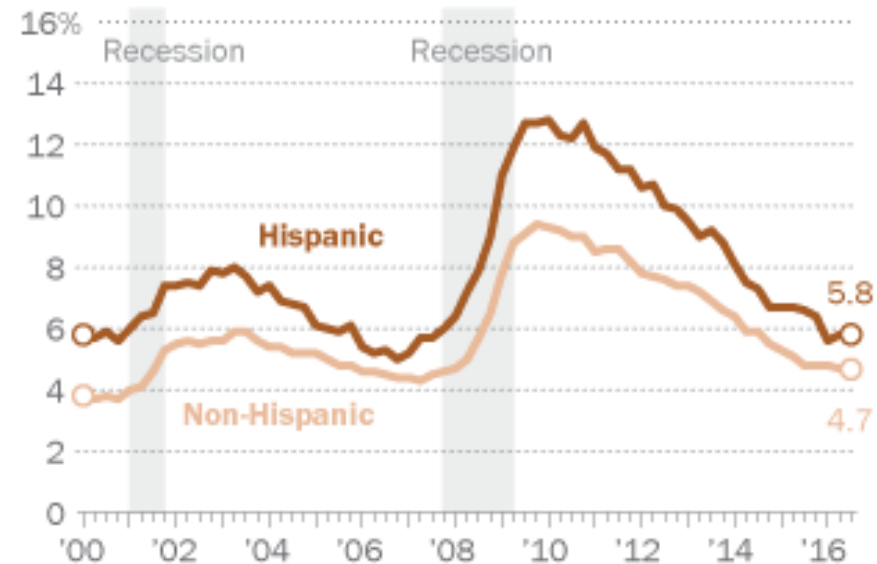
## Hispanic HH Income Grew in 2015

Real median HH income in 2015 dollars.



## Latino Unemployment Fell to 2006 Levels

Quarterly Unemployment Rate

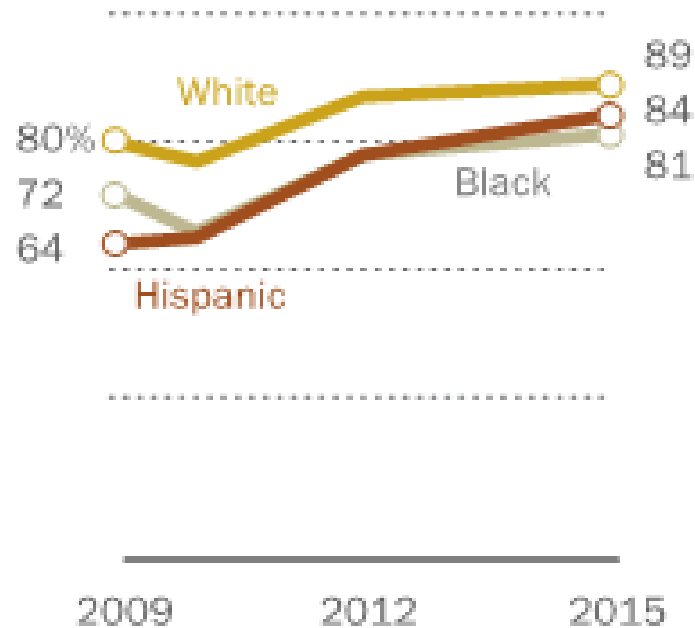


Source: PEW Hispanic Center, Nov. 11, 2016

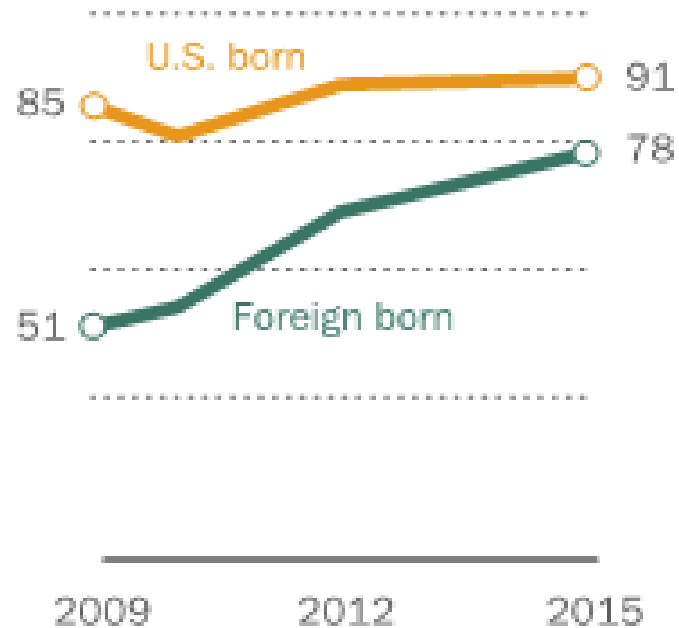
# HISPANIC ARE CLOSING TECH GAP

From US-born to Immigrant and English-only to Spanish-dominant, Hispanics are leveling the playing field, advancing via access to technology.

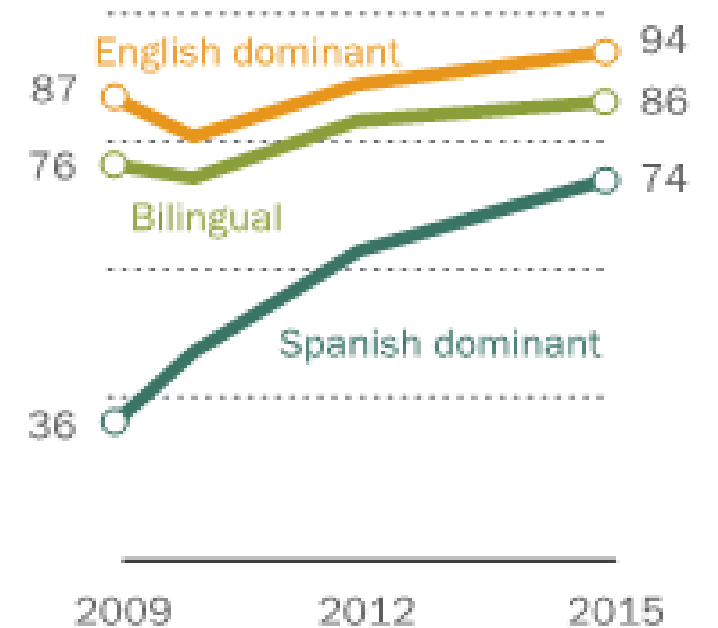
**U.S. adults, by race and ethnicity**



**Latino adults, by nativity**



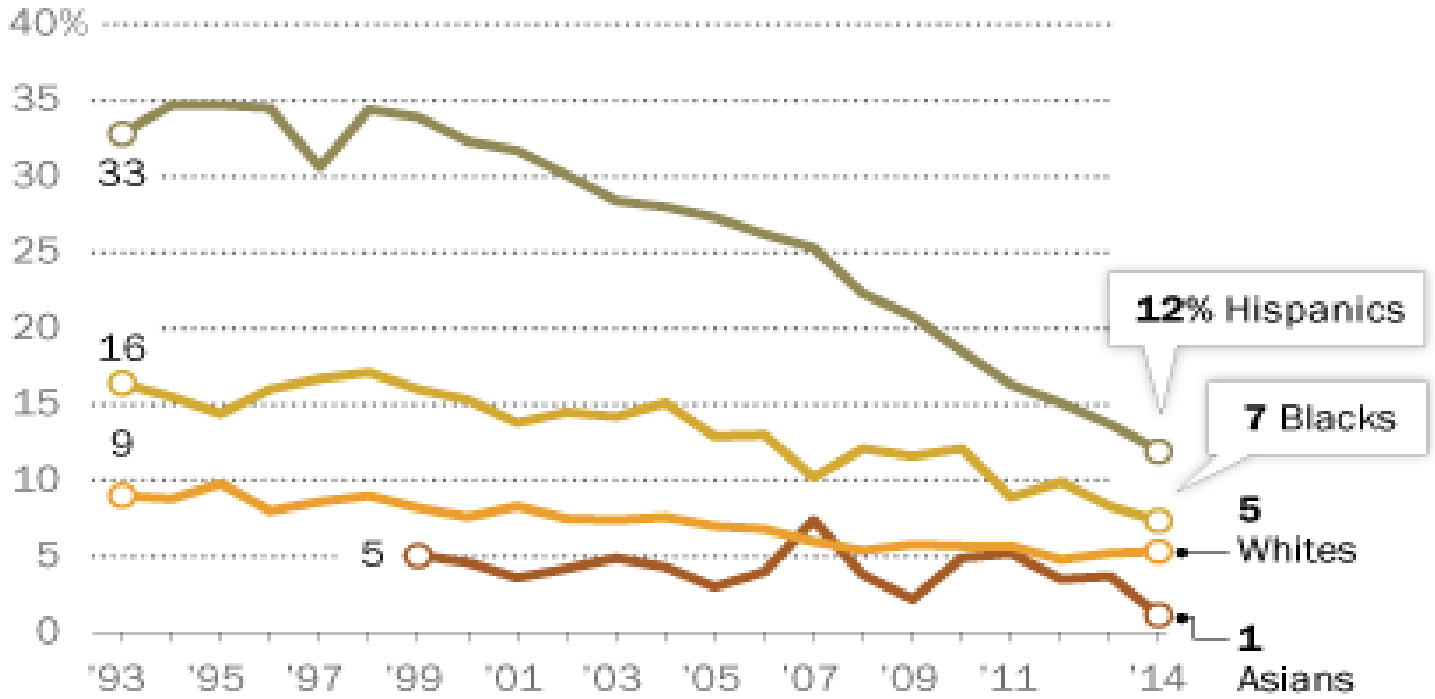
**Latino adults, by language dominance**



Source: National Survey of Latinos, and Pew Research Center – 2015.

# HISPANIC ARE CLOSING EDUCATION GAP

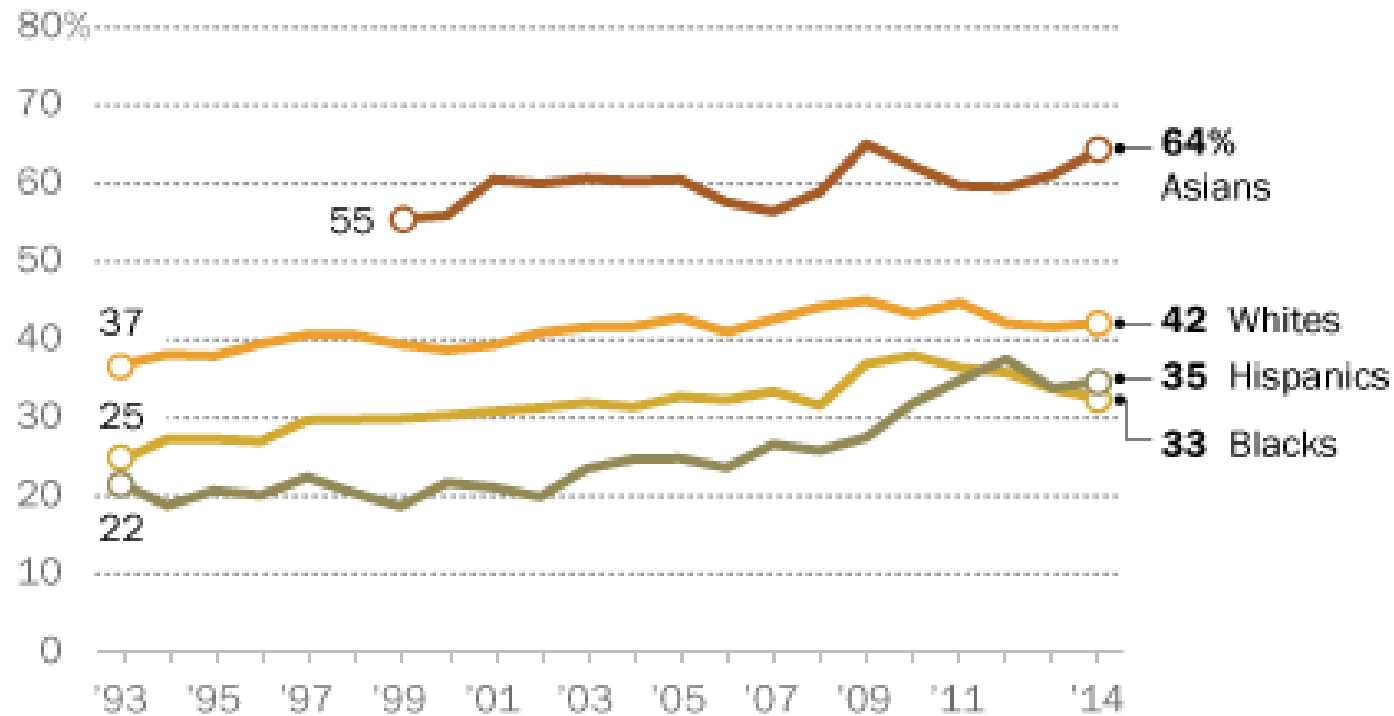
High school graduation has increased dramatically, with fewer dropouts and stronger completion rates.



Source: US Census Bureau, October CPS, Pew Hispanic, July 28, 2016

# HISPANIC ARE CLOSING COLLEGE GAP

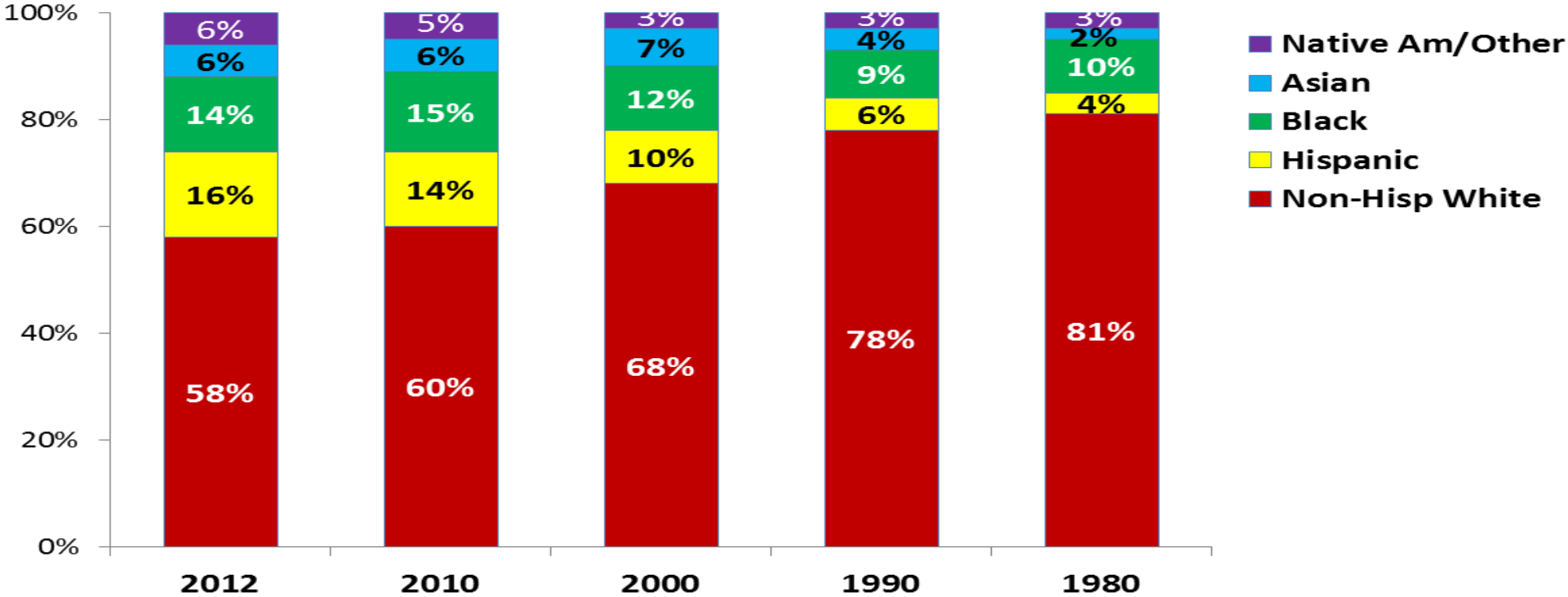
In 2014, just over a third (35%) of Latinos 18-24 were enrolled in college, a major increase from 22% in 1993, accounting for 2.3MM students in 2014.



Source: US Census Bureau, October CPS, Pew Hispanic, July 28, 2016

# EVEN CHANGING FACE OF US COLLEGES

After 30 years, Hispanics now four times as likely to be part of a diverse student body.



Source: U.S. Dept. of Education. Institute of Education Sciences, National Center for Education Statistics, Higher Education General Information Survey (HEGIS)



# HISPANIC OUTREACH

# LATINOS IN MIDST OF CULTURAL EVOLUTION

Constantly redefining and reinforcing what it means to be Latino.



## REDEFINING WHAT IT MEANS TO BE HISPANIC

### Culturally Savvy

- Refusing to be labeled or put in a box
- Creating a new American identity around a Hispanic core
- Strong believer in the American Dream



## MAKING A DIFFERENCE

### On their own terms

- Sees heritage as an advantage to navigate cultures
- Loud, intense and social by default
- Optimistic, forward-looking socially aware



## TAKING SENSE OF COMMUNITY TO ONLINE

### “Tech Sherpa” for family

- Confident social creator and cultural trendsetter
- Feel an obligation to family/ community to succeed
- Embraces new, buzz-worthy in food, fashion, music, tech

# MULTICULTURAL OUTREACH DEMANDS INTEGRATED TACTICS

Omnicultural approach requires that each segment addressed with culturally-relevant tactics.

Hispanics leading diverse cultural segments together comprise new mainstream

Must understand how cultures interact, borrow from one another

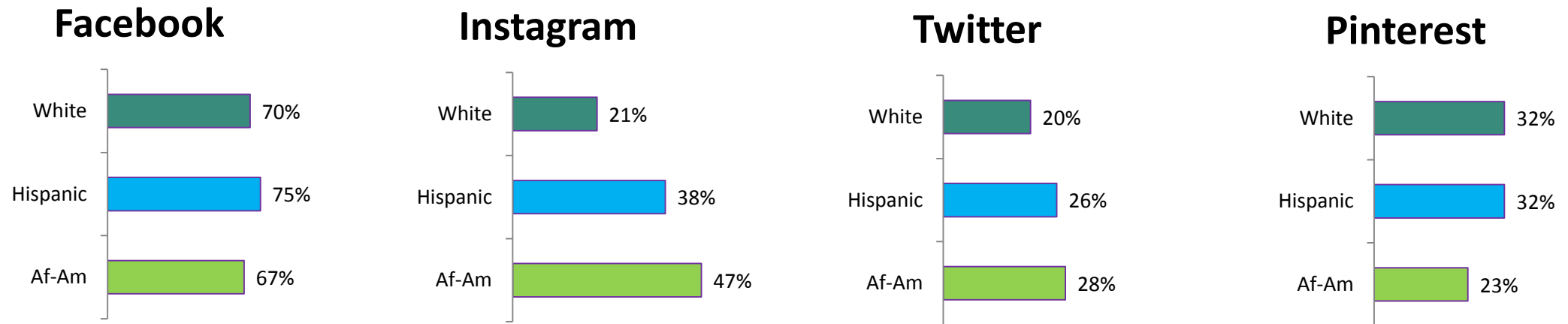
Segments maintain individual identities without alienating others

Overarching strategy integrates tactics addressing needs of each segment for optimum relevance, response, and growth.



# HISPANICS ENGAGE ACROSS PLATFORMS

Having bridged the technology gap, Hispanics are demonstrating high levels of active engagement across a variety of social media applications.

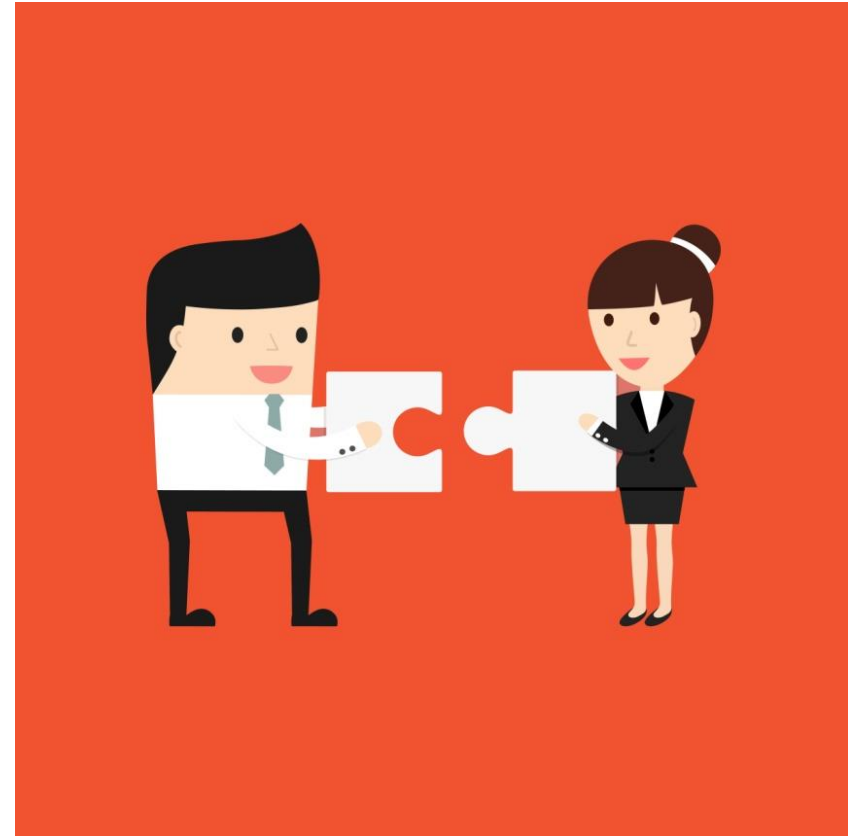


Source: Twitter Report, 2016.

# MORE SOCIAL, CONNECTED, MORE OFTEN

When compared to the general market, active Hispanic social media users in the U.S. tend to engage with brands more often and expect to be able to do so:

- **91%** of Hispanic Millennials are focus vs. 79% Gen Xers, 42% Boomers using social media
- **25%** more likely to follow brands on Facebook vs. non-Hispanic counterparts.
- **66%** expect to be able to connect with brands
- **81%** follow at least one brand
- **80%** have tweeted or re-tweeted at a brand
- **Follow more** numbers of Instagram accounts, including brands, vs. mainstream



# THINK BILINGUAL, USE SITUATIONALLY

In addition to engaging with brands more often, U.S. Hispanics often prefer bilingual or Spanish infused engagement with brands indicating cultural sensitivity, respect:

- **80%** prefer ads that incorporate Spanish messaging.
- **39%** of Instagram users post and consume bilingual content.
- **57%** tweet in Spanish+English or Spanish only
- **43%** tweet in English only
- **35%** of Hispanic Millennials say Spanish ads show respect, **27%** want sites available in Spanish



# BUILD PROCESS FOR ENGAGEMENT

Approach to Hispanic must be inclusive, not divergent from mainstream



## Determine Opportunity

- Establish size, type
- Prioritize segments
- Match needs, resources



## Understand Nuances

- Study behaviors, drivers
- Track attitudes, mindsets
- Target influencers



## Ready Organization

- Find Champion
- Get right people trained
- Set stage, optimize



## Commit to the Plan

- Reach where live, play
- Don't wait for them
- Invite, include, engage