RBFF Hispanic Marketing Strategies Webinar

Strategies, Insights & Tools to Engage New Fishing & Boating Participants

February 5, 2015
Agenda

I. Hispanic Market Update

II. Strategies and Tactics for Engaging Hispanics

III. Research Findings

IV. Vamos A Pescar Update

V. RBFF Resources Toolkit
Lopez Negrete Communications

Largest Hispanic owned and operated agency in the US

• Established in 1985
• Headquartered in Houston, with offices in Los Angeles, New York, Mexico City
• Passionate about the Hispanic community and the growing opportunity it represents for our clients
RBFF Hispanic Assignment

Develop integrated marketing plan to encourage greater Hispanic participation in fishing and boating.

Goals:

- Increase participation in fishing and boating
- Increase fishing license sales and boat registrations
- Achieve 10% increase in traffic across digital assets
- Support efforts of key RBFF stakeholders
Hispanic Market Update
Why Hispanics Still Matter
Hispanic Facts Update

- 54 MM strong, 17% of population, largest minority; majority in key DMAs
- Hispanics accounted for 48% of all population growth 2012 – 2013
- Projected to reach 65 MM (20%) by 2020
- Median age of 28 vs. 42 Non-Hispanic White
- 24% of kids under the age of 18, 26% of kids 0 - 5

Sources: U.S. Census and Geoscape MarketWatch
Hispanics Leading US Population Growth

Projected population growth 2010 to 2050 shows major ethnic impact.

- Total: +42%
- White Non-Hispanic: +1%
- Black: +56%
- Asian*: +142%
- Hispanic: +167%

*Excludes American Indian, Alaska Native, Hawaiian & Other Pacific Islander
Source: U.S. Census Bureau Population Projections

• Excludes American Indian, Alaska Native, Hawaiian & Other Pacific Islander
• Sources: U.S. Census Bureau, Population Projections and Nielsen Media
Top 10 States: Hispanic Population (MM)

These account for 42 MM Hispanics, 78% of the total Hispanic population.

California: 14.7
Texas: 10.2
Florida: 4.6
New York: 3.6
Illinois: 2.1
Arizona: 2.0
New Jersey: 1.7
Colorado: 1.1
New Mexico: 1.0
Georgia: 0.9

### Top 10 Hispanic Metro Areas

About half of all US Hispanics live in these 10 Metro areas

<table>
<thead>
<tr>
<th>Rank</th>
<th>Metro Area</th>
<th>Hispanic Population</th>
<th>% Hispanic Among Total Population</th>
<th>Among Hispanics, % Foreign Born</th>
<th>Among Under 18, % Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Los Angeles</td>
<td>5,804,000</td>
<td>44.8%</td>
<td>42.2%</td>
<td>58.8%</td>
</tr>
<tr>
<td>2</td>
<td>New York</td>
<td>4,317,000</td>
<td>24.2%</td>
<td>42.5%</td>
<td>29.6%</td>
</tr>
<tr>
<td>3</td>
<td>Houston</td>
<td>2,105,000</td>
<td>36.7%</td>
<td>40.5%</td>
<td>46.5%</td>
</tr>
<tr>
<td>4</td>
<td>Riverside, CA</td>
<td>2,062,000</td>
<td>47.9%</td>
<td>30.5%</td>
<td>60.9%</td>
</tr>
<tr>
<td>5</td>
<td>Chicago</td>
<td>1,971,000</td>
<td>21.5%</td>
<td>39.6%</td>
<td>30.3%</td>
</tr>
<tr>
<td>6</td>
<td>Dallas</td>
<td>1,809,000</td>
<td>28.4%</td>
<td>39.5%</td>
<td>38.4%</td>
</tr>
<tr>
<td>7</td>
<td>Miami</td>
<td>1,627,000</td>
<td>64.7%</td>
<td>65.8%</td>
<td>60.4%</td>
</tr>
<tr>
<td>8</td>
<td>Phoenix</td>
<td>1,163,000</td>
<td>30.0%</td>
<td>30.6%</td>
<td>43.5%</td>
</tr>
<tr>
<td>9</td>
<td>San Francisco</td>
<td>1,114,000</td>
<td>22.5%</td>
<td>39.6%</td>
<td>32.8%</td>
</tr>
<tr>
<td>10</td>
<td>San Antonio</td>
<td>1,112,000</td>
<td>55.5%</td>
<td>16.7%</td>
<td>65.2%</td>
</tr>
</tbody>
</table>

Source: Pew Hispanic Center, 2011 ACS.
States With Fastest Hispanic Growth

Rapid Hispanic population growth is occurring in unexpected States.

- Alabama: 158%
- Tennessee: 154%
- South Carolina: 154%
- Kentucky: 132%
- South Dakota: 129%
- Arkansas: 123%
- North Carolina: 120%
- Mississippi: 117%
- Maryland: 112%
- Georgia: 103%

Diversity Steadily Increasing Over Time

Age cohorts over time show dynamic racial/ethnic shift

Source: Pew Research Center, 2011 US Census CPS.
Today, “Under 5’s” are Majority Minority

Current trends by age group show the impact of Hispanics is NOW!

• Sources: Simmons Spring 2014 NHCS Adult Study 2-Year; US Fish & Wildlife Survey: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation
Hispanic Youth Exceeding Expectations

- Better educated
- Wealthier
- Entrepreneurial
- Bicultural
- Ambitious

Increased participation in professional services, business and leadership positions
Strong Post Recession Recovery in Place

- Hispanics continue closing “education gap”
- Household expenditure up: $41,500 to $42,500
- Unemployment down to 6.5% from 8.4% in 2014
- Highest labor participation rate at 66.0%

Sources: Bureau of Labor Statistics; US Census Bureau; Pew Hispanic Center
Hispanic Progress Not Yet Leveraged

- Hispanics lead in net new household formation, a key boat sales indicator…

- …but still lag the general market in boating participation

![Graph showing % YOY change in US owner households from 2000 to 2012 for Non-Motorized Boating and Power Boating, with a comparison between Hispanics and Non-Hispanics.](image)

Source: Simmons NCHSE Spring 2014  Adult 12 month
Hispanic Challenge: Under-index vs. GM

In outdoor activities, Hispanics overall don’t participate at mainstream levels.

- Closing the gap holds the key to securing the outdoor industry future

Source: Simmons NCHS Adult Summer 2014,
Hispanic Fishing & Boating Behavior
Our Hispanics Bull’s-Eye Has Proven True

HAPPY HIKERS

SOCIAL ANGLERS
**Hispanic Happy Hikers Form Target Core**

### Demographics:
- Bicultural Hispanics, 25–45 - Median Age: 36
- Married: 66%, Kids in HH
- HH income: $40k+ – Median income: $52K

### Outdoor Category
- Like to camp, backpack, mountain bike
- Regularly visit lakes and beaches
- Minimal boat ownership, canoe, kayak, jet ski

### Psychographics:
- Nurturers – emphasize keeping family happy
- See selves as goodhearted, affectionate, loving
- Family traditions, beliefs are very important

### Tech Attitudes:
- Heavy mobile, social users, use sites for local info
- Tech, primary life organizational tool
- Involved parent, tech helps share, compare track

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**Happy Hikers**

Family-oriented outdoors lovers. Their lives revolve around their kids. They plan activities around tight budgets and time constraints. Regularly outdoors, but fishing/boating rarely, if ever, makes the short list.

Source: Simmons NCHS Adult Summer 2014,
Happy Hikers are Outdoors Lovers

Hispanic Happy Hikers are more likely to participate in a variety of outdoor activities.

- Happy Hikers: 30% for CAMPING TRIPS
  - Total Hispanics: 11%

- Happy Hikers: 22% for MOUNTAIN/ROAD BIKING
  - Total Hispanics: 10%

- Happy Hikers: 20% for BACKPACKING/HIKING
  - Total Hispanics: 9%

- Happy Hikers: 15% for HORSEBACK RIDING
  - Total Hispanics: 6%

- Happy Hikers: 10% for MOUNTAIN/ROCK CLIMBING
  - Total Hispanics: 4%

- Happy Hikers: 9% for SNOWBOARDING
  - Total Hispanics: 5%

- Happy Hikers: 8% for DOWNHILL/CROSS COUNTRY SKIING
  - Total Hispanics: 4%

- Happy Hikers: 8% for SNOWMOBILING
  - Total Hispanics: 3%

Source: Simmons NCHS Adult Summer 2014
Happy Hikers Prime for Fishing, Boating

Not necessarily high-frequency participants, Hispanic Happy Hikers are more familiar with fishing and boating activities.

- **FRESH WATER FISHING**: 11% (Happy Hikers), 8% (Total Hispanics)
- **SALT WATER FISHING**: 17% (Happy Hikers), 8% (Total Hispanics)
- **FLY FISHING**: 12% (Happy Hikers), 5% (Total Hispanics)
- **CANOEING/KAYAKING**: 13% (Happy Hikers), 6% (Total Hispanics)
- **POWER BOATING**: 11% (Happy Hikers), 4% (Total Hispanics)
- **ROWING**: 9% (Happy Hikers), 5% (Total Hispanics)
- **JET SKIING/PWC**: 8% (Happy Hikers), 4% (Total Hispanics)
- **WATER SKIING**: 8% (Happy Hikers), 4% (Total Hispanics)
- **SAILING**: 8% (Happy Hikers), 3% (Total Hispanics)

Source: Simmons NCHS Adult Summer 2014.
Related Activities Present Big Opportunity

Compared to Total Hispanics, Hispanic Happy Hikers over-index in activities with potential links to states.

- **LISTENING TO MUSIC**: Happy Hikers 81%, Total Hispanics 63%
- **BARBECUING**: Happy Hikers 56%, Total Hispanics 36%
- **GOING TO A BEACH/LAKE**: Happy Hikers 54%, Total Hispanics 34%
- **VISITING A ZOO**: Happy Hikers 37%, Total Hispanics 21%
- **VISITING MUSEUMS**: Happy Hikers 25%, Total Hispanics 17%
- **VISITING AN AQUARIUM**: Happy Hikers 24%, Total Hispanics 12%
- **VISIT STATE FAIR(S)**: Happy Hikers 17%, Total Hispanics 11%
- **BIRD WATCHING**: Happy Hikers 13%, Total Hispanics 6%

Source: Simmons NCHS Adult Summer 2014, Happy Hikers Total Hispanics
Hispanic characteristics naturally fit an outdoor lifestyle

• Younger, vibrant families love outdoors, action, excitement
• Highly social, group-oriented, enjoy shared experiences
• Boating and fishing facilitate cultural fusion, have cachet, signal success and progress

But, novice outdoors, often lack experience, exposure to what’s available

• Don’t typically research process as in-depth as non-Hispanics
• Rely more on word-of-mouth, social sharing and limited role models/celebrities
• Place more trust in authority figures to educate, recommend, guide
• Language barriers can slow the process, bar is low, acceptance of efforts high
Strategies & Tactics for Engaging Hispanics
## Hispanic Engagement Process

<table>
<thead>
<tr>
<th>Determine the Opportunity</th>
<th>Understand the Consumer</th>
<th>Ready the Organization</th>
<th>Activate</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Determine the size of the opportunity</td>
<td>• Understand mindsets</td>
<td>• Get the right people on board, train them</td>
<td>• Focus on community wants/needs</td>
</tr>
<tr>
<td>• Segment the market</td>
<td>• Determine attitudes, behaviors, preferences</td>
<td>• Optimize offerings</td>
<td>• Differentiate</td>
</tr>
<tr>
<td>• Choose your target(s)</td>
<td>• Learn their influencers</td>
<td>• Set the stage</td>
<td>• Invite, be welcoming</td>
</tr>
</tbody>
</table>
Begin Outreach With Key Questions

• How big is my Hispanic opportunity?
• Do I need to do Hispanic marketing?
• Where should I focus my resources?
• Who should I target? Why?
• What do I need to know about them?
Get Started With The Facts

What you will need

• Geo-targeted database with usage/spend data
  ✓ Fee-based: Geoscape, Donnelly, Nielsen, etc.

• A list of all of your sites
  ✓ Location
  ✓ Outreach area

• Database or spreadsheet to track everything

What you are looking for

• Socio-demographics for each site/location
  ✓ Household income, category participation/spend
  ✓ Ethnicity, nativity, ancestry
Each Location is Different: Miami

- Heavily Hispanic, Cuban/Caribbean, wealthy foreigners; large upwardly mobile middle class; category more developed

<table>
<thead>
<tr>
<th>Miami</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>328,973</td>
</tr>
<tr>
<td>Hispanic Population</td>
<td>294,754</td>
</tr>
<tr>
<td>Hispanic Population %</td>
<td>90%</td>
</tr>
<tr>
<td>Purchasing Boats/Trailers: Total</td>
<td>$4,185,787</td>
</tr>
<tr>
<td>Purchasing Boats/Trailers: Hispanic</td>
<td>$3,806,757</td>
</tr>
<tr>
<td>Hispanic % of Sales</td>
<td>91%</td>
</tr>
</tbody>
</table>
Each Location is Different: Houston

Houston
- Houston heavily Hispanic; Mexican ancestry, mix of foreign and domestic

<table>
<thead>
<tr>
<th></th>
<th>Houston</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>182,811</td>
</tr>
<tr>
<td>Hispanic Population</td>
<td>52,850</td>
</tr>
<tr>
<td>Hispanic Population %</td>
<td>29%</td>
</tr>
<tr>
<td>Purchasing Boats/Trailers: Total</td>
<td>$3,188,942</td>
</tr>
<tr>
<td>Purchasing Boats/Trailers: Hispanic</td>
<td>$548,356</td>
</tr>
<tr>
<td>Hispanic % of Sales</td>
<td>17%</td>
</tr>
</tbody>
</table>
Prioritize Your Sites/Locations

EXAMPLE: Prioritize locations that need Hispanic market support

<table>
<thead>
<tr>
<th>Store Area % Hispanic</th>
<th>Class</th>
<th>Support Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;15%</td>
<td>Small Hispanic</td>
<td>No special handling; can provide support if asked for by regular staff</td>
</tr>
<tr>
<td>15 – 35%</td>
<td>Significant Hispanic</td>
<td>Large prospect community; work with local staff on Hispanic plans</td>
</tr>
<tr>
<td>35%+</td>
<td>Heavy Hispanic</td>
<td>Full Hispanic support; focus most of your resources and energy here</td>
</tr>
</tbody>
</table>

- If you have a consumer database, tag your Hispanic consumers
  - Direct marketing
  - Tracking and measurement
Hispanic Barriers Must Be Overcome

Lack of Experience/Education
- Must have something for everyone in family
- Lack of role models fishing/boating
- Successful experiences ensure repeat

Perceptions of Cost
- Believe boating/fishing out of range
- Licenses/fees unknown can be problematic

Concern for Safety
- Key requirement for gatekeeper moms
- Education, training, in-language support vital

Heavy Reliance on Key Influencers
- Trust often limited to those they identify with, share culture
- Celebrities, spokespersons seen as more believable
Reach Hispanics Via Media They Consume

Technology helps share experiences, make sure not to miss out on anything.

Source: Simmons NCHS Adult Summer 2014, Base = Hispanic Happy Hikers
Be Prepared For When They Come

On-location
- Create family-friendly environment, young, action-oriented
- Offer sensory experiential activities – seeing, feeling, playing
- Consider Hispanic staff for relevance, credibility

Materials
- Provide in-language materials
- Make basic, necessary information bilingual (products, events, license info)
- Use culturally-relevant imagery

Brand Ambassadors
- Mobilize existing Hispanic enthusiasts
- Utilize social media – Facebook, Twitter
- Invite, Invite, Invite!
Get Staff Behind the Opportunity

Entire organization needs to buy in

• Understand the why – opportunity benefits
• Know how to approach
• Have confidence to reach out to this segment
• Have the right info and materials
• Know how to find them

Toolkit resources
http://takemefishing.org/general/about-rbff/programs-and-materials/

• Webinars
• Boating and fishing terms
• Photo library
• Industry research
Retailers’ Keys to Success

Retailer’s 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
Manufacturers’ Keys to Success

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 success stories to increase cultural relevance.
State/Federal Agencies’ Keys to Success

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.)
Research Findings
Hispanics Mystery Shopping
Mystery Shopper Methodology

Study of fishing and boat sales took place from May to August, 2014

- Total of 66 mystery shopping trips made to boat dealers and retailers
- In Texas: Houston and Dallas; Florida: Miami, Orlando and Tampa
- Included chain and family-owned stores
- Mainstream families and Hispanics, mix of experience levels

Topics covered included:

- Educating the consumer
- Product suggestions
- Product demos
- Shopper experience

Stores Barely “Pass” Mystery Shopping

Taking all into consideration, both store types received passing scores – barely
- Chain dealerships performed better vs. family-owned in three key areas:
  - First Impressions, Overall Impressions, and Closing

![Bar chart showing comparison between Family-Owned and Chain Dealers scores](chart.png)

Source: Texas and Florida Retail Studies: The Recreational Boating & Fishing Foundation, 9/2014
Mainstream families and Hispanics gave stores minimally passing scores.

- Mainstream families rated boat sales associates higher in: First Impressions, the Sales Process and in Overall Impressions

Source: Texas and Florida Retail Studies: The Recreational Boating & Fishing Foundation, 9/2014
Missing Opportunities to Connect with Hispanics

Cultural sensitivity, understanding segment needs, mindset
  • Local market research, situation analysis, staff training, consumer feedback.

Failing to emphasize key features and benefits
  • Often, major points of concern are different, as much emotional as functional

Waiting for Hispanics to come to them
  • Participate in community events, activities: demonstrate, educate, celebrate

Not making Hispanics feel as “welcome and comfortable” as mainstream
  • Recognition, acceptance, feeling valued and invited are vital

Overall, not making Hispanics feel that this is for them
  • Place emphasis on inclusion, invite prospects to events and workshops, getting demographic info for follow up, and the close.
Hispanic Boating Path to Purchase Study
Preliminary Findings
RBFF Boat Study Supporters
Objectives were to gain insights into:

- Boating attitudes and behaviors
- Boat ownership motivations and drivers
- Boat sales best practices

Insights would serve to provide:

- Intelligence to be shared by RBFF stakeholders
- Direction/context for quantitative research phase.

Methodology included:

- One-on-ones in Miami and Houston
- Sales reps with success with Hispanics
- Current and prospective Hispanic boat owners
Highlights to Pique Your Interest

Current Hispanic Exposure to Advertising and Marketing is Limited

- Exposure to boating is vital to creating desire to own, participate
- Hispanics are not seeing boating ads, getting industry messages
- Consider expanding to media/channels consumed by Hispanics
- Culturally relevant messaging and imagery is critical

Perceptions of Affordability Present a Major Barrier to Ownership

- Hispanics believe boat ownership is out of their range
- Dealers must address perception of affordability
- Realization of affordability is the key trigger to purchase
- Consider offering alternative financing options

Dealers Must Capitalize on the In-Store Shopping Experience

- Dealer experience is vital
- Hispanics want to be respected as valued customers
- Involving entire family is key element in path to purchase
- Spanish-language communication can impact sales process
Vamos A Pescar Update
FY15 Year in Review

• Launched Vamos A Pescar Campaign in April 2014
  ✓ Website has garnered over 305,000 visits, almost 36,000 monthly
  ✓ Poised to surpass goal of 350,000 by March 31, 2015

• Geographic focus for launch was Texas and Florida
  ✓ Texas Parks & Wildlife and Florida Fish & Wildlife Conservation Commission

• New Hispanic boating content added to VamosAPescar.org
  ✓ Bilingual videos created in cooperation with Discover Boating

• Conducted research specifically focused on boating
  ✓ Mystery Shopper Project
  ✓ Hispanic Boating Research
In FY16, Hispanic Plan is Stay the Course

**FY2014 CONTENT DEVELOPMENT**
- Develop creative assets and campaign microsite, needed for launch (leverage existing TMF assets).

**FY2015 TEST MARKETS**
- Launch Hispanic program in two pilot states, develop associations with media and retail partners.

**FY2016 MARKET EXPANSION**
- Evolve program to build upon test market learning/results, expand nationally – CA, NY and IL, via Online, Social, Radio.

**FY2017 CONTINUITY**
- Build on program’s national reach.

**FY2018 CONTINUITY**
- Continue to optimize program based on KPIs.
VamosAPescar.org Building Momentum

305k Total Visits
Hispanics Family, How-To Oriented

69k looking for “How to” info

12k looking for “Where to” info
VamosAPescar.org Being Recognized

Davey Awards:
- 2014 Silver Award Winner: Websites – Branding
- 2014 Silver Award Winner: Mobile Websites – Education
- 2014 Silver Award Winner: Mobile Websites – Sports & Recreation
- 2014 Silver Award Winner: Mobile Marketing – General Interest/Variety
- 2014 Silver Award Winner: Mobile Marketing – Lifestyle

W3 Awards:
- 2014 Silver Award Winner: General Website Categories – Lifestyle
- 2014 Silver Award Winner: Mobile Websites – Education

MobileWebAwards:
- Best Non-Profit Mobile Website
- Best of Industry: Family Mobile Website
- Best of Industry: Leisure Mobile Website
VAP Social Media Newly Launched
George H.W. Bush  Vamos A Pescar™
Education Fund

$200k
RBFF Resources Toolkit
RBFF Resources Currently Available

- Webinars
- How-to Videos
- Lifestyle Video – Vazquez Family
- Research & Learnings
- Photo Library
- Web Banners
- Spanish Translation Guide
- Quarterly Newsletter to keep you updated

Spanish Translation Guide of Boating and Fishing Terms

Multicultural Photo Library

Webinar – Engaging the Hispanic Audience: Insights to Action
But Wait, There’s More... to Come!

- Webinars
- Boating Research
- Expansion to CA, NY, & IL
- More How-To Videos in Spanish
- Spanish-Language Web Content
- Continuing Education & Research
- Finally, stay tuned for future info and developments through RBFF’s NewsWaves newsletter

TakeMeFishing.org/corporate – Resource Center
Gracias!
Questions?