RBFF Vamos A Pescar™ Campaign
State Market Expansion Webinar

May 7, 2015
Agenda

I. Hispanic Market Update

II. Hispanic Boating & Fishing Behavior

III. Vamos A Pescar FY16 Road-map

IV. FY16 Hispanic Creative Showcase

V. FY16 Hispanic Media Plan Update

VI. RBFF Resources Toolkit

VII. State Agency Feedback & Discussion
Lopez Negrete Communications

Largest Hispanic owned and operated agency in the United States

• 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 boating and fishing.

Goals:

- Increase participation in boating and fishing
- 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 Lead U.S. Population Growth

Projected population growth 2010 to 2050 shows major ethnic impact.

Note: Excludes American Indian, Alaska Native, Hawaiian & Other Pacific Islander
Sources: U.S. Census Bureau, Population Projections and Nielsen Media
RBFF Year Two States Are Hispanic Top 5

RBFF year two states top the list and account for 68% of Hispanic target.

- 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

Source: U.S. Census, 2013
Year Two Has 9 of Top 10 Hispanic Metros

About half of all U.S. Hispanics live in the 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>
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<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
Hispanic Boating & Fishing Behavior
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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hispanic</th>
<th>Non-Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Motorized Boating</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Jet Ski/Wave Runner</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Power Boating</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Water Skiing</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Any Fishing</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: Simmons NCHS Adult Summer 2014
Hispanic Boating, Fishing by State

Hispanic participation rate gaps exist across the U.S. and at state level.

Total U.S.
- Hispanic: 21%
- Non-Hispanic White: 13%
- Power Boating: 8%
- Own Boat: 11%

Florida
- Hispanic: 14%
- Non-Hispanic White: 18%
- Power Boating: 4%
- Own Boat: 4%

Texas
- Hispanic: 17%
- Non-Hispanic White: 24%
- Power Boating: 3%
- Own Boat: 5%

California
- Hispanic: 12%
- Non-Hispanic White: 14%
- Power Boating: 6%
- Own Boat: 1%

Illinois
- Hispanic: 9%
- Non-Hispanic White: 18%
- Power Boating: 3%
- Own Boat: 0%

New York
- Hispanic: 6%
- Non-Hispanic White: 20%
- Power Boating: 1%
- Own Boat: 1%

Source: Simmons Fall 2014 NHCS Adult 2-year Study
Hispanic Happy Hikers Form Target Core

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.

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

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

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

- **Camping Trips**: 11% (Happy Hikers) vs. 1% (Total Hispanics)
- **Mountain/Road Biking**: 10% (Happy Hikers) vs. 1% (Total Hispanics)
- **Backpacking/Hiking**: 9% (Happy Hikers) vs. 2% (Total Hispanics)
- **Horseback Riding**: 6% (Happy Hikers) vs. 1% (Total Hispanics)
- **Mountain/Rock Climbing**: 4% (Happy Hikers) vs. 2% (Total Hispanics)
- **Snowboarding**: 5% (Happy Hikers) vs. 1% (Total Hispanics)
- **Downhill/Cross Country Skiing**: 4% (Happy Hikers) vs. 2% (Total Hispanics)
- **Snowmobiling**: 3% (Happy Hikers) vs. 1% (Total Hispanics)

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: 32%
SALT-WATER FISHING: 17%
FLY FISHING: 12%
CANOEING/KAYAKING: 13%
POWER BOATING: 11%
ROWING: 9%
JET SKIING/PWC: 8%
WATER SKIING: 8%
SAILING: 8%

Source: Simmons NCHS Adult Summer 2014
FY15 Year in Review

• Launched Vamos A Pescar Campaign in April 2014
  ✓ Website surpassed goal of 350,000 visits by March 31, 2015
  ✓ Garnered over 36,000 visits monthly

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

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

• Conducted research specifically focused on boating
  ✓ Mystery Shopper Project
  ✓ Hispanic Boating Research
Website Helps Family, How-To Orientation

101K
Fishing “How to” visitors

23K
Fishing & Boating Safety visitors
VAP Social Media Launched & Growing

Vamos A Pescar
@Vamos_A_Pescar

La pesca y navegación recreativa son actividades para todos. Así lo hagas solo, con amigos o en familia.

Washington, DC • vamospescar.org

135 FOLLOWING  34 FOLLOWERS

What have you been up to?

VamosAPescar.org shared a link:
Posted by Hootsuite (9) - 5 hours ago

Pregunta para nuestros pescadores que están aprendiendo #apescar: ¿Qué más les gustaría aprender? http://ht.ly/1rEZj
George H.W. Bush Vamos A Pescar™
Education Fund

$200K
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 – FL and TX – develop associations with media and retail partners.

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

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

- **FY2018 CONTINUITY**: Continue to optimize program based on KPIs.
FY16 Market Expansion

With a successful pilot year in Florida and Texas, the Vamos A Pescar campaign expands into California, Illinois, and New York for FY16.

- CA, IL, and NY continue FY15 messaging with existing digital and radio creative assets
- Creative assets in FL and TX evolving to take advantage of FY15 findings and progress – messaging refreshed to take advantage of the summer peak season

68% of U.S. Hispanics
FY16 VAP Campaign Goals

Following 12 months in 2 states with over 350,000 site visits …

This year, we’re aiming even higher!

600,000+

Site Visits to VamosAPescar.org

in FY16
FY16 Hispanic Creative Showcase
Campaign A: Nuestra Aventura

IDEA:
In every great story, the only real truth is that everyone tells it differently.

No matter who tells the tale — fishing and boating give mama, papa and the kids the opportunity to share, have fun, and really connect with unforgettable family stories that you just can’t stop talking about.

INSIGHT:
With the right incentive, each of us becomes master storytellers.

Our target, the Latino Happy Hikers, are family-oriented nature lovers always on the lookout for new activities, adventures and stories to share with their children, family and friends.
Campaign A: Nuestra Aventura

:15 PRE-ROLL

This innovative execution uses the family storytelling (from multiple POVs) of the radio spots.
Campaign A: Nuestra Aventura

Static Banner

Una sola aventura, muchas maneras de vivirla
CTA: Aprende Más

One adventure, many ways to live it
CTA: Learn More
IDEA:
The z-z-z-z sound of a fish taking the spool off your reel, is one you’ll never forget.

Aside from the fun and the great memories, the funny thing about the experience of boating and fishing is that it leaves you and your family with a long-lasting impression — an impression that really shows.

INSIGHT:
A single sound brings pictures to mind, ignites memories, and stays with you forever.

Boating and fishing is the perfect family experience for the Latino Happy Hikers, yet they may be hindered by the misconception that “fishing isn’t really for me.” But the truth of the matter is that once they’re out on the water and hear the silky zzzzzzzzzzzz of the reel, they are hooked.
FY16 Hispanic Media Plan Update
FY16 Media Strategy

- Refine existing efforts by implementing an acquisition and awareness media strategy that aligns media by tactic by tier
- Expand efforts by including additional regions to the market mix
- Support organic social efforts by leveraging efficiencies to drive message to key target audience
Leverage Happy Hikers Media Usage

Constantly connected via mobile, highly social and live to share experiences.

- Like staying connected via mobile (76%/128) or tablet (38%/141)
- Constantly frequent Web for info and entertainment (85%/135)
- Spanish terrestrial (60%/121) & digital audio (60%/120) provide the cultural link
- Social posting to share life experiences (85%/135)
# FY16 Market List

## CURRENT MARKETS

<table>
<thead>
<tr>
<th>State</th>
<th>HISP PERSONS 25-49</th>
<th>FLORIDA</th>
<th>HISP PERSONS 25-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>Texas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Houston</td>
<td>878</td>
<td>Miami-Ft. Lauderdale</td>
<td>812</td>
</tr>
<tr>
<td>Dallas-Ft. Worth</td>
<td>757</td>
<td>Orlando-Daytona Beach</td>
<td>273</td>
</tr>
<tr>
<td>San Antonio</td>
<td>460</td>
<td>Tampa-St. Petersburg</td>
<td>255</td>
</tr>
<tr>
<td>McAllen/Harlingen</td>
<td>375</td>
<td>West Palm Beach</td>
<td>141</td>
</tr>
<tr>
<td>El Paso</td>
<td>251</td>
<td>Fort Myers-Naples</td>
<td>94</td>
</tr>
<tr>
<td>Austin</td>
<td>231</td>
<td>Jacksonville</td>
<td>48</td>
</tr>
<tr>
<td>Corpus Christi</td>
<td>109</td>
<td>Tallahasse</td>
<td>15</td>
</tr>
<tr>
<td>Laredo</td>
<td>83</td>
<td>Gainesville</td>
<td>9</td>
</tr>
<tr>
<td>Waco</td>
<td>74</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Midland-Odessa</td>
<td>69</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amarillo</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lubbock</td>
<td>55</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tyler-Longview</td>
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<td></td>
<td></td>
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<tr>
<td>Abilene</td>
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<td></td>
<td></td>
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<tr>
<td>Wichita Falls</td>
<td>19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beaumont-Port Arthur</td>
<td>18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Angelo</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Victoria</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>3,535</strong></td>
<td><strong>Total Market Total</strong></td>
<td><strong>5,182</strong></td>
</tr>
</tbody>
</table>

## EXPANSION MARKETS

<table>
<thead>
<tr>
<th>State</th>
<th>HISP PERSONS 25-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td></td>
</tr>
<tr>
<td>Los Angeles</td>
<td>2,934</td>
</tr>
<tr>
<td>San Francisco-Oakland-San Jose</td>
<td>641</td>
</tr>
<tr>
<td>Sacramento-Stockton-Modesto</td>
<td>377</td>
</tr>
<tr>
<td>San Diego</td>
<td>375</td>
</tr>
<tr>
<td>Fresno-Visalia</td>
<td>351</td>
</tr>
<tr>
<td>Bakersfield</td>
<td>135</td>
</tr>
<tr>
<td>Monterey-Salinas</td>
<td>124</td>
</tr>
<tr>
<td>Palm Springs</td>
<td>83</td>
</tr>
<tr>
<td>Santa Barbara</td>
<td>82</td>
</tr>
<tr>
<td>Chico-Redding</td>
<td>25</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
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</tr>
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</table>

<table>
<thead>
<tr>
<th>State</th>
<th>HISP PERSONS 25-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td></td>
</tr>
<tr>
<td>New York City</td>
<td>1,800</td>
</tr>
<tr>
<td>Rochester</td>
<td>22</td>
</tr>
<tr>
<td>Buffalo</td>
<td>20</td>
</tr>
<tr>
<td>Albany</td>
<td>19</td>
</tr>
<tr>
<td>Syracuse</td>
<td>11</td>
</tr>
<tr>
<td>Utica</td>
<td>3</td>
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<tr>
<td><strong>Subtotal</strong></td>
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<table>
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<th>State</th>
<th>HISP PERSONS 25-49</th>
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<tr>
<td>Chicago</td>
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<tr>
<td>Champaign-Springfld-Decatur</td>
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<tr>
<td>Peoria-Bloomington</td>
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<tr>
<td>Quincy-Hannibal-Keokuk</td>
<td>1</td>
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<tr>
<td><strong>Subtotal</strong></td>
<td><strong>784</strong></td>
</tr>
</tbody>
</table>

## FY2016 HA25-49 MARKET GRAND TOTAL 12,968

## FY2016 RBFF % US HISPANIC COVERAGE 68%

## TOTAL U.S. HA25-49 19,087

Expansion Market Total 7,786
## FY16 Tactical Evolution

### Refine to achieve goals

<table>
<thead>
<tr>
<th>ACQUISITION</th>
<th>AWARENESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Digital tactics to be driving force in delivering site visits</td>
<td>• Broadcast radio will continue to serve as an awareness vehicle</td>
</tr>
<tr>
<td>• Quantifiable in real time</td>
<td>• Terrestrial radio allows for RBFF brand to ingrain itself within Hispanic community via DJ Chatter</td>
</tr>
<tr>
<td>• Cost-efficient medium</td>
<td></td>
</tr>
</tbody>
</table>

### Expand awareness

Increased budgets yield expansion

- Expansion into **California, Illinois** and **New York** is most cost efficient using digital media
  - Digital can target the states as a whole vs. specific markets without cost repercussions
- Condensed radio flighting allows for terrestrial radio expansion to NYC and Chicago

![Map showing expansion areas](image)
**FY16 Media Mix and Roles**

*Note: Local radio support for California metro areas will be delayed pending drought conditions. Hispanic search efforts funded through general market search budget.*
FY16 Digital Media Highlights

Use a combination of networks and direct sites to reach the Happy Hikers target in an effort to increase awareness and drive VAP traffic.

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**Partners**

- Proven performers will ensure campaign delivers on-site goals

**Highlights**

- Premium digital publishers provide opportunity for video impactful creative units
  - Native ad units
  - Rich media

- Leverage Facebook targeting capabilities
- Utilize site as both direct traffic driver and social conversation starter
  - Latter dependent on launch of VAP FB page

Page Post Video

- Jasper’s Market
  - Click here to see how Jasper’s Market makes fresh pesto! Fresh and easy!

---

$.19 Mobile CPC

$1.39 Display CPC
FY16 Broadcast Highlights

Partner with top Hispanic radio stations to increase awareness of recreational boating and fishing

- 10 on air weeks alignment during key summer period
- Utilize DJ’s community ties to extend RBFF message
- Leverage radio buy for continued PSA support
- Expand efforts from Houston and Miami to include New York City and Chicago
- Local radio support for California metro areas will be delayed due to drought conditions
RBFF Hispanic List Leads in Key Markets

The complete radio station list is comprehensive and far reaching.

<table>
<thead>
<tr>
<th>Station</th>
<th>Affiliate</th>
<th>Format</th>
<th>AQH Rtg</th>
<th>Rnk</th>
</tr>
</thead>
<tbody>
<tr>
<td>KLTN-FM</td>
<td>Univision</td>
<td>Regional Mexican</td>
<td>1.7</td>
<td>1</td>
</tr>
<tr>
<td>KOVE-FM</td>
<td>Univision</td>
<td>Spanish Adult Hits</td>
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<td>2t</td>
</tr>
<tr>
<td>KTMJ-FM</td>
<td>Self</td>
<td>Regional Mexican</td>
<td>1.0</td>
<td>3</td>
</tr>
<tr>
<td>KLOL-FM</td>
<td>CBS</td>
<td>Spanish Contemporary</td>
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<td>4</td>
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<tr>
<td>KODA-FM</td>
<td>iHeartMedia</td>
<td>Adult Contemporary</td>
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<td>5</td>
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<tr>
<td>KQQK-FM</td>
<td>Self</td>
<td>Regional Mexican</td>
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<td>6t</td>
</tr>
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<td>KAMA-FM</td>
<td>Univision</td>
<td>Spanish Contemporary</td>
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<td>KTBZ-FM</td>
<td>iHeartMedia</td>
<td>Altern/Modern Rock</td>
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<td>Country</td>
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<td>iHeartMedia</td>
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<td>Contemporary</td>
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<tr>
<td>WBMM-FM</td>
<td>CBS</td>
<td>Contemporary</td>
<td>0.7</td>
<td>5</td>
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<tr>
<td>WPBQ-FM</td>
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<tr>
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<td>Hot AC</td>
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<td>7</td>
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<td>Univision</td>
<td>Spanish Contemporary</td>
<td>0.6</td>
<td>7t</td>
</tr>
<tr>
<td>WTMX-FM</td>
<td>Hubbard</td>
<td>Hot AC</td>
<td>0.5</td>
<td>9</td>
</tr>
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<td>Adult Contemporary</td>
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<td>Univision</td>
<td>Spanish Hits</td>
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<td>iHeartMedia</td>
<td>CHR</td>
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<td>Eastman</td>
<td>Rythmic CHR</td>
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<td>CBS Radio</td>
<td>Hot AC</td>
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*Nielsen Audio, Aug/Sep/Oct 3 book avg, Hisp P25-49 M-Su 6a-12m
### FY16 Media Flowchart

#### Target: HA25-49

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### AWARENESS

- **TV PSA’s**
  - Executed by PSA Agency

### LOCAL RADIO

- **Base (.60s) & DJ Endorsements**

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<th>City</th>
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<tr>
<td>New York City</td>
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### SUB-TOTAL: $21,441,444

### ENGAGE

- **SEM**
  - $200K Provided by GM Paid Search Budget

### DIGITAL - TEXAS, FLORIDA, NEW YORK, CALIFORNIA, ILLINOIS

- **ONLINE DISPLAY**
  - **Desktop**
  - **Mobile**
  - **Social**

- **FY15 Roll-Over**
- **Ad Serving Fee**

### SUB-TOTAL: $78,596,476

### GRAND TOTAL

- **$100,037,920**
- **$1,255,807**
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!

✓ More Webinars
✓ 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!
State Feedback & Discussion