

# **RBFF Hispanic Marketing Strategies Webinar**

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

February 5, 2015



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# Agenda

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- 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

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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



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# RBFF Hispanic Assignment

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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



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# Hispanic Market Update



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# Why Hispanics Still Matter

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# 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



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# Hispanics Leading US Population Growth

Projected population growth 2010 to 2050 shows major ethnic impact.



\*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

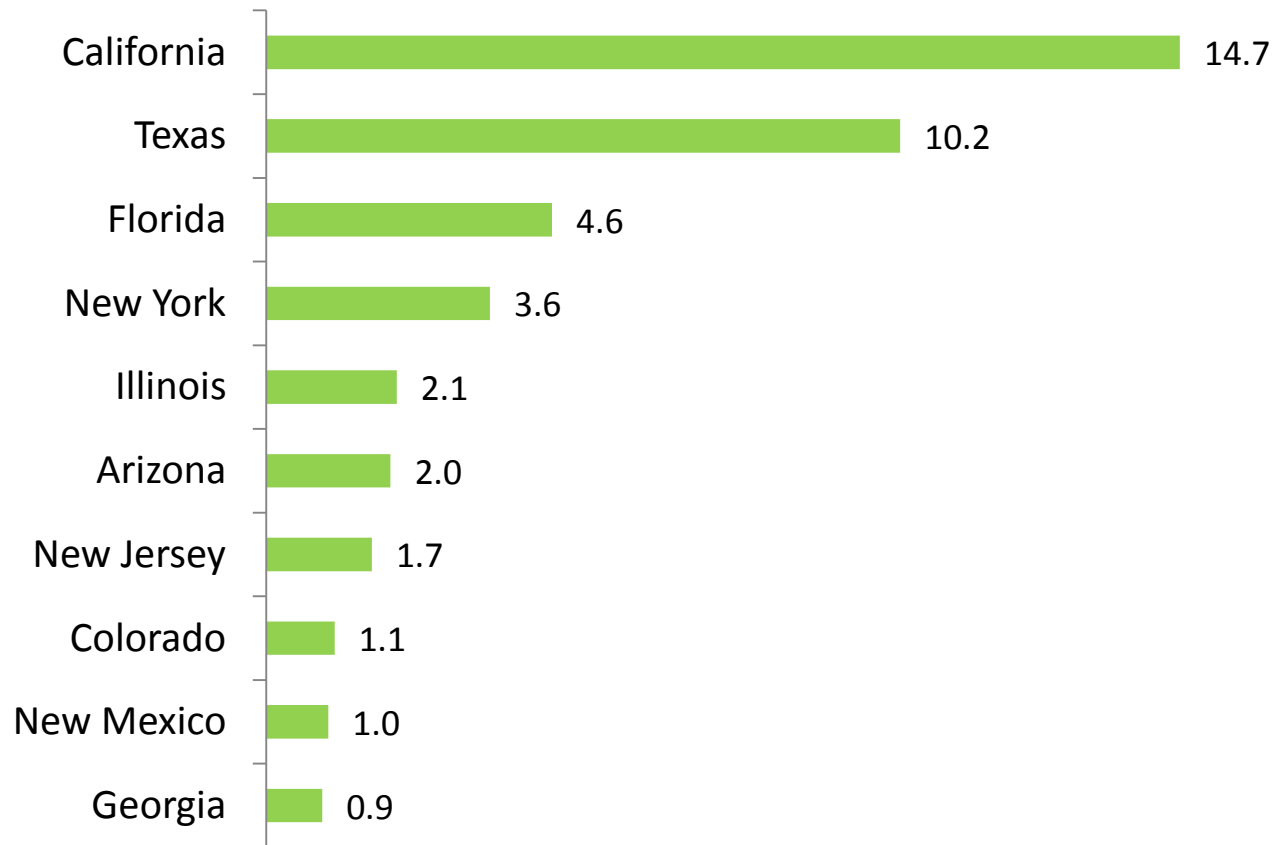


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# Top 10 States: Hispanic Population (MM)

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



Source: US Census, 2013.



# Top 10 Hispanic Metro Areas

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

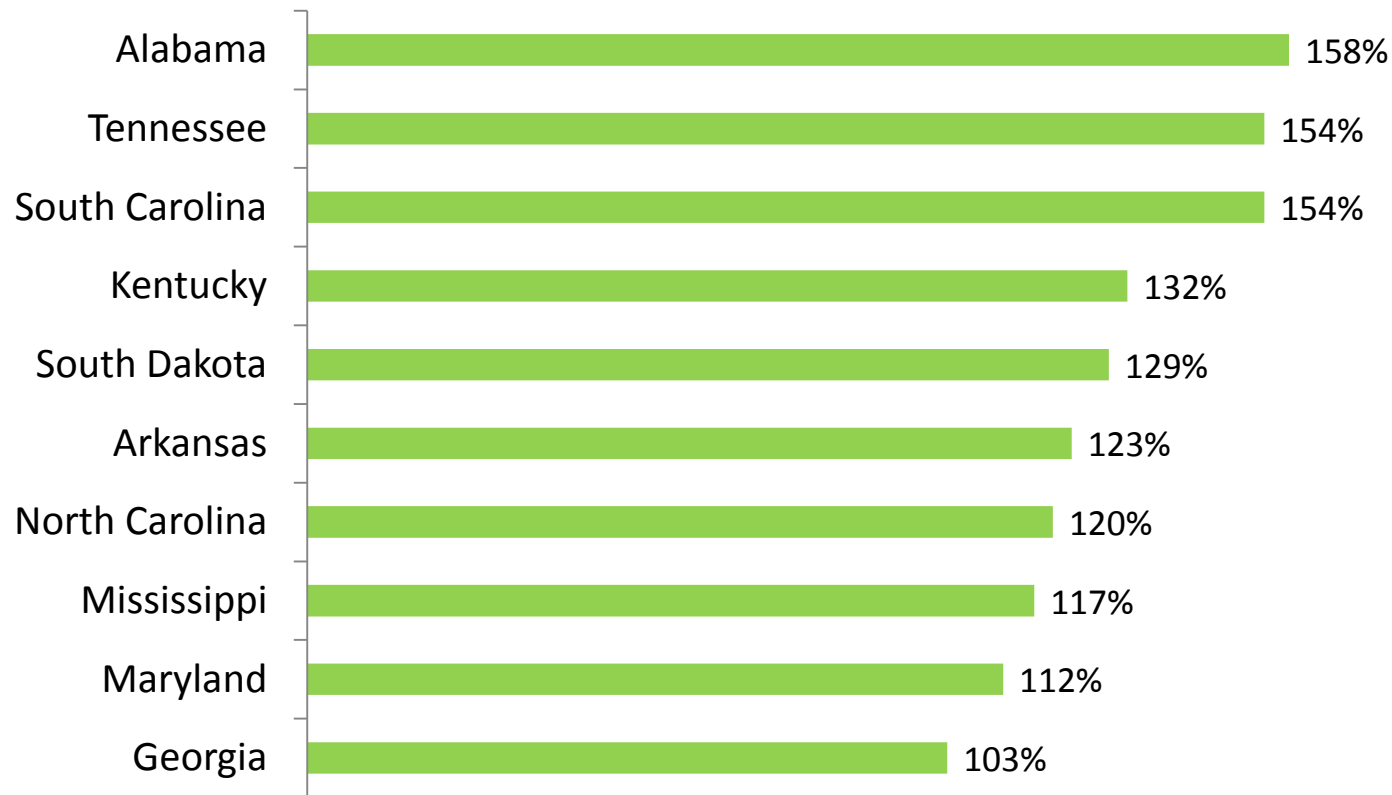
Rank	Metro Area	Hispanic Population	% Hispanic Among Total Population	Among Hispanics, % Foreign Born	Among Under 18, % Hispanic
1	Los Angeles	5,804,000	44.8%	42.2%	58.8%
2	New York	4,317,000	24.2%	42.5%	29.6%
3	Houston	2,105,000	36.7%	40.5%	46.5%
4	Riverside, CA	2,062,000	47.9%	30.5%	60.9%
5	Chicago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

Source: Pew Hispanic Center, 2011 ACS.



# States With Fastest Hispanic Growth

Rapid Hispanic population growth is occurring in unexpected States.

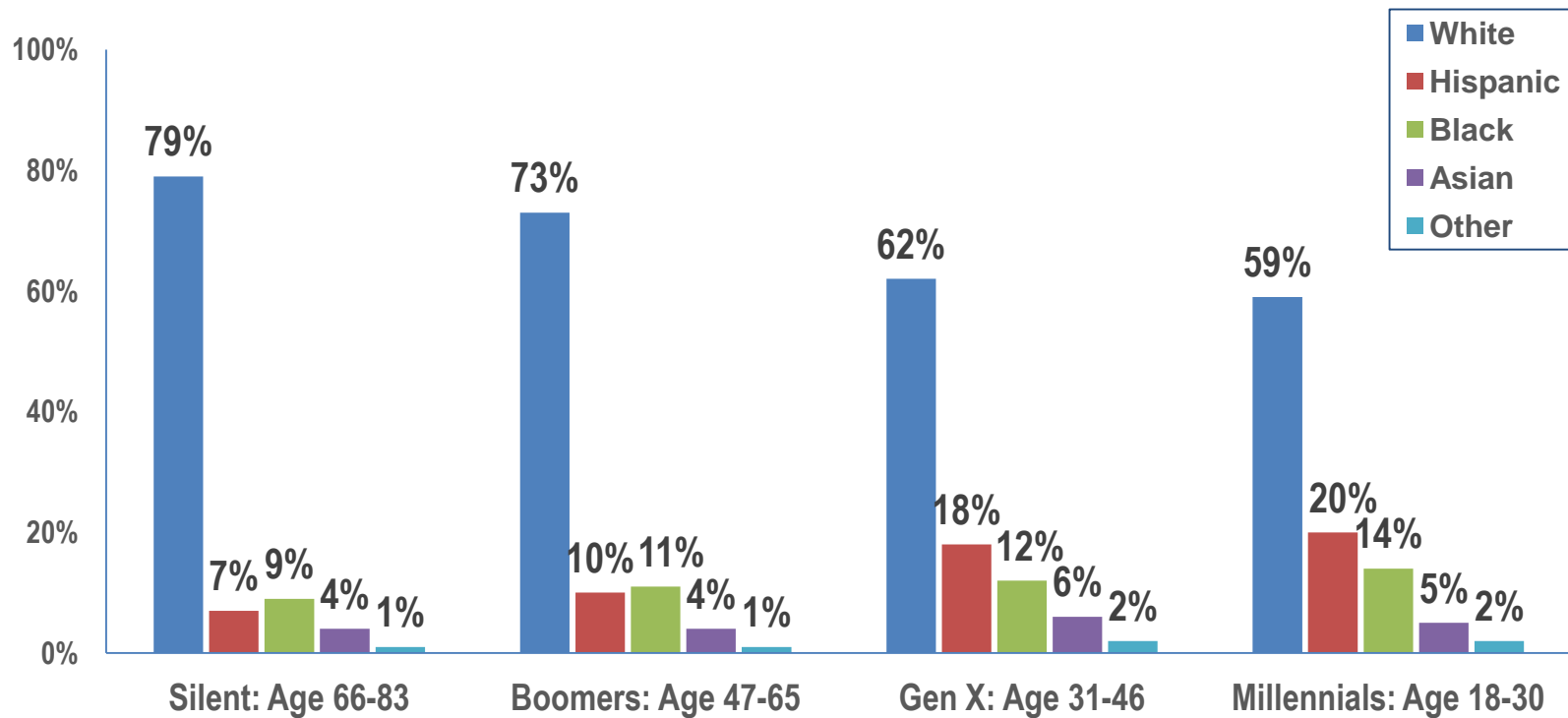


Source: US Census. Hispanic Growth by State 2000 - 2010.



# Diversity Steadily Increasing Over Time

Age cohorts over time show dynamic racial/ethnic shift



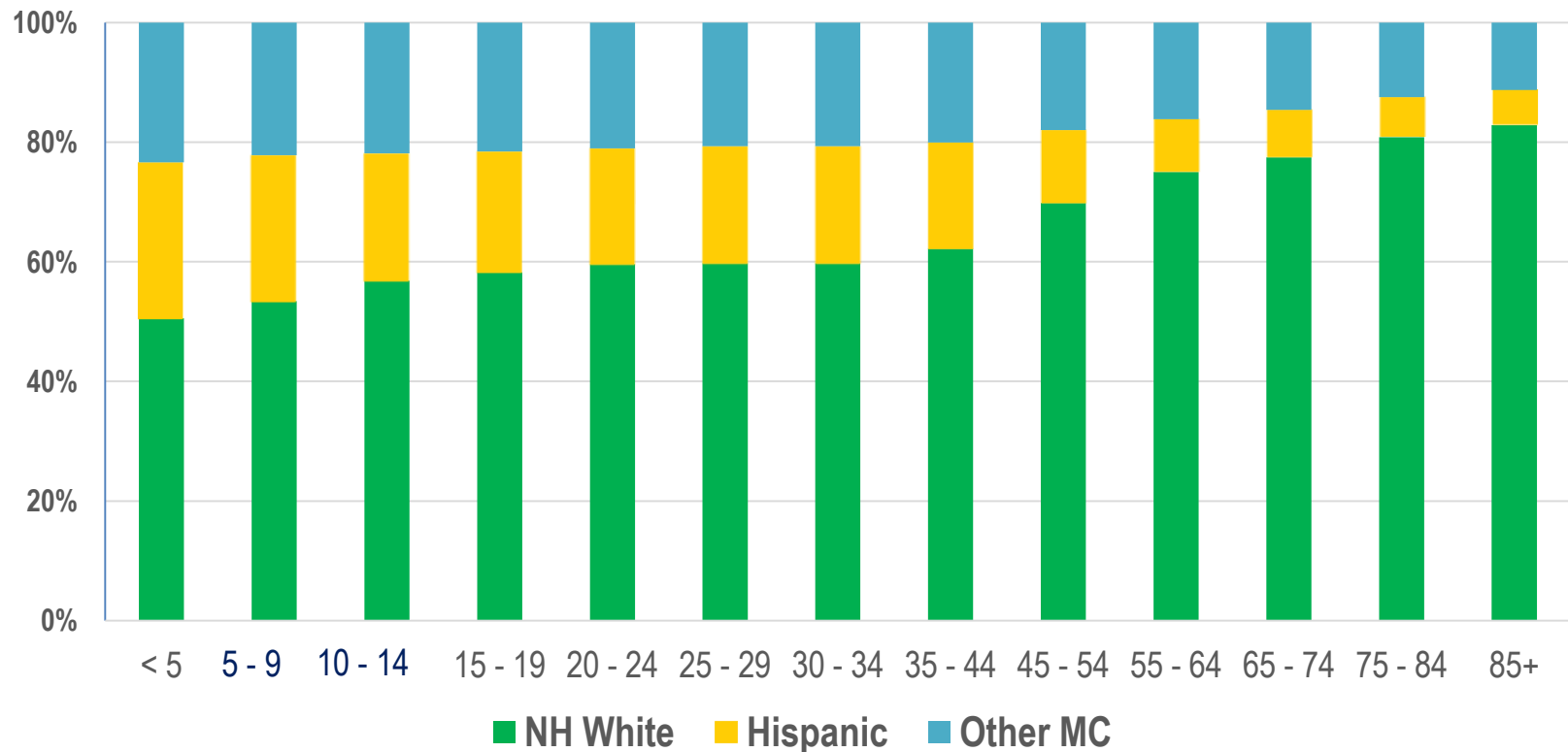
Source: Pew Research Center, 2011 US Census CPS.



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# Today, “Under 5’s” are Majority Minority

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



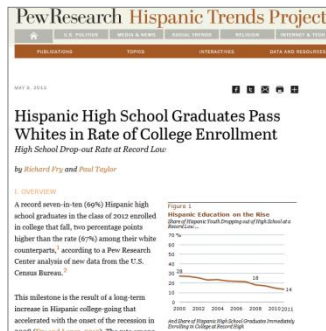
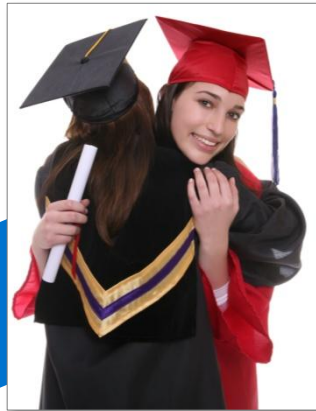
•Sources: Simmons Spring 2014 NHCS Adult Study 2-Year; US Fish & Wildlife Survey: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation





# Hispanic Youth Exceeding Expectations

- Better educated
- Wealthier
- Entrepreneurial
- Bicultural
- Ambitious

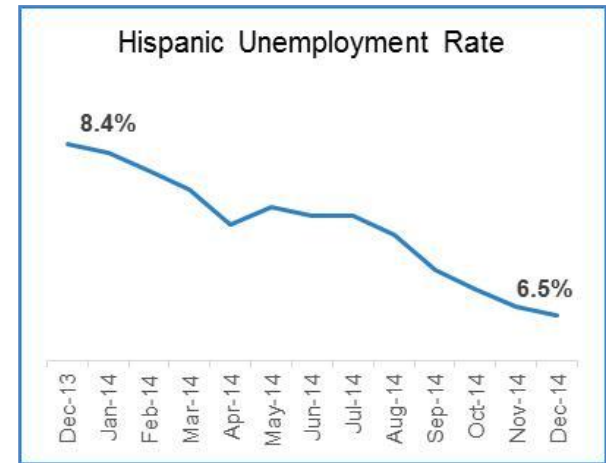
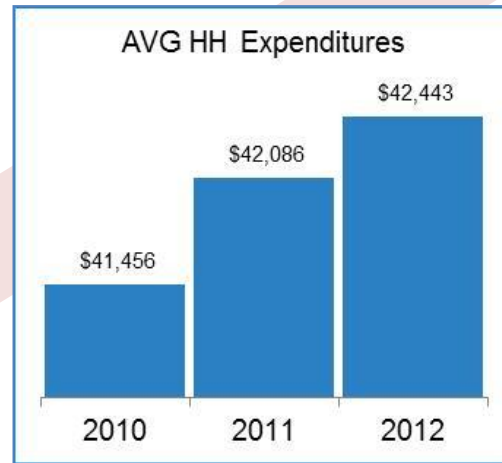
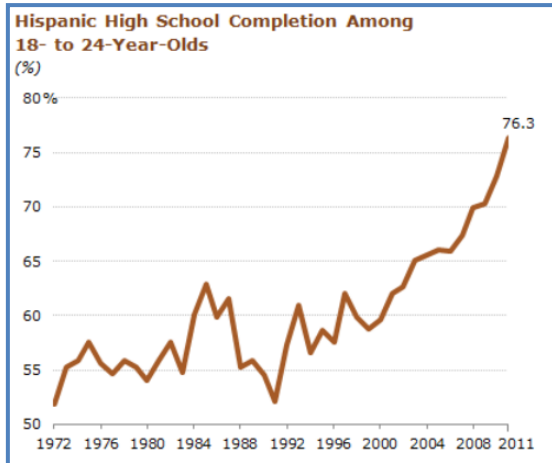


➤ Increased participation in professional services, business and leadership positions



# 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%



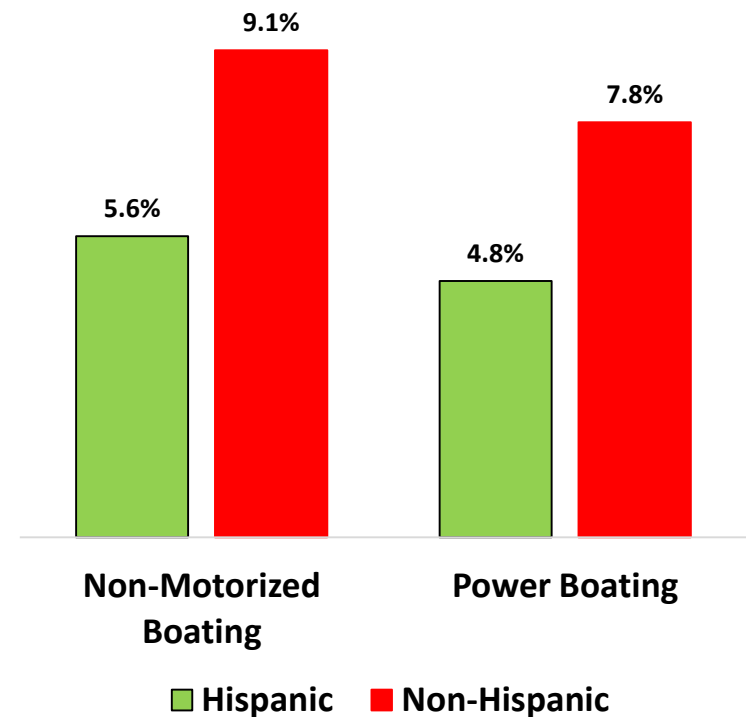
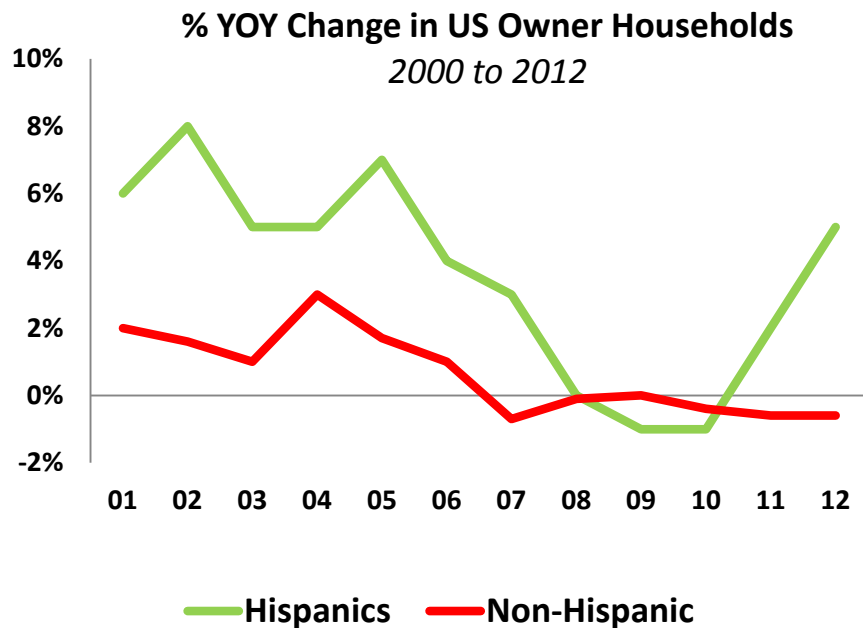
Sources: Bureau of Labor Statistics; US Census Bureau; Pew Hispanic Center



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# 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



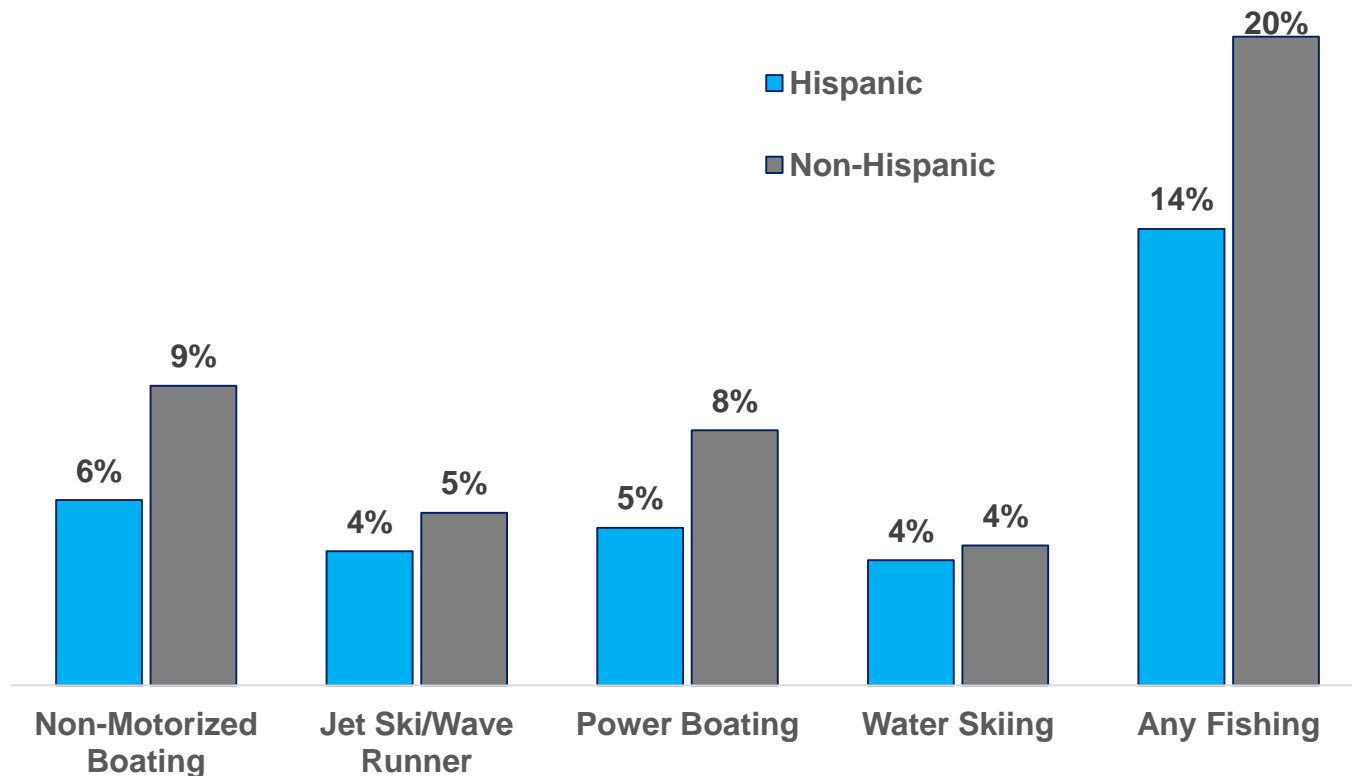
Source Simmons NCHSE Spring 2014 Adult 12 month



# 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,



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# Hispanic Fishing & Boating Behavior





# Our Hispanics Bull's-Eye Has Proven True



**HAPPY  
HIKERS**



**SOCIAL  
ANGLERS**

# 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,

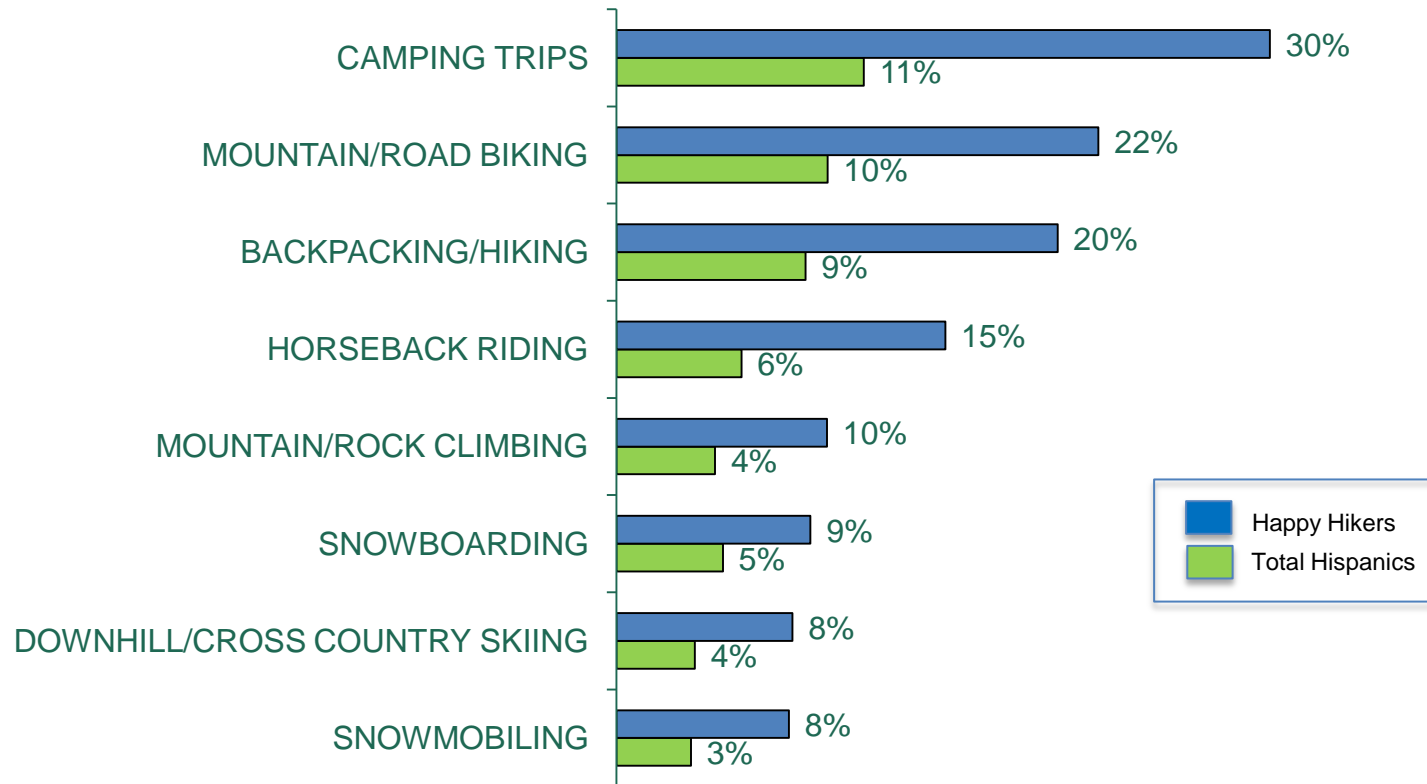


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# Happy Hikers are Outdoors Lovers

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



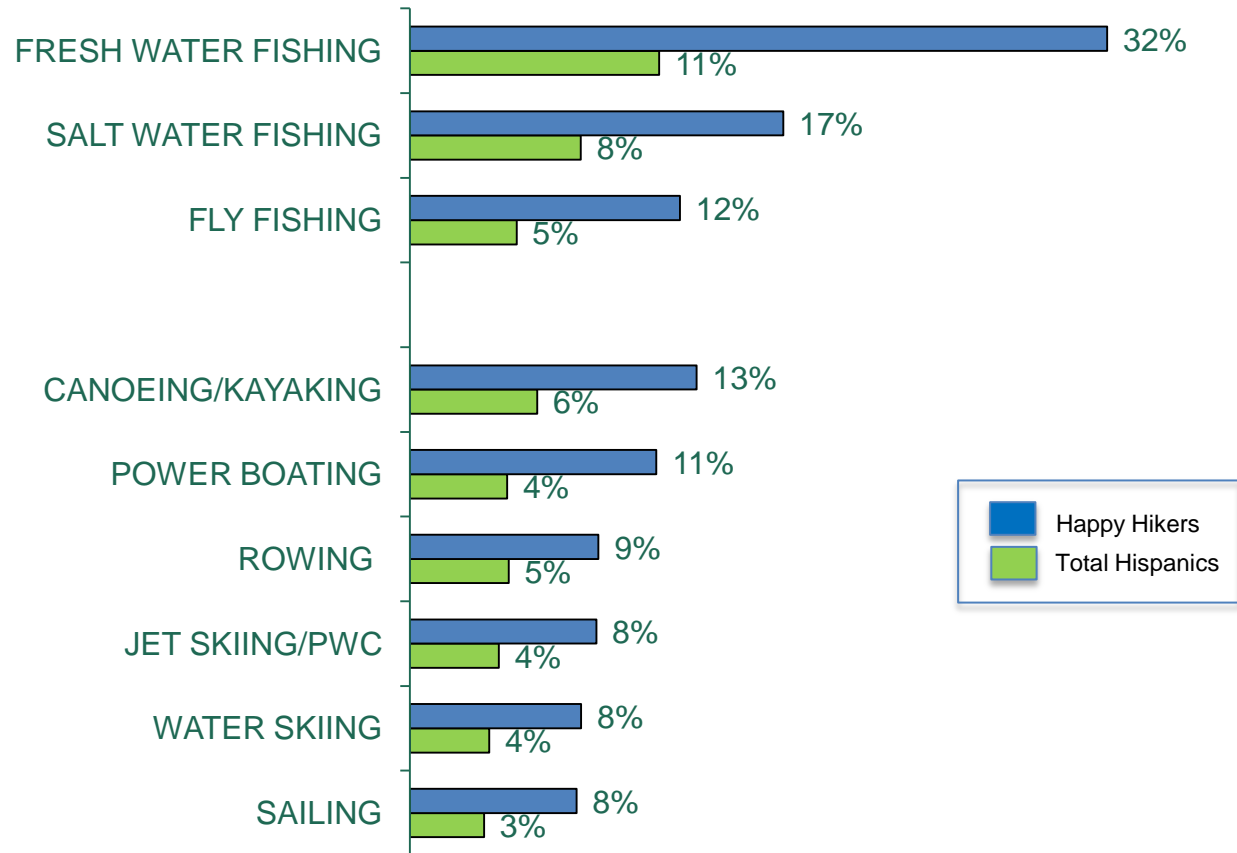
Source: Simmons NCHS Adult Summer 2014,



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# Happy Hikers Prime for Fishing, Boating

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



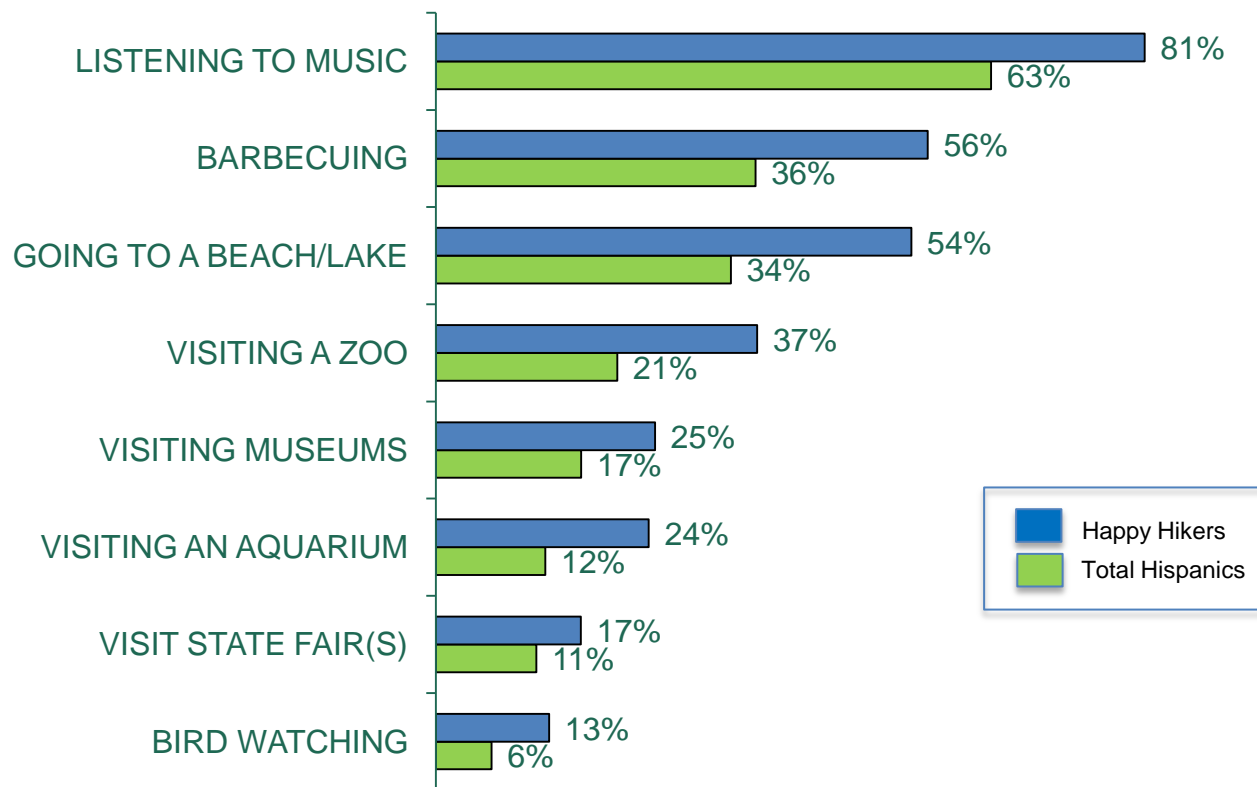
Source: Simmons NCHS Adult Summer 2014,



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# Related Activities Present Big Opportunity

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



Source: Simmons NCHS Adult Summer 2014,



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# Latinos Lack Experience & Exposure

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## 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



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# **Strategies & Tactics for Engaging Hispanics**



# Hispanic Engagement Process



# 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
  - ✓ **Free:** US Census, Bureau of Labor Statistics
  - ✓ **Fee-based:** Geoscape, Donnelly, Nielsen, etc.
- A list of all of your sites
  - ✓ Location
  - ✓ Outreach area
- Database or spreadsheet to track everything

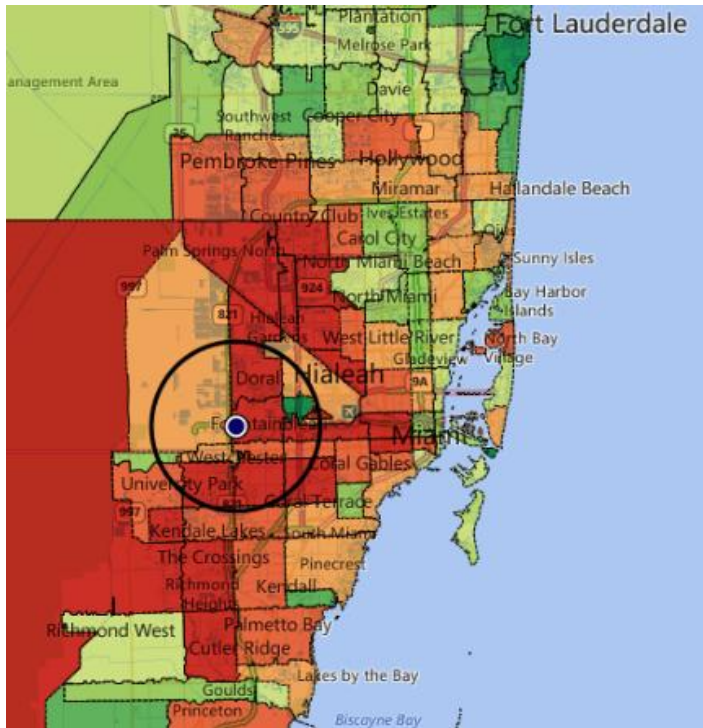
## What you are looking for

- Socio-demographics for each site/location
  - ✓ Household income, category participation/spend
  - ✓ Ethnicity, nativity, ancestry





# Each Location is Different: Miami



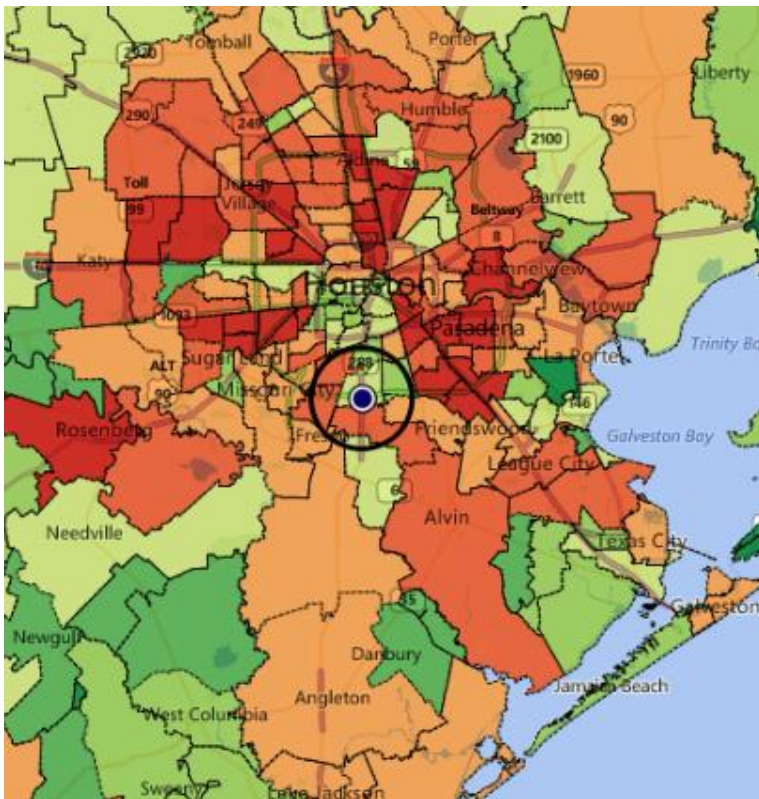
	Miami
Total Population	328,973
Hispanic Population	294,754
Hispanic Population %	90%
Purchasing Boats/Trailers: Total	\$4,185,787
Purchasing Boats/Trailers: Hispanic	\$3,806,757
Hispanic % of Sales	91%

## Miami

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



# Each Location is Different: Houston



	Houston
Total Population	182,811
Hispanic Population	52,850
Hispanic Population %	29%
Purchasing Boats/Trailers: Total	\$3,188,942
Purchasing Boats/Trailers: Hispanic	\$548,356
Hispanic % of Sales	17%

## Houston

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



# Prioritize Your Sites/Locations

EXAMPLE: Prioritize locations that need Hispanic market support

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

- 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

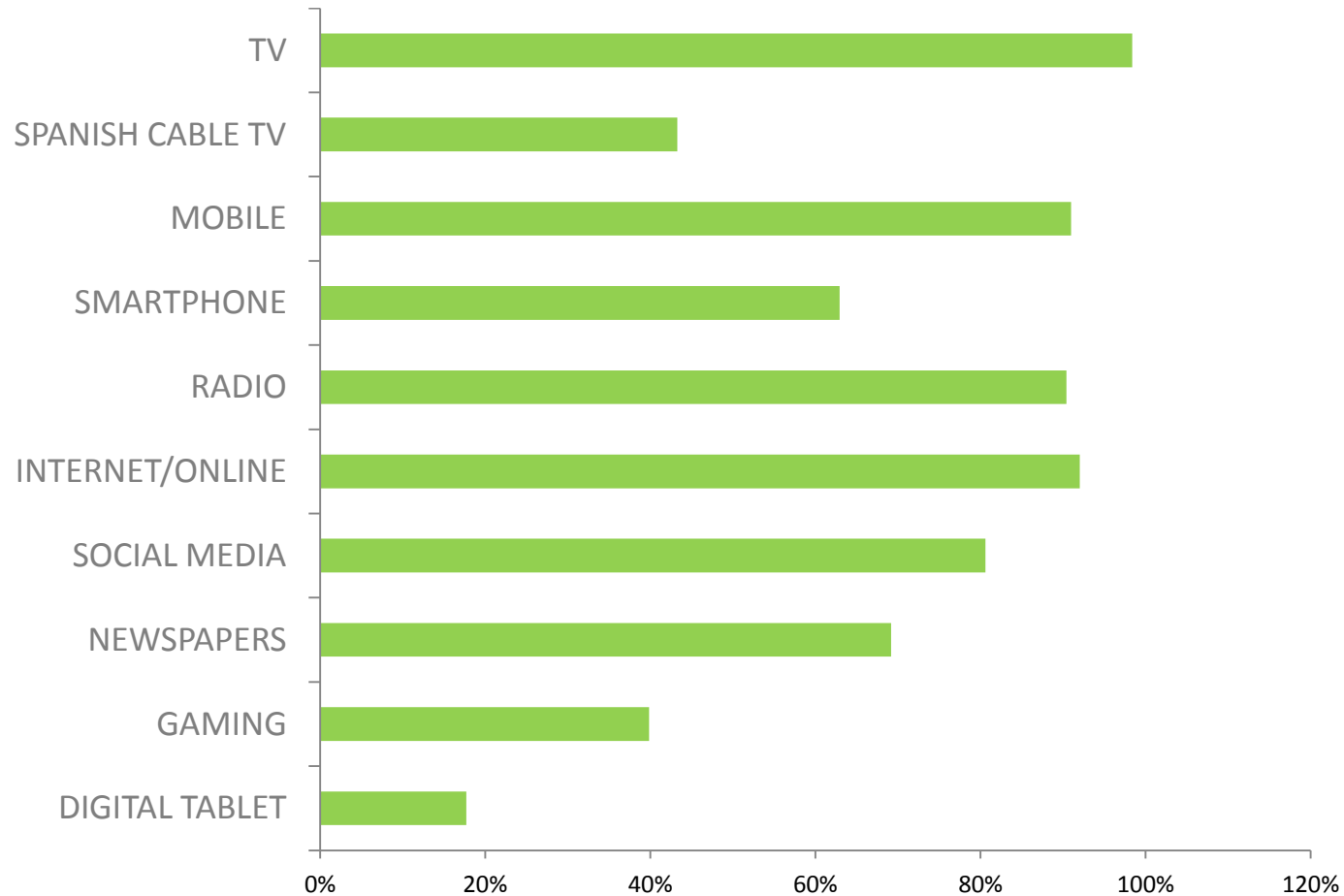
## Heavy Reliance on Key Influencers

- 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

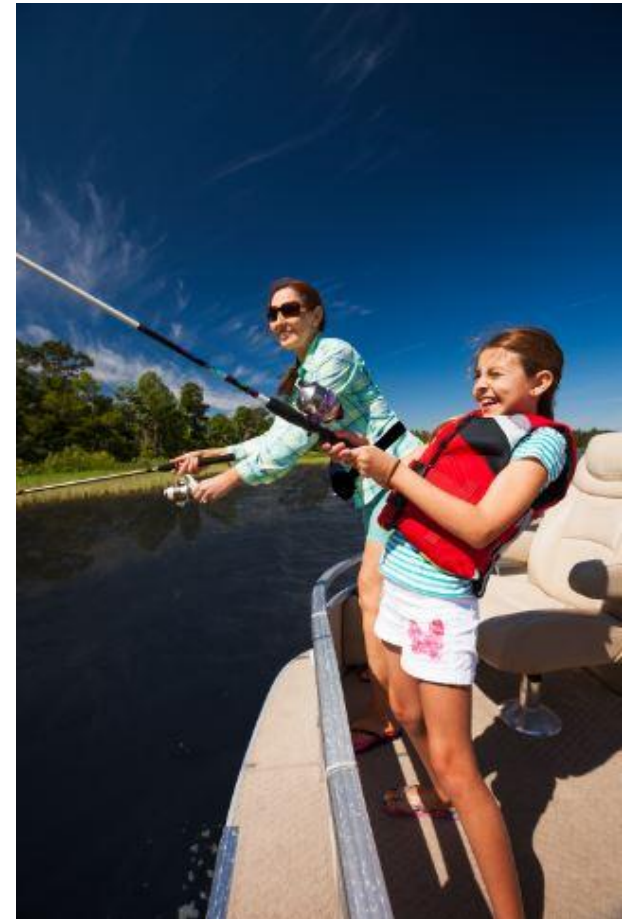
## Entire organization needs to buy in

- 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

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## 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



# Manufacturers' Keys to Success

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## 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 success stories to increase cultural relevance.



# State/Federal Agencies' Keys to Success

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## State/Federal **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.)





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# Research Findings



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# Hispanics Mystery Shopping



# Mystery Shopper Methodology

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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

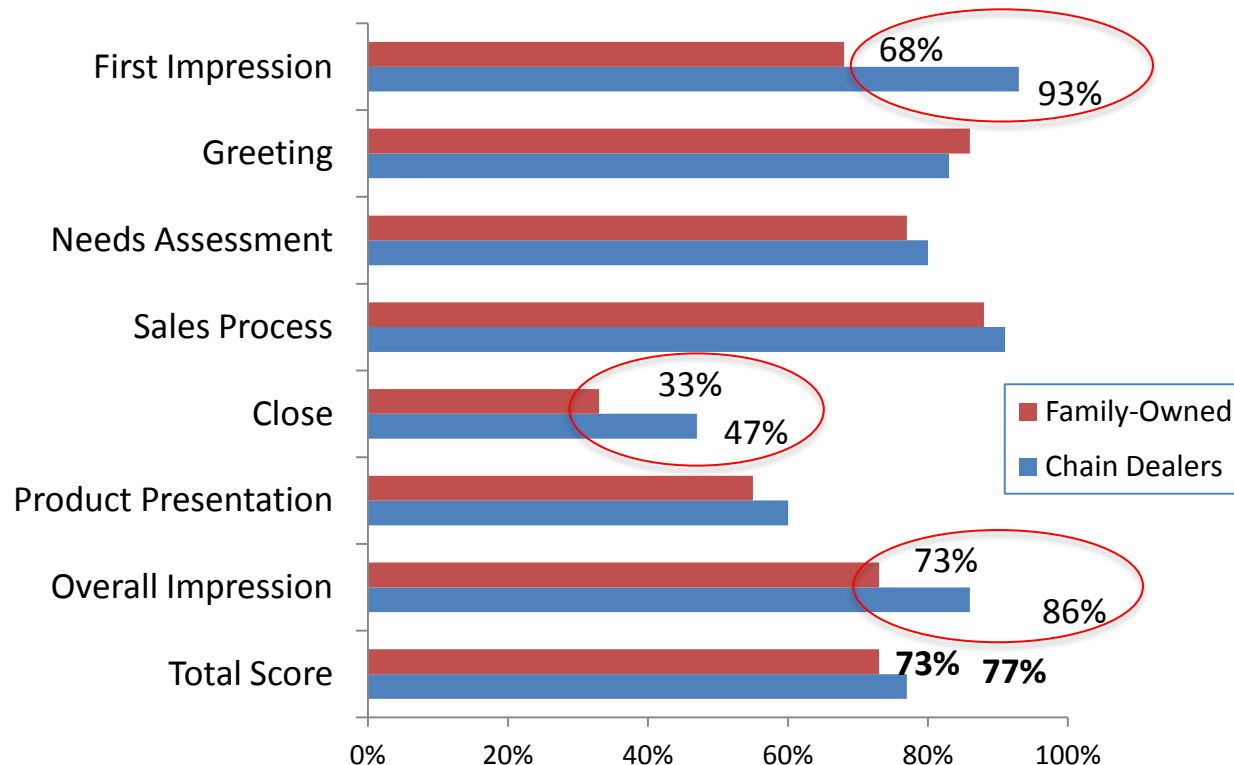
Full results at: <http://takemefishing.org/general/about-rbff/research-and-evaluations/>



# 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



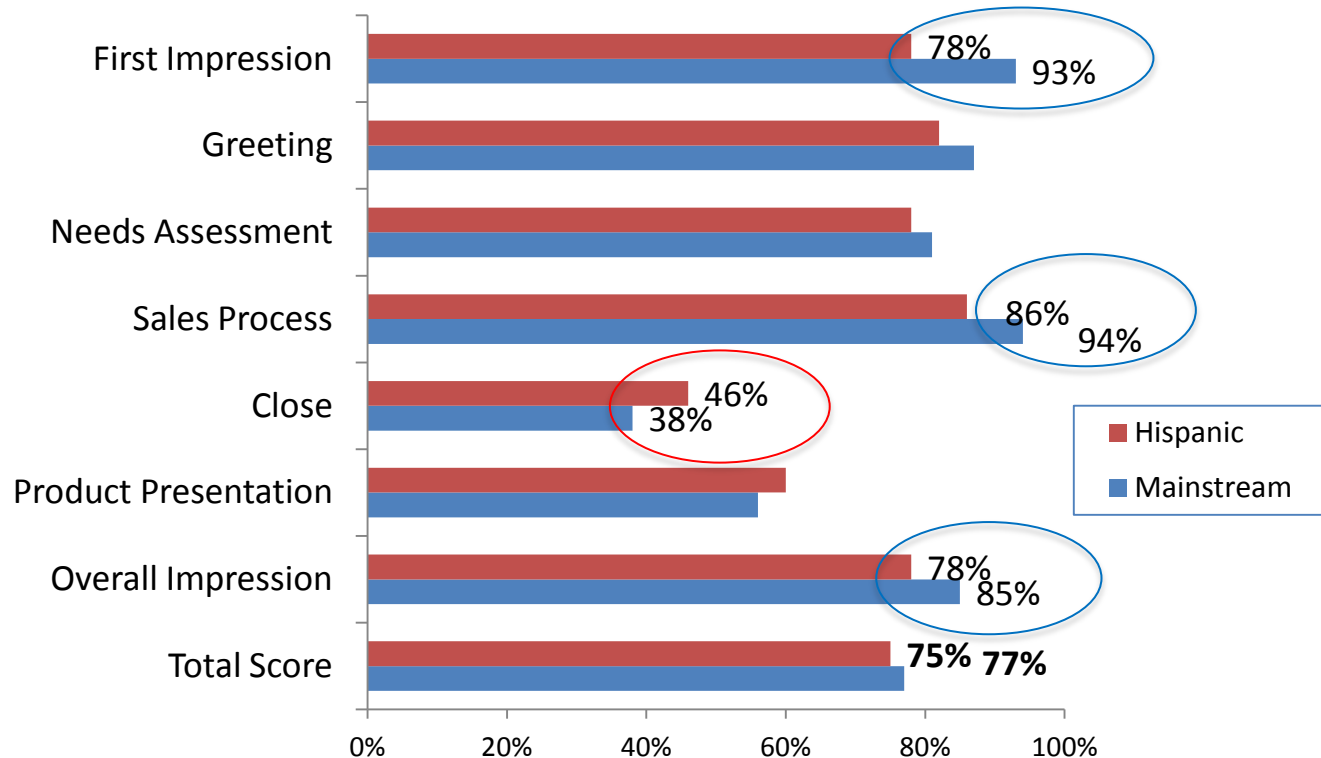
Source: Texas and Florida Retail Studies: The Recreational Boating & Fishing Foundation, 9/2014



# Sales Process Varied by Ethnicity

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

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## **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

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## Preliminary Findings



# RBFF Boat Study Supporters

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# Study Background, Methodology

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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

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## 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





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# Vamos A Pescar Update



# FY15 Year in Review

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- 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](http://VamosAPescar.org)
  - ✓ Bilingual videos created in cooperation with Discover Boating
- Conducted research specifically focused on boating
  - ✓ Mystery Shopper Project
  - ✓ Hispanic Boating Research



[VAMOSAPESCAR.org](http://VAMOSAPESCAR.org)

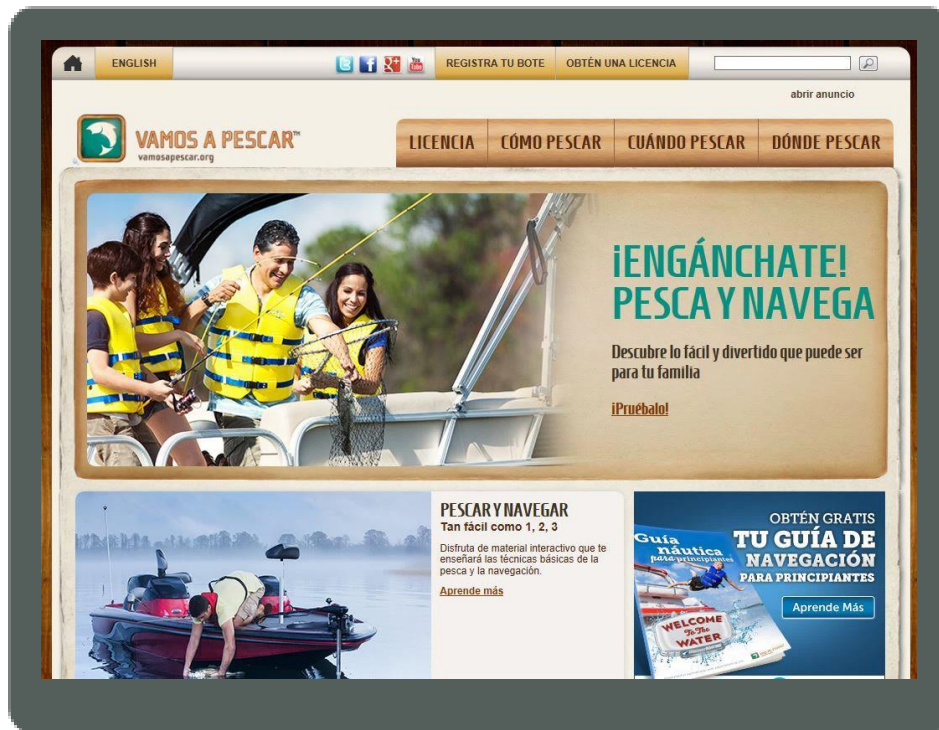


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# In FY16, Hispanic Plan is Stay the Course



# VamosAPescar.org Building Momentum



305k Total Visits



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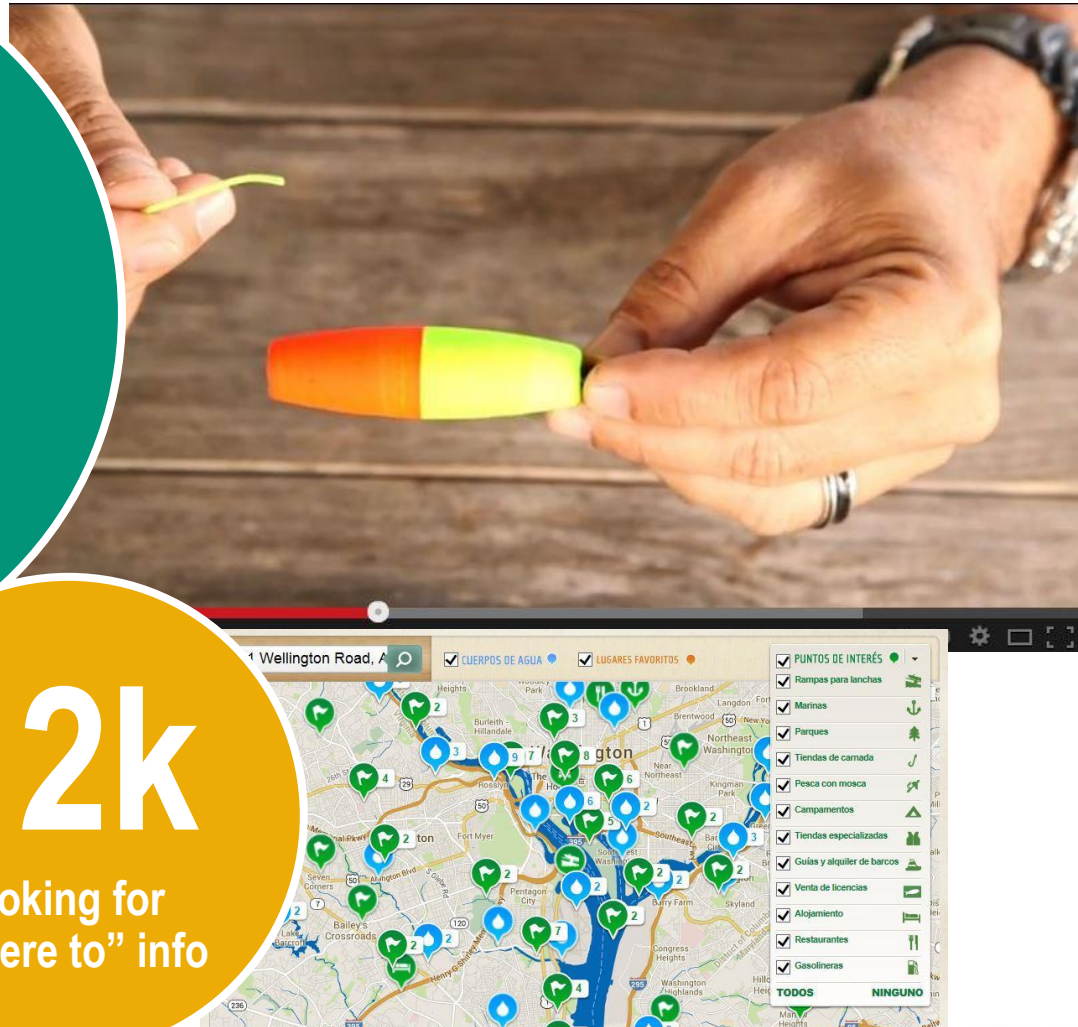
# Hispanics Family, How-To Oriented

69k

looking for “How to” info

12k

looking for  
“Where to” info



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# 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

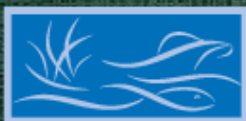
## W3 Awards:

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

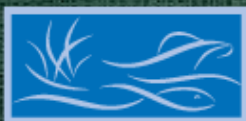


## MobileWebAwards:

- Best Non-Profit Mobile Website
- Best of Industry: Family Mobile Website
- Best of Industry: Leisure Mobile Website



# VAP Social Media Newly Launched



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# George H.W. Bush *Vamos A Pescar*<sup>TM</sup> Education Fund



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# **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





# 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](https://www.TakeMeFishing.org/corporate) – Resource Center**



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# Gracias!



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# Questions?



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