



**PORTADA | RESEARCH REPORTS**

# **2014 HISPANIC SPORTS MARKETING SURVEY (Targeted Report)**



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**Note:** The data for this Portada Targeted Report has been processed, analyzed and summarized by Project Leader **Alessandro Criollo**.

# 1. Introduction/Overview

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Sports Marketing and Advertising have become a major force in U.S. and global marketing. Sponsorship of sports events is a big line item in the marketing budgets of major marketers. Particularly soccer oriented ones, which according to some estimates, make up more than 60% of global sport marketing budgets. With the passion of Hispanics for soccer and other sports, Sports are also a major driver of the Hispanic marketing, advertising and media sector.

This Portada Targeted Report publishes and analyzes the result of a survey of 366 sports marketing practitioners during February, March and April 2014. This survey was given to them on portada-online.com before downloading the “2014 Portada Soccer Marketing Guide in partnership with Soccer.com and AC&M Group.” Survey answers are aggregated as a total and also divided in 3 major constituencies. “Buy Side” or “Buyers”; All executives that have direct influence over sports marketing budget: client side executives (mostly brand marketers), as well as media buyers and planners at agencies). “Sell side” or “Sellers”; Media owners and their direct or indirect sales representatives. Some Survey have a third group that is broken out called “Other”; This group includes those executives that can’t be classified as either “Buyers” or “Sellers”, including “researchers” and “service providers to the Sports Marketing Industry.” In some Survey results the “Sell Side” and “Other” Groups are combined and called “Non-Buyers”.

## 2. Main Results

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### *2.1. The Expected 2014-2018 Annual Growth rate of Hispanic Sports Marketing Budgets is 8.2%*

Survey respondents expect Hispanic sports marketing budgets to grow by a compounded **annual rate of 8.2% throughout the 2014-2018 period** (see Table 1 below). Respondents who have direct influence over sports marketing budgets expect Hispanic sports marketing budgets to grow at an annual rate of 7.3% over the next five years, while those who do not, expect an annual growth rate of 8.6%.

**Table 1: Question: By how much do you expect Hispanic sports marketing budgets to grow annually over the next five years?**

<b>Answers</b>	<b>Growth rate used to calculate Avg. Growth Rate</b>	<b>Non Buyers</b>	<b>Buyers</b>	<b>Total</b>
Blank		4%	9%	5%
Decrease 0% to 5%	-2.50%	3.5%	1.8%	3%
Decrease by more than 5%	-10%	3.1%	3.7%	3.3%
Grow by more than 15%	20%	19.5%	14.7%	18%
Grow 0% to 5%	2.50%	30.7%	40.4%	33.6%
Grow 5% to 15%	10%	42.8%	38.5%	41.5%
<b>Expected Annual Growth Rate (2014-2018)</b>		<b>8.6%</b>	<b>7.3%</b>	<b>8.2%</b>

**Note:** To calculate the expected annual growth rate: The proportion (%) of respondents who chose a particular growth rate is multiplied by the particular growth rate. The result of this multiplication (share of respondents who chose that particular growth rate times the growth rate) is then added to obtain the overall expected growth rate.

## 2.2 Categories: Highest Growth seen in Telco, CPG followed by Financial and Automotive

Per Table 1, the majority of the survey takers, who have direct influence over marketing budgets, be they're brand marketing directors and/or media planners/buyers at agencies, are expecting there to be growth in sports marketing budgets over the next 5 years. Roughly 80% of them expect growth to range from 0% to 15% and an additional 15% expect it to exceed 15% (Table 1). Of the respondents included in the above 95% a clear majority chose either **Telecommunications or CPG (Consumer Packaged Goods)** as the category they see the most growth happening over the next 5 years. These two above categories were followed by **Financial Services and Automotive** (see Cross Tabulation 1 in Appendix).

## 2.3 Channels: Digital/Content Marketing

53% of respondents of the Survey expect Digital Media (websites, mobile and Social Media) to be the channel that will grow the most for sports marketers over the next five years (see Table 2 below). Content Marketing, a combination of paid, owned and

earned media that usually has a very strong digital media component, follows as the main communication type chosen with 25.4%. The preference for Digital Media/Content Marketing is even higher in the “Buy Side” group (Media Buyers/Planners and Brand Marketers) with ratios of 61.5% and 25.7%.

**Table 2: Question: Which communications type do you see growing the most for sports marketers in the next 5 years?**

<b>Answers</b>	<b>Other</b>	<b>Buyers</b>	<b>Sellers</b>	<b>Total</b>
<b>BTL – Guerrilla Marketing</b>	2.6%	4.6%	2.9%	<b>3.3%</b>
<b>Content Marketing</b>	30.3%	25.7%	18.1%	<b>25.4%</b>
<b>Digital Media</b>	44.1%	61.5%	57.1%	<b>53%</b>
<b>Other</b>	7.9%	3.7%	5.7%	<b>6.0%</b>
<b>Print</b>	3.9%	0.9%	6.7%	<b>3.8%</b>
<b>TV</b>	11.2%	2.8%	8.6%	<b>7.7%</b>
<b>Blank</b>	0%	0.9%	1.0%	<b>0.5%</b>

If we look at the “Buy Side” only, the share of “Content Marketing” is stronger. Among those “Buy Side” respondents who deem that sports marketing budgets will grow between 5% and 15% in the next 5 years, 33% expect that Content Marketing will be the main Communications type, vs 54.8% of digital. Of those that think that growth will be higher than 15%, 37.5% expect that Content Marketing will be the main Communications type, vs 43.8% digital (see *Cross Tab 2 in Appendix*).

## **2.4 American Football, Baseball and Basketball have most potential (other than Soccer)**

Other than Soccer, there are many other sports where there is a high potential for Hispanic sports marketing. According to survey respondents (Table 3 below), they are in this order:

- **American Football (32.2%)**
- **Baseball (19.1%)**
- **Basketball (17.5%)**

Additionally, according to Table 3, the “Buy-Side” American Football is significantly favored (41.3%) followed by Basketball (17.4%). Interestingly Boxing gets a higher ratio of choices (13.8%) than Baseball (12.8%).

**Table 3: Question: When it comes to reaching out to Hispanics via Sports content what sports type other than soccer do you think has the most potential over the next five years?**

Answers	Non Buyers	Buyers	Total
American Football	28.4%	41.3%	32.2%
Baseball	21.8%	12.8%	19.1%
Basketball	17.5%	17.4%	17.5%
Boxing	16%	13.8%	15.3%
Other	16%	13.8%	15.3%
blank	0.4%	0.9%	0.5%

42.9% of “Buy Side” respondents who expect Hispanic Sports Marketing Budgets to grow between 5% and 15% annually, said that American Football is the sport they see most potential in when it comes to engaging the Hispanic population (other than Soccer). Of those that expect an annual growth rate higher than 15%, 25% chose Basketball as the sport with most potential (see *Appendix Cross Tab 3*).

## 2.5 Share of Hispanic Sports Marketing in overall Marketing Budgets

“Buy Side” respondents were asked what share Hispanic Sports Marketing Budgets have in their overall Marketing Budgets. According to Table 4 below, more than 50% of the surveyed replied that the **Hispanic Sports Marketing’s share in their overall Marketing Budget lies between 0 and 15%**. The average share of the Hispanic Sports Marketing Budget in the Marketing Budget of the respondents is at **15.4%**.

**Table 4: Question: What share does Hispanic Sports Marketing Budget have in your overall Marketing Budget?**

Answers	Buyers
0 to 5%	34.57%
5% to 15%	27.16%
15% to 30%	20.99%
30% to 50%	12.35%
50% plus	4.94%
Average Share	15.4%

**Note:** To calculate the average share. The proportion (%) of respondents who chose a particular share is multiplied by the particular share. The result of this multiplication (share of respondents who chose a particular share times the share chosen) is then added to obtain the overall average share.

## 4. Appendix

### Cross Tabulation 1 (only “Buy Side”)

1) By how much do you expect Hispanic sports marketing budgets to grow over the next five years (annual growth rate)?

3) What type of categories do you see the most growth coming from?

VAR00001 \* VAR00003 Crosstabulation

			VAR00003					Total	
			Automotive	Big Box Retail	Consumer Packaged Goods	Financial Services	Other		Telecommunications
VAR00001	blank	Count	1	0	0	0	0	0	1
		% within VAR00001	100.0%	.0%	.0%	.0%	.0%	.0%	100.0%
		% within VAR00003	10.0%	.0%	.0%	.0%	.0%	.0%	.9%
	decrease 0% to -5%	Count	0	0	1	0	0	1	2
		% within VAR00001	.0%	.0%	50.0%	.0%	.0%	50.0%	100.0%
		% within VAR00003	.0%	.0%	2.9%	.0%	.0%	2.9%	1.8%
	decrease by more than 5%	Count	0	0	2	0	1	1	4
		% within VAR00001	.0%	.0%	50.0%	.0%	25.0%	25.0%	100.0%
		% within VAR00003	.0%	.0%	5.7%	.0%	8.3%	2.9%	3.7%
	grow by more than 15%	Count	1	1	2	4	2	6	16
		% within VAR00001	6.3%	6.3%	12.5%	25.0%	12.5%	37.5%	100.0%
		% within VAR00003	10.0%	25.0%	5.7%	28.6%	16.7%	17.6%	14.7%
	grow 0% to 5%	Count	4	1	14	6	6	13	44
		% within VAR00001	9.1%	2.3%	31.8%	13.6%	13.6%	29.5%	100.0%
		% within VAR00003	40.0%	25.0%	40.0%	42.9%	50.0%	38.2%	40.4%
	grow 5% to 15%	Count	4	2	16	4	3	13	42
		% within VAR00001	9.5%	4.8%	38.1%	9.5%	7.1%	31.0%	100.0%
		% within VAR00003	40.0%	50.0%	45.7%	28.6%	25.0%	38.2%	38.5%
Total	Count	10	4	35	14	12	34	109	
	% within VAR00001	9.2%	3.7%	32.1%	12.8%	11.0%	31.2%	100.0%	
	% within VAR00003	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

## Cross Tabulation 2 (only "Buy Side")

1) By how much do you expect Hispanic sports marketing budgets to grow over the next five years (annual growth rate)?

4) Which communications type do you see growing the most for sports marketers in the next 5 years?

VAR00001 \* VAR00004 Crosstabulation

			VAR00004						Total	
			blank	BTL "Guerrilla Marketing"	Content Marketing (including Social media)	Digital	Other	Print		TV
VAR00001	blank	Count	0	0	0	1	0	0	0	1
		% within VAR00001	.0%	.0%	.0%	100.0%	.0%	.0%	.0%	100.0%
		% within VAR00004	.0%	.0%	.0%	1.5%	.0%	.0%	.0%	.9%
	decrease 0% to -5%	Count	0	0	1	1	0	0	0	2
		% within VAR00001	.0%	.0%	50.0%	50.0%	.0%	.0%	.0%	100.0%
		% within VAR00004	.0%	.0%	3.6%	1.5%	.0%	.0%	.0%	1.8%
	decrease by more than 5%	Count	0	0	0	2	1	0	1	4
		% within VAR00001	.0%	.0%	.0%	50.0%	25.0%	.0%	25.0%	100.0%
		% within VAR00004	.0%	.0%	.0%	3.0%	25.0%	.0%	33.3%	3.7%
	grow by more than 15%	Count	0	1	6	7	0	1	1	16
		% within VAR00001	.0%	6.3%	37.5%	43.8%	.0%	6.3%	6.3%	100.0%
		% within VAR00004	.0%	20.0%	21.4%	10.4%	.0%	100.0%	33.3%	14.7%
	grow 0% to 5%	Count	1	0	7	33	2	0	1	44
		% within VAR00001	2.3%	.0%	15.9%	75.0%	4.5%	.0%	2.3%	100.0%
		% within VAR00004	100.0%	.0%	25.0%	49.3%	50.0%	.0%	33.3%	40.4%
	grow 5% to 15%	Count	0	4	14	23	1	0	0	42
		% within VAR00001	.0%	9.5%	33.3%	54.8%	2.4%	.0%	.0%	100.0%
		% within VAR00004	.0%	80.0%	50.0%	34.3%	25.0%	.0%	.0%	38.5%
Total	Count	1	5	28	67	4	1	3	109	
	% within VAR00001	.9%	4.6%	25.7%	61.5%	3.7%	.9%	2.8%	100.0%	
	% within VAR00004	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

### Cross Tabulation 3 (only “Buy Side”)

1) By how much do you expect Hispanic sports marketing budgets to grow over the next five years (annual growth rate)?

5) When it comes to reaching out to Hispanics via Sports content what sports type other than soccer do you think has the most potential over the next five years.

VAR00001 \* VAR00005 Crosstabulation

			VAR00005						Total
			American Football	Baseball	Basketball	blank	Boxing	Other	
VAR00001	blank	Count	0	0	0	0	1	0	1
		% within VAR00001	.0%	.0%	.0%	.0%	100.0%	.0%	100.0%
		% within VAR00005	.0%	.0%	.0%	.0%	6.7%	.0%	.9%
	decrease 0% to -5%	Count	1	0	1	0	0	0	2
		% within VAR00001	50.0%	.0%	50.0%	.0%	.0%	.0%	100.0%
		% within VAR00005	2.2%	.0%	5.3%	.0%	.0%	.0%	1.8%
	decrease by more than 5%	Count	2	1	0	0	0	1	4
		% within VAR00001	50.0%	25.0%	.0%	.0%	.0%	25.0%	100.0%
		% within VAR00005	4.4%	7.1%	.0%	.0%	.0%	6.7%	3.7%
	grow by more than 15%	Count	3	2	4	0	2	5	16
		% within VAR00001	18.8%	12.5%	25.0%	.0%	12.5%	31.3%	100.0%
		% within VAR00005	6.7%	14.3%	21.1%	.0%	13.3%	33.3%	14.7%
	grow 0% to 5%	Count	21	4	8	1	5	5	44
		% within VAR00001	47.7%	9.1%	18.2%	2.3%	11.4%	11.4%	100.0%
		% within VAR00005	46.7%	28.6%	42.1%	100.0%	33.3%	33.3%	40.4%
	grow 5% to 15%	Count	18	7	6	0	7	4	42
		% within VAR00001	42.9%	16.7%	14.3%	.0%	16.7%	9.5%	100.0%
		% within VAR00005	40.0%	50.0%	31.6%	.0%	46.7%	26.7%	38.5%
Total	Count	45	14	19	1	15	15	109	
	% within VAR00001	41.3%	12.8%	17.4%	.9%	13.8%	13.8%	100.0%	
	% within VAR00005	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	