

The Hispanic Community and Outdoor Recreation

Presented to

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By

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Executive Summary

Synopsis

The Hispanic population in the United States is growing very rapidly and is projected to represent 25% of the U.S. population by 2050. Given the size of this population and its tremendous spending power, Outdoor Industry Foundation (OIF) and the rest of the outdoor industry must learn more about Hispanics and how they fundamentally differ from traditional outdoor participants and consumers. The purpose of this white paper, therefore, is to provide general information on Hispanics, as well as information about Hispanics specific to the outdoor industry. The following areas are discussed in detail regarding the U.S. Hispanic population: **culture, leisure time, youth, income, and language.**

Much of the information contained in this white paper was extracted from existing secondary data and supplemented with a survey conducted as primary research.

Summary of Major Findings

- The three most valued and influential aspects of Hispanic culture are family, community, and personalization
- Current leisure time and activities are represented by the following characteristics
 - Available leisure time in the Hispanic community is growing, however:
 - Total leisure time available within the Hispanic segment is currently low
 - Hispanics currently spend more time on other popular areas of leisure besides outdoor activities
 - Hispanics are as interested in participating in sports and other physical activities for health reasons as they are for social reasons
 - A strong commitment to family and friends drives leisure activity decision making
 - The most active groups of Hispanics are males aged 18-34 with a higher education level
- The youth segment represents the largest, fastest growing, and most important segment of Hispanics
 - Youth demonstrate a positive attitude toward outdoor activities
 - They show current interest in gateway activities: camping, hiking, biking, trail running
 - Youth view English as their dominant language and use English based websites
 - Obesity is a major issue with Hispanic youth
- Income level does not drastically impact participation and is not a factor in outdoor activity interest
 - Hispanic households spend more on footwear (in absolute dollars), entertainment, and children (in relative dollars) than the rest of the U.S. population
- A more concerted effort to provide information and materials in Spanish is needed

Recommendations

1) Increase Awareness

- Consider grass roots campaigns
- Stress the health benefits
 - Target parents and children in an informational campaign
 - Connect with community mentors
 - Work with doctors to push outdoor activities
- Get Hispanics to switch from current physical activities to outdoor activities
- Partner with community groups to introduce children to different outdoor activities
 - After school programs
 - Church programs
 - Summer/weekend camps
- Partner with retailers to sponsor outings
 - Organize group activities
 - Provide funding for activities and equipment fees

2) Gateway Activities

- Encourage further participation in gateway activities like camping, hiking, biking, trail running, and fishing
- Stress activities that take less time
- Stress group activities
- Build up loyalty and interest and then encourage movement beyond gateway activities

3) Personalization

- Reach out to Hispanics
- Use the Spanish language to promote activities
 - Signs
 - Maps
 - Websites
 - Direct mail
 - Brochures
- Emphasize commitment to Hispanic segment
 - Hiring practices
 - Recruitment

4) Other

- Increase accessibility
 - Transportation to venues
 - More local venues
- Leverage the size of the Hispanic population and its buying power
 - Present as an alternative form of family entertainment
 - Target Hispanics for sale of athletic footwear
- Turn-offs for Hispanics (what ***NOT*** to do)
 - Treat Hispanics as a homogeneous group
 - Assume all demographics respond similarly
 - Assume all Hispanics are low-income and cannot afford to participate



Fast Facts: The Hispanic Community and Outdoor Recreation

Population Overview

The Hispanic population in the U.S. is growing rapidly. Hispanics are the largest minority group in the U.S. with approximately 14% of the total population. They are projected to account for nearly 1 out of every 5 U.S. residents by 2012 and nearly 1 out of 4 by 2050.²

Family and Community

Hispanic children are twice as likely as their non-Hispanic white counterparts to have grandparents and other adult relatives living in their homes.²

Half of Hispanics have at least two siblings, while 20% have three or more. Non-Hispanic white children are much more likely to have only one sibling or be the only child.²

Over 64% of Hispanics attend church on a regular basis compared to the average American that attends 40% of the time.²

Leisure Time

Leisure time in the American Hispanic population has increased by 34% since 1990, from 2.9 hours to 3.9 hours a day, but compared to other ethnicities, the Hispanic segment ranks amongst the lowest in total leisure time available.²

While 89% of Hispanics find outdoor activities fun, and 82% believe outdoor activities are healthy, 71% of males and 64% of female Hispanics report that they do not participate in outdoor activities due to lack of time.¹

Only 34% of Hispanics are spending greater than 4 hours per week on physical activities, whereas the majority (61%) is spending between 1 and 4 hours and 6% are not spending any time at all.¹

The most active subgroup amongst Hispanics appears to be those aged between 18 and 34. Within this group, only 4% are not participating at all, while 40% are active over 4 hours per week.¹

Youth

The population of Hispanics under the age of 18 is increasing quickly. Fully 1/3 of all Hispanics in the US are under the age of 18.²

Hispanic teens are significantly more obese than other American children. Nearly 25% of Hispanic children 12-18 are overweight, compared to 12.9% of whites and 21.8% of blacks.²

Income and Spending

In 2003, Hispanics alone controlled about \$653 billion in spending in the U.S.²

Between 1996 and 2001, Hispanic household median income increased 20% from \$27,977 to \$33,565 compared to just 6% for all U.S. households. However, the average income of non-Hispanic whites is 51.9% higher, and that of blacks is 6.2% higher.²

Hispanics spend greater portions of their income on entertainment and children than non-Hispanics. Hispanics also spend 96% of their before tax income, while non-Hispanics spend only 82.1%.²

Language

59% of the Hispanics prefer to use Spanish in every situation, while 70% speak Spanish in their homes.²

The significance of language as a barrier to participation in outdoor activities among Hispanics depends greatly on age. Among Hispanics aged 45+ and above, 40% said language was a barrier. Among younger Hispanics the percentage was far smaller.¹

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Introduction

New Opportunities with Hispanics

The Outdoor Industry Foundation (OIF) recognizes that while it possesses extensive industry expertise and knowledge on outdoor activities, it has concentrated its efforts on a more traditional base of Caucasian-Americans. The composition of the U.S. population is constantly changing and evolving, so much so that a concerted effort now must be made to involve Hispanics – a population representing an avenue of high growth for the outdoor industry. If OIF is to achieve its overall goal of increasing participation it must seek to attract Hispanics to outdoor activities.

While this document mostly discusses outdoor activities from the perspective of increasing participation, it should be emphasized that from a business perspective this is a very attractive segment. Hispanics have commanded much attention recently due to their phenomenal growth rate in the U.S. In fact, The U.S. Census Bureau places the Hispanic population at approximately 40 million, a number which is likely understated due to underreporting and illegal immigration.¹ Furthermore, Hispanics have an enormous amount of purchasing power. Selig Center projections reveal that this group alone controlled about \$653 billion in spending power in 2003.² This will only increase in the near future. Hence, there is the potential for large financial gains if OIF can influence a small percentage of Hispanics to become more involved in outdoor activities and have its member firms capture just a small fraction of the spending from this population.

Overall Statistics and Background

According to a Census Bureau report released in June 2004, an estimated 39.9 million Hispanics live in the United States. With close to 13% of the total population, they are the largest minority group in the United States and their numbers are only increasing. Hispanics are estimated to grow by 188% to 102.6 million—or roughly one-quarter of the population—by 2050. Hispanics will account for nearly one out of every five U.S. residents by 2012 if current growth rates continue.³

The table below illustrates some of these figures as well as other selected US demographic information:

<u>Important Hispanic Numbers</u>	<u>Hispanics</u>	<u>Non-Hispanics</u>
Current Population	39.9 million	250.1 million
Projected Population by 2050	102.6 million	324.9 million
Percentage of U.S. Population	13.7%	86.3%
Projected % of U.S. Pop. by 2050	24%	76%
Average Age	26.7	39.6
Mean Household Income	\$34,241	\$43,318
Background	67% Mexican	N/A
	14% Central & S. American	
	9% Puerto Rican	
	4% Cuban	
	7% Other	
Source: US Census Bureau 2003		

OIF understands that outdoor activities cannot be targeted and marketed to Hispanics as though the segment is fundamentally the same as the outdoor industry's current participants and consumers. Hispanics need to be treated as a unique population with its own characteristics; a group of people viewing the world through a slightly different kaleidoscope. As a result, OIF and the rest of the outdoor industry need to gain familiarity with Hispanics.

The purpose of this white paper, therefore, is to provide general information on Hispanics, as well as information about Hispanics specific to the outdoor industry. In particular, the following areas will be discussed in detail regarding the U.S. Hispanic population: **culture, leisure time, youth, income, and language.**

Research Methodology

Overview

The methodology used to gather information during this project consisted of two phases. First, we performed secondary research to collect information regarding Hispanics and their connection to the outdoors. Then we performed primary research using a survey we developed to supplement our secondary research where it was incomplete. While secondary research provided a substantial amount of information on Hispanics, there were few studies connecting Hispanics to outdoor activities, which underscored the need for the primary research.

Secondary Research Methodology

Initially, we met with the research librarians at the UCLA Anderson Rosenfeld Management Library who directed us to several databases and websites. OIF also provided us with various paper and online resources. After individual reviews of library and partner resources, we decided to expand upon five of the most important and salient topics regarding Hispanics and their participation in outdoor activities – culture, leisure time, youth, income, and language. We categorized our accumulated findings into a general spreadsheet that was shared amongst the team. A sample of this spreadsheet can be seen in the [Appendix](#).

Primary Research (Survey) Methodology

We concurrently worked on composing a survey (“the survey”) and finding participants. For the survey composition, we created a list of objectives based on the gaps in our secondary research and we designed questions around them. We sought information on:

- Leisure time (hours, interests, budget)
- Physical activities (active/non-active, hours, interests)
- Actual interest in specific outdoor activities
- Importance of family
- General interest in outdoor activities
- Reasons for not participating in outdoor activities

The questions were also designed to obtain a deeper understanding of our five interest areas: culture, leisure time, youth, income, and language. The survey questions and results are in the [Appendix](#). After the initial draft of the survey, an iterative process of revising and submitting the newest version for review by Professor Andrew Ainslie was performed. Professor Robert Kaiser, a market research expert, also aided with the survey to help us better define parameters (i.e. sample size, question order, length, etc.) required for a successful survey. OIF then looked at the survey to give feedback and approval. Once a final version was agreed upon, it was sent to a Spanish translating service, Verbatim Solutions. Finally, we entered both an English and Spanish version of our survey on Zoomerang.com – an online survey website. To make access easier, a shorter URL (www.notlong.com) was used, redirecting respondents to the Zoomerang site:

- www.activitysurvey.notlong.com (English version)
- www.encuesta.notlong.com (Spanish version)

To increase the response rate for the survey, we offered a small prize to a randomly selected winner.

At the same time, we worked on finding people to whom we could send the survey. We composed and sent an e-mail to various Hispanic organizations informing them of our project and the need for their assistance. Several conference calls and meetings followed, but ultimately none of these contacts were able to distribute the survey. We also contacted Luis de la Parra, Director of Marketing and Promotions at the Spanish language media company Univision, and had a face-to-face meeting. Luis was very excited about our project and created a 15-second television promotion advertising a website link to our survey. The promotion played 3-4 times a day for a week on Univision.

Aside from the Univision promotion, the survey was also distributed to Hispanic respondents via e-mail and through paper surveys. In total, we received 303 responses – 131 from the Spanish version and 172 from the English version. [Exhibit 1](#) illustrates the geographical location of the survey respondents. 71.9% live in California and 18.8% live in Texas, which correlates with the top two Hispanic population concentrations in the United States at 30.1% and 18.8%, respectively.

Findings

Culture

By understanding what Hispanics value, outdoor organizations and retailers can focus their marketing efforts on attracting Hispanics to the outdoors. Our research led us to conclude that the following are amongst the most highly prized values: family, community, and personalization.

Family

Unlike traditional American families, Hispanics do not distinguish between their immediate and extended families.⁴ Therefore, it is common for Hispanics to live and participate in activities as a “multi-generational extended family.”⁵ Hispanics look at their family as their support system, “providing emotional and material support and behavioral referents.”⁴

It is not surprising then that Hispanic households in the United States have a different makeup. Hispanic children are twice as likely as their non-Hispanic White counterparts to have grandparents and other adult relatives living in their homes. Hispanic families also take in boarders—many of whom are recent immigrants, to help pay for expenses.⁶ The survey supported this finding as 26% of survey respondents who primarily speak Spanish in their homes live with 5 or more people.

Hispanic children also tend to have more siblings and younger parents. Nearly half of the Hispanic population under the age of 18 has parents who are under the age of 35. This is in stark contrast to the 12.2% of non-Hispanic white children whose parents are under the age of 35. Additionally, half of Hispanics have at least two siblings, while 20% have three or more.⁶ This differs from non-Hispanic white children who are much more likely to have only one sibling or be the only child.

Hispanic families differ from white non-Hispanics, not only in the general composition of the families, but also in how they influence each other in certain situational contexts. One

example of this is how Hispanic families encourage each other to hold large social events. Frequently at these events, an overabundance of traditional foods is served. These foods often include large quantities of animal fats such as lard and cheese. Fatty meats like carnitas, tripas de leche, and menudo are also preferred and processed flour and sugar are also frequently used.⁷ Because many of these traditional foods are unhealthy, Hispanics are prone to weight gain. Thus, the Hispanic family culture which promotes these family events has indirectly contributed to higher levels of obesity. As Lisa Zajur, Director of The Spanish Academy and Cultural Institute in Richmond, comments, “We love to get together and eat.”⁸ Hispanics can look to outdoor activities as a way to mitigate some of these health issues that have arisen as a result of familial cultural and social influences.

Besides emotional support and social activities, family influences physical activity. In the Hispanic culture, “leisure activity occurs mainly in the context of family and friendship groups.”⁹ “Social support from family and friends has been positively related to physical activity, and it was found to be one of the main factors associated with initial motivation to increasing physical activity in a group of middle age and elderly minority women.”¹⁰ The impact can be quite detrimental as “those with low perceived levels of social support were twice as likely to be physically inactive when compared to those who reported high support.” This secondary research was supported by the survey as 57% of respondents would most likely be more interested in outdoor activities if their friends/family had a higher level of interest. Additionally, 78% of survey respondents find information on outdoor activities from family and friends, which shows the important role family plays in learning and gathering information on outdoor activities.

Community

Americans depend on their extended families the way Hispanics look to their communities; these communities are “tightly knit.”⁴ When Hispanics immigrate into the country, they rely on their Spanish speaking family and friends, who function as their mentors to help them make the transition. “Community leaders and other local influencers serve as advocates and counselors” to newcomers.¹¹ This type of closeness

creates a greater importance on grass-roots level marketing in the community.¹² By bonding and supporting a local community, an organization can start to build loyalty.

Winning over the community is important because Hispanics “tend to be much more brand loyal than other consumers,” with Hispanics saying brand names are important when shopping.¹³ Most find “brand names superior to store brands because of family dynamics, taste perceptions, consistent quality, tradition and familiarity.”¹⁴ By combining a grass-roots marketing campaign with the loyal nature of the Hispanic market, outdoor retailers have the opportunity to expose this growing population to quality products and services and ensure future years of sales.

In the Hispanic community, church plays an important role. Most Hispanics consider church to be “the most trusted voice in this community and partnering can be easy.”⁵ Over 64% of Hispanics attend church on a regular basis compared to the average American that attends 40% of the time.¹⁵ Church “influences family life and community affairs, giving spiritual meaning to the Hispanic culture.”¹⁶ In short, in the Hispanic community and especially in the church community, “a person seeks refuge among a culture that's understanding, that has a certain degree of connection, among a community of people who can be supportive and who can give trust and safety.”¹⁷

Personalization

Hispanics strongly value their interpersonal relationships as seen in their families and within their communities. Hispanics often seek this type of connectivity – strong personal relationships, people who understand their needs and motivations, and individuals who genuinely care about their livelihoods. Awarding trust and being open-minded follow closely behind. EconSouth published an article stating, “Relationships are extremely important in the Hispanic culture. If you treat Hispanic customers with both respect and cultural understanding, they will remain loyal to your business and tell their friends and family that you have gone the extra mile to make them feel welcomed.”¹⁸

It is also important that “politeness toward all is essential because the decision-maker – the only one whose approval counts – may be a less-than-obvious person.”¹² Around 35% of Hispanics prefer to shop with family as reported by the survey results. When approaching a group of Hispanics out shopping, salespeople must put forth the effort to make a connection and treat everyone with respect.

Recommendations

A simple way to combine church, family, and outdoor activities is to work with the local church and plan an outing. Given the high percentage of Hispanics that attend church, this option allows Hispanics to easily integrate the important aspects of their lives in a simple afternoon and introduces them to an activity and/or products that they can continue to enjoy in the future.

Another way to reach Hispanics is to organize a grassroots campaign targeting local mentors and community leaders, who may be political, religious, or highly revered individuals. An example would be working with Los Angeles Mayor Antonio Villaraigosa to publicly advocate the benefits of outdoor activities. In this manner, retailers can take advantage of the word-of-mouth custom that is pervasive in the Hispanic community. By winning over the respected members of the community, retailers aim to become the salient brand in their minds with the end goal of capturing their brand loyalty behavior. Targeting the community leaders is an excellent way for the retailers to get their foot-in-the-door.

Lastly, the outdoor industry can utilize bilingual doctors to promote outdoor activities. Doctors are mentors, are trusted and respected individuals in the community, and can advocate outdoor activities as an alternative to more traditional forms of exercise. When communicating with Hispanics, it is important that doctors be cognizant of their need for more personalized service.

Leisure Time

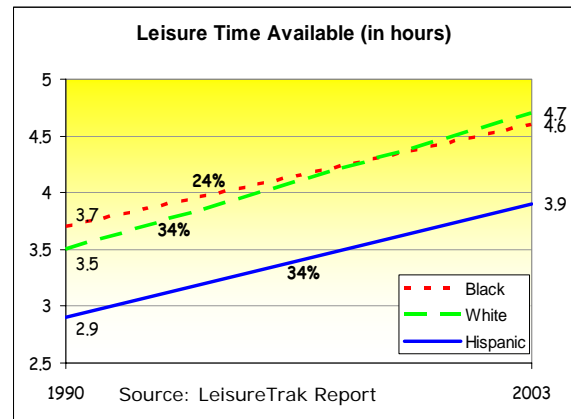
Leisure time in the American Hispanic population has increased dramatically since 1990, but compared to other ethnicities, the Hispanic segment ranks amongst the lowest in total

leisure time available. While total leisure time is an important factor to consider when analyzing potential outdoor activity involvement, it is the growth in leisure time that provides the greatest opportunity for increased participation in the future.

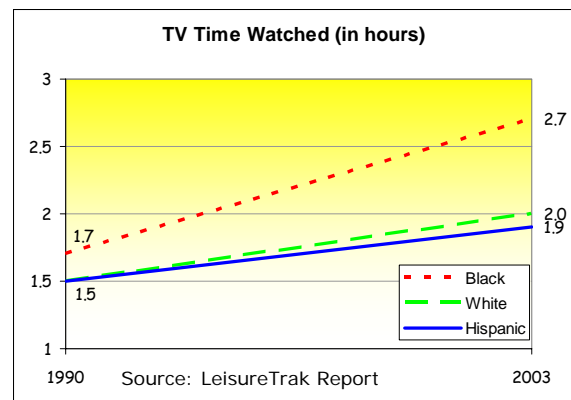
As Hispanics and other ethnic segments become exposed to new activities, they often become enthusiastic participants. And while there has been significant growth in leisure time in the Hispanic segment, traditional methods of marketing outdoor activities to mainstream America may not convince Hispanics to spend this extra leisure time outdoors and therefore must be examined under a different lens. Only by appealing to the unique motivations and leisure desires of the Hispanic segment will growth in outdoor activity participation result.

Leisure Time Growth

In 1990, Hispanics had 2.9 hours of daily leisure time available, compared to 3.9 hours in 2003 – an increase of a full hour, as reported by the LeisureTrak Report.¹⁹ This equates to an increase in leisure time available to Hispanics of 34% over the thirteen year span. This is equivalent to the leisure time growth rate of the white population, and is 10% greater than that exhibited by the black population.



Notably, the increase in available leisure time in the Hispanic segment has not resulted in as much of an increase in TV watching time during the same time period as compared to other segments. While total daily TV viewing by Hispanics did increase by 27%, this is less than the 33%



increase exhibited by whites and the 59% increase by blacks.¹⁹ In fact, only 24 minutes of the one hour increase in total leisure time realized by Hispanics is spent watching TV. In contrast, the white population added 30 minutes to their viewing time and the black population added a full hour.

Leisure Activities

As Hispanics become more acculturated and integrated into American society, they have learned to enjoy many of the same leisure activities as the mainstream American population. Even more, as Hispanics have migrated to the suburbs and become more accustomed to the activities and lifestyles of the mainstream American, their motivations and desires have also changed.

Whites have traditionally enjoyed gardening, fishing, and video games as favorite leisure activities, which are almost as popular among Hispanics. Hispanics also enjoy exercise as much as whites, African-Americans, and Asian-Americans. Running, hiking, and swimming are the top ranked exercise activities amongst Hispanics. And contrary to popular thought, Hispanics have embraced American football to the point where it is now more popular than soccer. This too is consistent with white American preferences.

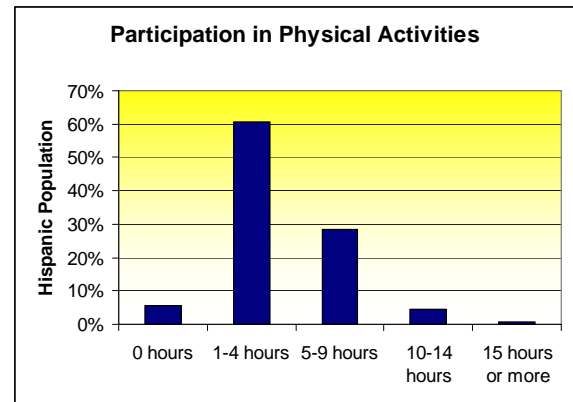
Hispanics are also enjoying activities popular among other ethnicities. Listening to music, going to the movies, and shopping are nearly as popular among Hispanics as they are among the African-American population. With regard to sporting activities, team sports are also popular among Hispanics, as with African-Americans. However, Hispanics also tend to participate in individual sports, which is more popular with whites.

Sports vacations[†] – While the white population still dominates in the area of sport vacations, where one in four whites is participating on a yearly basis, Hispanics are catching up. Today, nearly one in six Hispanics takes a sports vacation in a given year, which is similar to the participation rate of the African-American and Asian-American populations.

[†] A sports vacation would be defined as any vacation in which the primary focus or purpose is to attend or participate in a sporting event.

Physical Activities

Our survey results revealed that Hispanics are spending minimal amounts of time on physical activities. Only 34% of Hispanics are spending greater than 4 hours per week on physical activities, whereas the majority (61%) is spending between 1 and 4 hours and 6% are not spending any time at all. This is consistent with the findings



of the SGMA International Hispanic Market Sports Participation Report²⁰ which shows that only 18.7% of Hispanics aged 6 or greater participate in fitness activities more than 100 times a year. This is less than whites who participate at a level of 23.1%. The most active subgroup amongst Hispanics appears to be those aged between 18 and 34. Within this group, only 4% are not participating at all, while 40% are active over 4 hours per week. Further understanding why this subgroup is more active could prove crucial in determining how to increase participation levels of the entire Hispanic segment.

There appears to be some correlation between different education levels, sex, and household size when measuring the level of physical activity amongst Hispanics. For example, Hispanics with the highest education levels appear to be most active. Only 4% of those with at least some level of college education reported no level of weekly physical activity, and 38% reported levels of activity greater than 4 hours a week. Activity levels are even higher among Hispanics with advanced degrees (Masters Degree or higher). Only 2% of this segment reported no weekly physical activity, while 41% reported greater than 4 hours of activity in a week. These impressive participation rates could provide an opportunity for the highest educated Hispanics to mentor the rest of the segment into increasing their overall participations levels.

Male Hispanics appear to be more active than females. While 7% of males reported no physical activity compared to 5% of females, 40% of males reported that they are active over 4 hours in a week compared to only 29% of females. However, the fact remains that

the majority of Hispanics from both sexes still only reported between 1 and 4 hours of physical activity each week.

Finally, those Hispanics who live by themselves or share their homes with one other person appear to be more active than those living in larger households. Only 4% of these Hispanics reported no level of weekly physical activity and 42% reported greater than 4 hours of activity each week.

Despite the low overall levels of physical activity reported, running and other forms of basic exercise are the most popular physical activities amongst Hispanics when they actually are participating, based on the survey. From the survey, 48% of Hispanics reported that they participate in some level of running or jogging,

Most popular physical activities

Running / jogging	48%
Weightlifting / gym	23%
Bicycling (street or mountain)	19%
Aerobics	19%
Dancing	19%
Swimming	17%
Skateboarding	10%
Other	24%

while 23% reported participating in some form of weightlifting or gym activity. The Hispanic Sports Participation Report states that only 18% of Hispanics participate in running/jogging and 11.6% use weight resistance machines. While the magnitude of these numbers does not appear as significant as with our survey, when they are compared against the participation rates of other ethnicities, participation in these activities by Hispanics is still high. Only 12.4% of whites are reported to participate in running/jogging, while only 14.3% of blacks reported participating. Additionally, only 12.0% of whites are reported to use weight resistance machines, while only 8.8% of blacks reported usage.²⁰

Sporting Interests

While other ethnicities are most commonly interested in individual sporting activities, Hispanics have an interest in both team and individual sports.¹⁹ The Hispanic segment's commitment to their family and friends often transcends into a high level of interest in organized and/or team sporting activities. However, individual sports are also popular,

especially those sporting activities that provide high levels of health and fitness opportunities.

Team sports – The two favorite[‡] sports amongst Hispanics are American football and basketball. These sports are highly team-based and tend to require communication and collaboration between team members. Hispanics enjoy and rely on the team environment just as they do with their family and friends.

Hispanics		Asian-Americans	
Football	13%	Bicycling	10%
Basketball	11%	Weightlifting	9%
Running	9%	Basketball	9%
Walking	8%	Tennis	7%
Soccer	8%	Swimming	4%
Swimming	8%	Soccer	4%
Whites		African-Americans	
Walking	14%	Basketball	18%
Golf	11%	Football	10%
Basketball	5%	Walking	9%
Swimming	5%	Running	8%
Exercising	5%	Exercising	6%

Source: LeisureTrak Report

Individual sports – Hispanics enjoy individual sports almost as much as team sports. Running is the third favorite sport of Hispanics, while walking and swimming are tied with soccer as their fourth favorite sport. Each of these sports is generally done individually which supports the belief that Hispanics also derive enjoyment while being alone.

Health Opportunities

Hispanics are as interested in participating in sports and other physical activities for health reasons as they are for social reasons.¹⁹ This differs from other ethnicities. Whites and blacks, for example, overwhelmingly cite health as the greatest reason for their involvement.

Notably, Hispanics don't list exercising as a top five *favorite* sport activity; however, it is

Hispanics		Asian-Americans	
Basketball	27%	Basketball	23%
Exercising	20%	Exercising	18%
Running	19%	Bicycling	17%
Swimming	16%	Tennis	17%
Football	14%	Weightlifting	17%
Whites		African-Americans	
Walking	29%	Basketball	27%
Exercising	18%	Exercising	22%
Golf	15%	Bicycling	18%
Bicycling	14%	Tennis	16%
Basketball	12%	Weightlifting	13%

Source: LeisureTrak Report

[‡] Can be simply due to an interest in the sport, not necessarily actual participation

the number two sport activity that they actually *participate* in, second only to basketball (see illustration at right).¹⁹ Although exercising may not be considered the most fun or entertaining sporting activity to Hispanics, it is as important to them as it is to whites, African-Americans, and Asian-Americans, who exercise regularly.

Leisure Time Availability

While it has been shown that Hispanics are not participating in sports and other physical activities at high levels, it does appear that they derive social enjoyment when they do participate, and they have an appreciation for the associated health benefits. Consistent with these findings, the survey showed that Hispanics appear to have an interest and appreciation in the benefits that outdoor activities provide as well, but unfortunately a lack of time is constraining their ability to participate.

While 89% of Hispanics find outdoor activities fun, and 82% believe outdoor activities are healthy, 71% of males and 64% of female Hispanics report that they do not participate in outdoor activities due to lack of time. In fact, only 17% of Hispanics from the survey state their reason for NOT participating in outdoor activities is that they would rather be doing something else.

Outdoor activities are:

Fun	89%
Healthy	82%
Relaxing	73%
Social	70%
Exciting	61%
Peaceful	51%
Family oriented	46%
Challenging	42%
Expensive	19%
Strenuous	16%
Inconvenient	7%

When asked what would make them more likely to participate in outdoor activities, Hispanics chose *more leisure time available* more often than any of the four other choices. More encouraging, 44% of Hispanics said they would definitely participate in outdoor activities if they had more leisure time available and 88% said they would at least maybe participate if they had more leisure time available.

A lack of leisure time has proven the greatest constraint on participation in outdoor activities by Hispanics, even more than a lack of interest or financial constraints which came in second and third, respectively. Conversely, only 18% of Hispanics stated they would definitely participate in outdoor activities if there were more/better health benefits

and only 6% stated they would definitely participate in outdoor activities if more information was available in Spanish.

Recommendations

Hispanics are a unique segment and require a differentiated approach to reach out to them. Historically, whites have been involved in a wider variety of leisure activities than other ethnic populations. However, Hispanics participate in many of the same activities as white mainstream Americans, and act in response to many of the same motivations. While it is apparent that cultural boundaries have weakened over recent years, there remain subtle differences in the leisure time preferences and availability of Hispanics, which help to distinguish them from other ethnicities. Understanding these differences is a critical factor when attempting to market outdoor activities to this segment.

The availability of leisure time in the Hispanic community is growing. This, combined with the fact that Hispanics are not simply converting most of their extra leisure time into TV hours, as are some ethnicities, is encouraging to those looking to help increase Hispanic participation in outdoor activities. While Hispanics are certainly spending more time on other popular areas of leisure, the fact remains that Hispanics will have extra time on their hands in the future and will be looking for ways to take advantage of it.

Despite the existing leisure time growth trend, total leisure time available within the Hispanic segment is currently low. As a result, current priority must be placed on outdoor activities that do not require a large time commitment, such as trail running, hiking, biking, and fishing. Encouraging Hispanics to participate in activities such as these will build enthusiasm for outdoor activities as a whole. In the future when Hispanics have more time to participate, the momentum derived from prior outdoor activity involvement has the potential to encourage further activity in more time intensive activities.

With leisure time at a premium, we also suggest looking at areas of leisure that Hispanics are *already* involved. Although physical activity levels for most Hispanics fall within the 1-4 hours per week range, which is low, most of this time is spent exercising by

running/jogging or by going to the gym/weightlifting. Still, it may be possible to encourage Hispanics to switch some of that time into participating in outdoor activities such as trail running, biking, and hiking. The benefits would be that it does not require more of a time commitment than they are already expending and they would still be recipients of a variety of health benefits; from here they might be encouraged to expand into other outdoor activities as more time becomes available.

The benefits of group participation in outdoor activities can also be leveraged. Since Hispanics are a family and friend oriented segment, encouraging outdoor activities where group participation is possible would be valuable. Activities such as hiking and fishing would provide good entry level opportunities. Once again, the benefit would be that these activities would not require more of a time commitment than is already spent with their family and friends, but in addition Hispanics will gain the added benefit of participating in exciting new activities while encouraging a healthy lifestyle. This might prove to be an especially good opportunity for parents to spend time with their children while promoting active lifestyles.

Lastly, increasing awareness is essential to increasing participation in outdoor activities. This is true whether encouraging Hispanics to spend their limited available leisure time on outdoor activities requiring low time commitments, or changing their current activities by promoting the dual benefits of both health and group oriented activities. The consequence of not spreading awareness is that Hispanics will choose other forms of leisure as substitutes during their free time.

Youth

Overall Statistics and Background

The Hispanic market and especially the Hispanic youth market cannot be ignored by any industry in the U.S. that wishes to be competitive both today and in the near future. The sheer size of the Hispanic youth segment and its incredible growth rate demand immediate attention. It is important to focus on Hispanic youth, recognizing situations in

which they exhibit both distinct and similar attitudes toward traditional outdoor activity participation.

As children are exposed to outdoor activities at a younger age, the likelihood that they will continue to participate in such activities later on in their lives and adulthood increases substantially.²¹ Given this insight and a child's fundamental propensity to experiment, be malleable, and impressionable it is important for outdoor companies and advocates of outdoor activities to spend significant time and effort exposing the Hispanic youth population to the wide range of outdoor activities.

All children can appreciate nature and learn to enjoy the myriad of outdoor activities. As the survey illustrates, Hispanic youth expressed very favorable attitudes towards outdoor activities in general. See [Exhibit 2](#) for youth perception of outdoor activities. However, it is the undeniable size and growth levels of the Hispanic youth population in the United States relative to traditional youth participants that should make Hispanic youth a primary focus in the immediate and near future.

Profile of Hispanic Children

In the United States, less and less of the Hispanic population is comprised of older immigrants and skews toward a younger population. More Hispanics are settling in the U.S. which is where their children are being born. In fact, one out of three Hispanics (33.9%) is under the age of 18, compared to one out of four non-Hispanics (23.9%).⁶ [Exhibit 3](#) provides more detail on these numbers.

High Growth in the U.S.

The combination of rapid growth in the under-18 Hispanic population and slowing, even negative, growth in the younger age groups of the non-Hispanic population, has resulted in Hispanic kids becoming a larger force within the under-18 population of the U.S. Between 1990 and 2002 the Hispanic share of the under-18 population grew from 11.4% to 18%. The table below reveals the striking disparity between Hispanic and non-Hispanic growth rates in this age group.

- While the number of Hispanic children under the age of 5 increased 70%, the population of non-Hispanic children in this age group actually declined 1.8%
- The population of 5- to 13-year-old Hispanics grew ten times faster than the non-Hispanic population (75% vs. 7.4%); 14- to 17-year-olds Hispanics exhibited the same growth pattern (123.7% vs. 13.3%)
- The population of Hispanics under the age of 18 increased 81%, compared to 6.1% in the non-Hispanic under-18 population⁶

Hispanic and Non-Hispanic Populations Under 18 Years of Age, 1990 vs. 2002

Category and Age Group	1990		2002		Cumulative Growth 1980 - 2002
	#	% of Total Population	#	% of Total Population	
<i>Hispanic</i>					
0-4	2,330	3.7	3,962	5.4	70.0
5-13	3,778	5.9	6,611	9.1	75.0
14-17	1,141	1.8	2,552	3.5	123.7
Total 0-17	7,249	11.4	13,125	18.0	81.0
<i>Non-Hispanic</i>					
0-4	15,934	25.1	15,647	21.5	(1.8)
5-13	28,231	44.4	30,310	41.6	7.4
14-17	12,193	19.2	13,812	18.9	13.3
Total 0-17	56,358	88.6	59,769	82.0	6.1
Total U.S. 0-17	63,607	100.0%	72,895	100.0%	14.6%

Source: U.S. Census Bureau; Packaged Facts

Between 1990 and 2002, Hispanics accounted for most of the growth (63.3%) in the under-18 population and were responsible for 5.9 million of the 9.3 million added to this age group. Demographic trends in the under-5 age group provide an indication of the future of the U.S. youth population. While the number of non-Hispanic kids in this age group declined by 287,000, the population of Hispanic kids under the age of 5 grew by 1.6 million.⁶ Further details of these numbers are illustrated in [Exhibit 4](#).

Most Hispanic Youth are U.S.-Born

More than four out of five Hispanics under the age of 20 (83.7%) were born in the United States. However, approximately one out of three older teens in the 15- to 19-year-old age group came to the United States as an immigrant.⁶

English – The Language of Choice

Age is an even more important factor in determining the language preferences and capabilities of Hispanics. Younger Hispanics, regardless of whether they are foreign or U.S. born are much more likely than their older counterparts to view English as their dominant language. Approximately 90% of 5- to 17-year-olds are bilingual, while more modest figures of 71% of those aged 18- to 64 and 60% of those 65 years and older were considered to be bilingual.⁶ [Exhibit 5](#) breaks down age groups and their preferred spoken language.

Retaining Their Identity

Generally speaking, it is a common mistake for marketers to treat Hispanics as a homogenous population. Not all Hispanics are the same. In fact, there is great variability amongst Hispanics in the United States; there are over twenty different countries of origin, different dialects from generations, language familiarity, and capabilities, different socio-economic classes, different geographies, and many other differences.

Given such differences amongst Hispanics it is also important to recognize that it would be impractical and likely impossible for the outdoor industry to construct an individual message tailored to each group. By the same token, one message does not fit all and may not be the best solution although it may be the simplest.

According to the March 2002 Current Population Survey, 73% of Hispanics under the age of 15 are Mexican.⁶ This is consistent with Mexicans being the dominant nationality within the overall Hispanic population in the United States. Central and South Americans, Puerto Ricans, and Cubans comprise the other main nationalities. Clearly, while not all Mexicans are the same, many share similar values, histories, and backgrounds. This is partially because the Hispanic-identity has maintained a powerful hold across multiple generations in the United States. Almost 40% of those in the third generation or higher still refer to themselves primarily as Latino/Hispanic or in terms of their parents' or grandparent's country of origin rather than as American.⁶ Thus while

many of the Hispanic youth may have been born in the United States, they may still have strong ties to their parent or grandparents' country of origin.

Roles in Family Spending Decisions

Less acculturated parents tend to rely upon their children when selecting brands. Nearly one in three (32.2%) say that their kids have a significant impact on brands, compared to 25.6% of English-dominant parents and 24.1% of U.S. adults as a whole. This suggests that many less acculturated parents turn to their more acculturated, English-dominant or bilingual children for cues about buying decisions.⁶ The parents' lack of English may affect their decision making ability when it comes to purchases because they are not fully confident in what they may be buying. They believe they can rely upon and trust their children, who speak English much more fluently, in order to help make a more reliable decision. Marketers realize that kids are influential and often advertise and promote directly to them.

However, given the cultural environment within Hispanic families, some marketers with expertise in the Hispanic market suggest that it can make sense to target mothers more directly than what currently takes place in the general market. For example, a Hispanic version of an ad for the "Got Milk?" campaign of the Milk Processor Education Program focused on the responsibilities of the Hispanic mom for promoting the health of her children. According to 2003 Adweek Magazine, the New York based company Siboney USA, which developed the campaign, states that the ads targeted mothers because they are the "ultimate gatekeepers" in the Hispanic family.⁶

A similar view has been expressed by Luis Garcia, president of Garcia 360, a San Antonio, Texas-based marketing consulting firm. In his opinion, marketers interested in approaching Hispanic youth face obstacles not found in the general market because Hispanic teens "tend to be shielded by their parents from messages or activities that are seen as threatening to the family or irrelevant."⁶

Hispanic Youth Online

Cultural Access Group and Sapo Communications found in June 2002 that 91% of Hispanic youth who are online (ages 14 to 24) in Los Angeles say English is the primary language of the sites they visit. Only 6% of the websites surfed are Spanish-based and the remaining 3% are a mix of English and Spanish (also known as "Spanglish"). The Los Angeles area was chosen for the survey because according to the U.S. Census Bureau, it has the largest Hispanic market in the U.S., representing 19% of the total U.S. Hispanic population.²²

The trend towards visiting English based websites is consistent with earlier statements that more acculturated children, who have grown up in the United States or who are second and third generation, tend to exhibit similar characters to more mainstream Americans in spite of the strong cultural ties to their country of origin.

Hispanic Youth and Obesity

Similar to the rest of the Hispanic population, obesity is an issue for Hispanic youth. More so than other children in America, Hispanic youth are significantly more obese and unhealthy. Nearly 25% of Hispanic children 12-18 are overweight, compared to 12.9% of whites and 21.8% of blacks.²³ The health of Hispanic children is hurt by cultural attitudes toward weight, by parents who accommodate their children's dietary wishes, and by the lack of proper physical education at schools. As parents become more acculturated, they start buying fast food for their children. Among rural families, being overweight is actually seen as a sign of health.²⁴ Furthermore, as discussed in the section on Hispanic culture, an emphasis on large, social meals can cause weight gain and cultural norms praising a fuller figure can complicate matters even further.⁸

Hispanic children are less likely than other children to have health insurance or recommended vaccinations, disparities that a government study says will be magnified in the coming years by the nation's changing demographics. Comparatively, Hispanic children are in the worst health; the percentage of children ages 5-17 with good or excellent health stands at 87% for whites, 74% for blacks, and 72% for Hispanics.²³

All these aforementioned factors regarding obesity and a general lack of health amongst Hispanics and their children suggest that increased physical activity is a necessary component of a larger plan to get Hispanics healthier. Outdoor activities can provide an excellent alternative to traditional exercise.

Recommendations

In order to increase participation, Hispanic youth need to be directly approached and given the opportunity to decide if they are interested in outdoor activities. From a business perspective, they are the ultimate user of the “product” (the outdoor activity itself). Children must conclude on their own that these are activities they would be willing to spend their limited time pursuing. Fortunately, it appears that Hispanic youth show an interest in outdoor activities and do participate in a myriad of activities.

Consistent with OIF’s current approach toward acquiring new participants, we recommend that gateway activities be used as a stepping-stone to get youth involved. Hispanics are not only showing an interest in camping, hiking, biking, and trail running, but they are participating in these activities as well. [Exhibits 6 & 7](#) provide this detail. Furthermore, targeting these activities can circumvent lower amounts of disposable income that is typical of youth. Moreover, these are outdoor activities that do not require an enormous time requirement, can be pursued individually or with groups of family and friends, and require equipment that is relatively cheap or already exists in the household.

Getting Hispanic youth to participate in more expensive, complex, time consuming outdoor activities such as downhill skiing, kayaking, and rafting should be a secondary, longer-term goal that is pursued more aggressively as Hispanic youth ascend up the activity ladder. These are activities that require a more significant investment of money for equipment, travel expenses, etc. and more importantly precious time spent away from the family. In these cases, the parent will need to be involved since parental approval and buy-in is a key success factor. From a monetary standpoint, as with any expensive

purchase, the parents should not be ignored as they are most often the final decision maker and the one who pays the bill.

A major issue is that many Hispanic youth may not be aware of what types of outdoor activities are available to them. Increasing participation will be greatly facilitated if these children are simply exposed to the opportunities that are available. Many children may never have heard of snowshoeing or realized there were opportunities to go hiking or camping near their homes. An effort to educate Hispanic youth and make information more accessible is crucial. In terms of distributing information, OIF should consider schools and the Internet as primary avenues for disbursing information. Unlike the adult population, there is less need for Spanish websites because the majority of Hispanic youth are fluent in English. Also, in contrast to the adult population, direct mail appears an ineffective source to provide the youth information. See [Exhibit 8](#) for survey results on how youth find information on leisure.

Furthermore, within the Hispanic community, word-of-mouth plays a large role since Hispanics share much consumer information from person to person. Therefore, getting Hispanic youth to actually participate in some of the activities (even if the activities must be provided at a discount or even for free) will get the ball rolling and help encourage word-of-mouth goodwill. We recommend having sponsors fund and support outdoor activities for Hispanic youth. Because family is such an integral part of Hispanic culture we suggest involving parents and encouraging participation with their children.

Lastly, OIF should focus on the issue of Hispanic youth obesity. The emphasis should be on promoting outdoor activities as an alternative to traditional forms of exercise. Both parents and children should be targeted in an informational campaign explaining the current state of affairs of Hispanic health and how outdoor activities can help remedy and provide a fun, enjoyable way for youth to stay fit and healthy.

Income

Hispanics are becoming a more powerful force in the economy. This is strongly due to an increase in their household income. Between 1996 and 2001, Hispanic household median income increased 20% from \$27,977 to \$33,565 compared to just 6% for all U.S. households.²⁵

Although the Hispanic income numbers are growing faster than the national average, they are still in the lower level of the income bracket. The average income of non-Hispanic whites is 51.9% higher, and that of blacks is 6.2% higher. This is in part due to the types of jobs that Hispanics hold, as well as the fact that Hispanic women are slightly less likely to be in the workforce, but more likely to be stay-at-home moms. Even with this slight difference, household income numbers are impacted.⁶

Within the subset of families with children, only 39% of Hispanic families make over \$40,000 whereas almost 60% of non-Hispanic families make over \$40,000, as illustrated in [Exhibit 9](#). Although the gap is slowly closing, the disparity still exists. The table below shows total money in a household, regardless of children. It shows a slightly larger gap between Hispanics and non-Hispanics for all households. The largest percentage of Hispanics in any income bracket is 18.9%, which is the under \$15k per year range. For non-Hispanics, the largest percentage is the \$75k plus group, with 25.8%.⁶

2001 Total money of households by type (1,000s)				
	Hispanics		Non-Hispanics	
Under 15k	1,986	18.9%	15,322	15.5%
15k to 24,999	1,833	17.5%	12,743	12.9%
25k to 34,999	1,621	15.4%	11,968	12.1%
35k to 49,999	1,811	17.3%	14,992	15.2%
50k to 74,999	1,729	16.5%	18,327	18.5%
75k and over	1,517	14.5%	25,446	25.8%
Total	10,497		98,798	

Source: The US Hispanic Market

Reasons for Lower Income Levels

There are several reasons why Hispanic income is lower. The main reason pertains to the types of jobs they hold. Only 14% hold some type of executive, managerial, or professional employment. Major categories of jobs held by Hispanics are service type (22%), precision production and mechanics (14.7%) and administrative support (12.3%). In comparison to the non-Hispanic population, 35% are in some type of executive or managerial position, 17% are in service, 1.9% are in precision production, and 23% are in administrative. These types of jobs pay quite differently and the categories that have a higher percentage of Hispanics tend to be on the lower end of the pay scale.⁶

Another reason Hispanics have a lower income is due to lower levels of education. Hispanics are less likely to have higher education than non-Hispanics, contributing to the types of jobs for which they are qualified. This is impacted by the fact that a high portion of Hispanics are immigrants that cannot speak English when they arrive in the U.S. Almost 43% of Hispanics over 25 do not have a high school diploma. Only about 11.1% have a Bachelor's Degree, compared with 29.4% of non-Hispanics. For advanced degrees, only 2.99% of Hispanics have them, compared with 9.74% of non-Hispanics.

Hispanic mentors are making improvements in this area, as they reach out and identify with the Hispanic population, while also presenting the value of higher education. These include national organizations, such as National Hispanic Employee Association and Hispanic Association on Corporate Responsibility, as well as universities and public figures. This is helping Hispanic numbers to increase in the higher education areas, but the comparisons show that they still lag behind the rest of the population.⁶

Spending

Despite these specifics, the increase in Hispanic population and income are significant in that not only are there more Hispanics, but also their presence and buying power are dramatically changing the U.S. demographics and economy. With the increased income of Hispanics, there is also an increase in their buying power. Since 1990, the buying power (money in terms of products and services it buys) of Hispanics has grown 247%,

with the total market only increasing by 113%.²⁶ Hispanic priorities are different, as they tend to spend greater portions of their income on entertainment and children than non-Hispanics.⁵ Hispanics also tend to spend 96% of their before tax income, with the national non-Hispanic spending only 82.1%.⁶ This fact has dual meaning. Spending more could be seen as a positive in terms of their buying power and the positive impact this could have on businesses where Hispanics buy items. Yet, it also implies that they save less, have less disposable income, and have a tighter budget or more expenses. Hispanics earn less, but have different concerns and thus spend more as a percentage of their income.

An area seeing increased spending is the tourism industry. Hispanics are starting to go on more vacations and spend more on leisure activities, as their disposable income increases. It is reported that this type of spending for Hispanics will grow at 8.2%, with non-Hispanic growth at only 4.9%.²⁷ This statistic also includes the 43% of Hispanics that go back to their home country at least one time per year.⁶ In some cases, this trip back home is their vacation, and in other instances this is just another trip in addition to the leisure vacations they have started enjoying more.

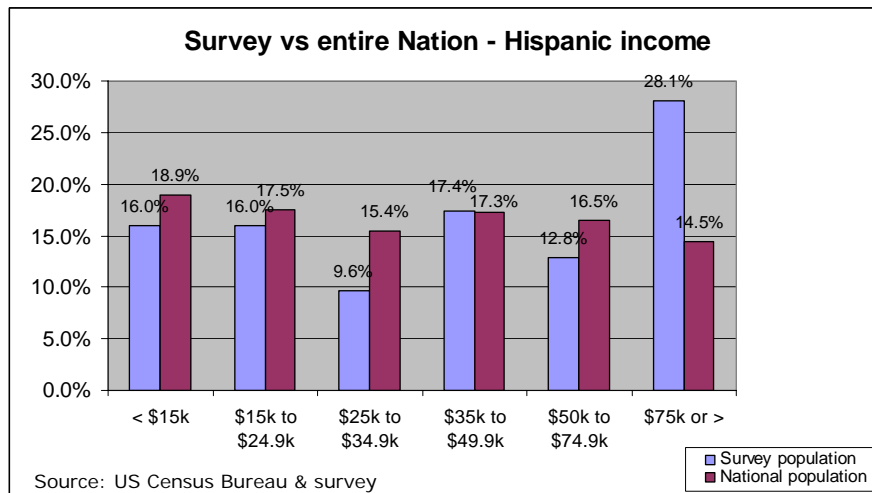
Hispanic households outshine non-Hispanics in yearly spending on clothes, apparel, and services. Hispanics spend more on their children in this category, mainly due to the increased number of children in a Hispanic household versus the national average. Footwear is the driver for this category. Hispanic households spend \$406 annually on footwear (1.2% of total Hispanic expenditures) compared to \$292 (0.7% of total expenditures) for non-Hispanics, a 39% difference. Other apparel and services are not as significant, with Hispanics spending \$241 (0.7% of total Hispanic expenditures), versus non-Hispanics spending \$261 (also 0.7% of total non-Hispanic expenditures).⁶

As stated earlier in the culture section, Hispanics make their buying decisions based on strong relationships and how well they know the product or brand they are buying. Providing samples of the product is a popular technique, giving Hispanics a better idea of the product and letting them try it out for themselves. Knowing the seller or positive word

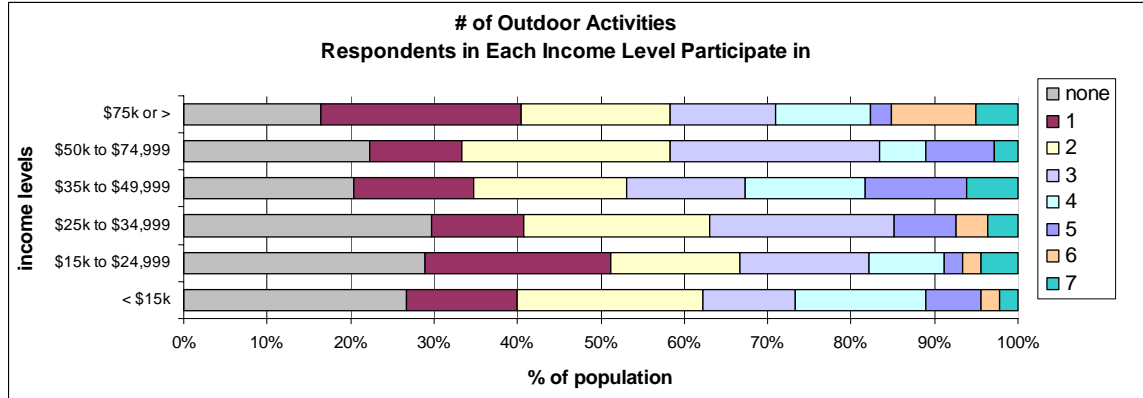
of mouth also impacts the Hispanic consumer. These are important characteristics to remember when reaching out to this segment, especially as the disposable income of Hispanics continues to increase and their buying power continues to rise.

Impact of Income on Outdoor Participation

The survey data was analyzed to determine if the gap in income levels and spending impacts Hispanic participation in outdoor activities. The chart below indicates there is a slight difference between the percentages of Hispanics in each income level of those surveyed versus the national Hispanic population. Average income for both populations is in the \$35k to \$45.9k range. Differences for the first five categories are 5% or less, but the largest difference is that the survey population has almost 13% more Hispanics in the greater than \$75k income range. This indicates that the survey respondents had a slightly higher income than the national average for Hispanics. However, dissecting the data more will show that this discrepancy is not a factor in the outcome of the data.



To determine if level of income was correlated with increased levels of participation in outdoor activities, we graphed how many activities each person currently participates in and what income bracket they fell into. Those participating in numerous activities (5, 6, 7 or more) came from different income ranges, suggesting there is not a drastic increase in participation levels for those who have a higher income, as seen in the chart below.



The survey data shows that the \$35k to \$49.9k income level has the highest average number of outdoor sports participated in as well as the highest average number of days per year for outdoor sports participation. Again, the data indicates that income level does not drastically impact participation.

We also compared participation in outdoor activities to other activities in which Hispanics participate. This included activities such as football, weightlifting, and basketball. The data continues to show, as seen in the chart to the right, that income is not a significant factor impacting participation in outdoor or other kinds of activities (with the exception of very low income individuals).

Income	Outdoor participation		Other participation	
	#	Avg day/yr	#	Avg day/week
< \$15k	3.09	31.8	1.33	1.81
\$15k to \$24,999	2.97	24.4	1.53	3.27
\$25k to \$34,999	2.95	26.8	1.63	4.96
\$35k to \$49,999	3.33	42.8	1.82	3.85
\$50k to \$74,999	2.86	33.8	1.94	4.38
\$75k or >	3.18	31.3	1.9	4.56

As already noted in the *Leisure Time* section, the number one reason for not participating was lack of leisure time. Almost 73% of the respondents stated that they would most likely or definitely participate more if they had additional leisure time. Broken down by income levels, 52% of those stating more time was a factor were from the \$75k plus income group and 49% of those stating more time was a factor were from the < \$15k income groups. This shows that regardless of income level, those with the highest and lowest levels of income believe leisure time is a constraint.

Lastly, income was not a major factor in determining the levels of interest in each outdoor activity, as illustrated in [Exhibit 10](#). This analysis was done for all outdoor activities, and levels of interest are fairly evenly distributed across all income brackets.

Recommendations

Although income does not currently appear to have a significant impact on the current level of outdoor activities for which Hispanics participate, as Hispanics start to increase their involvement this could become an issue. In order to minimize this impact, partnering with retailers to offer discounts would be a great way to increase Hispanic participation in initial or gateway activities. This would also play into their propensity for loyalty; by familiarizing Hispanics with retailers, venues, or activities they will be more likely to continue once they are more experienced with them.

In addition, conveying the value of outdoor activities to Hispanics will help them realize the benefits outweigh the monetary costs, potentially resulting in increased participation. Laying out the reasons and clarifying the benefits will help Hispanics feel more comfortable spending their money on something new.

Language

Language Segmentation

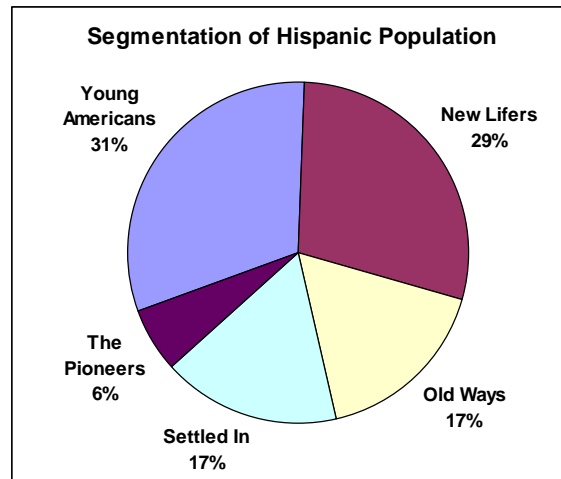
Language is a very important element to consider in the process of attracting Hispanics to outdoor activities and subsequently to outdoor retailers. A report presented by Scarborough Research²⁸ at the Hispanic Retail 360 Conference & Product Showcase in September 2005 states that there are generally five segments within the Hispanic population. The segments were listed as New Lifers, Old Ways, Settled In, The Pioneers, and Young Americans[§]. The table below shows characteristics of each segment:

[§] New Lifers= young (avg. 31 yrs), new to the U.S. Old Ways= middle-aged (avg. 54 yrs), least education. Settled In= Baby Boomer (avg. 43 yrs), highest income. The Pioneers= oldest (avg. 65 yrs), deep roots planted in Hispanic communities. Young Americans= youngest (avg. 26), all grown up American.

	New Lifers	Old Ways	Settled In	The Pioneers	Young Americans
Foreign Born	100%	100%	5%	0%	24%
Years in U.S.	8	24	30	N/A	23
Prefer Spanish	61%	61%	19%	21%	17%

New Lifers and Old Ways are 100% foreign born, predominantly speak Spanish and are less assimilated into American culture. On the contrary, the Settled In, Pioneers, and Young American segments are primarily U.S. born, prefer English, and are more assimilated into American culture. These five segments vary significantly when considering their acculturation levels and their dominant language; however, the unifying theme is that all segments speak some Spanish. Many Hispanics live in households that are multi-generational and may consist of one or more segments. Thus, activity leaders and marketers must decide the method they would like to use to relay their message.

Source: Emerging Latino Markets in the US



Use of Spanish

According to a Ketchum Global Research Network report in 2002, 59% of the Hispanic segment prefers to use Spanish in every situation, while 70% speak Spanish in their homes.²⁹ In terms of acculturation and language, Hispanics have mostly chosen to keep this part of their culture. As a result, promoters of outdoor activities may realize benefits in having a bilingual approach in attracting Hispanics.

The following examples illustrate some of the steps that outdoor industries have currently taken. The National Wildlife Federation’s Earth Tomorrow program targets inner-city kids in Houston, Atlanta, Detroit, and Seattle. The children fish, hike, or listen to talks on

endangered species.³⁰ However, to reach a broader segment, fundamental changes on the presentation of outdoor activities to Hispanics are necessary.

There have been improvements to the Applewhite Picnic Area in California's San Bernardino National forest. The presence of bilingual signs and hosts that speak Spanish has led to a record 80% of all visitors being of Hispanic heritage.³⁰ Vail Resorts has also recognized the importance of having hosts that speak the language of the customer and has set a goal of hiring a minimum of ten minority personnel into frontline positions (ski school, patrol, lift operations, mountain information) across each of the company's five resorts.³¹

A physical visit to the Angeles Forest also revealed bilingual signs, bilingual hosts, and some maps that were in Spanish. However, the official online site for the Angeles Forest where most information can be obtained about different activities including hiking, camping, and fishing was solely in English. This can be a major deterrent for Spanish-dominant Hispanics who, like most others, want to obtain critical information before taking their families on an excursion.

The aforementioned efforts to integrate the Spanish language at various national parks are steps in the right direction, but the reality is that these are the exception and not the rule. For example, during the winter season, there were advertisements being run on local English-language channels for outdoor activities at Big Bear Mountain, a ski area located outside of the Los Angeles metropolitan area in California. Similar advertisements were not being run on the Spanish-language stations, such as Univision and Telemundo. This is pertinent as a recent survey revealed that Hispanics found English advertisements 70% less effective than Spanish ads in terms of persuasion.³²

Retail Sector

This lack of attention to the language barrier can also be seen in the retail sector which would benefit from increased Hispanic participation in outdoor activities. A physical visit

to three top retailers, Patagonia, Recreational Equipment, Inc. (REI), and Big 5 Sporting Goods in three different geographical areas of Los Angeles yielded similar results.

Patagonia is a retailer of primarily environment-friendly activity clothing and accessories, located in an upscale area of Santa Monica, California. This location's signs, banners, and posters were offered in English and none of the employees spoke Spanish. However, the demographic of this town (87% non-Hispanic) may not mandate Spanish-language materials or speakers.

REI, a retailer of 'everything outdoors' is located on the border of Manhattan Beach (an upscale Los Angeles suburb) and Hawthorne (a lower to middle class suburb of Los Angeles). The location's signs, banners, and posters were also offered only in English and after inquiry, it was discovered that none of the employees spoke Spanish. In addition, at the entrance to the store there were free brochures which described the clinics available in January. They included introductions to ski/snowboard maintenance, basic bike maintenance, and volunteer requests for urban service projects. However, none of these brochures were available in Spanish. Despite the upscale zip code of the store, the town is adjacent to communities whose residents are primarily Hispanic (50%) and whose buying power is potentially being lost.

Big 5 Sporting Goods store, a retailer of general sporting goods, is located in a lower to middle-class area in Culver City, California in a primarily Hispanic and African-American community. The signs and posters at this location were also in English while one employee admitted to being able to speak a 'little Spanish.' At the cash register there were brochures/pamphlets advertising 'learn-to-ski packages' for the family that included equipment, lessons and lift tickets for as little as \$100. However, none of these brochures were provided in Spanish to cater to the local Spanish-speaking community. This trend was particularly alarming in this community which is 25% Hispanic.

A visit to the online sites of these retailers demonstrated similar observations regarding language as none of the websites were available in Spanish. By not making its website

available in Spanish, a firm may be missing 20% of all Internet users, considering half of all Hispanic-American Internet users are Spanish-language dominant. A study conducted by the Association of Hispanic Advertising Agencies states that the typical Hispanic-American Internet user is roughly 28 years old, slightly more likely to be male and unmarried.³³ This segment could be a prime target for these outdoor retailers.

Communication

Survey respondents revealed the method in which Hispanics receive information about outdoor activities. Only 9% stated they received information via direct mail. This is important as overall Hispanic households are 3.5 times more likely to respond to a direct mail solicitation than non-Hispanic households.³² In addition, only 10% said they received information via retail advertising, confirming the lack of targeted marketing observed in visits to outdoor retailers.

The importance of the Spanish language was also examined in the survey. When respondents were asked to give the reasons they do not participate in outdoor activities, only 8% responded that there is not enough information in Spanish. These results can be viewed in the survey data in the [Appendix](#). Only 3% responded that a tour guide or an instructor not speaking Spanish was a reason for their inactivity. Even more surprising, 86% of respondents who primarily speak Spanish at home did not think a lack of information in Spanish was a major reason for their reduced activity in the outdoors. Additionally, only 15% of respondents stated they would more likely or definitely participate in outdoor activities if more information was available in Spanish. Given the discrepancy between our survey results and the secondary data we looked for an explanation.

One reason for this discrepancy appears to be age. We looked at the responses of those who stated they would more likely or definitely participate in outdoor activities if more information was available in Spanish and found that in the group aged 45+ and above, 40% of respondents said language affected their behavior. The younger population, as

mentioned in the youth section, is more English dominant and therefore does not find information in Spanish as useful as other Hispanics.

Another reason for the discrepancy is that a majority of our survey respondents were either highly proficient or fluent in English (88%). Consequently, the importance of Spanish for this sample of survey respondents may be significantly less than for the general population.

Finally, there appears to be a disparity between stated intentions and actual intentions. The secondary research states that 70% of Hispanics prefer to speak Spanish in their homes. If Spanish is important in the home it is reasonable to believe it will be important for Hispanics outside the home as well.

Recommendations

We believe that outdoor organizations and retailers should embrace the Spanish language to show inclusion and engagement of Hispanics in outdoor activities. Also, using the Spanish language in signs and websites satisfies some of the personalization that Hispanics desire in their everyday lives.

More outdoor organizations should include bilingual signs and hire bilingual employees so that those Hispanics who mostly speak Spanish can feel comfortable when participating in activities. It is important that these organizations not only have bilingual references at their site locations, but also include these online. For example, the Angeles Forest in California may find an increase in visitors if there were to be an alternate Spanish-language website. In Los Angeles, where the population is 50% Hispanic, a bilingual website would be beneficial.

As stated earlier, there were several brochures or pamphlets offering first-time ski deals and seminars in ski/snowboard maintenance at visited retailers. Including some of these pamphlets in Spanish may attract otherwise indifferent Hispanics to the possibility of trying some activities. To gauge the increase in Hispanic participation from providing

Spanish reading materials, retailers can select a small test market and distribute information there before deciding to put the effort into a mass distribution of Spanish literature in multiple locations. To minimize further risk, retailers may choose to offer the bilingual option in certain test markets with a heavy Hispanic presence.

A slightly more expensive and long-term venture by retailers would be to develop Spanish-language websites in addition to their regular English sites. As stated previously, 50% of all Hispanic internet users are Spanish-dominant, so potential sales are being lost.

Another long-term option for retailers may be to develop direct mail pieces offering first-time hiking, biking or skiing packages to Hispanics. As stated previously, Hispanic youth are not attracted by direct mail pieces, but the older population is 3.5 times more likely to respond to a direct mail solicitation. As with the in-store pamphlets, this direct mail test can be done in select Hispanic markets to see whether there is a noticeable Hispanic response.

Other Barriers

In addition to the five main categories mentioned above, there were several other issues that stood out as barriers for Hispanic participation in outdoor activities. These were safety, accessibility, lack of equipment, and parental approval.

Safety

Several of our secondary resources stated that a deterrent to Hispanic outdoor participation may be personal safety. Some Hispanics live in low-income neighborhoods that tend to be more dangerous (i.e. crime, gangs, etc.) and thus spend a limited amount of time outdoors for recreation. Activities like jogging and walking alone would clearly be impacted by this issue. This issue was reiterated in our primary research tool where one respondent said that if he were able to trust his neighbors he would increase his outdoor participation.

Accessibility/Distance

Both primary and secondary resources found that a notable barrier was the lack of accessibility to outdoor activities. In the survey, it was found that 29% of respondents attributed their lack of outdoor engagement to the distance of these activities from their residences. Most Hispanics live in urban settings which are typically isolated from the suburban or rural locales of many outdoor activities such as rafting, skiing, and even camping.

Lack of Necessary Equipment

Hispanics may not have the necessary tools to participate in some outdoor activities. Our primary research revealed that 43% of respondents thought that their lack of participation in outdoor activities could be partially attributed to the absence of equipment. This may be attributed to the fact that Hispanics are not exposed to the presence of rental facilities or the equipment may be too expensive.

Parental Approval

As stated earlier, Hispanics are a close-knit, family-oriented group that maintains bonds beyond their immediate family. Mothers are very protective of their children and if they perceive a particular activity to be dangerous or too far away from home, they may not approve of them. In our primary research, some of the comments from young respondents included that their parents would not allow them to participate in certain activities.

Conclusion

In the near future, it is projected that Hispanics will represent almost one-quarter of all Americans. The sheer size and staggering growth rate of this population require that the outdoor industry make a dedicated effort toward engaging Hispanics and increasing participation levels. They are a unique population with many qualities and characteristics that are distinct from the traditional outdoor enthusiast and it is important that businesses and other interested parties treat them as such. Still, our primary and secondary research show they share many of the same core values that can lead to a positive and lasting relationship with the outdoors.

There are three primary areas to consider when promoting outdoor activities to the Hispanic population. First, Hispanics are constrained by the amount of leisure time available to them on a daily basis. As a result, promoting outdoor activities that require the least time commitment will be the most effective in attracting actual participants. Second, a strong commitment to their family and friends drives leisure activity decision making. Consequently, outdoor activities that can be enjoyed in groups will be more welcome than activities that require spending time away from friends and family. Finally, health is as much a concern to Hispanics as it is to the general American population. Accordingly, it is important to promote the health benefits that can be derived through outdoor activity participation. This is especially imperative when appealing to parents to promote outdoor activities to their children.

Raising awareness of outdoor activities fitting the Hispanic population is critical to increasing their participation levels. Without truly understanding what opportunities are available to them, Hispanics are destined to continue using their leisure time in an alternative fashion. As a result, it is critical to exploit the channels of communication that will yield the highest response. Unique to the Hispanic population is their use of Spanish as a primary or at least secondary language. While most Hispanics have become accustomed to mainstream America's use of English in most daily activities, reaching out to them in Spanish might be recognized as an attempt to relate to them on a more

personal level. Personalization of this sort could result in a greater and more passionate response, with more Hispanics enthusiastic about taking part in outdoor activities because they feel an individualized attempt was made to earn their consideration.

Our early hypothesis was that income might influence Hispanics' choice of activity and furthermore might even prevent Hispanics from participating in certain activities. Our findings, however, refute this hypothesis and show that income is generally not correlated with Hispanics participating in specific activities. Activities that are the most expensive are not skewed toward Hispanics in higher income brackets. Instead, it is more evenly distributed across all income levels. However, as Hispanics become more involved in more complex outdoor activities and begin to pursue non-gateway activities, income may become more of a factor in terms of equipment needed or accessibility to the venues.

Recommendations

The following section summarizes our main recommendations for getting Hispanics more involved in outdoor activities, from both a participation and marketing perspective.

1) Increase Awareness

- **Consider grass roots campaigns** – Team with local Hispanic community leaders and community organizations to profile mentors that support outdoor activities. This leverages the Hispanic loyalty and word-of-mouth factors.
- **Stress the health benefits**
 - **Target parents and children in an informational campaign** – Explain the current state of affairs of Hispanic health and how outdoor activities can help remedy and provide a fun, enjoyable way for youth to stay fit and healthy.
 - **Connect with community mentors** – Work with local policymakers, health educators, city planners, community members, and advocates to disseminate information on Hispanic obesity issues. For example, look to partner with *California Latino 5 a Day Campaign* and the *League of California Cities-Latino Caucus* who are responsible for the Latino Health Summit³⁴ to suggest outdoor activities as an alternative.
 - **Work with doctors to push outdoor activities** – Work with doctors that treat Hispanic patients to increase their knowledge of available outdoor activities. Providing pamphlets, magazines, and websites on outdoor activities will make doctors aware of other options available to recommend to patients for improving their health.
- **Get Hispanics to switch activities** – Substitute current physical activities with outdoor activities. This will expand Hispanics' knowledge of possible exercise options. For example, demonstrating how trail running is similar to running in a different environment should draw more interest. Given limited leisure hours, switching may be necessary to get Hispanics to participate.

- **Partner with community groups to introduce children to different outdoor activities** – Partnering with local churches, schools, and organizations to promote outdoor activities ties directly into an important aspect of Hispanics’ lives and also builds on established groups. This would entail taking small groups of children and/or adults to different venues for activities for learning and participation. This will not take time away from family or communities, but will add to it and also bring the health benefits of outdoor activities into the equation.
 - **After school programs**
 - **Church programs**
 - **Summer/weekend camps**
- **Partner with retailers to sponsors outings** – Retailers can provide in-store or on-site demonstrations (where possible) to increase awareness and knowledge of outdoor activities. Consider having instructors take groups out on day-trips or other short outings to practice or learn about a new outdoor activity. Fully funding or subsidizing a portion of the cost of the outing or equipment fees would alleviate much of the financial burden and greatly encourage participation.

2) Gateway activities

- **Encourage participation in gateway activities** – Current interest is already high for camping, fishing, hiking, biking, and trail running. Provide details on how to get more involved (i.e. specify locations where these activities can be performed, or requirements for equipment, etc.).
- **Stress activities that take less time** – Promote activities that require less of a time commitment. Biking, hiking, trail running, surfing, and fishing all can be done with relatively small amounts of time.
- **Stress group activities** – Most outdoor activities can be done in groups. This is well aligned with the Hispanic emphasis on family and friends. Consider leveraging other pre-existing groups where Hispanics congregate (i.e. church).
- **Build up loyalty and interest and then encourage movement beyond gateway activities** – Simply having Hispanics participate in outdoors activities will make them feel more comfortable in the environment and greater exposure to outdoor

activities will logically result in higher participation levels. Given the size and importance of the youth population, look to develop an early bond between youth and the outdoors.

3) Personalization

- **Reach out to Hispanics** – Demonstrate an attempt to reach Hispanics on a more personal level.
- **Use the Spanish language** – Offer materials related to outdoor activities in Spanish. Encourage national parks and other outdoor venues to provide Spanish signs or have Spanish language tours. However, a cost/benefit analysis should first be conducted to assess if the payback will be large enough to justify the investment.
 - **Signs** – Use of Spanish in retail stores and at outdoor facilities including campsites and hiking trails would be helpful
 - **Maps** – Located at outdoor facilities including campsites and hiking trails
 - **Website** – For outdoor organizations and long-term initiative for retailers
 - **Direct mail** – To capture the ‘new lifers’ segment (does not include youth) who still speak Spanish predominately and still read direct mail solicitations
 - **Brochures** – In retail locations pertaining to outdoor facilities and classes for activities
- **Emphasize commitment to Hispanic segment**
 - **Hiring practices** – Retailers should hire Hispanic employees and/or Spanish speaking individuals in areas with high Hispanic populations. This demonstrates a commitment to provide Hispanic consumers with services catered to their unique needs.
 - **Recruitment** – Consider recruiting influential businessmen and women to the board of directors. Retailers can benefit from a Hispanic perspective within the company. This also goes a long way to establish good public relations with the Hispanic community and provide a mentor for the community.

4) Other

- **Increase accessibility** – Identify venues where outdoor activities can be done in the evenings and do not require a long journey away from home.
 - **Transportation to venues** – Provide means of access to venues.
 - **More local venues** – Increase number of local venues.
- **Leverage the Hispanic population’s size and enormous buying power** – Critical when communicating the need to cater to Hispanics to retailers and other organizations. The largest growing minority group in the U.S. representing nearly \$750 billion in buying power cannot be ignored.
 - **Outdoor activities should be presented as an alternative form of family entertainment** – Hispanics spend more on entertainment and children than Non-Hispanics.
 - **Target Hispanics for sales of athletic footwear** – Hispanic households annually spend 39% more in absolute dollars than do non-Hispanics.
- **Turn-offs for Hispanics** – What *NOT* to do when reaching out.
 - **Treat Hispanics as a homogenous group** – Be aware of cultural differences between the backgrounds of Hispanics and how it impacts their responses.
 - **Assume all demographics respond similarly**
 - **Younger** – Responds to more on-line, techie information, and English; are more acculturated to mainstream American customs and culture.
 - **Older** – Responds to more direct mail and Spanish.
 - **Assume all Hispanics are low-income and cannot afford to participate in and purchase outdoor related products** – Again, the Hispanic population in the U.S. has enormous buying power, and is steadily increasing its income levels.

Exhibits

Exhibit 1: Map of Survey Respondents

Survey Respondents

State	# surveyed	% of survey
CA	218	71.9%
TX	57	18.8%
CO	10	3.3%
AZ	6	2.0%
IL	3	1.0%
FL	2	0.7%
WA	2	0.7%
NJ	1	0.3%
MA	1	0.3%
NC	1	0.3%
MD	1	0.3%
<u>KS</u>	<u>1</u>	<u>0.3%</u>
Total	303	100.0%

Hispanic Population

Rank	State	%
1	CA	30.1%
2	TX	18.8%
3	FL	8.0%
4	NY	7.4%
5	IL	4.3%

Source: US Census Bureau 2003

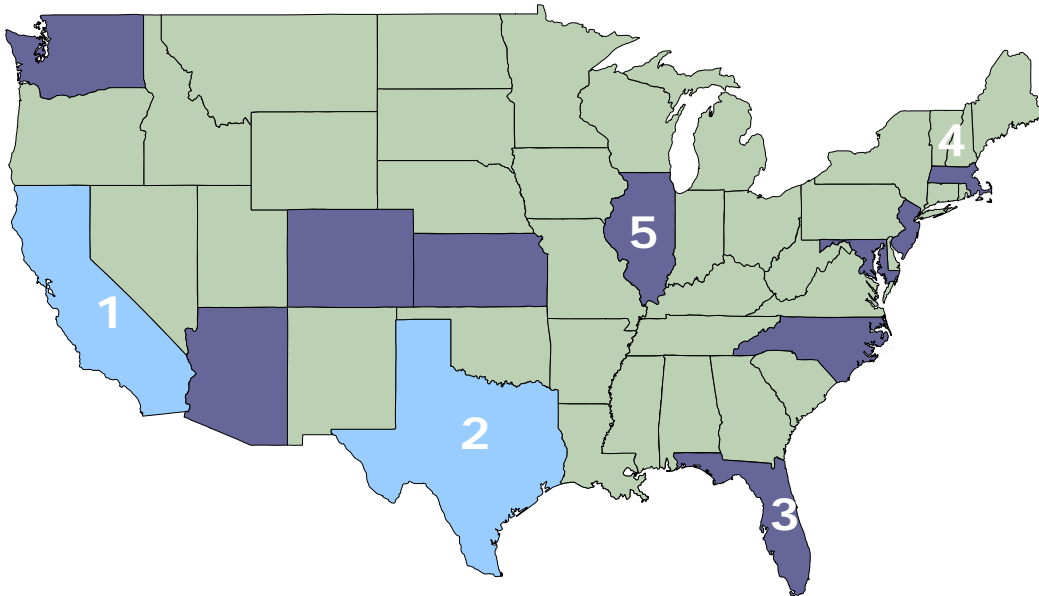


Exhibit 2: Youth Perceptions of Outdoor Activities – Survey

	Number of Youth Perceiving Outdoor Activities (40)	
		% of Youth
Fun	38	95%
Exciting	29	73%
Relaxing	27	68%
Healthy	24	60%
Peaceful	24	60%
Social	21	53%
Family oriented	16	40%
Challenging	15	38%
Expensive	7	18%
Inconvenient	2	5%
Strenuous	1	3%

Exhibit 3: Population by Age

Under-18 Population by Selected Age Group, Hispanics vs. Other Population Groups, July 2002 (in thousands)

Age Group	All People		Hispanics		Non-Hispanics	
	#	% of Total Population	#	% of Total Population	#	% of Total Population
0 to 4	19,609.1	6.8	3,961.7	10.2	15,647.5	6.3
5 to 13	36,920.8	12.8	6,610.8	17.1	30,309.9	12.1
14 to 17	16,364.6	5.7	2,552.2	6.6	13,812.4	5.5
Total 0 -17	72,894.5	25.3	13,124.7	33.9	59,769.8	23.9
Total Population	288,368.7	100.00%	38,761.4	100.00%	249,607.3	100.00%

Source: U.S. Census Bureau; Packaged Facts

Exhibit 4: Population Growth by Age

Population Growth, Hispanics vs. Non-Hispanics under 18 Years of Age, 1990 vs. 2002 (in thousands)

Age Group	Total Population Growth	Hispanics		Non-Hispanic	
		Population Growth	% of Total Growth In Age Group	Population Growth	% of Total Growth In Age Group
0 to 4	1,345	1,632	121.3	-287	(21.3)
5 to 13	4,912	2,833	57.7	2,079	42.3
14 to 17	3,030	1,411	46.7	1,619	53.4
Total	9,287	5,876	63.3%	3,411	36.7%

Source: U.S. Census Bureau; Packaged Facts

Exhibit 5: Spoken Language by Age

Bilingual and Native English-speaking Hispanics, by Age Group, 2000 (in thousands)	Age Group					
	5-17		18-64		65+	
	#	%	#	%	#	%
Category						
Bilingual and native English speakers	7,557	87.9	15,056	70.8	1,024	60.2
Speak Spanish at home and speak English "well" or "very well"	5,792	67.4	13,377	62.9	1,000	58.8
Speak only English at home	1,765	20.5	1,679	7.9	24	1.4
Speak English "not well" or "not at all"	1,038	12.1	6,217	29.2	677	39.8
Total	8,595	100%	21,273	100%	1,701	100%

Source: The US Hispanic Market

Exhibit 6: Interest Level (Youth) – Very High, High & Medium – Survey

Activity	Unfamiliar with Activity	Very Low Interest	Low Interest	Medium Interest	High Interest	Very High Interest	VH + H + M Interest
Camping	10%	8%	8%	38%	23%	15%	75%
Hiking	23%	15%	8%	40%	8%	8%	55%
Biking	13%	18%	20%	15%	28%	8%	50%
RockClimbing	20%	18%	13%	28%	15%	8%	50%
Snowboarding	30%	13%	13%	18%	10%	18%	45%
TrailRunning	18%	28%	18%	15%	18%	5%	38%
Canoeing	40%	18%	8%	18%	10%	8%	35%
Rafting	43%	13%	13%	15%	10%	8%	33%
Backpacking	23%	30%	15%	20%	5%	8%	33%
Surfing	28%	25%	18%	10%	8%	13%	30%
Fishing	28%	25%	20%	20%	5%	3%	28%
Downhill Skiing	40%	23%	13%	5%	8%	13%	25%
Kayaking	43%	18%	15%	10%	8%	8%	25%
Cross-Country Skiing	43%	23%	15%	10%	10%		20%
Snowshoeing	53%	18%	15%	8%	5%	3%	15%
Birdwatching	40%	33%	15%	5%	5%	3%	13%

Exhibit 7: Days Participated in Past Year (Youth) – Survey

Activity	Entire Youth Population (Only)							2+ days
	0 days	1 day	2-4 days	5-10 days	11-30 days	31-74 days	75+ days	
Camping	60%	5%	23%	13%				35%
Biking	50%	18%	18%	5%		5%	3%	33%
TrailRunning	70%	10%	3%	5%		10%		20%
Hiking	65%	18%	10%	3%				18%
Backpacking	83%	8%	10%					10%
Fishing	80%	13%	3%	5%				8%
Snowboarding	88%	8%	3%	3%				5%
Surfing	95%		5%					5%
Birdwatching	85%	13%	3%					3%
Downhill Skiing	95%	3%	3%					3%
RockClimbing	80%	18%		3%				3%
Canoeing	95%	5%						0%
Cross-Country Skiing	98%	3%						0%
Kayaking	95%	5%						0%
Rafting	95%	5%						0%
Snowshoeing	100%							0%

Exhibit 8: How Youth Find Information on Leisure – Survey

	Number of Youth Using Source for Info	% of Youth Using Source for Info
Friends/Family	31	78%
School	21	53%
Television	19	48%
Internet	16	40%
Radio	16	40%
Organizations/Clubs/Recreation Centers	11	28%
Newspaper/Magazine	7	18%
Retail advertising	1	3%
Church	1	3%
Direct mail (e.g. brochures)	0	0%

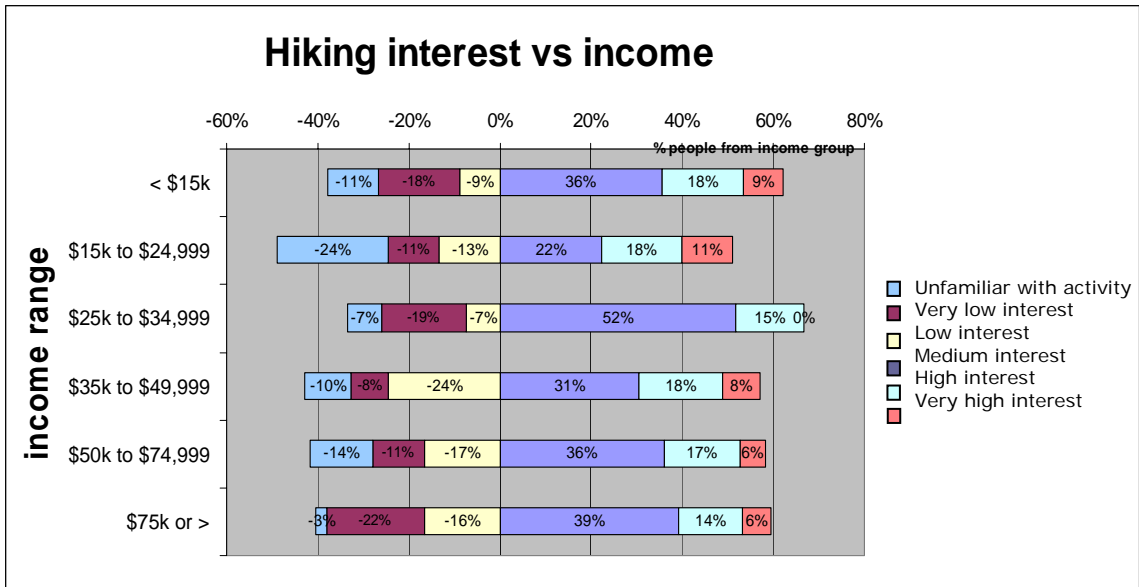
Exhibit 9: Income of Families with Children

2002 Income of Families with Children

<u>Income</u>	<u>Hispanics</u>		<u>Non-Hispanics</u>	
under 10k	1480	11.5%	6265	8.7%
10k to 19,999	2223	17.3%	7241	10.0%
20k to 29,999	2115	16.5%	8103	11.2%
30k to 39,999	2006	15.7%	7953	11.0%
40k to 49,999	1315	10.3%	7187	9.9%
50k to 74,999	1969	15.4%	14414	19.9%
75k and over	<u>1709</u>	13.3%	<u>21157</u>	29.3%
Total	12817		72320	

Source: The US Hispanic Market

Exhibit 10: Interest of Outdoor Activities vs. Income – Survey



Appendix

Secondary Research Worksheet (Sample)

ID	Publication Name	Publisher/Source	Source Type	Source Location	Original Source	Publication Date	Pages/Length	Types of Media	Research Type	Search Terms	Category/Expertise
	article / media title	eMarketer, FACTIVA, Businessweek, WSJ, Hispanic.com, etc.	database, webpage, magazine, newspaper	library, hardcopy, web address	"original" if created by published source, else other source	date	# of pages, other measure	article, chart, data	primary, secondary	"Hispanic & outdoors", "Latino & recreation"	family, culture, health, religion, income, language, leisure hours, geographic proximity
7	Reaching the Hispanic Market	google search	internet	www.waza.org/Publications/200		Oct-03	2	article	secondary	Marketing & Advertising to Hispanics	marketing, language
8	Today's Hispanic Consumer	google search	internet	www.tia.org/uploads/casestud		4/27/2005	5	article	secondary	Marketing & Advertising to Hispanics	marketing, culture, language
9	New Approaches to Marketing to Hispanics	google search	internet	http://www.imakenews.com/ephanthrop/e			4	article	secondary	Marketing & Advertising to Hispanics	marketing, culture, language
10	Who is the Hispanic Consumer	google search	internet	http://www.ketchum.com/DisplayWebPage/0			3	article	secondary	Marketing & Advertising to Hispanics	marketing, culture, language
11	Five Things About the Hispanic market	google search	internet	http://www.refresher.com/garcia2.html			4	article	secondary	Marketing & Advertising to Hispanics	marketing, culture, language
12	Can Your Customers Shop in Spanish	google search	internet	http://www.imediconnection.com		4/22/2004	3	article	secondary	Marketing & Advertising to Hispanics	culture, language
13	Reaching Hispanics Online	google search	internet	http://www.imediconnection.com		9/8/2005	2	article	secondary	Marketing & Advertising to Hispanics	culture
14	Riding the Rising Wave of Hispanic Buying Power	google search	internet	http://www.firbatlanta.org/inv		First quarter 2005	6	article	secondary	Marketing & Advertising to Hispanics	income, culture
15	Dealers Find Key to Hispanic Sales Success Involves Immersion in Culture	google search	internet	http://www.autonemarketing.com/ar/news/mag/story/ht				article	secondary	Marketing & Advertising to Hispanics	language, culture, marketing
16	The New Majority Marketing to Minorities	google search	internet	http://www.sba.gov/gopher/Business-Develop			10	article	secondary	Marketing & Advertising to Hispanics	marketing, culture, language
17	Reaching out to the nation's growing Hispanic market	google search	internet	http://www.responsemag.com/responsemag/a			3	article	secondary	Marketing & Advertising to Hispanics	marketing, language

Outdoor Activity Participation Survey

1) Who do you MOST prefer to be with when participating in the following leisure activities?

	By Myself	With Family	With Friends	N/A
Watching TV/movies at home	48	188	60	7
Going to a movie	6	113	180	4
Shopping	87	107	105	4
Going to the park	12	175	99	17
Going to church	14	224	9	56
Playing video games	48	56	89	110
Reading	264	19	3	17
Exercising	135	41	115	12
Playing sports	12	63	199	29

	By Myself	With Family	With Friends	N/A
Watching TV/movies at home	16%	62%	20%	2%
Going to a movie	2%	37%	59%	1%
Shopping	29%	35%	35%	1%
Going to the park	4%	58%	33%	6%
Going to church	5%	74%	3%	18%
Playing video games	16%	18%	29%	36%
Reading	87%	6%	1%	6%
Exercising	45%	14%	38%	4%
Playing sports	4%	21%	66%	10%

2) How much money do you spend on leisure activities in a week?

Less than \$10	\$10 - \$19	\$20 - \$49	\$50 - \$99	\$100 - \$249	\$250 or more
34	45	118	66	32	8

Less than \$10	\$10 - \$19	\$20 - \$49	\$50 - \$99	\$100 - \$249	\$250 or more
11%	15%	39%	22%	11%	3%

3) How do you find information on leisure activities? (Check all that apply)

Internet	182
Friends/Family	235
Newspaper/Magazine	107
Direct mail (e.g. brochures)	28
Television	148
Radio	107
Organizations/Clubs/Recreation Centers	81
Retail advertising	30
School	106
Other, Please Specify	3

Internet	60%
Friends/Family	78%
Newspaper/Magazine	35%
Direct mail (e.g. brochures)	9%
Television	49%
Radio	35%
Organizations/Clubs/Recreation Centers	27%
Retail advertising	10%
School	35%
Other, Please Specify	1%

4) What kinds of physical activities do you currently participate in? (Check all that apply)

Running / jogging	146
Bicycling (street or mountain)	57
Weightlifting / gym	70
Aerobics	57
Dancing	57
Swimming	53
Skateboarding	30
Other, Please Specify Team or Individual Sports	73

Running / jogging	48%
Bicycling (street or mountain)	19%
Weightlifting / gym	23%
Aerobics	19%
Dancing	19%
Swimming	17%
Skateboarding	10%
Other, Please Specify Team or Individual Sports	24%

5) How many hours, on average, do you participate in physical activity each week?

0 hours	1-4 hours	5-9 hours	10-14 hours	15 hours or more
17	184	86	14	2

0 hours	1-4 hours	5-9 hours	10-14 hours	15 hours or more
6%	61%	28%	5%	1%

6) Mark your level of interest for each of the following activities:

	Unfamiliar with activity	Very low interest	Low interest	Medium interest	High interest	Very high interest
Hiking	37	47	45	103	47	24
Camping	24	56	45	83	68	27
Rock climbing	78	82	63	54	20	6
Backpacking	50	79	49	73	30	22
Trail running	44	80	60	66	32	21
Biking	24	40	55	104	56	24
Surfing	85	91	50	47	17	13
Fishing	63	82	52	58	31	17
Rafting	93	56	45	57	37	15
Canoeing	95	69	51	54	22	12
Kayaking	93	67	52	46	30	15
Bird watching	120	109	45	14	11	4
Downhill skiing	105	71	38	41	29	19
Cross-country skiing	123	79	52	35	12	2
Snowboarding	90	70	41	48	31	23
Snowshoeing	139	81	39	31	8	5

	Unfamiliar with activity	Very low interest	Low interest	Medium interest	High interest	Very high interest
Hiking	12%	16%	15%	34%	16%	8%
Camping	8%	18%	15%	27%	22%	9%
Rock climbing	26%	27%	21%	18%	7%	2%
Backpacking	17%	26%	16%	24%	10%	7%
Trail running	15%	26%	20%	22%	11%	7%
Biking	8%	13%	18%	34%	18%	8%
Surfing	28%	30%	17%	16%	6%	4%
Fishing	21%	27%	17%	19%	10%	6%
Rafting	31%	18%	15%	19%	12%	5%
Canoeing	31%	23%	17%	18%	7%	4%
Kayaking	31%	22%	17%	15%	10%	5%
Bird watching	40%	36%	15%	5%	4%	1%
Downhill skiing	35%	23%	13%	14%	10%	6%
Cross-country skiing	41%	26%	17%	12%	4%	1%
Snowboarding	30%	23%	14%	16%	10%	8%
Snowshoeing	46%	27%	13%	10%	3%	2%

7) How many days have you participated in each of the following activities within the past year?

	0 days	1 day	2-4 days	5-10 days	11-30 days	31-74 days	75+ days
Hiking	152	42	54	34	14	4	3
Camping	167	25	70	30	7	3	1
Rock climbing	261	28	8	5	0	0	1
Backpacking	225	30	26	11	10	1	0
Trail running	180	24	30	26	21	9	13
Biking	130	35	46	40	24	16	12
Surfing	268	14	13	5	2	1	0
Fishing	222	37	18	15	6	4	1
Rafting	270	19	9	5	0	0	0
Canoeing	276	18	8	0	1	0	0
Kayaking	267	19	12	3	0	1	1
Bird watching	269	23	8	1	2	0	0
Downhill skiing	250	26	14	11	2	0	0
Cross-country skiing	286	13	1	3	0	0	0
Snowboarding	251	26	12	8	4	1	1
Snowshoeing	280	16	4	3	0	0	0

	0 days	1 day	2-4 days	5-10 days	11-30 days	31-74 days	75+ days
Hiking	50%	14%	18%	11%	5%	1%	1%
Camping	55%	8%	23%	10%	2%	1%	0%
Rock climbing	86%	9%	3%	2%	0%	0%	0%
Backpacking	74%	10%	9%	4%	3%	0%	0%
Trail running	59%	8%	10%	9%	7%	3%	4%
Biking	43%	12%	15%	13%	8%	5%	4%
Surfing	88%	5%	4%	2%	1%	0%	0%
Fishing	73%	12%	6%	5%	2%	1%	0%
Rafting	89%	6%	3%	2%	0%	0%	0%
Canoeing	91%	6%	3%	0%	0%	0%	0%
Kayaking	88%	6%	4%	1%	0%	0%	0%
Bird watching	89%	8%	3%	0%	1%	0%	0%
Downhill skiing	83%	9%	5%	4%	1%	0%	0%
Cross-country skiing	94%	4%	0%	1%	0%	0%	0%
Snowboarding	83%	9%	4%	3%	1%	0%	0%
Snowshoeing	92%	5%	1%	1%	0%	0%	0%

8) Please RANK who you would most like to be with when you participate in outdoor activities: (1=Favorite, 6=Least Favorite)

	1	2	3	4	5	6
My entire family	97	51	33	57	29	36
A few close family members	36	101	68	51	31	16
Large group of friends	34	49	88	76	42	14
Small group of friends	80	40	71	70	27	15
People I don't know	23	23	23	22	98	114
Alone	33	39	20	27	76	108

	1	2	3	4	5	6
My entire family	32%	17%	11%	19%	10%	12%
A few close family members	12%	33%	22%	17%	10%	5%
Large group of friends	11%	16%	29%	25%	14%	5%
Small group of friends	26%	13%	23%	23%	9%	5%
People I don't know	8%	8%	8%	7%	32%	38%
Alone	11%	13%	7%	9%	25%	36%

9) Outdoor activities are: (check all that apply)

Fun	271
Relaxing	222
Challenging	126
Healthy	249
Expensive	58
Social	212
Strenuous	49
Peaceful	156
Family oriented	138
Inconvenient	20
Exciting	186

Fun	89%
Relaxing	73%
Challenging	42%
Healthy	82%
Expensive	19%
Social	70%
Strenuous	16%
Peaceful	51%
Family oriented	46%
Inconvenient	7%
Exciting	61%

10) Why don't you participate in outdoor activities? (Check all that apply)

I do not have the necessary equipment	130
Activities are too expensive	92
Limited interest amongst family and friends	90
Not enough time	204
Activities are too far from where I live	87
Activities are too dangerous	25
Activities are too physically demanding	21
Not enough information available in Spanish	24
Tour guides/instructors don't speak Spanish	10
I'd rather spend time doing something else	53
I don't like to be exposed to weather	16
Other, Please Specify	23

I do not have the necessary equipment	43%
Activities are too expensive	30%
Limited interest amongst family and friends	30%
Not enough time	67%
Activities are too far from where I live	29%
Activities are too dangerous	8%
Activities are too physically demanding	7%
Not enough information available in Spanish	8%
Tour guides/instructors don't speak Spanish	3%
I'd rather spend time doing something else	17%
I don't like to be exposed to weather	5%
Other, Please Specify	8%

11) What would make you more likely to participate in outdoor activities? (Check once in each row)

	Not at all	Probably not	Maybe	Most likely	Definitely
More leisure time available	16	20	54	79	134
Higher income and/or less expensive	32	35	79	87	70
Higher interest among family and/or friends	28	28	74	100	73
More information available in Spanish	171	43	43	31	15
More/better health benefits	81	46	72	48	56

	Not at all	Probably not	Maybe	Most likely	Definitely
More leisure time available	5%	7%	18%	26%	44%
Higher income and/or less expensive	11%	12%	26%	29%	23%
Higher interest among family and/or friends	9%	9%	24%	33%	24%
More information available in Spanish	56%	14%	14%	10%	5%
More/better health benefits	27%	15%	24%	16%	18%

12) Do you have a child/children between the ages of 6-18?

Yes	No
53	250

Yes	No
17%	83%

13) What kinds of physical activities does your child/children currently participate in? (Check all that apply)

Running / jogging	20
Bicycling (street or mountain)	20
Weightlifting / gym	9
Aerobics	10
Dancing	10
Swimming	8
Skateboarding	15
Other, Please Specify Team or Individual Sports	21

Running / jogging	38%
Bicycling (street or mountain)	38%
Weightlifting / gym	17%
Aerobics	19%
Dancing	19%
Swimming	15%
Skateboarding	28%
Other, Please Specify Team or Individual Sports	40%

14) How many days has your child/children participated in each of the following activities within the past year?

	0 days	1 day	2-4 days	5-10 days	11-30 days	31-74 days	75+ days
Hiking	37	7	6	2	1	0	0
Camping	31	1	10	7	2	2	0
Rock climbing	46	3	4	0	0	0	0
Backpacking	45	2	2	3	1	0	0
Trail running	36	9	4	3	0	1	0
Biking	21	2	9	5	4	6	6
Surfing	49	0	3	0	1	0	0
Fishing	35	3	7	3	2	3	0
Rafting	49	2	2	0	0	0	0
Canoeing	46	3	4	0	0	0	0
Kayaking	49	2	2	0	0	0	0
Bird watching	45	4	1	3	0	0	0
Downhill skiing	46	4	3	0	0	0	0
Cross-country skiing	50	2	1	0	0	0	0
Snowboarding	49	3	1	0	0	0	0
Snowshoeing	50	3	0	0	0	0	0

	0 days	1 day	2-4 days	5-10 days	11-30 days	31-74 days	75+ days
Hiking	70%	13%	11%	4%	2%	0%	0%
Camping	58%	2%	19%	13%	4%	4%	0%
Rock climbing	87%	6%	8%	0%	0%	0%	0%
Backpacking	85%	4%	4%	6%	2%	0%	0%
Trail running	68%	17%	8%	6%	0%	2%	0%
Biking	40%	4%	17%	9%	8%	11%	11%
Surfing	92%	0%	6%	0%	2%	0%	0%
Fishing	66%	6%	13%	6%	4%	6%	0%
Rafting	92%	4%	4%	0%	0%	0%	0%
Canoeing	87%	6%	8%	0%	0%	0%	0%
Kayaking	92%	4%	4%	0%	0%	0%	0%
Bird watching	85%	8%	2%	6%	0%	0%	0%
Downhill skiing	87%	8%	6%	0%	0%	0%	0%
Cross-country skiing	94%	4%	2%	0%	0%	0%	0%
Snowboarding	92%	6%	2%	0%	0%	0%	0%
Snowshoeing	94%	6%	0%	0%	0%	0%	0%

15) How well do you speak the following languages?

	I do not speak this language	Low proficiency	Medium proficiency	High proficiency	I am fluent
English	2	7	28	37	229
Spanish	10	28	39	50	176

	I do not speak this language	Low proficiency	Medium proficiency	High proficiency	I am fluent
English	1%	2%	9%	12%	76%
Spanish	3%	9%	13%	17%	58%

16) What is the primary language spoken in your home?

English	Spanish	Other, Please Specify
128	161	14

English	Spanish	Other, Please Specify
42%	53%	5%

17) Where were you, your parents, and your grandparents born? (Check once in each row)

	Born in the U.S.	Not born in the U.S.
Myself	189	114
Father	69	234
Mother	72	231
Grandfather - Father's side	43	260
Grandmother - Father's side	48	255
Grandfather - Mother's side	43	260
Grandmother - Mother's side	45	258

	Born in the U.S.	Not born in the U.S.
Myself	62%	38%
Father	23%	77%
Mother	24%	76%
Grandfather - Father's side	14%	86%
Grandmother - Father's side	16%	84%
Grandfather - Mother's side	14%	86%
Grandmother - Mother's side	15%	85%

18) How many people live in your household including yourself?

1	2	3	4	5	6 or more
25	73	62	48	49	46
1	2	3	4	5	6 or more
8%	24%	20%	16%	16%	15%

19) How old are you?

Under 13	13-17	18-24	25-29	30-34	35-44	45-54	55+
1	39	81	79	46	35	15	7
Under 13	13-17	18-24	25-29	30-34	35-44	45-54	55+
0%	13%	27%	26%	15%	12%	5%	2%

20) What is your household income?

Less than \$15,000	\$15,000 to \$24,999	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 or more	Preferred not to answer
45	45	27	49	36	79	22
Less than \$15,000	\$15,000 to \$24,999	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 or more	Preferred not to answer
15%	15%	9%	16%	12%	26%	7%

22) Are you male or female?

Male	Female
94	186
Male	Female
34%	66%

23) What state do you live in?

AZ	CA	CO	FL	IL	KS	MA	MD	NC	NJ	TX	WA
6	218	10	2	3	1	1	1	1	1	57	2
AZ	CA	CO	FL	IL	KS	MA	MD	NC	NJ	TX	WA
2%	72%	3%	1%	1%	0%	0%	0%	0%	0%	19%	1%

An Outdoor Case Study

Outreaching to diverse communities: The Hispanic community

by **David Lira Leveron**³⁵

It's a summer Monday morning--a school bus leaves one of the Union League Boys and Girls Clubs (ULBGC) carrying eighteen boys and twenty girls from the Pilsen neighborhood in Chicago. Behind, a handful of parents wave goodbye to their most precious possessions, their children. Some parents and children alike show the same signs of uncertainty--fear and sometimes even tears. These children are on their way to two weeks of summer camp, but for many parents in this heavily Hispanic neighborhood that is a frightful thought.

Across the city, the same ritual takes place at the other three Boys and Girls Clubs operated by the Union League Boys and Girls Clubs organization, which operates four boys and girls clubs and a camp. Indeed, every other Monday--from mid-June through mid-August--four bus loads of children leave the city to experience summer camp. During the summer of 2003, almost half of them went to camp for the very first time.

Sixty-five miles north of Chicago, just across the border between Illinois and Wisconsin in Salem, Wisconsin, about fifty summer camp staff await the arrival of the campers. At around 10:30 a.m., one hundred and thirty-six campers arrive. Their laughs, screams, quarrels, excitement, and uncertainty, pretty much define what the following two weeks will be like. As they run, play, laugh, and enjoy themselves, socio-political circumstances unravel around their own existence in a country that many of them call their own and that for many others is a strange land where their parents brought them to find opportunities for a better life. However, at this time in their short lives all they want is just to have a little fun.

Union League Boys and Girls Clubs were founded in 1919--the first boys and girls club opened its doors in 1920, and the camp was purchased and began operations in 1924. Since the 1920s, Chicago neighborhoods have changed drastically in their ethnic, economic, and socio-political composition. All four boys and girls clubs are now operating in neighborhoods with heavy concentrations of Latino/Hispanic ethnic groups--followed by African Americans and a handful of Eastern Europeans.

The Union League Boys and Girls Clubs Camp serves 136 campers every two weeks, from six through thirteen years of age. Seventy-two are girls and sixty-four are boys. Last year close to 65 percent were of Hispanic background, about 30 percent African American, and close to 5 percent White. These numbers reflect pretty much today's boys and girls clubs membership. However, it wasn't always like this. In 1994, numbers were very different--approximately 60 percent of the campers were African Americans, 25 percent Hispanics, and about 15 percent White. Ten years ago, most of the campers were coming from all over the city and suburbs and only a handful from the neighborhoods where the boys and girls clubs operated.

The Union League Boys and Girls Clubs' philosophy states clearly that camp is an extension of the clubs and that camp services and programs must closely reflect the philosophies, approaches, and services of the boys and girls clubs. In 1994, when an assessment of services was conducted, it became obvious that by serving almost 70 percent of children from areas outside of the clubs' service areas, the boys and girls clubs camp was not accomplishing its mission as stated in the organizational philosophy.

Changes had to be made, but how? After all, the ethnic composition of the areas served by the clubs is heavily Hispanic, and summer camp is not part of the Hispanic culture. Many Hispanic parents to this date are still adamantly opposed to sending their children away for two weeks, and even a greater number of Hispanic kids really don't want to change the comfort zone of their homes for the uncertainty of two weeks away from their families.

The Strategy

Adjusting to change is difficult. The strategy implemented to make sure that the camp became an extension of the boys and girls clubs was without doubt a challenging and painful one. And, at the same time a success story. Hispanic parents in the neighborhoods were not going to change their minds just because the boys and girls clubs decided to change their outreach strategies and serve more kids from the neighborhoods.

The first step was to make it economically appealing.

Children could attend a free two-week session sponsored by the ULBGC organization. The requirements were that they had to become members of the boys and girls clubs, live within the clubs' service areas, or attend one of the partner schools in the clubs' service area. To make sure that the transition didn't affect former campers who lived outside the clubs' service areas, these former campers were asked to pay a minimal fee. However, all new campers coming from areas outside the clubs' service areas had to pay the whole cost of a two-week session, which at the time was \$365. At the present time, parents are still paying a minimal fee of \$25 per child to attend the camp and \$200 if the camper wants to go back for a second session. Because of our outreach strategies, we discourage campers to attend a second session to allow more youth to live the camp experience.

The second step was to make the program trustworthy.

Through all my experience working with the Hispanic community, I have learned that it takes ten satisfied parents to convince one doubtful parent to finally send his/her children to camp. At the same time, it takes one unsatisfied parent to convince ten parents not to send their kids to camp. This is probably true with all camps--however, it's a fact of life in our neighborhoods. Developing a trustworthy parent/camp partnership is a crucial element in any outreach strategy. Having someone of Hispanic background in the administrative team is definitely beneficial.

Since 1994, many counselors, unit leaders, and program directors have been recruited from the same neighborhoods as the ones in which our campers live. Many members of the staff are transfers from the local boys and girls clubs--giving the parents the assurance that their children are with people they know and trust. Many others are former campers who come back as junior staff, counselors, and even administrative team members.

Additionally, in order to establish the key element of trust, we made camp more parent friendly--not just to satisfy parents as customers in a business setting, but rather to make them feel part of the camp and to assure them that they are in control when it comes to the lives of their children. At the Union League Boys and Girls Clubs Camp, parents are welcomed to visit their children any day and at any time. If parents can't come to the camp, they can talk to their children on the phone during mealtimes--and in extreme cases--the camp will provide transportation for parents who wish to come to visit their children and don't have the means to do it. This approach has definitely helped the camp develop an environment of parent trust for the camp.

The third step is to make the camp program worthwhile.

For many people, Hispanics included, summer camp is not a part of their survival priorities--especially people who live in the inner city. If parents lack the knowledge of the importance of the camp experience in the development of young people, most likely they will not make an effort to explore camp opportunities and options.

This proved to be true in all the neighborhoods where our boys and girls clubs operated. Many people in our communities who send their children to camp have done so because of their own economic situation--sacrificing their own customs because camp is a cheap, yet safe and fun way to save on child care. The parents discover, however, that the rewards are incredible.

Through the years, these campers who started to go to camp as a necessity developed into wholesome youth whose parents were willing to pay higher fees so their children could continue benefiting from the camp experience. The most important part of our approach was the word-of-mouth effect since Hispanic communities share much of the consumer information from person to person.

The fourth step--making it fun--is intrinsically tied to the third step.

Making it FUN is one of the most essential parts of our program, because while the campers are having fun, we can make sure they are being helped in their growth and development. Campers keep coming back to camp because it's fun--that is their bottom line.

Parents continue to send their children to camp because their children are not only having fun, but also because they are growing and developing in a safe, nurturing, and healthy environment.

How do parents know this? Parents have the opportunity to visit their children at camp and see for themselves the healthy relationships that develop between their kids and the camp staff. They are able to build partnerships with the camp director and other staff from the boys and girls clubs. And, perhaps, most important, when their children come home from camp, their parents see the positive effects that the camp experience had on them.

Clear Vision and Commitment

Our outreach strategy works well. It is an ongoing process because our neighborhoods are constantly changing--and as some families move out of the neighborhoods, new ones arrive--and the process starts all over again. It is not an easy task, but it is working. The most important point is that in order to make the camp economically appealing--or free--and to make it trustworthy, worthwhile, and fun, we needed a clear vision and commitment from the camp committee and the board of trustees down to the executive director, club directors, and other people involved with the camp--if we wish to impact the lives of the children in our communities.

The Big Picture and the Bottom Line

In 1986, when I first came to work at the Union League Boys and Girls Clubs as a program director at Club One in the Pilsen neighborhood, my first boss and mentor, Frank Matkovich, started my induction as a youth professional and manager with five short words--look at the big picture. Ever since then, I have been looking at the big picture. In 1999, when Mary Ann Mahon Huels took over the direction of our organization as executive director, she made it clear that we also had to look at the bottom line. As we look at the different possibilities and acquire a better understanding of the dynamics of Hispanic communities, we can assess and improve our outreach strategies and develop new approaches to better serve their children--using both concepts.

The bottom line is that there are currently more than 12,000,000 Hispanic children in the U.S. whose parents need to be educated about the benefits of the camp experience. Unfortunately the biggest misconception by most camps is that Hispanics can't afford the cost of sending their children to camp. According to a Census Bureau study, 12.4 percent of Hispanics earned \$50,000.00 or more--while 26.3 percent earned \$35,000.00 or more. A study released by the U.S. Department of Commerce, in October 2001, reported the number of Hispanic-owned firms was growing rapidly. Hispanic-owned businesses in the United States totaled 1.2 million firms, employed over 1 million people, and generated nearly \$200 billion in revenues. Most of these people have children!

Because Hispanics are a heterogeneous group, there are unlimited possibilities for camps--since they too are so varied--to include and serve this growing population. Currently, within the camp industry/movement, there are many different kinds of camps--including private camps, religious camps, agency camps, private nonprofit camps, sports camps, specialized camps, etc. At the same time, the Hispanic upper middle class and middle class are growing at a rapid pace to the point that most U.S. corporations are targeting the

Hispanic market. By the year 2050, the power of the Hispanic market will reach \$1 trillion. This can only mean that there are opportunities for many different camps to impact this growing segment of our population. It is to the detriment of the camp community to overlook this diverse population--or to categorize them.

The American Camping Association Illinois Section is making a tremendous effort to outreach different communities--especially the Hispanic community. For the last five years, the section has conducted camp fairs in five Chicago Public Schools with heavy concentrations of Hispanic and African American students. It has developed a Web site, which includes information for college students searching for employment opportunities and for parents looking for camps to send their children. This section has a long history of developing partnerships and programs that pay for disadvantaged children to attend camp--children from families that otherwise couldn't afford the camp experience.

Camp can enrich lives and change the world--for everyone. As camp professionals, we must develop a vision and commitment to reach out to diverse communities and to provide children of different ethnic, social, and economic backgrounds the opportunity to live the camp experience.

David Lira Leveron has been a youth professional for seventeen years and a camp director for the last twelve. He serves on the board of directors and co-chairs the Public Awareness Committee for the American Camping Association Illinois Section. For more information on the Union League Boys and Girls Clubs programs, contact Leveron at d.leveron@unionleaguebgc.org.

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