

POTENTIAL AND PITFALLS OF RESEARCHING ETHNIC COMMUNITIES IN RECREATION: A PUERTO RICAN CASE STUDY

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Abstract: Although the empirical literature on ethnic/racial groups and recreation has been growing, there have been requests by researchers for approaches on procuring information from hard-to-reach populations. The purpose of this report is to provide prospective researchers with "lessons learned" in the field when researching ethnic group members. This study observes Puerto Ricans in central Massachusetts. A process for gaining access to, and garnering support from, the Puerto Rican community is discussed. The key elements of the process are bilingualism, key informants, and community involvement. Limitations of the methodological approach and resource lists are discussed.

Introduction

The value of understanding the recreation behavior of ethnic/racial groups has generated considerable interest in the empirical literature (Floyd, 1998; Gramman, 1996; Henderson, 1998; Kivel, 2000; Stodolska, 2000). One reason for this interest in the United States (U.S.) is changing population demographics. According to the U.S. Census (2001), the three largest ethnic/racial groups are Blacks (12.3%), Hispanics/Latinos (12.5%) and Asians/Pacific Islanders (3.7%). By 2050, the U.S. population will be more culturally diverse with less than 53% of the population categorized as non-Hispanic Whites; 15% Black; over 24% Latino; nearly 9% Asian; and about 1% Native American (U.S. Bureau of the Census, 1998). As a result of demographic changes, recreation providers in the U.S. will have tremendous challenges ahead in terms of service delivery, policy-making, and identifying participation patterns of "non-traditional" users.

With a population of 35.3 million people, Latinos comprise the largest ethnic group in the U.S. People of Mexican descent constitute 58.5% of all Latinos in the U.S. People of Puerto Rican origin embody nearly a tenth of all Latinos¹ (9.6%), while people of Cuban descent (3.5%) and Other Latinos (28.4%) account for the remainder of the Latino population in the U.S. (U.S. Census Bureau, 22 October 2001).

¹ This percentage reflects people of Puerto Rican descent in the U.S. mainland. People from Puerto Rico are not included in this percentage. With the inclusion of Puerto Rico's population, people of Puerto Rican descent would constitute 19.9% of the Latino population (Source: U.S. Census Bureau, Census 2000, Summary File 1).

As population demographics shift, a better understanding of the use of public recreation space by ethnic (non-Caucasian) group members is needed. An ethnic group² is defined as a social group set apart on the basis of cultural or nationality characteristics (Floyd, 1999). Earlier work (1970s and 1980s) on ethnicity and recreation utilized the marginality and ethnicity paradigm to explain differences in recreation patterns, with the majority of the focus on Black/White comparisons (Hutchison, 1987; Klobus-Edwards, 1981; Washburne, 1978; Woodard, 1988). Later work (1980s and 1990s) offered general critiques and identification of other factors which may impact ethnic recreation behavior (Allison, 1988; Dwyer & Gobster, 1992; Gramman, 1996; Hutchison, 1988; Johnson, Bowker, English & Worthen, 1997). Recent work on ethnicity and recreation posits acculturation as a notable factor in explaining perceived recreation benefits and outdoor recreation patterns in Asian and Latino groups (Floyd & Gramman, 1993; Heywood & Engelke, 1995; Shaul & Gramman, 1998; Stodolska, 1998; Tierney, Dahl, Chavez, Apt, & Mok, 2000; Yu & Berryman, 1996).

The focus of this study is on Latinos, more specifically, Puerto Ricans. Most studies involving Latinos have concentrated in the U.S. Southwest, or have utilized people of Mexican descent, with some exceptions (Chavez, 1993; Juniu, 2000). Relatively little is known about the Latinos in the Northeastern portion of the U.S., and less is known about Puerto Rican recreation behavior. Latinos, in general, tend to concentrate in urban centers. Puerto Ricans are more likely to live in a central city (61.2%) (Therrien & Ramirez, 2001).

A difficulty often encountered in researching ethnic groups is accessibility to the population one wants to study. In an article on researching diverse populations, Henderson (1998) noted that "[methods] are important, but the strategies used to get information are essential. Researchers may need to stray from research protocol to obtain data and create an environment of social support" (p. 164). Scant studies examine, in ample detail, how the ethnic group under study was approached, and how rapport was established. The objective of this study is to illustrate the sample collection procedure and document how rapport was established. Based on this objective and the studies mentioned earlier, the research question developed for this study is the following: How does one gain access to a hard-to-reach ethnic population?

Sample Characteristics

Subjects and Sampling Frame

The ethnic group members selected for this study are Puerto Ricans. Although researchers have examined Latinos in previous studies, little is known about Puerto Ricans as a distinctive subgroup of Latinos. Because of the

² The term "ethnic group(s)" or "ethnic group member(s)" is used instead of "minority(ies)" because of the pejorative connotation affiliated with the term minority. It is similar to Henderson's (1998) use of "diverse populations."

relationship between the United States and Puerto Rico (P.R.), Puerto Ricans provide researchers with an opportunity to look at the acculturation process, and to identify their recreation behavior. Rodríguez accentuates this particular point with the Puerto Ricans in New York City.

The experience of Puerto Ricans in New York City points up more clearly than any researched materials the chasm that exists between whites and blacks in the United States and the racism that afflicts both groups. For within the U.S. perspective, Puerto Ricans, racially speaking belong to both groups; however, ethnically, they belong to neither (1996, p. 25).

Puerto Ricans are the second largest ethnic subgroup within the heterogeneous Latino population in the U.S. It was important to consider this Latino group from the U.S. Northeast for three reasons. First, from a demographic standpoint, Puerto Ricans are most likely to live in the U.S. Northeast (63.9%) than any other Latino subgroup (Therrien & Ramirez, 2001). In New England, Puerto Ricans are nearly 50% of the Latino population (U.S. Bureau of the Census, 2000). Second, earlier U.S. based research regarding ethnicity/race and recreation has focused primarily on African Americans and Mexicans in either the U.S. South or West. Third, the investigator needed to have access to the ethnic group members. Because the investigator is Puerto Rican, and a native of the study area, the investigator had access to the population, and an understanding of the population and its cultural nuances to facilitate participation in the study.³

Geographic profile

This study was conducted in Southbridge, Massachusetts (MA). Puerto Ricans in MA constitute 46.5% of the Latino Population (U.S. Bureau of the Census, 2000). Southbridge is located in Worcester County, MA, and borders northern Connecticut. Southbridge is approximately 60 miles west of Boston, MA. There are five parks in Southbridge, and all the parks are located approximately one mile (1.6 km) from the downtown area.

Demographic and historic profile

According to the 2000 U.S. Census, Southbridge's population was 17,214. According to the 1990 U.S. Census,⁴ the median household income for Southbridge

³ I was raised in Southbridge, MA and have inside knowledge of Southbridge's Puerto Rican population, their history, traditions, community leaders, and familial ties to Puerto Rico. Travel to and from the U.S. mainland and the island of Puerto Rico was, and continues to be, a regular occurrence.

⁴ For this study, U.S. Census 2000 data were used for population figures, and U.S. Census 1990 data were used for all other reporting (e.g., income, occupation, education). U.S. Census 2000

residents was \$27, 834, as compared to \$20,918 for Latino households. Southbridge Puerto Ricans constitute the largest ethnic group in Southbridge. Puerto Ricans represent 20.2% (3,472) of the city's population, and 87% of the city's Latino population (U.S. Bureau of the Census, 2000). Over half of the Puerto Rican population (56%) was born in P.R.. Spanish is spoken by nearly 10% of the entire Southbridge population, and by about 75% of all Latinos in Southbridge (U.S. Bureau of the Census, 1990).

The first Puerto Rican family arrived in Southbridge in 1957 (Brown, 1982). Puerto Rico, at the time, was making the transition from an agricultural to an industrial economy. As a result, Puerto Rico's agrarian labor force turned to the U.S. for economic relief. Specifically, Southbridge's Prest-Wheel Company hired many Puerto Ricans in the late 1950s and early 1960s (Brown, 1982; Datz, 1998).

By the late 1960s, Puerto Ricans were attracted to Southbridge because of its need for an unskilled labor force to work in industry. Those Puerto Ricans who arrived in the 1960s paved the way for the next wave in the 1970s. This point is promulgated in the 2000 U.S. Census. The demographics of the Latino population in Southbridge exhibit population growth in the 1960s and mid-1970s. In the mid-1980s and 1990s, Southbridge Latinos experienced another population boom. As of the year 2000, Latinos ages 14 and under constitute 36% of Southbridge's Latinos. The majority of those arriving in Southbridge spoke only Spanish, and knew each other from their barrios (neighborhoods), neighboring towns, or family friends. As a result, an enclave of Puerto Ricans was established in Southbridge that reinforced ethnic cohesion. Strong family ties to P.R. were maintained because families often left siblings and parents behind. Southbridge Puerto Ricans travel to P.R. quite often and send capital and clothing to their extended families in P.R. (Southbridge Puerto Ricans, personal communications, December 1998 - January 1999). Southbridge Puerto Ricans are particularly suited for this study because of the strong ties to their homeland. The respondents would be emigrant, first, or second generation Puerto Ricans in Southbridge.

Sample population

Subjects were selected from the Puerto Rican population of Southbridge, MA. Subjects were 14 years of age or older. Because high school students are active users of Southbridge parks, it was important to include them in this study. High school students offer a broader age variance which may illustrate generational influences on participation at public recreation sites.

Garnering Support for the Survey

Procedures for high school sample selection

For the selection of Puerto Rican high school students, the investigator met with the superintendent of schools and the

Economic data for municipalities were not available at the time of submission.

high school principal to obtain permission and support for the administration of the questionnaire during home room period. A copy of the questionnaire, the human subjects approval form from Michigan State University, and a letter of introduction were provided prior to administration approval. It was mentioned that participation was strictly voluntary and that collected data would remain anonymous and confidential. Verbal endorsement was granted from both the superintendent and the principal.

The high school liaison was the head of the Social Studies curriculum in the school system. Explanations and instructions were given to him on how to conduct the study. A count of the number of Puerto Ricans in the High School was obtained and questionnaires were provided in both English and Spanish. According to a breakdown by home rooms, there were a total of 135 Latino high school students (W. Gosk & J. P. Bailey, personal communication, January, 1999). All Puerto Rican high school students who were present on the day of the questionnaire delivery were given questionnaires.

Procedures for adult population sample selection

In order to sample the Puerto Rican adult population, key persons in the Puerto Rican community had to be contacted to amass support for the study. These community leaders have access to lists of names, or have contact with Puerto Ricans at Puerto Rican-owned establishments. This process involved tapping into the Puerto Rican community's social capital by utilizing formal and informal networks in order to obtain verbal consent and addresses of prospective respondents.

In addition to the above list, the researcher solicited family, friends, and associates to help "spread the word." A letter explaining the purpose of the study was given to each of the community leaders listed in the above areas, and they were given instructions to ask their clients/parishioners/co-workers to participate by furnishing their address on an address "sign-up" sheet. The investigator was granted the opportunity to address the Puerto Rican public at one of the most heavily attended masses of the year: Christmas Eve Mass. The priest allowed the investigator to address the congregation in Spanish, and situated a desk at the rear of the church so that parishioners could enlist in the study after mass ended.

Selection of subjects: Problems and solutions to creating a list

While the method for the creation of a list is somewhat unorthodox, it is a function of the population under study based on the researcher's knowledge of the population. Therefore, alternative methods for a list were needed. Researchers call for creative solutions to this problem. For example, Salant and Dillman (1994) suggest creating a list from multiple sources or using a purposive sample design.

Many Puerto Ricans in Southbridge do not have listed phone numbers; therefore, the telephone directory was not a valid tool. Additionally, the Puerto Rican population is very mobile. Often times they will move one or two times

a year, move in with extended family, or relocate to P.R. These situations create problems with using the telephone directory as a list source.

Another traditional list source is the city's annual census⁵. The town clerk mentioned that the census is not as accurate as they would like due to a lack of cooperation on the part of Puerto Ricans, general undercounting difficulties, and a lack of Puerto Rican census takers (Helen I. Lenti, personal communication, December 22, 1998). Therefore, traditional sampling techniques were augmented with purposive sampling techniques to increase the possibility of an individual's participation in the study.

It was crucial that social support was created first, in order for the study to be successful in the adult Puerto Rican population. Knowledge of the population is critical to getting enough responses to perform useful analyses. The study population required informal and formal lines of communication. For example, the researcher "informally" solicited names via personal contacts throughout the community in order to make Puerto Ricans aware of the study. It is culturally more acceptable to first "ask" if the subject's name and address can be used for a mailing, and then perform the actual mailing. Watson (1992) noted that conventional sampling methods have been ineffective in reaching ethnic/racial populations. He identified three sampling techniques and the problems associated with ethnic minorities. They are as follows:

1. *Random sampling* - inadequate as many in the ethnic community have not been on the electoral registers.
2. *Quota sampling* - insufficient data have existed from the census on which to sample targets and selected sample points may not reflect where ethnic groups actually are.
3. *Random digit dialing* - how do you establish ethnic origin with any degree of certainty by telephone? (Watson, 1992, p. 339)

Although his comments referred to ethnic minorities in the United Kingdom, researchers have encountered similar problems in the United States. Cox (1990), for example, argues for non-traditional designs and unconventional methods for researching minorities in the U.S.

Sutton and Schurman ... note that conventional methodology calls for all respondents and for investigators to refrain from disclosing the details of the research objective to the respondent ... They acknowledge that they made a conscious decision to violate these rules despite the potential effects of

⁵ Under Massachusetts (MA) election law, MA cities are required to conduct an annual census. The census provides names, dates of birth, precinct and occupations. The annual census is used mostly for grants and public funding.

bias on the results. They concluded that considerations such as an ability to obtain data and to create an environment of social support in which interviewees will provide responses must sometimes take precedence over traditional notion of scientific "objectivity." I believe that their findings are applicable to other emotionally sensitive topics such as race/ethnicity, and that they illustrate the need for new paradigms of research methodology (Cox, 1990, p. 11).

The above quote illustrates several issues related to researching ethnic minorities. First, it is difficult to obtain truly representative samples of ethnic/racial populations. Second, because of the difficulty in obtaining a list, other nontraditional methods are required to augment or create a list. Third, an environment of social support (over objectivity) is needed for participation.

Through contact with community leaders in public programs, agencies, private establishments, and the local church where most Puerto Ricans worshiped, the researcher "spread the word" and Southbridge Puerto Ricans were more responsive. The social support was created along informal lines. Asking Puerto Ricans to fill out the questionnaire when one first visits would be considered improper. An initial house call or visit should be informal. One can talk about business, but not actually conduct business. This is a similar concept to what Winter and Chavez (1998) referred to as taking time to "visit" for successful data gathering.

Conducting personal interviews at the place of residence would require at least two visits. The first visit would be to establish social support. This will typically involve sitting down for a cup of coffee, catch up on social, political, or family events in the community or P.R., and then a discussion on the survey. To talk "just business" or visit quickly would be considered "rude" and would most likely assure a lack of participation. A second visit would be required to conduct the actual interview where it would be considered an "official" visit. As one can surmise, the cost and time for this method of ensuring an adequate sample size and response rate would be quite large.

Methodology

Questionnaire distribution

The first step, discussed in previous sections, was to collect names via purposive and snowball sampling techniques to create a list. The investigator began to "spread the word" about the study approximately three weeks before the letters were sent to community leaders. The letters and sign-up sheets were sent to community leaders about a month prior to addressing the congregation on Christmas Eve. The second step was to cross-reference the names with the various lists (lists from community leaders, town clerk, phone book, and high school) to make sure that the names did not appear twice.

The final list for the Puerto Rican adult population yielded 690 mailing addresses (539 signed up and 151 addresses were from the phone book and the town census), and 35 additional surveys to be delivered to the Head Start Program. There were 135 potential respondents who were Puerto Rican high school students. The number of questionnaires distributed was 860 (39% of the 2225 resident Latinos over age 14). The aggregate time it took to collect the names and addresses was approximately two and a half months.

The investigator opened "formal" lines of communication. Instead of making a "formal" second visit to individual homes (see earlier comment), adult subjects were contacted by mail. The surveys were mailed to those whose names were solicited. The cover letter was printed on academic department letterhead to convey a sense of importance to the respondents. This was an approach recommended by several community leaders to increase response.

Data Collection

In order to enhance an adequate response rate, the collection process included techniques suggested by Dillman (1978). Dillman's total design method (TDM) was not followed in entirety due to monetary and time constraints. The basic concepts, however, were applied. The mailing procedure for the collection of the data involved the following steps: (1) mailing the introductory letter and autobiography; (2) mailing the cover letter and questionnaire; and (3) mailing the follow-up letter and replacement questionnaire.

The initial mailing involved the use of a letter and autobiography. The letter acted as an announcement and solicitation for completion of the questionnaire. In addition, a short autobiography of the investigator was included so that the Puerto Ricans had an update on the investigator since the time he left the community. The autobiography acted as a proxy for the investigator's personal visit, and gave the respondent a glimpse of the investigator's academic and personal background. This is an extension of the social support concept. The initial mailing was sent by first class mail.

One week after the initial mailing, the cover letter and questionnaire were mailed out. The cover letter provided information on the purpose of the study, what the information will be used for, and how their names were chosen. In order to save on costs, the first wave of surveys was mailed by third class bulk mail. Accounting for a mailing time of 7-10 days, the return window given was approximately two weeks.

There were some problems with the third class bulk mailing. After speaking with the post office in Southbridge, the investigator found that third class mail gets distributed very poorly and is not always sorted the same day it arrives because it is not considered priority mail. The first surveys arrived haphazardly. As a result, the investigator waited an additional two weeks for responses to arrive before mailing the follow-up survey. In

the cover letter, the investigator tried to convey an understanding of the problem with the mail, while at the same time expressing a necessity for having full participation.

Survey Response

A total of 690 questionnaires were mailed to Puerto Ricans in Southbridge. Of the 690 surveys initially mailed, 77 (11%) were returned due to incorrect addresses, thereby reducing the number of mailed questionnaires to 613. The majority (45) of the addresses for the returned letters were addresses from the phonebook. Thirty percent of the phonebook addresses were incorrect, while only five percent of the sign-up list yielded incorrect addresses. This reinforces the notion that purposive sampling was indeed a better way to identify the desired respondents than using the telephone directory, especially given the mobile nature of the population under study.

A total of 304 Puerto Ricans responded by mail. This produced a response rate of approximately 50%. The level of response was probably affected by the third class postage for the first mailing of the questionnaires. Factors which may have influenced the overall response included the following: (1) lack of priority given to third class mail; (2) lack of current addresses in phone book; and (3) no forwarding address.

Because of problems related to mailing and delivery, the response rate of 50% is a conservative estimate. The amount of actual delivered questionnaires is unknown. In addition to the 304 returned by mail, 29 were received from the community leader at the Head Start Program, and 57 came from Southbridge High School students of Puerto Rican descent. The total amount of usable surveys (N) totaled 384. Of the 384 surveys, 209 (54%) were in Spanish.

Sample and Population Demographics

Puerto Ricans constitute 87% of the Latino population in Southbridge. The researcher used Latinos as the reference population when comparing the sample to the population. The 2000 Census does not have a breakdown by Puerto Ricans. According to the 2000 Census, persons over the age of 14, of Latino origin, number 2,225. The median age of respondents in the study is 32, with the youngest respondent being 14 years of age, and the oldest being 80 years of age.

Because there is no precise information on non-response, the sample was compared to population figures from the 2000 U.S. Census to assess representativeness. To assess representativeness, age and gender were compared. Table 1 illustrates the frequencies between age and gender in the sample, and expected frequencies based on census percentages. In both cases, the observed frequencies do not equal the expected frequencies. The chi square for age is 9.45 ($\chi^2_{critical} (\alpha=.05, df=9) = 16.92$). Chi square for gender is 10.75 ($\chi^2_{critical} (\alpha=.05, df=1) = 3.84$). The chi square test for homogeneity indicates that the sample is representative

with respect to age, but not with respect to gender. The most under-represented age group is the 20-24 age category (10% in sample vs.13% in population), and the most over-represented age groups are the 25-29 age category (14% in sample vs.12% in population) and the 45-49 age category (9% in sample vs.7% in population).

Table 1 Age and Gender Breakdown by Sample and Census

Age Category ^a (N=369)	Sample ^b (%)	Census ^c (%)
15-19	15	15
20-24	10	13
25-29	14	12
30-34	15	14
35-39	10	12
40-44	10	9
45-49	9	7
50-54	5	6
55-59	4	4
60+	5	6
Gender Category ^a (N=382)	Sample ^b (%)	Census ^c (%)
Male	40	48
Female	60	52

^a - age 14 excluded from analysis due to incomparability with 2000 U.S. Census cohorts
^b - Survey respondents ^c - 2000 U.S. Census

Data Analysis

Ancestry

In this sample, 73% of Southbridge Puerto Ricans were born in P.R. In addition, 99% of all Puerto Ricans had parents which were born in P.R. There are almost no respondents of mixed ancestry. This finding suggests a homogenous ethnic group. In addition, the majority of respondents are of emigrant or first generation status.

The data also suggest that cultural ties are not only reinforced by familial ties, but by ties to P.R. Nearly 80% of the respondents have lived in P.R. When comparing the average years living in P.R. ($M = 18.5$, $SD = 11.14$, $Min./Max. = 1yr. / 59 yrs.$, $N = 295$) and in the United States ($M = 19.5$, $SD = 10.91$, $Min./Max. = 0 yr. / 50 yrs$, $N = 375$) the means are very similar. This supports the view that there are strong ties to the island and that Puerto Ricans in Southbridge can be generalized to other Puerto Ricans. In addition, one could speculate that there is continuous migration back and forth between P.R. and Southbridge.

Discussion

Gaining access and establishing rapport

I found that the sample collection technique used in this study, while somewhat unorthodox, is quite effective in reaching ethnic group members. I recommend that the sample collection technique be used to enhance research participation by other ethnic/racial groups.

Successfully accessing Hispanic research participants demands an understanding of demographic information about Hispanics in general and, in particular, about the communities in which they live that at times is not easily available ... Legitimacy can be enhanced if initial contacts are carried out by bilingual Hispanic researchers or interviewers who are more likely to be seen as part of the community and not personally threatening (Marín and Marín, 1991, pp. 45-46).

Because I am bilingual and a member of Southbridge's Puerto Rican community, cultural immersion within the community was possible. This facilitated contact with several key community leaders for the solicitation of research participants. Chavez (2000) challenged recreation professionals to make strategic plans that "invite, include, and involve" (the "I" triad, p. 185) ethnic/racial groups in leisure. I advocate for a similar approach when researching ethnic group members.

Community involvement is recommended. I incorporated this into the study design by using key informants as consultants and establishing a public forum for participation, i.e., speaking with the congregation on Christmas Eve mass. This was possible because I am a member of the congregation, and I was able to speak with the priest in person and in writing. This pattern of informality followed by formality worked well for garnering support.

There are some limitations to this approach. Bias may be introduced depending on how and who is asked to help garner support. Key informants need to be selected from within the ethnic community space (organizations, businesses, churches), and external to the ethnic community space (workplace, schools, city government). Researcher bias was controlled through the research methodology, and is the reason for its inclusion in this study. To reduce researcher bias further, all respondent names were compiled by key informants.

In summary, I presented a methodological approach to researching ethnic groups that provided an acceptable response rate, and involves the ethnic community in the research process. Critical to the approach are key informants and immersion of the investigator in the ethnic community.

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