# THE DIGI-DIVIDE AT SXSW 2014

A Study on Latinos at SXSW and the Digital Space

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A REPORT CREATED IN COLLABORATION BY:





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### **EXECUTIVE SUMMARY**

The following independent report combines the findings from qualitative and quantitative research conducted during the 2014 SXSW Interactive Festival with the objective to better understand the state of Latinos' role in the digital space in general, and SXSW Interactive Festival, in particular. Over 200 Latinos participated in the study including 134 respondents to an online survey, 43 in-person (intercept) interviews and 50 participants in a Latino Ideation session during SXSW.

The report highlights 3 key themes that emerged from the research:

- LATINOS' RELATIONSHIP WITH TECHNOLOGY: USERS, BUT NOT ENOUGH MAKERS

  Latinos were described as being heavy digital users, especially of online social networks like Facebook and

  Twitter. Yet, they are seen as practically absent in technology development, innovation and entrepreneurship.
- SXSW'S LATINOS IN TECH TRACK: A WELCOME ADDITION BUT GREATER INTEGRATION IS VITAL TO FUTURE SUCCESS

Respondents appreciated SXSW's efforts to include more Latinos in the festival with the creation of the Latinos in Tech track. At the same time, it is critical that future Latino-specific programming be incorporated into the main event site so that Latinos are visible and can readily access content and networking opportunities.

PANELS: NOT JUST "LATINO PANELS" BUT MORE LATINOS IN "MAINSTREAM PANELS"

While respondents enjoyed and appreciated panels focusing on Latinos through the Latinos in Tech track, many proffered that including Latinos in "mainstream panels" is an important step forward to create inclusiveness and diversity in the broader conversations taking place at the conference.

Recommendations in this report call on SXSW, businesses and organizations, as well as Latino individuals to take action and ensure that Latinos' role in the digital and technology fields is further cultivated at the festival and beyond.



### **BACKGROUND**

South by Southwest Festival has been an integral part of the Austin landscape since 1987. In that time, the festival has grown into a global event that brings tens of thousands of people from all over the world to Austin, as well as millions of dollars. SXSW Interactive in particular has grown to be a hotbed for people to come together and discuss the latest trends and innovations in the digital and tech fields.



As SXSW expands, the festival has lead and supported various initiatives to ensure that historically under-represented groups increase their participation and contribution in the festival. Among these initiatives is its V-O-W-E-L scale of basic diversity principles (Variety, Opinion, Women, Ethnicity, and Location) that guide its panel selection process, as well as its Blacks in Technology (BIT) programming. Specifically aiming to increase Latinos' presence, SXSW Interactive welcomed The Social Revolución as its first official Latino event in 2012 and 2013, and launched the Latinos in Tech track as part of its panel programming in 2014.

Beyond SXSW's official efforts, other events have supported Latinos' experience during the Festival. This includes the Kapor Center's Latin@s in Tech Pre-Conference held prior to the 2014 Interactive Festival.

The following report has been produced through a collaborative effort aimed at exploring opportunities not only for strengthening Latinos' experience at SXSW Interactive Festival, but also their contribution to the digital and tech fields beyond the conference.

#### Sources:

- SXSW 2014 Economic Impact Report http://www.sxsw.com/sites/default/files/attachments/2014%20SXSW%20Economic%20Impact%20Analysis.pdf
- SXSW 2014 Statistics http://sxsw.com/sites/default/files/attachments/STATISTICS%20FOR%20SXSW%20%202014%20(1).pdf



### **METHODOLOGY**

The findings in this report draw from a blended research design that included the following methods:

#### **ONLINE SURVEY**

Ethnifacts, in conjunction with Mando Rayo + Collective, conducted an online survey of 134 Latinos, which included 50% who attended the 2014 festival, 13% who attended SXSW in prior years, and 37% who had never attended. Respondents were able to complete the survey via social media, at a SXSW 2014 social event, or at an unofficial SXSW Latino event. Survey questions can be found in Appendix A.

#### IN-PERSON INTERVIEWS (INTERCEPTS) AT SXSW INTERACTIVE FESTIVAL

In addition to the online survey, 43 attendees of SXSW Interactive and the SXSW Latinos in Tech track were interviewed through one-on-one intercepts using the questions in Appendix B. Respondents were a mix of first-time SXSW attendees, as well as those who had attended several times.

#### **DISCUSSION GROUPS**

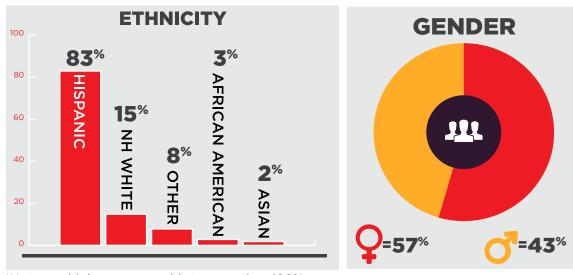
On March 10, 2014, a group of 50 people participated in an ideation session at Takoba in Austin, Texas where they discussed the role of Latinos in technology and in the SXSW Interactive Festival.



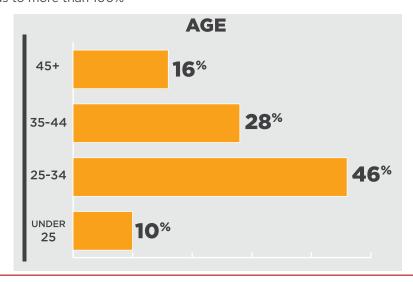
#### **METHODOLOGY**

#### PARTICIPANT CHARACTERISTICS (ONLINE SURVEY)

More than half of survey respondents (57%) were female, and 43% were male. Of the respondents, 83% were Hispanic, 15% were Non-Hispanic White, 3% African-American, and 2% Asian. Those who did not identify as Hispanic/Latino were in one way or another engaged with Latino-related causes or fields. Respondents were mainly 25-44 years old, with 46% falling into the 25-34 category, and 28% between 35-44. This skew towards younger respondents adds value to our findings as it provides the perspective of an important age group that will shape the future of Latinos in tech and innovation.



\*Note: multiple response adds to more than 100%

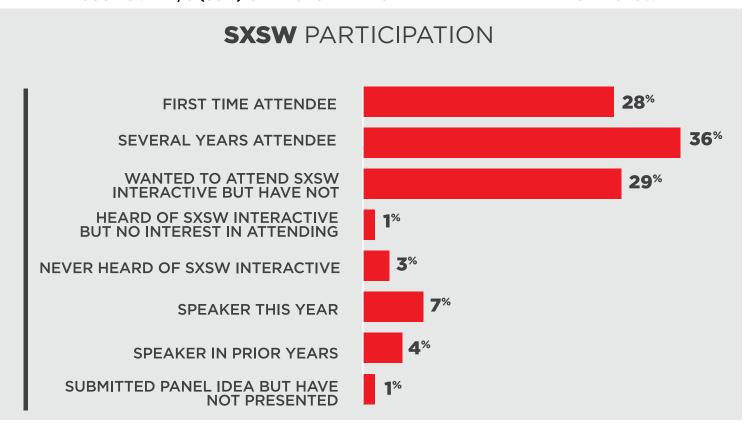




#### **METHODOLOGY**

#### **PARTICIPANT CHARACTERISTICS (ONLINE SURVEY)**

#### JUST OVER 1/3 (36%) OF RESPONDENTS ARE REPEAT ATTENDEES AT SXSW

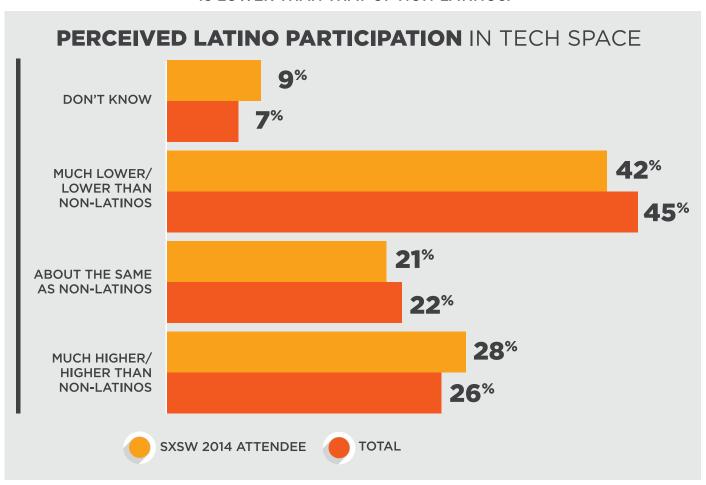




### LATINOS' RELATIONSHIP WITH TECHNOLOGY: USERS, BUT NOT ENOUGH MAKERS

When asked to share what first came to mind when they heard the words *digital, technology,* and *Latinos,* most respondents referred to social media use (Twitter and Facebook), while others talked about online videos and mobile use. A follow-up question asking whether Latinos are involved enough in the digital/tech space pointed to discontent that Latinos are not involved in tech and digital innovation. One of the most popular answers to questions about how people associate Latinos with technology was that they are consumers, and users of social media (as opposed to creators of technology). Of those who completed the online survey, 45% said Latino participation in the tech space was "much lower" or "lower" than Non-Latinos; 22% believed it was the same for both groups.

## ALMOST HALF (45%) OF RESPONDENTS BELIEVE LATINOS' PARTICIPATION IN THE TECH SPACE IS LOWER THAN THAT OF NON-LATINOS.





#### LATINOS' RELATIONSHIP WITH TECHNOLOGY: USERS, BUT NOT ENOUGH MAKERS

### **LATINOS: DIGITAL USERS**

- 78% use the Internet or send or receive email at least occasionally (up 14% since 2009).
- This rate is even higher among English-dominant/Bilingual Latinos who make up 75% of all Latino internet users.
- Two-thirds (68%) of Latino internet users report using Facebook, Twitter or other social networking sites 10% higher than all U.S. internet users.
- 60% of Latino social media users say they mostly or only use English.

(Source: Pew Hispanic Center, 2013)

#### **NOT ENOUGH MAKERS:**

In the recent years, there has been a call for transparency among tech companies as it relates to diversity in the workplace, and the numbers below point to a stark lack of Latino representation. For example, while Latinos represent 15% of the US workforce, they make up only 6.5% of the STEM workforce, and less than 1% of all Venture Capital professionals.

(Source: Census, 2011, National Venture Capital Association and Dow Jones Venture Source, 2011)

#### **% OF WORKFORCE WHO IDENTIFY AS LATINO**

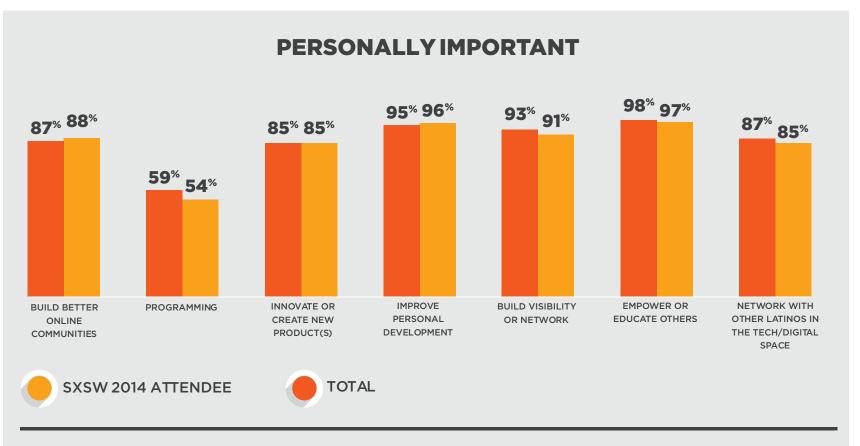




## LATINOS' RELATIONSHIP WITH TECHNOLOGY: USERS, BUT NOT ENOUGH MAKERS

During the survey, respondents were asked what aspects of the digital and tech space were most important to them. While fewer respondents were interested in programming (59%), most noted that empowering and educating others (98%), as well as personal development (95%) were personally important to them. Further research should be conducted to understand what areas of tech are most appealing to Latinos, and what strategies may be employed to increase interest in tech professions such as programming.

EMPOWERING AND EDUCATING OTHERS (98%), FOLLOWED BY PERSONAL DEVELOPMENT (95%), ARE THE MOST IMPORTANT TO RESPONDENTS.





### LATINOS' RELATIONSHIP WITH TECHNOLOGY: USERS, BUT NOT ENOUGH MAKERS

When it comes to improving Latinos' role in tech and festivals such as SXSW, education seemed to be participants' biggest solution, in addition to cultural changes. More than half of respondents had attended a previous SXSW conference and said education, and promoting technology within schools and with youth was a big topic of conversation — in addition to better representation and involvement with the media and how Latinos are portrayed, specifically. Respondents also spoke about how Latinos could introduce technology to their children, and shift conversations about technology at home.

"Opportunity and dearth. I think it's kind of two sides of the coin. We're the largest consumers of technology, the largest users of social media, but among the least represented in the creators. So that's the gap that I think is interesting for SXSW to close and to lead in closing."

- In-person Interviews

"It is well known that Latinos are avid tech-oriented individuals, socially active, and heavy smartphone users. Unfortunately all content in the leading conferences addressing the importance of this segment is limited."

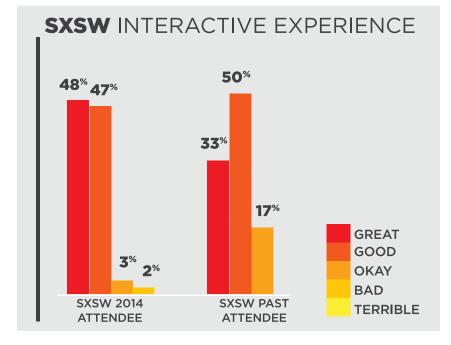
- Open-end response in online survey





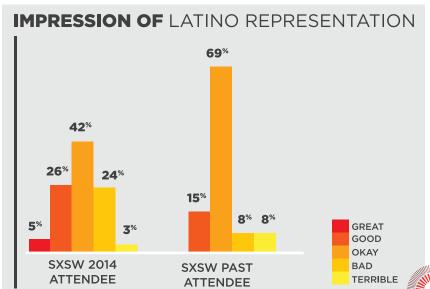
# SXSW'S LATINOS IN TECH TRACK: A WELCOME ADDITION, BUT GREATER INTEGRATION IS VITAL TO FUTURE SUCCESS

Overall, respondents attending SXSW Interactive 2014 had a better experience than past attendees, with 48% saying it was great vs. 33% of past attendees, and significantly fewer saying it was an ok or negative experience.



## RESPONDENTS ATTENDING SXSW 2014 HAD A BETTER EXPERIENCE THAN PAST ATTENDEES.

Yet, their experiences did not necessarily match up to their impression of overall Latino representation at the 2014 conference. With 31% of 2014 attendees saying Latino representation was good or great, and 27% saying it was bad or terrible, SXSW 2014 attendees had a less neutral impression of Latino representation at SXSW than did past attendees.



SXSW 2014 ATTENDEES HAVE A LESS NEUTRAL IMPRESSION OF LATINO REPRESENTATION AT SXSW THAN DO PAST ATTENDEES.

## SXSW'S LATINOS IN TECH TRACK: A WELCOME ADDITION, BUT GREATER INTEGRATION IS VITAL TO FUTURE SUCCESS

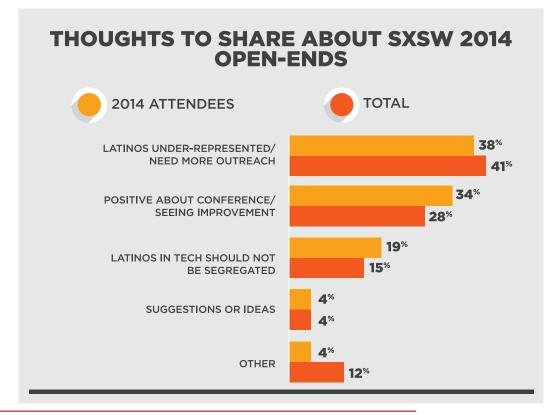
Open-end comments and interviews brought to light mixed feelings about representation among conference attendees.

While they had positive feelings about their experience and observed improvements from previous years, there was frustration about continued under-representation and outreach, and that the Latino Track was not integrated with the main event location

"My sense is that Latino outreach, programming, participation and networking are improving, a trend that is much overdue." - Open-end response in online survey

"I am happy to see such incredible participation in the Latino community this SXSW. Representation is deeply important to me, and I am eager to see the growth and possibilities in our own community provided by such interaction. I cannot wait!" - Open-end response in online survey

IN RESPONSE TO A QUESTION ABOUT OTHER THINGS THAT THEY WOULD LIKE TO SHARE ABOUT PARTICIPATION AT DIGITAL/TECHNOLOGY CONFERENCES, LATINOS WERE VERY POSITIVE ABOUT IMPROVEMENTS MADE AT SXSW 2014, BUT EXPRESSED SOME FRUSTRATION ABOUT LACK OF LATINO REPRESENTATION AT SXSW AND LACK OF INTEGRATION WITH THE MAIN EVENT AT THE CONVENTION CENTER.





# SXSW'S LATINOS IN TECH TRACK: A WELCOME ADDITION, BUT GREATER INTEGRATION IS VITAL TO FUTURE SUCCESS

According to respondents, The Latinos in Tech track was a positive step and a quality event that should be expanded to create a more diverse and inclusive SXSW experience. The track was praised for providing the opportunity to network and to learn more about Latinos working in technology. Many respondents also appreciated that the track was free because it allowed many people to attend, not just badge holders.

"I think it's amazing that Latinos are participating and even speaking at conferences like these!"

- Open-end response in online survey

"My favorite part [of Interactive] is that there are panels targeted to Latinos. It's great that someone put all these different speakers together." - In-person Interviews

"I loved that it was free because I was able to attend. It needs to be advertised better. Way better."

- Open-ended question in online survey

There was, however, a strong sentiment that while the Latinos in Tech track was an excellent program, it was not on par with the conference's main events and its distance from and conflicting schedule with the main event impaired attendance and attention. On the heels of the success of Latinos in Tech, respondents urged SXSW to expand and incorporate the programming into the main festival.

"We are speaking in a little hotel across the river, meanwhile most of the sessions are happening on the other side. So I think our involvement is still very small, but absolutely so happy that it is even a step in the right direction." - In-person Interviews

"SXSW needs to integrate discussions about Latinos in to the SXSW programming proper and not relegate us to the Holiday Inn 1.5 miles away." - In-person Interviews



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#### **NOT JUST "LATINO PANELS" BUT MORE LATINOS "IN MAINSTREAM PANELS"**

While respondents enjoyed and appreciated panels focusing on Latinos through the Latinos in Tech track, many proffered that including Latinos in "mainstream panels" is an important step forward to create inclusiveness and diversity in the broader conversations taking place at the conference. According to many respondents, a more inclusive SXSW set of offerings that integrated Latinos into general panels would strengthen the way in which Latinos participate in the event. The suggestion was made that SXSW could serve as a "matchmaker" for panels looking for diversity and potential Latino panelists, or that SXSW could do more outreach to non-white networks to seek panel submissions.

"I'd love to see more Latinos immersed in the mainstream, general market, general panels. So it's not the 'Latino panel' with 'Latino people' but the 'technology panel' with people who are good at that, but happen to be Latino." - In-person Interviews

"It'd be great if SXSW could include Latinos in 'mainstream' panels and not relegate them to specialized panels across the river." - Open-end response in online survey

"It's important to have Latinos at conferences like this because we offer a perspective that the mainstream doesn't have." - In-person Interviews

Latinos play an important role in the digital marketplace given their size, growth, avid use of mobile technology and social media. Including Latinos in the primary Interactive programming, and expanding the Latinos in Tech track, would benefit Latinos and the Non-Latinos alike.



#### A CALL TO ACTION

Respondents were asked, based on their experience and attendance at SXSW, what would be some ideal ways to improve Latino participation and inclusion at SXSW Interactive. Improved messaging and communication, as well as some changes to how SXSW designs its programming, were seen as key a strategies to grow Latino inclusion as attendees and panelists.

Finally, those surveyed suggested that Latinos be asked to reach out to their networks to encourage more people to attend and participate in the festival.

The following are a series of recommendations inspired by their answers aimed at creating change at the organizational (SXSW & related organizations/businesses) and individual level (Latinos).

#### TEN STRATEGIES SXSW CAN PUT INTO ACTION:

- 1. Strategically partner with Latino influencers and leaders in the digital space and their communities to ensure integration is thoughtful and culturally relevant.
- 2. Ensure that a certain percentage of main stage events are relevant to the evolving "general market" of which Latinos and multiculturals are quickly becoming the dominant force, as it is in social media.
- Increase Latino participation and showcase diversity at SXSW by creating corporate sponsorship opportunities. Align with corporations that have demonstrated initiative in the Latino marketplace such as AT&T, Google, Hulu, Twitter, among others.
- 4. Invest in diversity strategies to be a more inclusive organization and event, including the hiring of Latinos to help organize Latino outreach, both for panelists and attendees.
- 5. Increase communication specifically aimed at Latinos about attendance and participation.
- 6. Invest in scholarships for attendees, as cost may be an issue with some Latino participants (perhaps employ corporate sponsors to provide scholarships).
- **7.** Ensure Latino representation serves on the SXSW Advisory Board for PanelPicker.
- **8.** Develop an ambassador program for Latino/as to help recruit attendees and panelists.
- 9. Support efforts that are aiming to increase the pipeline of Latinos in tech professions.
- **10.** Collaborate with more non-profits and foundations serving Latinos.

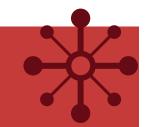


#### **A CALL TO ACTION**

Important organizations have been created to help Latinos build capacity in the digital space. Affiliations with organizations such as these can play an important role at SXSW.

#### **CHANGE-MAKERS**

## A FEW EXAMPLES OF ORGANIZATIONS BUILDING CAPACITY FOR LATINOS IN THE DIGITAL SPACE.



**LATINO START-UP ALLIANCE:** Based in Silicon Valley, the Latino Startup Alliance provides technical understanding, entrepreneurial training, and thought leadership.

**KAPOR CENTER FOR SOCIAL IMPACT:** Pursues creative strategies that will leverage information technology for positive social impact, primarily with underrepresented communities, focusing on gap-closing endeavors.

**THE PIPELINE FELLOWSHIP:** An angel investing bootcamp for women that works to increase diversity in the U.S. angel investing community and creates capital for women social entrepreneurs.

MANOS ACCELERATOR: This is a first of its kind accelerator targeting Latino entrepreneurs who are generally under-represented in early-stage ventures. Their current class of Latino-owned startups include everything from wearables to games and payments, and they include Bandbazaar, CoupleCare, Cycle Money, Cuestiona.me, FashionTEQ, My Bigame and saySquare.

**ELLA INSTITUTE:** A career innovation company devoted to advancing the influence of Latinas in the United States and abroad. They connect women to programs, opportunities and influential networks by leveraging technology, social media and live events.

**CROWDISMO:** A pioneering crowdfunding platform in the U.S. fueling innovation, creativity, social impact, and entrepreneurship within the Latino Community.



#### **A CALL TO ACTION**

#### TEN STRATEGIES TECH COMPANIES CAN PUT INTO ACTION:

- 1. Assess what policies or plans you have in place for reaching out to Latinos. Is your organization/company representative of your consumers or the community you serve?
- 2. Develop connections and build relationships with Latino communities.
- **3.** Develop a Latino leadership entity within your organization/company.
- 4. Support efforts that are aiming to increase the pipeline of Latinos in tech professions.
- 5. Evaluate how your current workforce reflects/challenges the current gap of Latinos in tech professions.
- **6.** Be committed. Show up often and when it matters. Online and off-line.
- **7.** Encourage and support employees to attend or speak at the conference.
- **8.** Support and sponsor Latino-related events and activities at tech conferences.
- **9.** Develop specialized Latino programs and/or initiatives.
- 10. Strategically partner with Latino digital organizations.

#### TEN STRATEGIES LATINOS CAN PUT INTO ACTION:

- **1.** Be an advocate for more Latinos as creators, not just users of technology.
- **2.** Put your ideas out there. Don't bottle them in, share them and watch them grow.
- **3.** Reach out to people in the tech industry and seek mentorship opportunities.
- **4.** Educate yourself on the opportunities, scholarships and resources available at tech conferences.
- 5. Invest, participate, and attend more mainstream conferences like SXSW.
- **6.** Submit more panels to SXSW Interactive Festival.
- 7. Seek out STEM and other tech-related programs that engage Latinos and connect them to people you know.
- **8.** Lobby employers to sponsor Latinos to attend tech conferences.
- 9. Volunteer at SXSW for free access to the SXSW experience.
- 10. Tell your friends, colleagues and communities about tech conferences via social media, blogging or word of mouth.



A CALL TO ACTION

# TRAINING RESOURCES A FEW EXAMPLES OF TRAINING RESOURCES FOR LATINOS

**Code2040:** Provides pathways to educational, professional, and entrepreneurial success in technology for underrepresented minorities with a particular focus on Blacks and Latino/as.

**Codeup:** An in-person bootcamp that takes you from non-techie to web programmer in 12 weeks. They developed the program to meet the needs of businesses looking for talented programmers, and to offer people a second chance at a meaningful life and a fulfilling career.

### **Access Code (Coalition for Queens):**

Access Code is an innovative tech education program that equips adults from underserved and underrepresented backgrounds with the computer programming skills and entrepreneurial training to succeed in tech.

**Girls Who Code:** Girls Who Code works to educate, inspire, and equip high school girls with the skills and resources to pursue opportunities in computing fields.

<u>Sabio</u>: Sabio's mission is to train unemployed, underemployed and underrepresented individuals to enter the technology sector so that they can participate in today's knowledge-based economy.

**DIY Girls:** DIY ("Do-It-Yourself") Girls' mission is to increase women and girls' interest in technology, engineering and making by providing hands-on educational experiences.



## **ABOUT US**



Mando Rayo + Collective is a multicultural agency based in Austin, Texas. As a collective, WE AIM TO CO-CREATE SOLUTIONS for client and industry problems. This means empowering communities and providing creative strategies that will connect, influence and engage an ever changing multicultural marketplace. We are communication advocates that represent the underrepresented and bring to life our clients' goals through our talent and work.

OUR VISION REFLECTS OUR WORK and the community. It's about making a difference and most importantly it's about challenging others to think differently. As our communities grow, our clients' needs grow to reach them and that's when we come together, much like a super team. Engage with us online at www.MandoRayoCollective.com.



EthniFacts is a knowledge and insights provider founded and led by five senior principals for the purpose of developing and implementing an unconventional perspective on consumer and civic cultures. With deep collective experience in consumer research, trends, marketing and sales, advertising and planning, and corporate consulting, the company uses innovative means to sample the voice of multicultural consumers and a proprietary suite of measurement scales to explain and forecast consumer behavior. EthniFacts solutions employ a powerful array of analytical tools that combine high cultural acuity and rigorous statistical science to provide clients with an actionable road map for the new America Reimagined.



## **APPENDIX A**

#### **DIGI QUIZ**

- 1. Are you...(MARK MORE THAN ONE IF YOU'RE A MIX)
- a. Hispanic
- b. African American
- c. Asian
- d. Non-Hispanic White
- e. Other
- 2. How old are you? OPEN END NUMERICAL
- 3. Gender
- a. Male
- b. Female
- 4. What city do you live in? OPEN END
- 5. Would you say Latinos' participation in the digital & technology space is...
- a. Much higher than non-Latinos
- b. Higher than non-Latinos
- c. About the same as non-Latinos
- d. Lower than non-Latinos
- e. Much lower than non-Latinos
- f. Don't know
- 6. How important are the following to you personally? Give a rating of 5 if it is extremely important and 1 if not at all important.
- a. Build better online communities
- b. Programming
- c. Innovate or create new product(s)
- d. Improve personal development
- e. Build visibility or network
- f. Empower or educate others
- g. Network with other Latinos in the tech/digital space
- 7. Which statement(s) describes your experience with SXSW Interactive? Mark all that apply
- a. First time attendee
- b. Several years attendee
- c. Have been a speaker in prior years
- d. Am a speaker this year
- e. Submitted panel idea but have not presented
- f. Wanted to attend SXSW Interactive but have not
- g. Heard of SXSW Interactive but no interest in attending
- h. Never heard of SXSW Interactive

- 8. In which years have you attended SXSW Interactive? MARK ALL THAT APPLY
- a. 2014
- b. 2013
- c. 2012
- d. 2011
- e. before 2011
- f. Never attended
- 9. How would you rate your experience at SXSW Interactive overall?
- a. Great
- b. Good
- c. Okay
- d. Bad
- e. Terrible
- f. Never been
- 10. How well are Latinos represented at SXSW Interactive this year or in the most recent year you attended?
- a. Great
- b. Good
- c. Okay
- d. Bad
- e. Terrible
- f. Never been
- 11. Other than SXSW Interactive, what other technology or digital conferences have you attended? For each one attended, indicate if you were a speaker OPEN END.
- 12. Any additional comments/thoughts regarding Latino participation at digital/technology conferences that you would like to share? Just tell us what you think? OPEN END.



## **APPENDIX B**IN-PERSON INTERVIEWS

- 1. What first comes to mind when you hear the words digital, technology, and Latinos?
- a. Do you think Latinos are involved enough in the digital/tech space? b. How can we grow the Latino presence in the digital space?
- (Probe for them to elaborate more on their initial answer. "tell me more about that, why do you think that is?")
- 2. When it comes to conferences like SXSW Interactive, what role do you see Latinos playing?
- a. Are there opportunities for improving Latinos' participation/role in these types of events?
- b. What do you think needs to happen moving forward?
- c. What panels would you like to see at SXSW?
- 3. Tell me about your experience so far at SXSW Interactive. What do you feel you're getting out of it? What's been your favorite part/least favorite part? Anything that has surprised you?
- 4. Any additional comments you want to share regarding Latinos, Tech and South By Southwest Interactive?

