EXECUTIVE SUMMARY

El Pomar Foundation's Pikes Peak Recreation & Tourism Heritage Series was launched in 2015 to increase knowledge of and interest in important parts of the region's economy, quality of life, recreation, and tourism. Using its convening power, the Foundation seeks to bring together key organizations, stakeholders and leaders. Discussion topics focus on key challenges as to how the region can best promote and protect recreation and tourism in a diverse economy with a high quality of life.

The Heritage Series convened a public session titled “Mountains Matter to Millennials” on September 8, 2016 at the Penrose House in Colorado Springs, Colorado. The Pikes Peak region is interested in the youngest cohort of adults: the millennial generation, as key professionals, active members of the community, and drivers of innovation and quality of life. The Heritage Series set out to explore and listen to this age group to determine how they use the outdoors and what they will contribute as the next generation to maintain our spectacular natural backdrop and quality of life.

Before the September 8 event, the Heritage Series partnered with Colorado College's Innovation Institute and Springs Insight Exchange to conduct a survey of outdoors leisure and recreation engagement. Survey results were then used to inform and guide a brainstorming session at the “Mountains Matter to Millennials” event. Drawing from the Outdoors Leisure and Recreation Survey results, the audience participated in roundtable discussions that highlighted outdoor recreation sector strategies on engagement and volunteering, improvement of amenities, removing barriers to participation, attracting and retaining millennials, marketing and branding, and funding opportunities.

The survey and millennial’s roundtable together explored the attitudes of millennials in the Pikes Peak region and celebrated the important role “mountains” play in our community. The purpose of this report is to spark discussion and encourage action by providing valuable information on the attitudes of millennials regarding outdoor recreation in the Pikes Peak region. This report will enable champions of our region’s recreational assets to strengthen and protect investments in our natural environment.
INTRODUCTION

In the summer of 2016 the Heritage series worked with Colorado College’s Innovation Institute and Springs Insight Exchange to conduct a survey on outdoors leisure and recreation engagement. Survey results were then used to inform and guide a brainstorming session on September 8, 2016 at the Penrose House in Colorado Springs, Colorado. The survey was sent to a broad population, but hoped to gain insight from the millennial generation on the state of outdoor recreation in the Pikes Peak region.

Millennials were a focus of the survey and brainstorming session because of their growing importance in the sustainability and future of Colorado Springs. The Pikes Peak region is interested in millennials and their role as professionals, active members of the community, and drivers of innovation. The Heritage Series specifically sought to answer how millennials, as professionals and innovators, interact with outdoor recreation.

Millennials are sometimes categorized in ways that question their orientation to the outdoors. Take for instance this statement from the director of the National Park Service, “Young people are more separated from the natural world than perhaps any generation before them.” Or consider this from Bozeman-based writer Todd Wilkinson, “Sentiment persists that younger recreationists, who tend to like things faster and steeper than their elders do, don’t care about the land the way their backpacking forebears did.” Do these statements accurately represent millennials in the Pikes Peak region? If it’s accurate, what steps need to be taken to ensure younger generations appreciate, protect, and engage with outdoor spaces?
COLORADO RECREATION

In order to understand the role that outdoor recreation plays in Colorado Springs for millennials, this report first includes an analysis of how Colorado compares to the rest of the nation. The latest statewide survey of outdoor recreation compares the U.S. population's overall participation in outdoor recreation activities with those of Coloradans. Consistently our state outpaces the US levels of participation by at least a factor of four. Below is a profound example.

Patterns of Millennials’ Outdoors Use

<table>
<thead>
<tr>
<th>Activity</th>
<th>Colorado</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiking</td>
<td>52%</td>
<td>11%</td>
</tr>
<tr>
<td>Overnight backpacking</td>
<td>36%</td>
<td>3%</td>
</tr>
<tr>
<td>Freshwater fishing</td>
<td>36%</td>
<td>13%</td>
</tr>
<tr>
<td>Running/jogging</td>
<td>31%</td>
<td>17%</td>
</tr>
<tr>
<td>Mountain Biking</td>
<td>22%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Data Retrieved From: Colorado Statewide Comprehensive Outdoor Recreation Plan 2014 (Colorado Parks and Wildlife)

Are there differences by age group, such as between how millennials and Generation X use the outdoors? The Heritage Series Survey garnered participation rates by adult age groups. As shown in the graph below, even between millennials and Generation X’s (34-49) differences appear, with some forms of strenuous activity giving way to more "body-friendly" types of leisure. Similar patterns appear when baby boomers (50-68) and silents (69-84) are analyzed. One dimension remains constant: significant continuing high rates of outdoors activity in Colorado Springs. This is consistent with the Colorado Statewide Comprehensive Outdoor Recreation Plan findings above.

Outdoor Recreation: Millennials vs. Generation X

*Data Retrieved From: Pikes Peak Outdoors Leisure & Recreation Survey
SURVEY AND ROUNDTABLE RESULTS

The Pikes Peak Region is known for its high quality of life, natural beauty, and plentiful outdoor recreation. In recent years, the question of how to improve upon and better market the region’s natural opportunities for tourists and citizens alike has gained considerable attention.

In response, the Colorado College Innovation Institute, Springs Insight Exchange, and El Pomar Foundation’s Pikes Peak Heritage Series program partnered to create the Pikes Peak Outdoors Leisure & Recreation Survey to measure specific aspects of the outdoor spaces important to residents of the Pikes Peak Region. Between July and September 2016, more than 200 individuals provided qualitative and quantitative data on recreational participation, regional assets, and opportunities for investment.

On September 8, 2016 the survey results were presented at the “Mountains Matter to Millennials” session. Using the survey results as a foundation for discussion, more than 100 mostly millennial attendees discussed outdoor recreation’s opportunities and challenges in the Pikes Peak region. Moving forward, the results from this survey and discussion are intended to continue to drive conversations between business, nonprofit, and government leaders around strategic investments in our region’s outdoor sector.

Key Findings

- Millennials are in search of a “champion” for outdoor industry and recreation in Colorado Springs
- There is demand for a “go-to” website and/or app featuring regional information about outdoor recreation businesses, trails and open spaces, and volunteer opportunities
- There should be more opportunities to partner with business communities and the city for branding and visibility
- The region could host statewide or national conferences on various outdoor industry sectors
- The region’s governments and businesses should capitalize on new technology and media platforms to market the region’s outdoor assets
- Taxes and fees for parks and open spaces are acceptable if supported with clear evidence of benefits
- There is a demand for formal university programs around outdoor recreation and for paid internship opportunities
The survey and millennials' session results combined identify these key outdoors and recreation challenges:

- Millennials (ages 18-33) noted lack of access to outdoors spaces, regional image, and failing infrastructure were some of the greatest challenges facing the Pikes Peak region.
- The need for sustainable funding is also a concern that crosses generational lines. Some millennials say they wouldn't mind paying more access fees, in a “pay-to-play” format similar to hunting and fishing licenses.

Other results include ideas such as:

- Consideration of new taxes or fees for tourism in the region.
- Education about the value of the region’s natural assets should start early and be integrated into schools, and a community service component could be incorporated at all grade levels, from preschool through higher education.
- Local colleges and universities should be involved with education regarding conservation as well as recreation and leisure.
Specific issues identified by millennials are:

- Completing the Legacy Loop trail, other trails along waterways, and various overpasses and underpasses.
- Lack of parking/shuttles for popular and other trailheads and parks.
- Lack of collaboration among outdoor recreation groups and stakeholders.
- The need for better trail integration, improved east-west access, ties to waterways and diversification aside from Pikes Peak.

Survey respondents of all ages identified outdoor accessibility, natural features, and the environment as regional strengths. Millennials in particular view the ability to access and recreate in nature as a greater strength than simply having a natural backdrop.
Survey results revealed that just over half of the 62 millennials who took the survey currently volunteer for an outdoor organization, and 48% do not. Of note, among other generations who responded to the survey, 54% volunteer with outdoor groups and 46% said they do not.

**Percentage of Millennials who Volunteer for an Outdoor Organization**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td>48.3%</td>
<td></td>
<td>51.7%</td>
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</tbody>
</table>

*Data Retrieved From: Pikes Peak Outdoors Leisure & Recreation Survey*

- Millennials said they would be more likely to volunteer with outdoor groups if there were “short-term, more sociable and community-oriented” projects, not long-term commitments.
- In addition to a web database, communication boards at parks and trailheads with information about events and volunteer opportunities could help coordinate engagement.
- Building community awareness will help more people advocate for outdoor maintenance and protection.
- Programs specifically aimed at youth could help foster an ethic of environmental stewardship.
- Outdoor service groups should form fun, creative partnerships to attract millennials in the region to volunteer and donate.

Friends of the Peak, RMFI and Catamount Institute were the top three organizations millennials said they have volunteered with.
Challenges:

Managing our Outdoor Assets: When asked “What is the greatest challenge facing the Pikes Peak Region?” 31 percent of participants aged 18-33 provided responses on issues related to the outdoors, including access, conservation, and maintenance.

One of the most noticeable differences between millennials and older demographics was found in open-ended responses to the greatest challenges of the Pikes Peak region. While 10% of older respondents identified local politics as the greatest challenge, that number fell to 6% among millennials. In contrast, more than 15% of millennials gave responses about the Pikes Peak region’s reputation as the greatest challenge for the region, compared to 7% of older respondents. These findings seem to highlight the desire for younger residents to improve the image of the region, and perhaps open the door to discuss branding and marketing for younger visitors and residents. Improving and maintaining the quality of our outdoor trails and infrastructure was a top priority among nearly all respondents.

Opportunities:

Responses from the survey and roundtable discussions highlighted the following opportunities for improving quality of life and outdoor recreation for residents of the Pikes Peak region, particularly for millennials:

Engagement and Volunteering: Improved information is a key tool for engagement. Young residents would love to see a community website for outdoor recreation and volunteer opportunities. Once engaged, millennials are looking for service opportunities coupled with social and cultural experiences.

Amenities and Access: Residents of the Pikes Peak region have natural assets unmatched by other Front Range communities. Completed trails along waterways, improved parking, and alternative access points for popular sites would enable more residents to experience the outdoors and improve quality of life.

Urban Revitalization: Downtown Colorado Springs and other historic neighborhoods are experiencing increasing millennial populations and economic vitality. Millennials suggested highlighting the unique experiences that the region’s urban spaces offer.

Regional Branding: Our natural assets, small business climate, and rich mix of outdoor recreation businesses and nonprofits can help the region emerge as a hub of outdoor and small business innovation.

Collaboration: Colorado Springs school systems, businesses and local government are ideal partners. Millennials would like to examine where natural partnerships could exist to better share resources, funding, and expertise.
RECOMMENDATIONS & NEXT STEPS

From the Heritage Series Survey and Roundtable conversation, we bring forward the following recommendations to ensure opportunities for leisure and recreation are identified and can act as a way to attract and engage even more millennials in our region:

*Invite millennials to the table.* Our natural environment, more than anything, will be intractably altered by today’s decisions. Emerging leaders must be included in conversations about outdoor access, development and stewardship.

*Engage creatively.* Cultivate the next generation of environmental stewards through experiences that capitalize on Colorado’s cultural heritage. Upslope Brewery’s recent ‘backcountry tap room,’ for example, attracted nearly 2,000 young beer-lovers to the White River National Forest for a one-day event.

*Market our mountains.* Brand the Pikes Peak region as hub of outdoor innovation and connect the Olympic City brand with what draws us here in the first place—a spirit of sport, adventure and the mountain massif.

*Invest in urban renewal.* Revitalized public spaces, smart redevelopment and urban trails will not only attract young workers, but also help preserve the surroundings we all enjoy.

*Take outdoor education to the next level.* Colorado’s Outdoor Recreation Industry Office is a testament to the sophistication and foresight of the state’s outdoor sector. Our universities are perfectly poised to capitalize on this industry and offer new programs in outdoor recreation and entrepreneurship that prepare the next wave of industry leaders and environmental advocates.
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