



PIKES PEAK REGION

OUTDOOR INDUSTRY STAKEHOLDER REPORT

2022

Photo Credit: Front Range Climbing

OVERVIEW

This project was made possible by the Colorado Tourism Office Restart Industry Program.



The Pikes Peak Outdoor Recreation Alliance (PPORA) distributed a survey to 160 outdoor businesses and nonprofit organizations in El Paso, Teller, and Fremont counties in April/May 2022 and received 53 responses. The final adjusted response rate was 27% with good representation of different types within each category (e.g. responses from guides, retail, manufacturing, stewardship, education, etc.)

This Executive Summary provides a high level snapshot of what we learned from the local industry sample. A complete benchmark report will be made available and a subsequent survey will be conducted in future years to measure growth and improvement.

Special thanks to all who participated in this project!

INDUSTRY SURVEY TAKE-AWAYS

There were a number of responses that were positive.
Here are some of the top positive responses:

92%

Recognize importance of relationships with other stakeholder groups and most feel they have good relationships



82%

Feel positive about their 12-month outlook



65%

Believe they would benefit from increased protection of public lands



58%

Feel the vast majority of users act responsibly



58%

Believe our outdoor industry is becoming more diverse & inclusive



ASPIRATIONS

FOR OUTDOORS IN PIKES PEAK REGION

These text answers were summarized and categorized and then put in order of greatest number of responses here:

- More/new trails for a variety of users
- Educate users on responsible practices
- Expand recreational opportunities to spread use
- Increase youth engagement
- Sustain our finite outdoor recreation resources
- Need for more planning & collaboration within our industry
- More minority engagement in outdoor recreation

OPPORTUNITIES UNVEILED

There were a number of areas where negative sentiment was expressed, highlighting some key areas of need in the region.

96%



Feel the risks & impacts of natural disasters do/will significantly impact the industry

ONLY 11%



Feel there are ample enforcement personnel; 11%

Feel funding for land managers is sufficient



ONLY 16%



Feel funding for conservation & stewardship projects is sufficient

ONLY 33%

Feel outdoor recreation infrastructure (parking, bathrooms, etc.) is well maintained



67%



Feel increasing visitation is having a negative impact on public lands & community resources

ONLY 36%

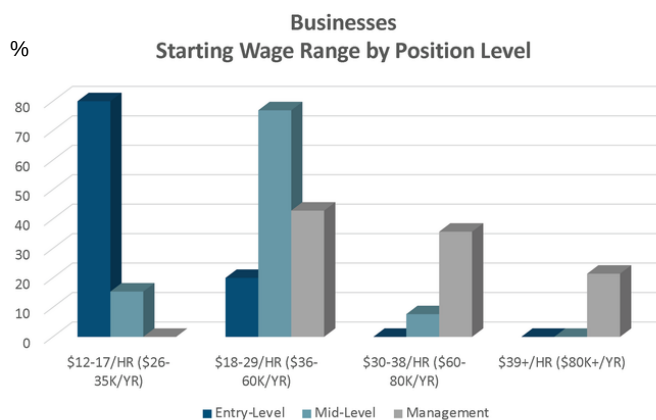
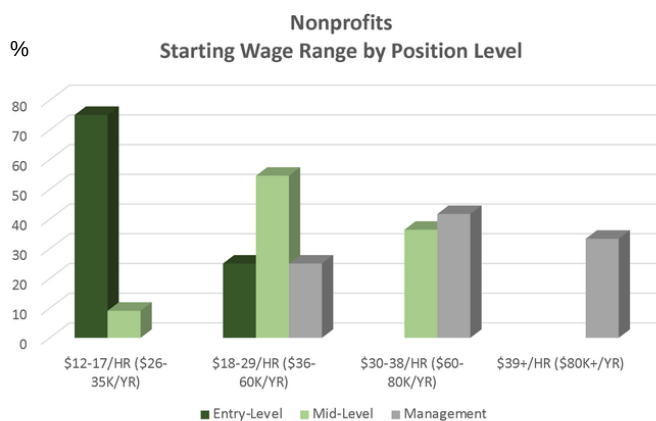
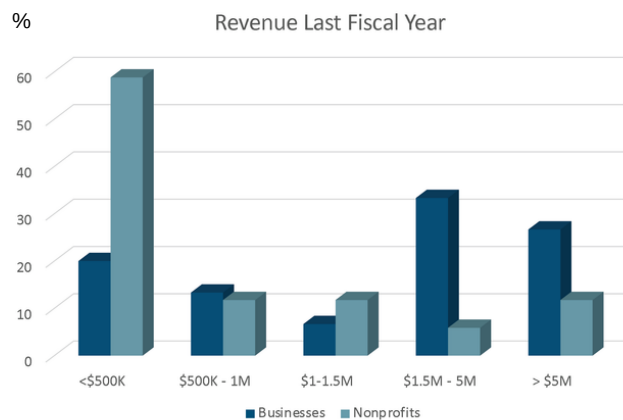


Feel our outdoor industry is reaching underserved communities

Over 1/3 of respondents shared further insights in open-ended questions. 122 responses were coded and sorted and are available at PPORA.org

OUTDOOR INDUSTRY BENCHMARKS

PIKES PEAK REGION



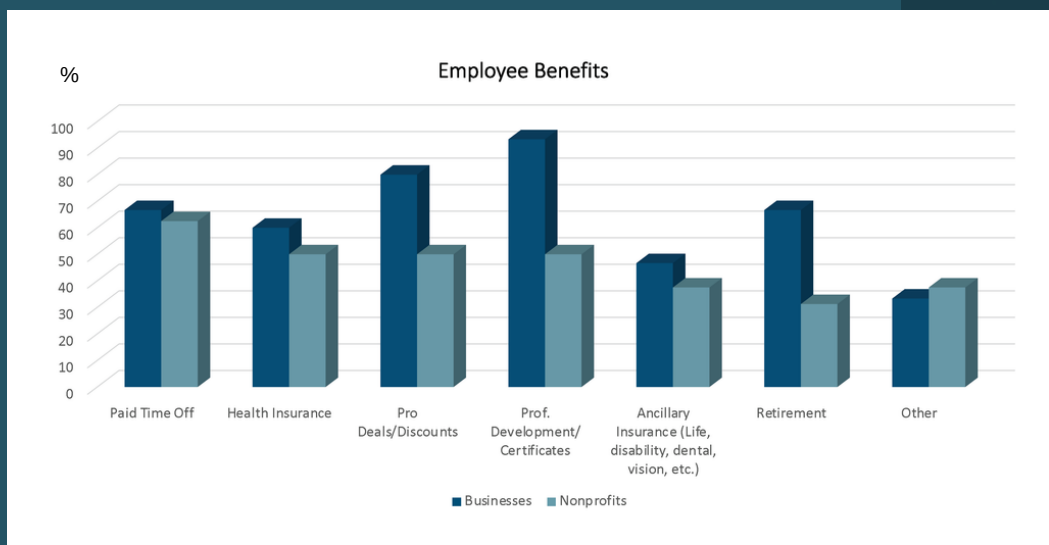
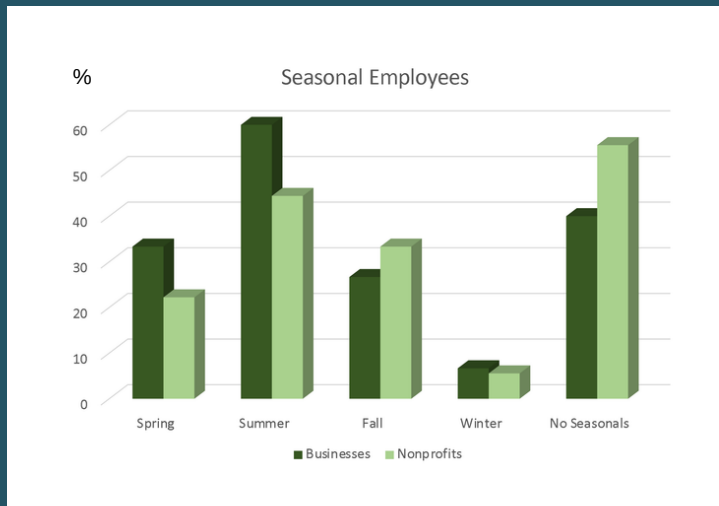
TOUGHEST POSITIONS TO FILL

BUSINESSES

- Accounting/Bookkeeping
- Admin & Maintenance
- Bicycle mechanics
- CDL drivers with P2 Endorsement
- Certified Automotive Technician
- Customer Service Positions
- Lot Technician
- Mechanics
- Office Manager
- Sales Associates
- Shop Clerk/Cleaning
- Ski Techs
- Trailhead Assistance

NONPROFITS

- Board Members, particularly Officers
- Event Temp workers and volunteers
- Fall Forestry Corps members
- Operations
- Operations Management
- Seasonal Field Positions
- Seasonal, Part-time
- Summer of Service Corps members
- Technical Staff
- Trusted Advisors
- Trainers
- Volunteers



COMPREHENSIVE INDUSTRY REPORT

2022 FULL INDUSTRY REPORT

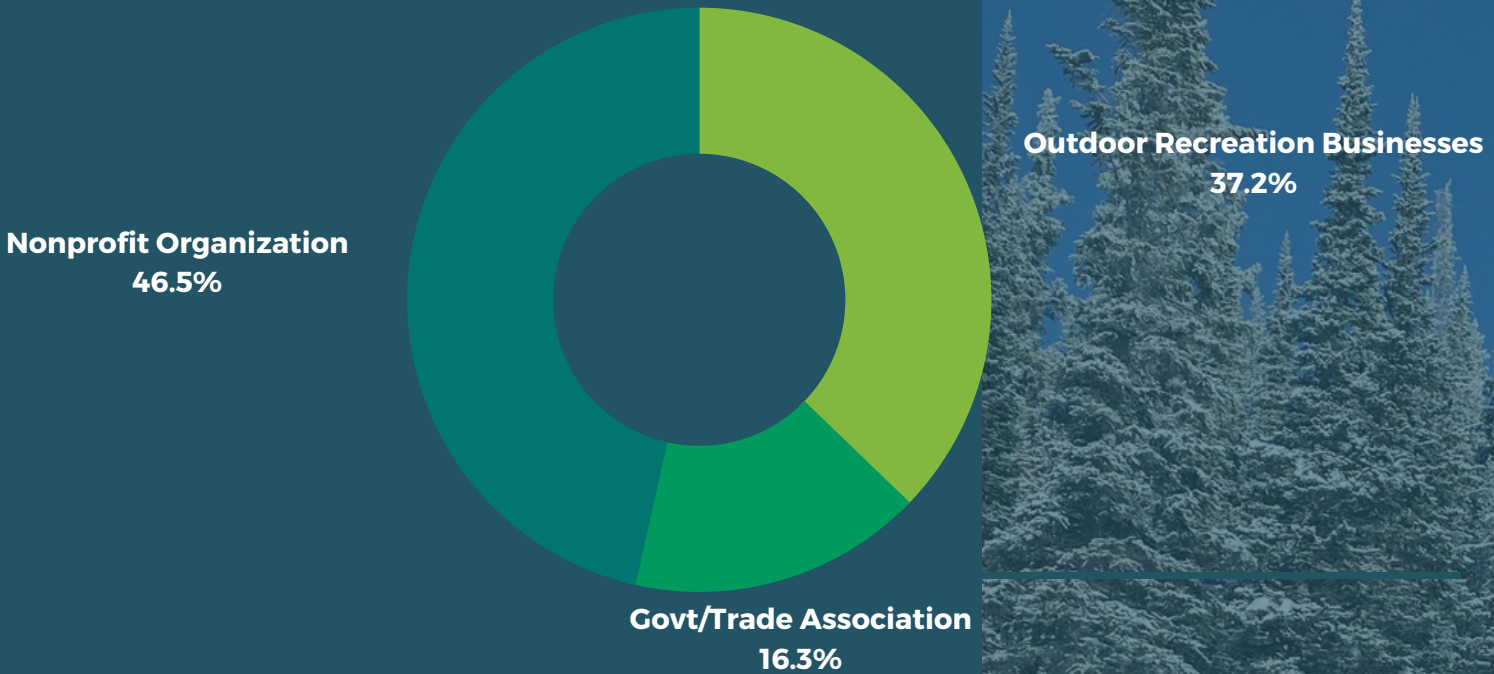
In appreciation for their time and insights, this comprehensive report is made for those who took part in completing the Outdoor Industry Stakeholder Questionnaire.

Comprehensive report and initial analysis provided by Bobby Chapell and the Colorado Tourism Office.

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INDUSTRY RESPONDENT BREAKDOWN



KEY FOR INTERPRETATION

Green Box

Indicates high concurrence with a “positive” outlook (i.e. things look good)

Red Box

Indicates high concurrence with a “negative” outlook (i.e. needs improvement)

Blue Box

Indicates high concurrence with a “neutral” outlook (i.e. not good, not bad, or subjective)

The following data points pertain to respondents' business and organizational insights.

OUTLOOK

82% of respondents feel positive about their 12 month outlook

And while 33% of respondents agree or strongly agree they have a strong pool of employees to draw from, there are 28% that disagree or strongly disagree with that sentiment.

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
My business/organization has a strong outlook for the next 12 months	0.00% 0	6.52% 3	6.52% 3	28.26% 13	54.35% 25	4.35% 2
My business/organization has a strong pool or pipeline of potential employees from which to draw	10.87% 5	17.39% 8	26.09% 12	21.74% 10	10.87% 5	13.04% 6
My business/organization is significantly impacted by the current rise in the cost of doing business	2.17% 1	8.70% 4	26.09% 12	26.09% 12	30.43% 14	6.52% 3
My business/organization operations are significantly impacted by the current global supply chain challenges	2.17% 1	17.39% 8	28.26% 13	19.57% 9	23.91% 11	8.70% 4

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
It is important for my business/organization to have strong relationships with diverse stakeholder groups within the industry and throughout the community	0.00% 0	2.17% 1	4.35% 2	19.57% 9	71.74% 33	2.17% 1
My business/organization has strong relationships with land managers	4.35% 2	8.70% 4	17.39% 8	23.91% 11	39.13% 18	6.52% 3
My business has strong relationships with outdoor nonprofits	0.00% 0	8.70% 4	15.22% 7	32.61% 15	39.13% 18	4.35% 2
My organization has strong relationships with outdoor businesses	0.00% 0	6.52% 3	19.57% 9	43.48% 20	30.43% 14	0.00% 0
My business/organization has strong relationships with tourism/destination marketing & management organizations	4.35% 2	30.43% 14	17.39% 8	26.09% 12	19.57% 9	2.17% 1
My business/organization has strong relationships with community economic developers	8.70% 4	15.22% 7	30.43% 14	30.43% 14	15.22% 7	0.00% 0
My business/organization has strong relationships with local government officials	6.52% 3	10.87% 5	17.39% 8	28.26% 13	34.78% 16	2.17% 1

RELATIONSHIPS

92% of respondents recognize the importance of relationships with diverse stakeholder groups throughout the community.

And...

By and large, all respondents agree or strongly agree that they have good relationships



GROWING THE ECONOMY

65% of respondents agree or strongly agree they would benefit from increased protection of public lands.

54% of respondents feel they would benefit from increased visitation during the shoulder season and 52% would benefit from increased tourism promotion.

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
My business/organization would benefit from increased protection of public lands and natural resources	8.70% 4	13.04% 6	13.04% 6	23.91% 11	41.30% 19	0.00% 0
My business/organization would benefit from more visitors in the shoulder season (Spring or Fall)	4.35% 2	15.22% 7	23.91% 11	17.39% 8	36.96% 17	2.17% 1
My business/organization would benefit from increased tourism promotion and increased visitation	4.35% 2	19.57% 9	21.74% 10	21.74% 10	30.43% 14	2.17% 1

The following data points pertain to respondents' insights on the Pikes Peak region.

INCLUSIVITY

The industry has some work to do. While most agree the industry is becoming more inclusive, there was a large percentage that were neutral and only a few that strongly agree.

A clear area for improvement is reaching underserved communities.



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
The outdoor industry in our region is becoming more diverse and inclusive (Diversity, Equity, and Inclusion)	0.00% 0	13.33% 6	26.67% 12	46.67% 21	11.11% 5	2.22% 1
The outdoor industry in our region is reaching underserved communities (such as people of color and indigenous heritage, people with disabilities, lower income communities, etc.)	4.44% 2	20.00% 9	40.00% 18	28.89% 13	6.67% 3	0.00% 0
The outdoor industry in our region is growing in youth participation - the next generation of the industry	2.22% 1	6.67% 3	33.33% 15	46.67% 21	11.11% 5	0.00% 0

USER ACCESS AND BEHAVIOR

STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
2.22% 1	17.78% 8	15.56% 7	51.11% 23	13.33% 6	0.00% 0
Information on responsible outdoor recreation best practices (ex: Leave No Trace) is readily available					
4.44% 2	20.00% 9	17.78% 8	42.22% 19	15.56% 7	0.00% 0
The vast majority of outdoor recreation users in our region act in a responsible manner					
11.11% 5	33.33% 15	26.67% 12	15.56% 7	11.11% 5	2.22% 1
Reservation and/or timed entry should be used more to manage increasing visitation in our outdoor recreation areas					
13.33% 6	11.11% 5	24.44% 11	31.11% 14	20.00% 9	0.00% 0
User fees should be used more to manage increasing visitation in our region's outdoor recreation areas					
4.44% 2	28.89% 13	31.11% 14	22.22% 10	6.67% 3	6.67% 3
Conflicts between outdoor recreational user groups are typically resolved respectfully between the involved users					

Respondents tend to agree that information on responsible recreation is available and the vast majority of users act in a responsible manner. Respondents are down the middle on user conflicts.

As far as management actions are concerned, there is slightly more agreement with user fees than with reservations.

47% of respondents disagree or strongly disagree that facilities are well maintained, but 46% agree or strongly agree trails and waterways are well maintained.

71% believe that there are not ample enforcement personnel, and 73% agree in the importance of public transportation.

INFRASTRUCTURE

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
Outdoor recreation infrastructure in our region (e.g. parking lots/bathrooms/trash receptacles/wayfinding signage) is well maintained	8.89% 4	37.78% 17	20.00% 9	33.33% 15	0.00% 0	0.00% 0
Trails, waterways, and parks in our region are well maintained	6.67% 3	31.11% 14	15.56% 7	44.44% 20	2.22% 1	0.00% 0
There are ample information/enforcement personnel in outdoor recreation areas	24.44% 11	46.67% 21	17.78% 8	6.67% 3	4.44% 2	0.00% 0
Public transportation, bikeability/walkability, and alternative transportation options (e.g. EV) are important for the success of our industry and region	11.11% 5	0.00% 0	13.33% 6	31.11% 14	42.22% 19	2.22% 1

REGIONAL ASSETS

	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
The assets and activities in our region are attractive to recreation users	0.00% 0	0.00% 0	0.00% 0	24.44% 11	75.56% 34	0.00% 0
Increasing visitation is having a negative impact on public lands and community resources	0.00% 0	17.78% 8	15.56% 7	40.00% 18	26.67% 12	0.00% 0
There is sufficient conserved/protected land (public and private) in our region areas	13.33% 6	31.11% 14	11.11% 5	24.44% 11	20.00% 9	0.00% 0
There are sufficient trails and recreation opportunities in our region for all user groups	24.44% 11	31.11% 14	8.89% 4	24.44% 11	11.11% 5	0.00% 0

There is strong alignment in most areas with everyone agreeing that regional assets are attractive.

2/3 of respondents feel increased visitation is having a negative impact on public lands and natural resources.

INDUSTRY SUSTAINABILITY

84% agree that funding for land managers and conservation is important, but only 11% believe that the funding IS sufficient for land managers and 16% believe it's sufficient for conservation and stewardship.



	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A
The risk and impacts of natural resource disasters (wildfires, mud slides, etc.) have a significant impact on the outdoor industry	0.00% 0	2.22% 1	2.22% 1	44.44% 20	51.11% 23	0.00% 0
Funding for land managers is important for the success of our outdoor industry	4.44% 2	2.22% 1	8.89% 4	22.22% 10	62.22% 28	0.00% 0
Funding for land managers is sufficient	26.67% 12	35.56% 16	22.22% 10	11.11% 5	0.00% 0	4.44% 2
Funding for conservation and stewardship projects is sufficient	24.44% 11	31.11% 14	22.22% 10	8.89% 4	6.67% 3	6.67% 3

OPEN-ENDED RESPONSE SUMMARY



Over one-third of respondents shared further insights in open-ended questions:

1. Please share any additional insights about your business/organization's outlook, concerns, and/or opportunities.
2. What are your aspirations for the outdoors-the industry, assets, infrastructure, or otherwise-in the Pikes Peak region?
3. If PPORA could do ONE thing within the next 18 months to strengthen the outdoor industry for the Pikes Peak region, what would it be and why?

122 responses were coded and sorted. For full transparency, we chose not to summarize responses in the report.

We have gathered a sample of responses to the three open-ended questions on the next page. **Please see all open ended responses on our website at www.ppora.org.**

OPEN-ENDED RESPONSE SAMPLE

1. Please share any additional insights about your business/organization's outlook, concerns, and/or opportunities.

"Protecting and utilizing the outdoors is important for our business/agency in that it promotes health and wellness."

"Group access to the public needs to improve. Permitting process is too onerous."

"A strong concern is not only finding staff, but finding qualified diverse staff from underrepresented populations."

"Planning needs to be done to determine WHERE land should be conserved and WHERE new recreational assets should be built. We are overused in some key areas but also under-used in other parts of the region that desire more outdoor recreation, such as in western Teller County. We need to work collaboratively to find more "win-win" scenarios."

2. What are your aspirations for the outdoors - the industry, assets, infrastructure, or otherwise - in the Pikes Peak region?

"Continued partnerships with land managers and private land owners to create new, responsible, attractive recreation opportunities for our region. We MUST figure out a way to accommodate new users (there are so many!) without negatively impacting our wildlife and open spaces."

"That we are somehow able to find a balance between use, conservation, and economic growth. More isn't always better."

"I would like to see the industry thrive with new outdoor businesses to support users, particularly in the parts of the region who are not experiencing economic growth from outdoor recreation."

"I'd like to see the land managers well-resourced and using innovative ways with new technology and practices to manage the recreational demand while preserving what makes this region special. I would like to see resources put toward forest health and wildfire prevention."

3. If PPORA could do ONE thing within the next 18 months to strengthen the outdoor industry for the Pikes Peak region, what would it be and why?

"Move forward a comprehensive recreation and conservation management plan for the Pikes Peak region."

"Provide more training in leave no trace, along with how best to prepare for participating in outdoor activities."

"Outdoor recreation within the Pikes Peak Region must strive to be inclusive of all forms of outdoor recreation, which challenges organizations like PPORA to ensure underrepresented forms of recreation are not forgotten or figuratively 'locked out.'"

"Improve communication and outcomes between the USFS and those of us who must work with them to accomplish goals."



INDUSTRY BENCHMARKING- BUSINESSES AND NONPROFITS

The following section dives into industry benchmarking of the Pikes Peak region's outdoor businesses and nonprofits. This section provides better understanding of the current state of the region's outdoor industry and better equips PPORA to support and advocate for the industry.

PPORA plans to repeat the questions from the Outdoor Industry Stakeholder Survey in several years to evaluate changes, growth, and continued challenges in our area.

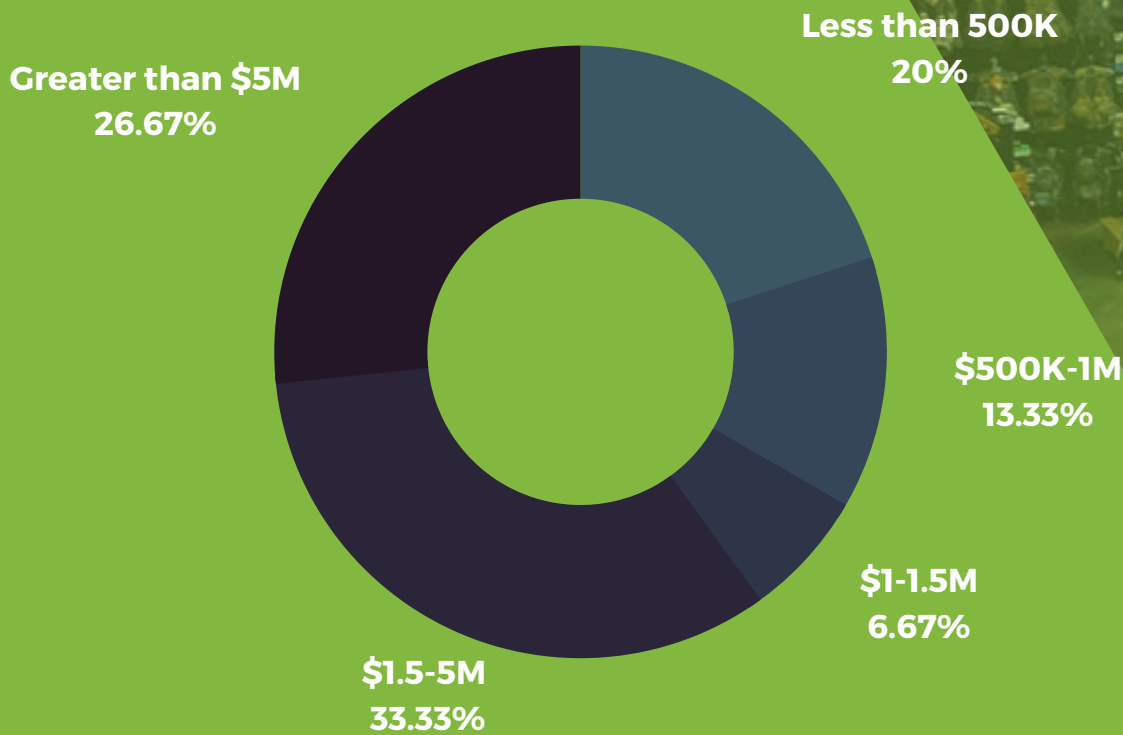
The following data breaks down annual revenue, employee wages, and seasonal workforce between businesses and nonprofits. (See the Executive Summary at the beginning of this report for additional, summarized benchmarks.)

Fewer responses make up this section, due to hesitation in providing more sensitive information.

Although helpful to better understand the current state of the industry, the small sample should be taken into consideration and broad assumptions and characterizations from the data should be avoided.

INDUSTRY BENCHMARKS- BUSINESS

What was your business/organization revenue in the last fiscal year?

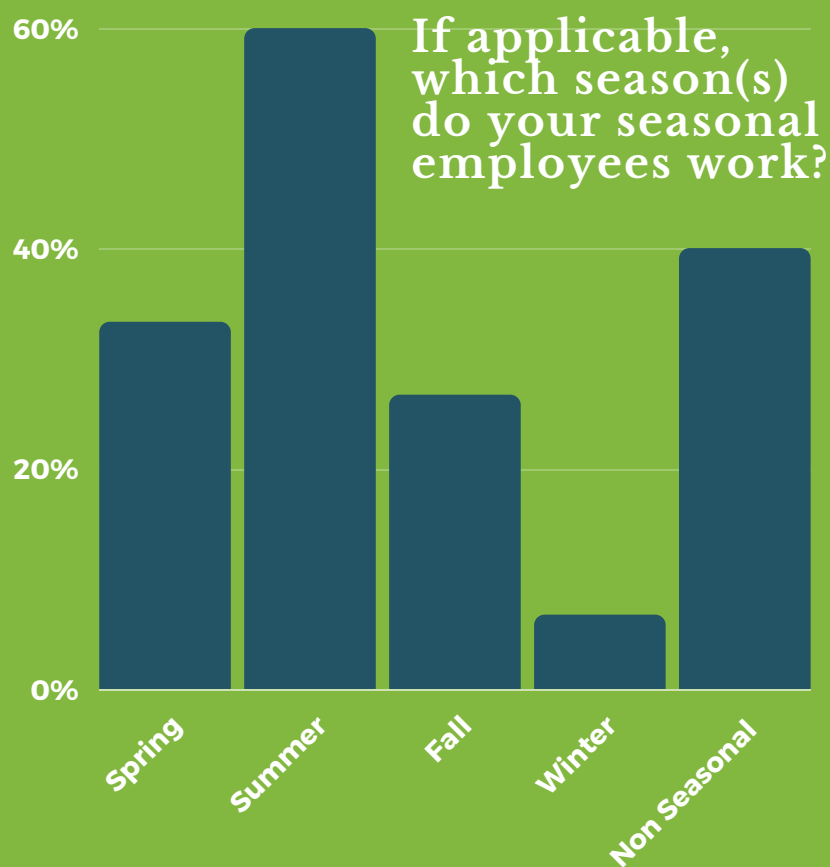


Please indicate the starting wage range for each of the following position levels.

	\$12-17/HR (\$26-35K/YR)	\$18-29/HR (\$36-60K/YR)	\$30-38/HR (\$60-80K/YR)	\$39+/HR (\$80K+/YR)
Entry-Level	80.00% 12	20.00% 3	0.00% 0	0.00% 0
Mid-Level	15.38% 2	76.92% 10	7.69% 1	0.00% 0
Management	0.00% 0	42.86% 6	35.71% 5	21.43% 3

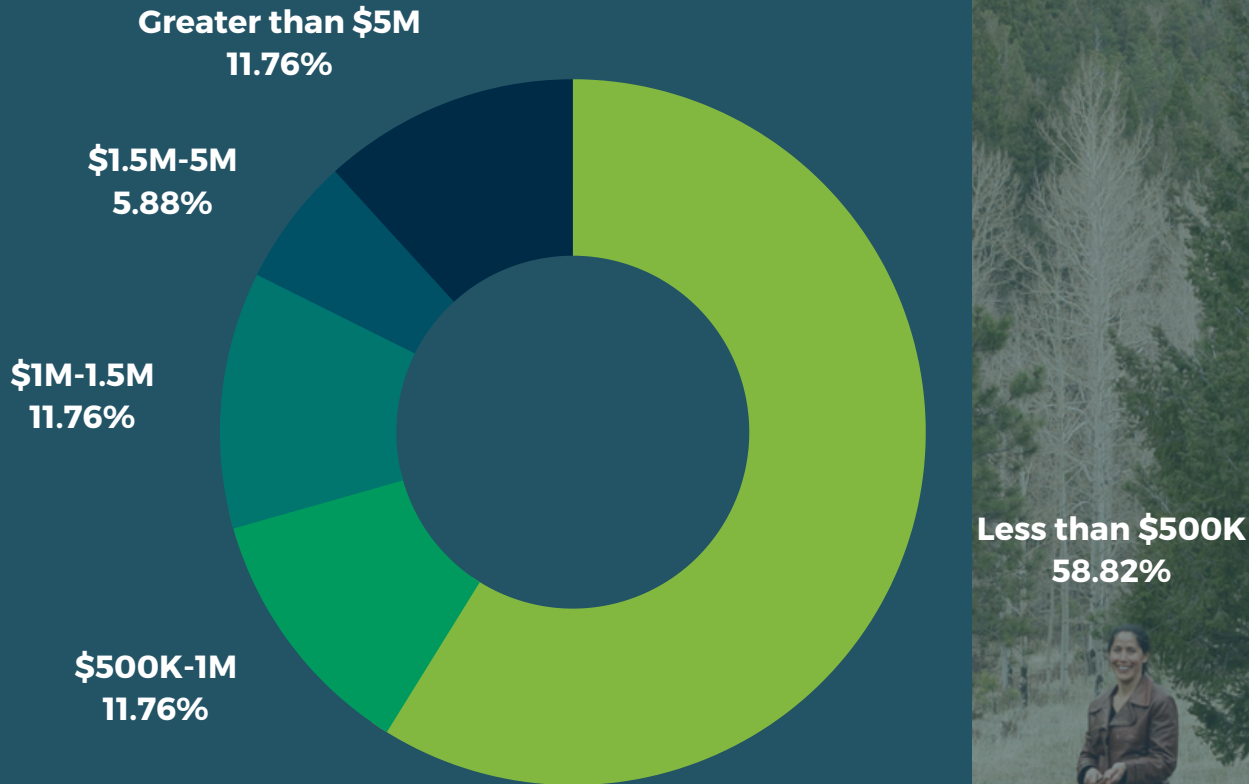
At peak employment (e.g., busy season), indicate the percentage of your workforce in each type of position below.

	< 25%	25-49%	50-75%	> 75%
Full Time	13.33% 2	6.67% 1	13.33% 2	66.67% 10
Part Time	71.43% 10	7.14% 1	14.29% 2	7.14% 1
Seasonal	66.67% 6	0.00% 0	11.11% 1	22.22% 2
Volunteers or Interns (unpaid)	100.00% 5	0.00% 0	0.00% 0	0.00% 0
Independent Contractors (e.g., guides, not W-2)	83.33% 5	0.00% 0	16.67% 1	0.00% 0



INDUSTRY BENCHMARKS- NONPROFITS

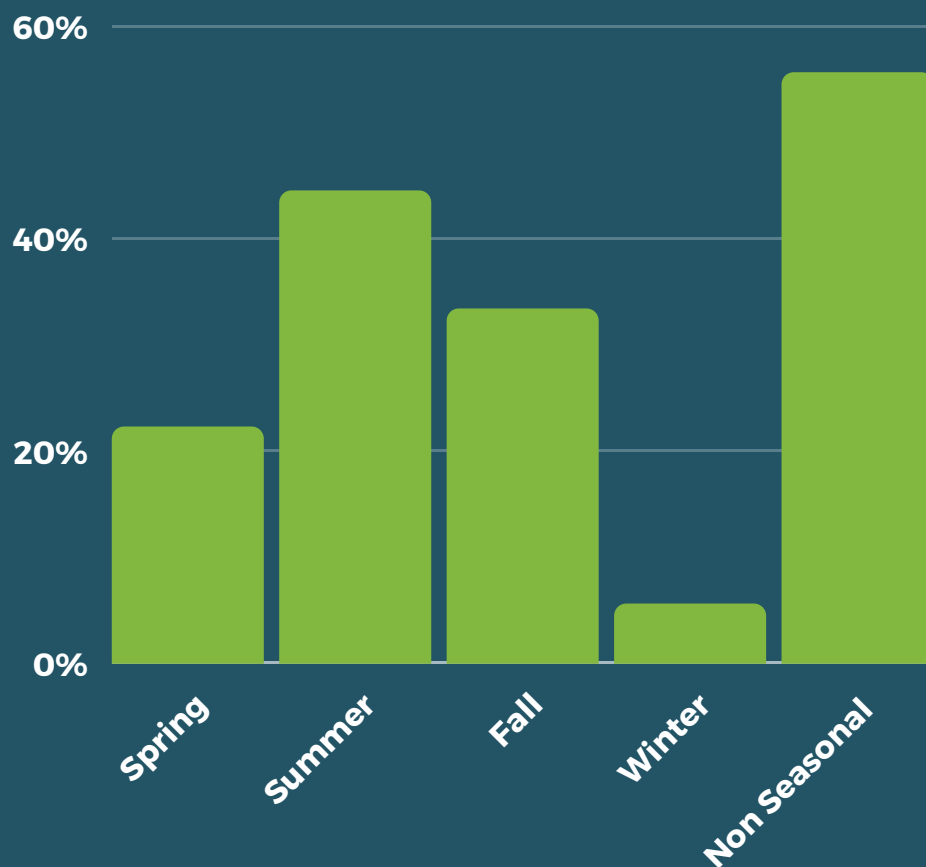
What was your business/organization revenue in the last fiscal year?



Please indicate the starting wage range for each of the following position levels.

	\$12-17/HR (\$26-35K/YR)	\$18-29/HR (\$36-60K/YR)	\$30-38/HR (\$60-80K/YR)	\$39+/HR (\$80K+/YR)	TOTAL
Entry-Level	75.00% 9	25.00% 3	0.00% 0	0.00% 0	12
Mid-Level	9.09% 1	54.55% 6	36.36% 4	0.00% 0	11
Management	0.00% 0	25.00% 3	41.67% 5	33.33% 4	12

If applicable, which season(s) do your seasonal employees work?



At peak employment (e.g., busy season), indicate the percentage of your workforce in each type of position below.

	< 25%	25-49%	50-75%	> 75%
Full Time	25.00% 3	8.33% 1	25.00% 3	41.67% 5
Part Time	37.50% 3	37.50% 3	12.50% 1	12.50% 1
Seasonal	28.57% 2	28.57% 2	14.29% 1	28.57% 2
Volunteers or Interns (unpaid)	30.77% 4	7.69% 1	15.38% 2	46.15% 6
Independent Contractors (e.g., guides, not W-2)	66.67% 6	11.11% 1	0.00% 0	22.22% 2

IMPACT

The insights gleaned through this project will:

- Help inform the planning work of the Outdoor Pikes Peak Initiative through the Colorado Outdoor Regional Partnership,
- Inform PPORA's strategic plan development for the next three years, and
- Serve as a baseline for the makeup, health and sentiments of the local outdoor industry that can be compared in years to come to learn see changing needs and growth in the industry.

ACKNOWLEDGEMENTS

This report would not have been possible without the hard work and participation of a number of people.

First of all, we want to acknowledge the Colorado Tourism Office. Through their Restart Industry Associations program, PPORA received a grant to do this work . PPORA was paired with Bobby Chappell, a CRAFT Mentor from the Tourism Consulting Collaborative, to deliver 75 hours of consulting to create, launch, and then analyze results from the Outdoor Industry Stakeholder Survey.

In creating the questionnaire, a number of partners consulted on format, questions to include, and delivery of the questionnaire.

And finally, special thanks goes to all of the stakeholders who took precious time to participate and share their insights on the industry as well as their personal data.

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