

ENGAGING TODAY'S GENERATION IN OUTDOOR RECREATION

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OUTDOOR FOUNDATION



OUTDOOR NATION



MISSION

Engage, empower and activate young leaders to spearhead a nationwide movement on campuses and in communities that results in a new generation of active, outdoor enthusiasts and stewards.



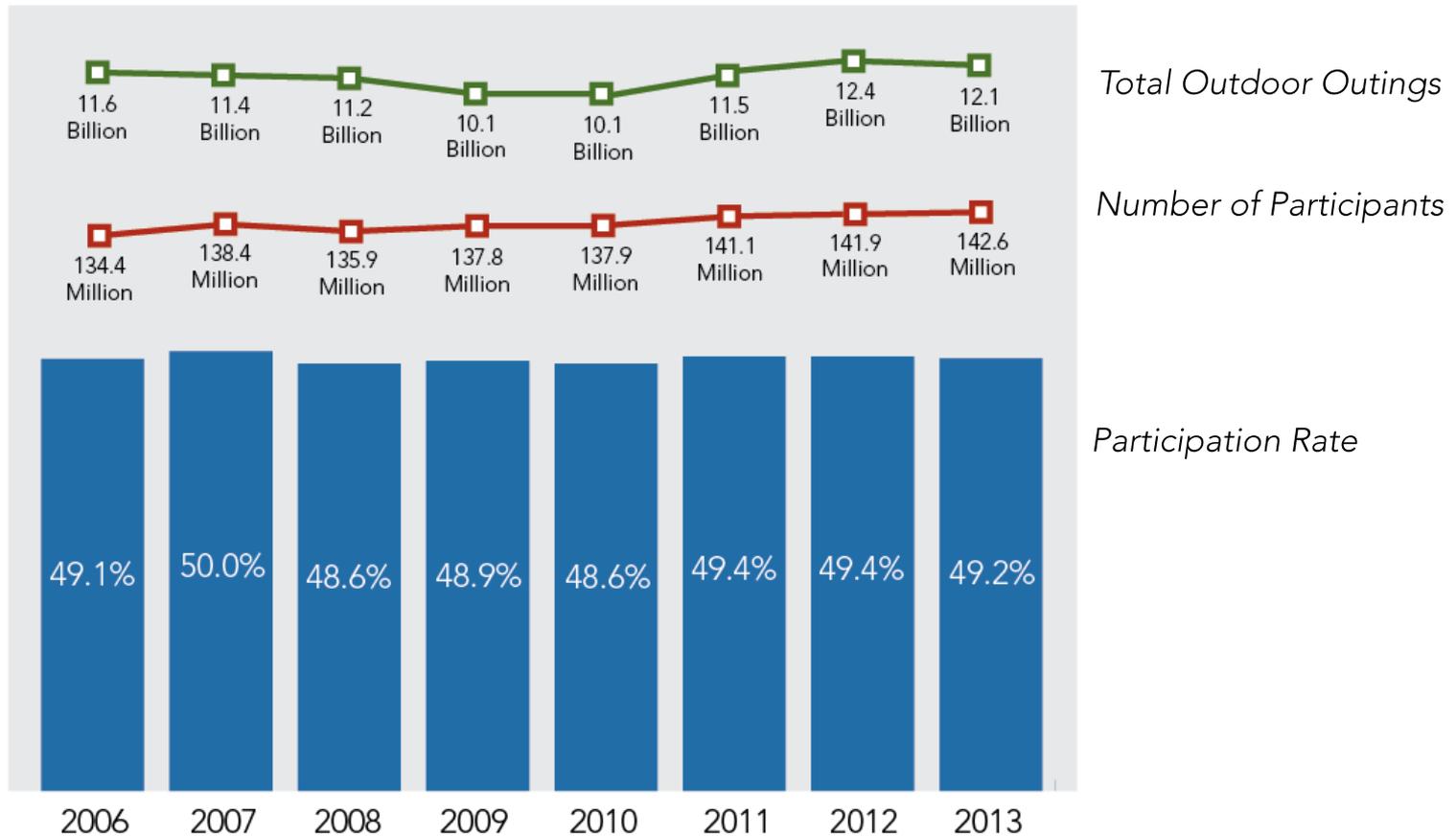


NATIONAL LEADER

Outdoor Nation represents the **largest and most active community of young people championing outdoor participation** and recreation.

- Since 2010, Outdoor Nation has held 30 summits and supported hundreds of campus and community projects – activating thousands of diverse and influential young people across the country.
- Outdoor Nation is working currently working with more 50 colleges nationwide – empowering students to spearhead outdoor outreach efforts.
- Outdoor Nation has the largest, most active online community of young people passionate about inspiring outdoor participation.

Current Outdoor Participation



Outdoor Participation in Utah



At least **82%** of **Utah** residents participate in outdoor recreation each year.¹

In Utah

OUTDOOR RECREATION
GENERATES...

\$12.0
BILLION
in consumer
spending

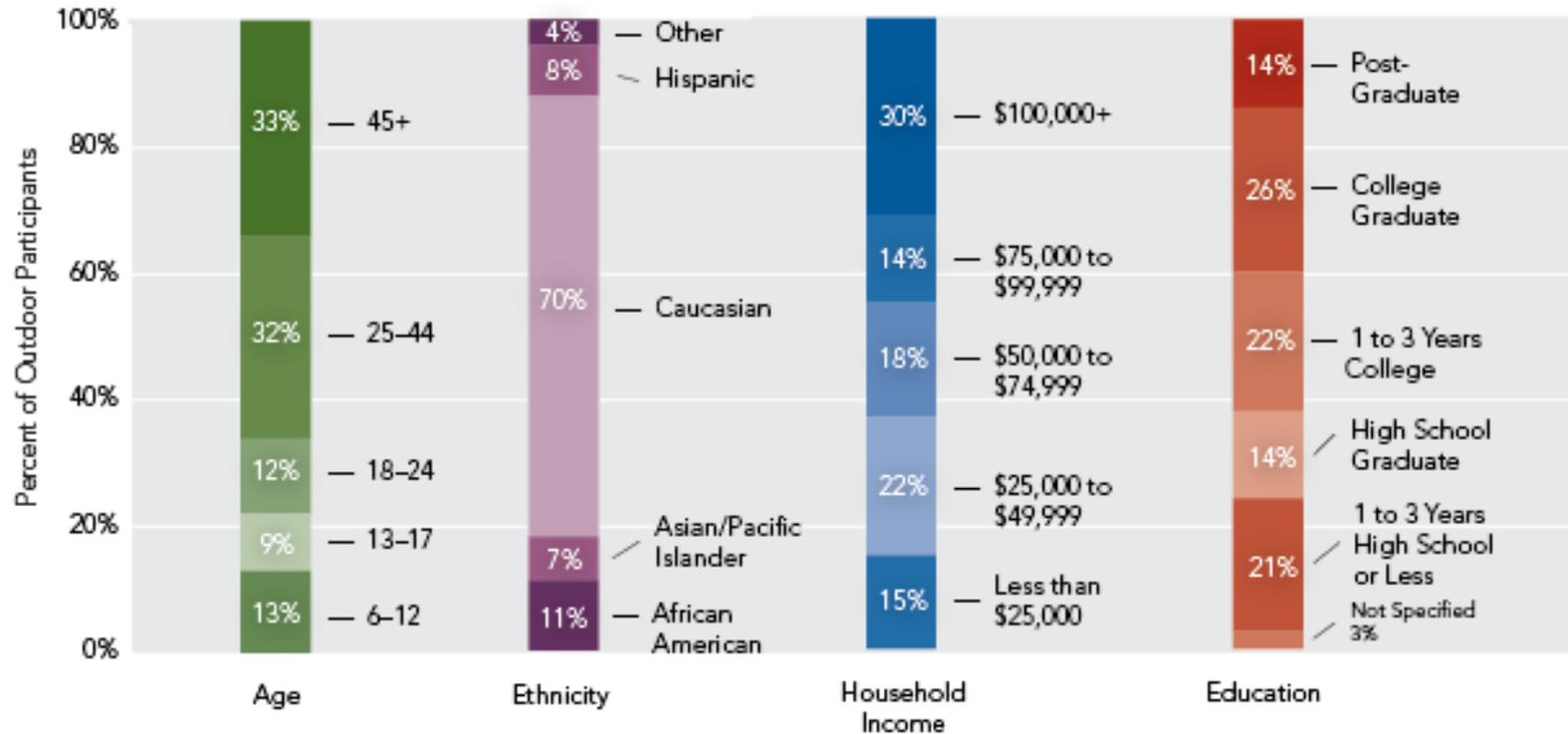
122K
direct
Utah
jobs²

\$3.6
BILLION
in wages
and salaries

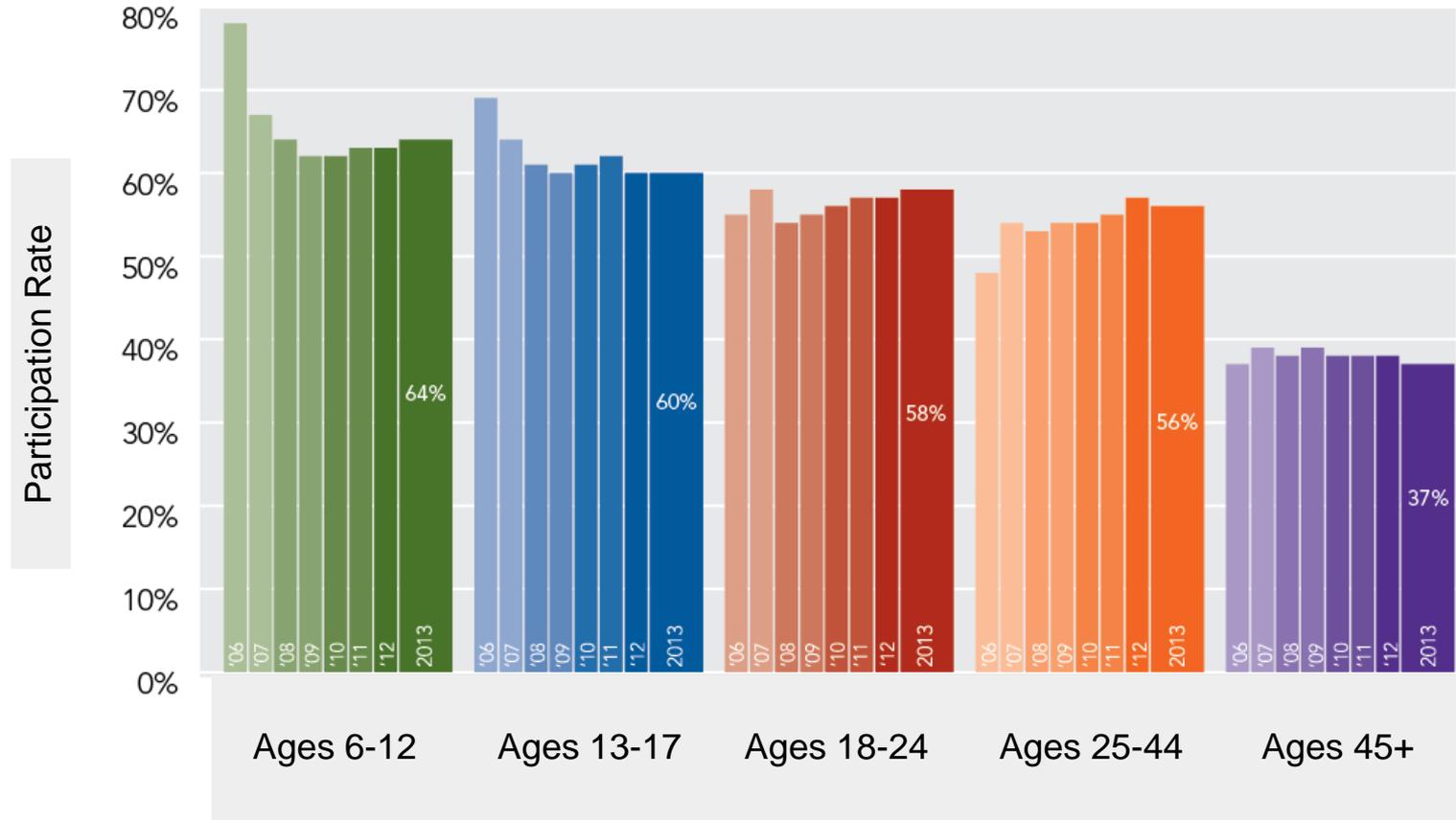
\$856
MILLION
in state and local
tax revenue

*Participants in hunting, fishing and wildlife viewing were estimated separately and are not part of this figure.

Participation by Demographic



Participation by Age



Youth Participation in Sports & Recreation Among Current Outdoor Enthusiasts

	Ages 6-12		Ages 13-17	
	Outdoor Participants	Non- Outdoor Participants	Outdoor Participants	Non- Outdoor Participants
<i>PE at School</i>	74%	60%	71%	60%
<i>Outdoor Activities</i>	41%	18%	46%	21%
<i>Team Sports</i>	40%	23%	45%	27%
<i>Cycling</i>	37%	24%	36%	22%
<i>Running/Jogging</i>	24%	14%	38%	19%
<i>Swimming for Fitness</i>	23%	13%	25%	13%
<i>Water Sports</i>	19%	9%	21%	9%
<i>Winter Sports</i>	14%	5%	18%	7%
<i>Racquet Sport</i>	8%	3%	15%	8%
<i>Fitness/Health Club- Based Activities</i>	5%	2%	13%	4%
<i>Golf</i>	5%	2%	11%	4%
<i>None of the Above</i>	11%	30%	11%	28%

Motivations to Get Outside

	Ages 6–12	Ages 13–17	Ages 18–24
<i>Be with family/friends</i>	76%	63%	51%
<i>Get exercise</i>	65%	69%	75%
<i>Experience excitement/adventure</i>	52%	44%	51%
<i>Develop my skills/abilities</i>	48%	50%	43%
<i>It is cool</i>	42%	28%	19%
<i>Be with people who enjoy the same things I do</i>	38%	43%	25%
<i>Keep physically fit</i>	36%	56%	60%
<i>Be close to nature</i>	31%	33%	47%
<i>Enjoy the sounds/smells of nature</i>	26%	26%	39%
<i>Gain self-confidence</i>	24%	30%	35%
<i>Gain a sense of accomplishment</i>	22%	31%	39%
<i>Observe scenic beauty</i>	22%	27%	44%
<i>Get away from usual demands</i>	18%	33%	49%
<i>Be with people who share my values</i>	13%	24%	18%
<i>Talk to new/varied people</i>	10%	13%	12%
<i>Experience solitude</i>	5%	13%	29%
<i>Other reason(s)</i>	7%	5%	5%

Youth Barriers to Getting Outside

	Ages 6–12	Ages 13–17	Ages 18–24
<i>I am not interested</i>	33%	41%	38%
<i>It is too expensive</i>	21%	18%	16%
<i>Too busy with other recreation activities</i>	18%	13%	5%
<i>I do not have time</i>	14%	22%	36%
<i>Too busy with family responsibilities</i>	12%	7%	16%
<i>I do not have the skills/abilities</i>	12%	17%	25%
<i>I do not have anyone to participate with</i>	12%	17%	30%
<i>Places for outdoor recreation cost too much</i>	11%	8%	9%
<i>Places for outdoor recreation are too far away</i>	10%	12%	12%
<i>I do not have transportation to outdoor venues</i>	6%	8%	7%
<i>I do not have enough information</i>	5%	7%	5%
<i>I am afraid of getting hurt by other people</i>	4%	3%	3%
<i>My health is poor</i>	3%	3%	6%
<i>I have a physically limiting disability</i>	3%	3%	2%
<i>Places for outdoor recreation are too crowded</i>	2%	2%	5%
<i>Places for outdoor recreation are poorly maintained</i>	2%	2%	3%
<i>I have household members with a physical disability</i>	1%	1%	1%
<i>Venues for outdoor recreation are too polluted</i>	1%	0%	0%
<i>I am afraid of getting hurt by animals</i>	1%	0%	2%
<i>Places for outdoor recreation are overdeveloped</i>	1%	0%	0%
<i>Other reason(s)</i>	18%	16%	15%

Young Adults' Outdoor Activities

Ages 18-24

Total Annual Outings: 2.1 billion
Average Outing/Participant: 118

Most Popular Outdoor Activities

By Participation Rate

- 1. Running, Jogging and Trail Running**
36% of young adults / 10.7 million
- 2. Car, Backyard, Backpacking and RV Camping**
22% of young adults / 6.6 million participants
- 3. Road, Mountain and BMX Biking**
16% of young adults / 4.8 million participants
- 4. Hiking**
14% of young adults / 4.4 million participants
- 5. Freshwater, Saltwater and Fly Fishing**
14% of young adults / 4.4 million participants

Favorite Outdoor Activities

By Frequency of Participation

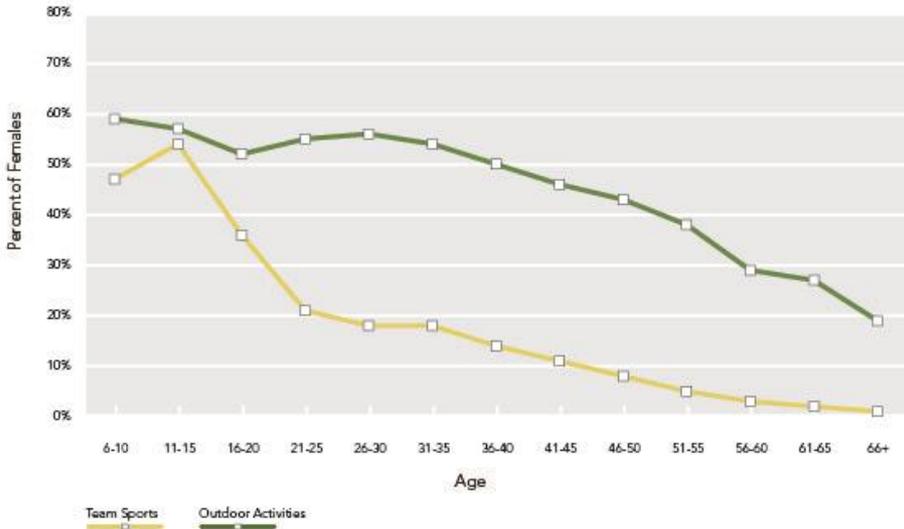
- 1. Running, Jogging and Trail Running**
96 average outings per runner / 1.0 billion outings
- 2. Road Biking, Mountain Biking and BMX**
89 average outings per cyclist / 424.8 million outings
- 3. Freshwater, Saltwater and Fly Fishing**
24 average outings per fishing participant / 105.5 million outings
- 4. Hiking**
21 average outings per hiker / 90.6 million outings
- 5. Skateboarding**
68 average outings per skateboarder / 83.5 million outings



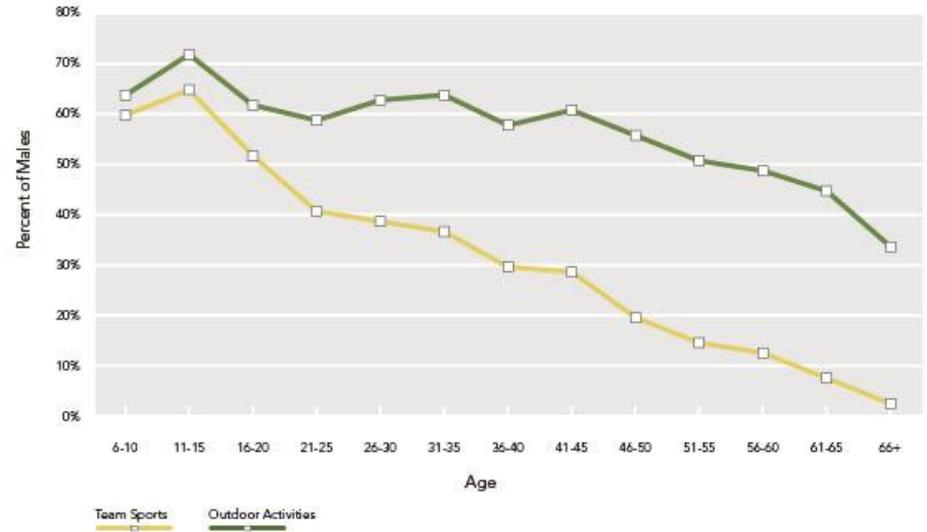
CAPTURE 'ACTIVE' MARKET SHARE

One of the biggest declines in activity among Americans occurs in the 'team sport category' between the ages of 16 – 24, providing a great opportunity to convert this group to outdoor activities.

Participation by Age, Females
Ages 6+



Participation by Age, Males
Ages 6+





WHAT KEEPS TODAY'S GENERATION FROM GOING OUTSIDE?

Barriers/Issues:

- The outdoors is does not feel inclusive
- Not aware of green spaces
- Lack of outdoor education



The Solutions?

- Change perceptions by proactively thinking about how we talk about and illustrate outdoor recreation
- Innovative programming
 - Technology/Outdoor or Health/Outdoor
- More opportunities that are close-to-home



ENGAGING THROUGH RECREATION ON PUBLIC LANDS

How could we engage today's generation in outdoor recreation on public lands?

- Local – close to home recreation
- Start with the fun!
 - Focus on play in parks and then add layers
 - Advocacy, Stewardship, Education
 - Make it social – peers and family
- You don't have to go to the Grand Canyon or Zion National Park to have an amazing and impactful outdoor experience. That can be perceived anywhere.
 - We shape the experiences as educators, planners, programmers and outdoor leaders.

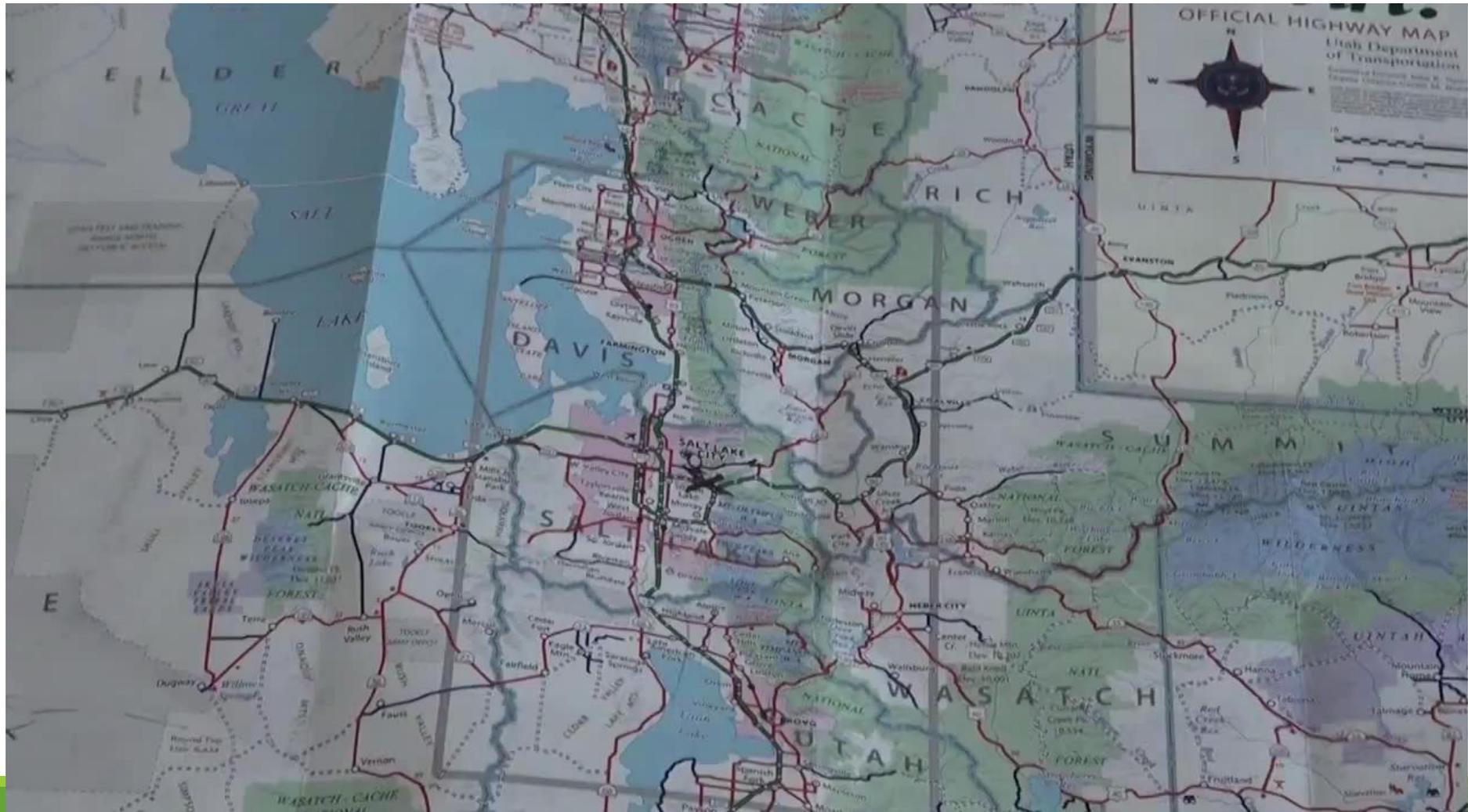


Salt Lake City Foundation and the Jordan River

- This project provided more than four dozen local Salt Lake youth with the opportunity to explore the Jordan River by boat, bike and on foot.
- These youth all participated in documenting the various resources along the river, contributing to the creation of the first recreation map ever for the river.
- The hope is to continue with the Jordan River Youth Ambassadors project, utilizing the connection that these youth now have with the river to build support among family and friends for this asset.



Salt Lake City Foundation and the Jordan River





Outdoor Recreation and Park Prescriptions

- Focus on using the outdoors for a place of health and wellness instead of using tradition medications
- Multilingual prescriptions
- Helps with the “daunting” feeling of the outdoors that a person who did not grow up with a camping or outdoorsy family often experiences.
- Prescriptions reduce discomfort and help kids and families engage with local parks – provides a feeling of “Hey, I belong here too!”
- Partnerships – healthcare providers, non-profits, land managers



Outdoor Recreation and Park Prescriptions

The National Park Service's (NPS) Rivers, Trails, and Conservation Assistance program is working with doctors, healthcare providers, and NPS managers as part of the Healthy Parks Healthy People (HPPH); Greater Washington Area Initiative (DC, VA, MD, and WV). Doctors are prescribing park or nature prescriptions to patients so they can improve their health, connect with the outdoors, and become park stewards.





COLLEGE MARKET OPPORTUNITY

Market:	21 million college students*
Spending Power:	\$417 Billion
Discretionary Spending:	\$150 Billion with 260% increase in freshman year
Brand Loyalty:	Established during college years
Influencers:	College students drive culture and trends
Tomorrow's Customer:	Within a year of graduation, 30% plan to buy a car, 15% plan to buy a house, 45% plan to take 3+ plane trips
How to Activate in Store:	Discount initiative specific to college students – in-store or on campus



Outdoor Recreation and the College Market

- 2nd life phase perfect for establishing or reestablishing a connection to the outdoors
- Independent evaluation shows that **Outdoor Nation participants currently in college reported the highest levels of engagement and intent to continue involvement.**
- Leverage the assets and infrastructure of a college campus with the ideas, energy and ingenuity of college students to engage and activate a new generation of outdoor enthusiasts



Outdoor Recreation and the College Market

How to Activate and Engage Year Round:

- Empower students to spearhead creative campaigns and activities that will motivate tens of thousands to get outdoors and get active.
- Foster a lasting outdoor culture within college campus communities through authentic peer-to-peer engagement and activation.
- Support and strengthen outdoor programs—generating attention, building awareness and growing membership.
- Enable students to develop leadership, community organizing and career development skills.
- Enable students to educate peers and influence decision makers about outdoor issues.



ECCLES OUTDOOR INDUSTRY CLUB
DAVID ECCLES SCHOOL OF BUSINESS

YEAR-ROUND CAMPUS ENGAGEMENT

Campus Convenings: Objective of this meeting will be to review our current programs and to brainstorm additional ways to meet the goal of increasing outdoor involvement by the student populace.

Community Outreach: Big Brother & Sisters and the community of international students that come to Salt Lake City for their studies.

Campus Activation: Working with the University of Utah's Campus Recreation department, plan and organize an overnight camping trip to Utah national parks.

- Target out of state students, international students, and any current University of Utah student who is willing to learn about the beauty found outdoors in the great state of Utah. Activities will include how to pack a backpacking ruck, basic survival skills, take a hike, introductory rock climbing course, nature walk focusing on plant life and geology, and how to setup a campsite.

Student Ambassador: Ryan Meader - first-year David Eccles School of Business MBA Candidate as well as a former United States Army Infantry Officer



CAMPUS CHALLENGE

Think Mother Nature Meets March Madness.

The Campaign:

2014 - The Campus Challenge pilot included 10 schools, inspired 43,000 outdoor activities, and was led by 8,500 young people.

In 2015, Outdoor Nation will launch the Campus Challenge where up to 50 schools will go 'head-to-head' during an 6-week competition to determine which school can get the most people outside and active.





OUTDOOR NATION

