CHAPTER 2: THEMES AND TRENDS

Chapter Two compares and contrasts survey data presented in Chapter One, and analyzes emerging themes and trends. A needs assessment was created from the theme/trend analysis, which formed the basis for the Outdoor Recreation Priorities for Public Parks and Recreation Providers and Stakeholders listed at the end of the Introduction (pg. 18). This chapter uses survey data to determine the preferences and needs of the state’s users of parks and recreation facilities, as well as those of parks professionals statewide.

LIMITATIONS OF THE SURVEYS

The surveys used by the DNR to create each SCORP are not necessarily scientifically correct in their methodology because of:

- Lack of funds and time to create the ideal scientific survey before each SCORP planning cycle ends.
- The problems inherent in successfully surveying an entire state of more than 6 million people.
- The challenges of surveying busy park professionals or park board members who work for more than 1,200 units of local government.
- The moving-target problem, in which constant changes in statewide demographics, economics, legislation, funding, etc., combine to provide more variables for which DNR staff can reasonably account.

DNR Outdoor Recreation staff members do their best to minimize each of these limitations, and the SCORP surveys are designed to provide the best possible representation of the needs, desires, and preferences of the state’s users and managers of parks and recreation facilities. All surveys used in this SCORP are designed to best represent all Hoosiers statewide, while making the most efficient and effective use of taxpayer dollars.

SURVEY TECHNOLOGIES CHANGING

Long-term readers of the Indiana SCORP will notice that the DNR has managed to catch up with advances in technology. This SCORP features surveys that run the gamut from old-school paper intercept and random telephone surveys to the use of sophisticated electronic touch screens and fully automated online surveys. Mixed-method public input surveying is generally the best way to ensure good demographic representation in a sample, and the advances in survey technology have provided useful new ways for DNR to discover what Hoosiers prefer and want from outdoor recreation.

A LOOK AT THE SURVEYS THEMSELVES

Two of the surveys for this SCORP were intended to sample all Indiana residents: the 2010 Outdoor Recreation Participation Survey, and the 2009 Trails Activity Survey. These surveys asked people about their participation in outdoor recreation activities, barriers to recreation, funding and barriers to participation. The other survey used in this SCORP, the 2010 Local Park and Recreation Provider Survey, was intended to provide a statewide sample of all Indiana park superintendents, park board members, local government officials, and others who work with county and municipal parks, and recreation facilities and programs. This survey asked park professionals and other recreation providers what types of facilities they operated, their budgets, capital projects, recreation programming, facility renovations, funding issues and possible solutions, outside competition, and staffing.

All three surveys were created independently of each other with separate goals, question sets, survey populations and results. Direct comparisons between the surveys aren’t a main goal of the SCORP; the variances between the surveys are a deliberate strategy to provide as diverse a dataset as financially possible given the time constraints. As mentioned in Chapter One, these three different survey population samples were intended to try to ascertain outdoor recreation needs statewide from both the provider and user viewpoints. Table 2.1 illustrates the methods used to produce the surveys.

A fourth survey used sparingly in this SCORP is the 2008 U.S. Department of Agriculture—Forest Service “National Survey on Recreation and the Environment” (NSRE). The NSRE differs from other surveys used because it is national in scope, and only asks people what kinds of outdoor recreation activities they participate in, and how often. The NSRE is a long-term study based on a random-digit-dialed telephone survey of a large sample (more than 100,000 since 1999) of
Table 2.1
Survey Methods Table:

<table>
<thead>
<tr>
<th>Survey Name</th>
<th>Date(s) of Survey</th>
<th>Number of people surveyed (n)</th>
<th>Survey Method(s)</th>
<th>Survey intended for (N)</th>
<th>Subject matter covered</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Outdoor Recreation Participation Survey</td>
<td>May, 2009 through August, 2010</td>
<td>6,824 respondents statewide</td>
<td>Electronic touch screen/paper intercept</td>
<td>All IN residents</td>
<td>Recreation participation, barriers, funding, activities</td>
</tr>
<tr>
<td>(Survey America)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010 Local Park and Recreation Provider Survey</td>
<td>January, 2009 through January, 2010</td>
<td>111 respondents statewide</td>
<td>Online survey</td>
<td>IN Park superintendents, park board members, local government officials, and others who work with local parks and recreation facilities and programs</td>
<td>Facilities operated, budgets, capital projects, programming, renovations, funding, competition, staffing</td>
</tr>
<tr>
<td>(Ball State University)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009 Trails Activity Survey (Survey America)</td>
<td>May through November, 2009</td>
<td>1,067 respondents statewide</td>
<td>Electronic touch screen/paper intercept</td>
<td>All IN residents</td>
<td>Trail activities, motivations, barriers, connectivity, surfaces, funding</td>
</tr>
<tr>
<td>2008 NSRE* (U.S.D.A. Forest Service)</td>
<td>Summer 2005 through Spring 2008</td>
<td>100,000 respondents Nationwide</td>
<td>Random-digit-dialed telephone survey</td>
<td>All US residents</td>
<td>Outdoor recreation activity preferences, and days participated</td>
</tr>
</tbody>
</table>

U.S. residents older than age 16. The NSRE is used for comparison to examine the similarities and differences between the outdoor recreation habits of Hoosiers versus those of the rest of the nation. The NSRE does not ask survey participants any questions about barriers, financial issues, accessibility, etc., so it will not be used in discussions about these survey topics.

**RECURRING THEMES IN THE SURVEYS**

Table 2.2 illustrates briefly some of the common themes that emerged during analysis of the data from all three surveys.

**Hoosiers are still “moving forward” by walking**

Walking is still the preferred outdoor recreation activity for the majority of Hoosiers. In the Outdoor Recreation Participation Survey, 46% of respondents said that they participated in walking for exercise or pleasure more than once per week, and 55% wanted to do so in the future. In the Trails Activity Survey, 79% of respondents said they walked on trails at least once per year and 38% of respondents said that they walked on trails once per week or more. The Local Provider Study results showed that 39% of surveyed park
superintendents had capital projects for paved bike/pedestrian trails planned for sometime in the next decade; 52% of park professionals indicated that they even provided recreation programming using their trails. As noted in the 2006 SCORP, walking requires little or no skill or training, minimum equipment, no special facilities, costs little, and has no age limits. “Walking” may include a great many related activities including (but not limited to): jogging, power walking, strolling, wheeling a wheelchair, pushing a stroller, running, or simply traveling as a pedestrian.  

**Hoosiers are aware of financial constraints**  
All three SCORP surveys had question responses that indicated financial issues and limitations were on the minds of Hoosiers. In the Outdoor Recreation Participation Survey, 21% (the single largest percentage of respondents) said that they spend less than $100 annually on their favorite recreation activity; 44% of Trails Activity Survey participants (the single largest percentage of respondents) said that the top amount they would be willing to spend on trail activities

### Table 2.2  
Survey Common Themes Table:

<table>
<thead>
<tr>
<th>Survey Name</th>
<th>Preferred Recreation</th>
<th>Financial Issues Important</th>
<th>“Out of the Box Thinking”</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Outdoor Recreation Participation Survey</td>
<td>Walking</td>
<td>Largest single percentage of respondents (21%) spend less than $100 annually on the favorite recreation activity</td>
<td>Respondents are participating at higher rates in many non-traditional activities: outdoor spectator sports/events; disc golf; 4 wheeling; outdoor photography, etc.</td>
</tr>
<tr>
<td>(Survey America)</td>
<td></td>
<td>Vast majority of respondents reported seeking funding beyond tax revenues</td>
<td>Innovation for funding, staffing, programming, partnerships, etc becoming critical to success</td>
</tr>
<tr>
<td>2010 Local Park and Recreation Provider Survey</td>
<td>Trails reported as highly popular for users; many providing programming</td>
<td>44% of respondents spend less than $100 annually on their favorite trail activity</td>
<td>31% of respondents want “better trail surfaces” and 24% want “walking, biking or riding clubs” as trail improvements</td>
</tr>
<tr>
<td>(Ball State University)</td>
<td></td>
<td>N/A</td>
<td>Respondents are participating at higher rates in many non-traditional activities: outdoor spectator sports/events; orienteering; caving; outdoor photography, etc.</td>
</tr>
<tr>
<td>2009 Trails Activity Survey</td>
<td>Walking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Survey America)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008 NSRE* (U.S.D.A. Forest Service)</td>
<td>Walking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*NSRE = National Survey on Recreation and the Environment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Indiana Statewide Outdoor Recreation Plan 2011-2015 | **CHAPTER 2** |
was less than $100. Local parks and recreation providers indicated they currently used mostly non-tax-based funding strategies to pay for their parks: 67% applied for grants; 63% received donations; 37% pursued a Community Foundation; 35% raised fees; 14% levied taxes, and the single smallest percentage (5%) said that they closed facilities.

It’s evident that many Hoosiers still feel the impact of the recent recession and have adjusted expenditures to compensate. This may be driving an increase in the use of local parks and recreation facilities, services and programs, as local sites have the advantage of reduced travel costs, low-or-no entry fees, minimum travel time, and easier, more convenient access versus outdoor recreation activities far away from home. The increase in park use in the face of the economic downturn is also evident at the national level.

The NSRE surveyed people about more than 60 different outdoor recreation activities, and reports the total number of people participating in these activities grew by 4.4% or from 208 million people to 217 million people from 1999 to 2008. The number of days of outdoor recreation participation over this same period grew from 67 billion to 84 billion, an increase of 25%, which supports the idea that outdoor recreation use is increasing.

**Innovative thinking is popular**

All three primary surveys in this SCORP show that both Hoosier public and park professionals are innovating and trying new things. Ordinary outdoor recreation activities commonly considered traditional include playground use, camping, fishing, hunting, etc. The participation survey clearly indicates that respondents are participating at higher rates in many non-traditional outdoor recreation activities, including, but not limited to, outdoor spectator sports/events, disc golf, four-wheel drive/off-road vehicle driving, outdoor photography, etc. This is reflected in the 2008 NSRE results, which showed increases in people participating in many of the same nontraditional activities: outdoor spectator sports/events, orienteering (using a map and compass to navigate cross-country on a pre-set “course”), caving/spelunking, and outdoor/nature photography. Growing user interest in new outdoor recreation activities may be driven by a number of factors. These include low costs to participate during tough economic times, Internet technology spreading information about new activities farther and faster than ever before, and other technologies creating better equipment more cheaply, especially in the case of photography.

Innovation and the ability to think creatively has become an important skill for outdoor recreation providers as well. Due to tight budgets, limited revenues and increasing public demand for facilities, services and programs, providers are realizing that innovation is one solution. Their innovations are mostly being driven by necessity. In the provider survey, public park operators report that new methodologies for obtaining funds, acquiring staff, creating and operating programs, and forging new partnerships are helping them succeed in these difficult economic times.

Trails users are also thinking innovatively. Past trails-activity survey respondents wanted more trails or connector trails as their preferred future trail improvements to increase their use of trails. A total of 31% of respondents to the 2009 Trails survey asked for “better trails surfaces” as their most desired trail improvement; 24% asked for “walking, biking, or riding clubs” and 18% wanted “increased personal safety measures.”

As use of trails and prevalence of trails increase nationally, trail users may be more aware of the different types of trail surfaces available, and therefore may have greater understanding of the effect that better trail surfaces have on their experiences. The social aspect of recreation has always been important to users, and while the idea of clubs to support this is not new, the idea previously wasn’t significant for Hoosier trail users. As our national population ages, personal safety is becoming a greater concern, both from a crime-prevention and a personal medical safety point of view. This may continue to be a consideration as the huge baby-boomer generation retires in greater numbers.

**Hoosiers versus the nation: the 2009 OR Participation Survey versus the 2008 NSRE**

As reported earlier, Hoosiers’ favorite outdoor recreation pastime is walking/running/jogging/hiking (pedestrian activities), both in terms of number of people participating, and the frequency in which they participate. The NSRE supports
this, stating that from 1999 to 2008, there was a 9.6% increase in the number of people who walk for pleasure. There was also a 6.8% increase reported in day hiking in that same timeframe. One number from the NSRE that jumps off the page is that kayaking has increased 63.1% nationally. Canoeing increased 2.3%. The participation survey doesn’t really reflect this. To Hoosiers, canoeing is still more popular than kayaking in terms of favorite activities, as well as in the amount of times people participated in both activities. This might be partly due to a minimum of challenging whitewater on Indiana rivers and streams. Hoosiers have lots of flat-water canoeing and kayaking opportunities but few highly technical or challenging rapids to encourage kayaking.

Horseback riding increased 4.9% from 1999 to 2008 in the NSRE. The participation survey appears to agree, as Hoosiers picked horseback riding as one of the top 20 outdoor recreation activities. According to the participation survey, camping (of all kinds) fell just outside the top 20 outdoor recreation activities as measured by user level of participation, and the NSRE shows a 2.7% increase in participation nationally.

Bicycling was the second most popular outdoor activity in the participation survey as measured by user level of participation; and the NSRE says that there was a 7.7% increase in the number of participants from 1999 to 2008. Fishing was the third most popular outdoor activity in the participation survey, but was hard to compare with the NSRE due to the categories into which the NSRE divides all fishing, such as: anadromous fishing (fish that are born in freshwater, migrate to the ocean to live, and return to freshwater to spawn, like salmon, shad and smelt), down only .4% in the number of participants; warm-water fishing (for fish species that use warm water to reproduce, such as bass, bluegill, crappie, and most other species common to all of Indiana), up 7.3% in the number of participants; and cold-water fishing (for fish species that use cold water to reproduce, like trout and Northern pike, most common to northern Indiana waters), down 2.1%.

One outdoor activity that had a huge gain in the number of participants in the NSRE that wasn’t asked about in the participation survey was ori-
enter. The NSRE reports a 58.6% increase in the number of participants in orienteering nationally from 1999 to 2008. This activity will be added to the list of surveyed activities in the next SCORP.

**Comparing Hoosier perceptions of trails: The 2009 OR Participation Survey and the 2009 Trails Activity Survey**

The results of the participation survey and the trails activity survey agreed in many ways. Both surveys said Hoosiers participated in trail activities in the following order: walking, biking and hiking. Results of the two surveys varied slightly when asking why people were participating in their activities (motivations). The participation survey ranked the top three reasons as 1. To be with family and friends; 2. Physical health; 3. Mental health (i.e., relaxation, stress reduction, meditation, spiritual renewal). The trails activity survey ranked the top three reasons as: 1. Pleasure, relaxation, recreation; 2. Health/physical training; 3. Family or social outing.

The two surveys were similar again in comparing the main reasons why people did not participate in their activities (barriers). The participation survey reported that most people participated: 1. “...as much as I want to;” 2. “structural barriers—poor setting/physical environment, lack of facilities or programs, time, money, transportation, safety, etc.” reduced participation; 3. “social barriers—no one to participate with, family conflict, responsibilities to others, etc.” was a barrier; 4. “personal barriers—no motivation, lack of skills, physical, mental or emotional health, ability level, etc.” inhibited participation. The trails activity survey reported that most people participated: 1. “...as much as I want to;” 2. “structural barriers—poor setting/physical environment, lack of facilities or programs, time, money/economic factors, transportation, safety, etc.” inhibited partici-

| Table 2.3: Activity Trends in Indiana, Top 10 Ranked in Order (Outdoor Rec. Participation Surveys) |
|---|---|---|---|---|
| **1989** | **1995** | **2000** | **2005** | **2010** |
| 1 Picnicking | Hiking/Walking/Jogging | Hiking/Walking/Jogging | Hiking/Walking/Jogging | Hiking/Walking/Jogging |
| 2 Pleasure Driving | Picnicking | Fairs/Festivals | Fairs/Festivals | Camping |
| 3 Walking | Swimming | Fishing | Swimming/SCUBA/ Snorkeling | Picnicking |
| 4 Swimming | Camping | Camping | Nature Observation/Photography | Fishing |
| 5 Fishing | Fishing/Hunting | Picnicking | Camping | Swimming |
| 6 Bicycling | Biking | Swimming/SCUBA/ Snorkeling | Fishing | Boating/Water Skiing/personal watercraft |
| 7 Camping | Boating | Nature Observation/Photography | Picnicking | Golf |
| 8 Nature Observation | Nature Observation | Playground Use | Bicycling | Bicycling |
| 9 Motor Boating | Playground Use | Bicycling | Motorized vehicle use | Hunting |
| 10 Golf | Boating/Water Skiing/personal watercraft | Boating/Water Skiing/personal watercraft | Horseback Riding | |
3. “personal barriers—no motivation, lack of skills, physical/mental/emotional health, ability level, etc.” inhibited participation; 4. “social barriers—no one to participate with, family conflicts, responsibilities to others, etc.” inhibited participation.

Hoosiers surveyed differed in how far they were willing to travel one way to participate in their favorite outdoor recreation activity. In the trails activity survey, “0-5 miles” was the No. 1 answer, with “26-35 miles” as second, and a tie between “16-25 miles” and “36-50 miles” as No. 3. The participation survey gave “More than 100 miles” as the No. 1 answer, with “36-50 miles” as No. 2, and “0-5 miles” as No. 3.

The differences may be fairly straightforward. Remember that walking was by far the most popular and participated-in activity in both surveys. The trails activity survey had much fewer activity options than the participation survey. Respondents to the trails activity survey might have been less willing to travel a long distance to do something as simple as walk. The other possible reason might be since they walked so often, they were less willing to travel long distances to do so. The participation survey results for this question likely stem from the fact that there are a great deal more activities represented in the “favorites” list, and many of those are not likely to exist near at hand, requiring travel to participate, favorite or not.

NEEDS ASSESSMENT

This section of the SCORP provides an overview of the needs identified by analyzing survey data, national trends, and related information. These identified needs directly contribute to the outdoor recreation priorities listed at the end of the introduction.

Identified needs from the surveys

More and varied kinds of trail or trail-related facilities (especially pedestrian) are needed.

- All three surveys agreed that many kinds of trails use are growing and in great demand statewide by all kinds of users, especially those with a pedestrian emphasis. National data fully agree with this trend.
- Recreation programmers and planners should remember that there is a wide
diversity of types of trails user, and that multi-purpose trail facilities are likely to better serve the needs of their publics than single-use sites. People use trails for all kinds of reasons, in all kinds of ways, and developing a trail system that caters to as many different types of users as possible is more likely to be successful.

Natural resource-based recreation of many kinds is still a major need among Hoosiers.

- “Non-consumptive” natural resource-based recreation is a strongly growing area of use that includes activities such as bird watching, nature photography and observation, camping, swimming, and more. The majority of “favorite” outdoor recreation activities from the participation survey were non-consumptive (4 out of 5)
- More traditional “consumptive” resource-based recreation uses are still popular and in demand (hunting, fishing, wild food gathering, etc.).
- Water-based recreation of all kinds is still extremely popular, and has expanded beyond traditional activities such as boating, canoeing and swimming in lakes, ponds and rivers to more developed urban water recreational activities such as splashpads and waterparks/sprayparks.

Community and individual health and wellness needs are becoming a greater priority.

- The surveys indicate that Hoosiers are choosing to recreate outdoors as part of a growing awareness of its positive effect on their health.
- Health and wellness as motivators for outdoor recreation of all kinds appeared to cross all demographics—all types of people were recreating for health reasons.
- At the state level, Indiana is creating programs and plans to fight the growing obesity epidemic, such as INShape Indiana, the Indiana Healthy Weight Initiative, and the State Department of Health’s Comprehensive Nutrition and Physical Activity Plan—2010 to 2020. Parks, recreation and trails are an integral part of these efforts.

Use of, and demand for local parks and recreation appears to be growing.

- Many reasons are driving an increase in use of local parks and recreation.
- Fuel costs are soaring.
- Struggling economy is affecting recreation use in households.
- Health-conscious visitors are using local and regional parks more.
- Local parks and recreation offer time- and opportunity-limited users better options to recreate.
- Communities are responding to economic and social pressures.
- Parks and recreation as an economic engine in local communities; strong parks and recreation programs encourage users to spend their recreation dollars close to home, and not just in parks, but in local businesses, restaurants, etc.
- Tourism dollars are attractive to cash-strapped communities.
- New businesses gravitate toward communities that offer strong quality of life, health and wellness for their work force.
- New residents attracted to a community bring new tax revenues; residents leaving take their tax money with them. Hoosiers indicate where they prefer to live by moving there.

Funding is tight for parks and recreation; adaptation and innovation is key.

- Users still rate increased fees as one of their least favorite ways to pay for access to parks and recreation.
- Property tax revenues are down in many communities, forcing tight budgets and impacting parks and recreation’s most traditional funding source.
- Park and recreation providers who actively seek innovative new ways to fund their programs, or partner/cooperate with those who can may be the most successful providers.
- State-level grants are both more important than ever to local communities to acquire and develop their future parks and recreation resources, and harder for which to find “match” money. Once again, those who can think out of the box may be the most successful.
• Greater use of existing parks and recreation facilities, programs and services are driving up the costs of operation and maintenance of facilities for local providers.
• Preventive maintenance is more important than ever—it’s cheaper to carefully care for facilities and equipment than to replace them.
• “Life-cycle costing,” in which the lifetime costs of operating and maintaining facilities and equipment, has become a best management practice for parks and recreation professionals.
• Careful outsourcing or privatizing of operations and maintenance services in some cases can lead to real-world cost savings without loss of quality of service or product.
• Use of volunteers, creation of friends-of groups, in-kind donation of equipment and services, donations, bequests, corporate sponsorships, and other financial and operational strategies are helping budget-conscious providers meet their organization's needs.

The next chapter of the document will focus on:
• Guidelines for recreation, parks and open space
• Local, regional and total outdoor recreation supply
• Total outdoor recreation acres
• Critical counties and regions