
OUTDOOR CHANNEL
LOWRANCE
SKEETER

# CHAPTER 2
# Themes & Trends

Chapter Two compares and contrasts the 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 Goals and Strategies for Public Parks and Recreation Providers and Stakeholders listed at the end of the Introduction (pg. 9). 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.

## SURVEY CHALLENGES

The surveys used by the DNR to create each SCORP are naturally impacted by:

- Lack of funds and time to create the 'ideal' scientific survey before each SCORP planning cycle ends.
- The challenges inherent in successfully surveying an entire state of more than 6.6 million people in a fully random manner.
- The challenges of surveying busy park professionals or park board members, who work for more than 1,600 units of local government.
- The moving-target problem, in which constant changes in statewide demographics, economics, legislation, funding, etc., combine to provide DNR staff an impossible number of variables to completely account for or tabulate.

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 users and managers of the state's 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.

## MIXED METHOD SURVEYING IN THIS SCORP

This SCORP features surveys that use methodologies that run the gamut from old-school paper intercept surveys to fully automated online surveys. Mixed-method public- input surveying is generally the best way to ensure good demographic representation in a sample. The advances in survey technology have provided useful new ways for DNR to discover what Hoosiers prefer and want from outdoor recreation. All survey methods have both advantages and drawbacks, so the multiple methods used in this SCORP's surveys are combined to reach as diverse a statewide demographic sample as possible.

## EXAMINING THE SURVEYS

Two of the surveys for this SCORP were intended to sample all Indiana residents: the 2017 Outdoor Recreation Participation Survey and the 2017 Trails User 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 2017 Local Parks and Recreation Provider Survey, was intended to provide a statewide sample of all Indiana park superintendents, park board members, local government officials, trail system administrators and others who work with county and municipal parks and recreation facilities and programs. This survey asked park professionals and other recreation providers about what types of facilities they operated, their budgets and revenue, capital projects, recreation programming, facility inventories, funding issues, ADA compliance 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 in this SCORP is the National Recreation and Park Association (NRPA) 2019 NRPA Agency Performance Review, formerly known as the NRPA Field Report. The Performance Review can be downloaded for free at: www.nrpa.org/publications-research/research-papers/agency-performance-review/. The NRPA Agency Performance Review is an analysis of data contained in NRPA's nationwide Park Metrics public parks and recreation database, formerly known as the Parks and Recreation Operating Ratio And Geographic Information System (PRORAGIS) database. Park Metrics was originally created as PRORAGIS by NRPA in 2010 as a means to collect parks and recreation system data at the community, region and national levels for use in

Table 2.1 **Survey Methods**

| Survey Name | Date(s) of Survey | Number of people surveyed (n) | Survey Method(s) | Survey intended for (N) | Subject matter covered |
|---|---|---|---|---|---|
| **2018 Outdoor Recreation Participation Survey (Survey America)** | April 2017 through April 2018 | 6,276 respondents statewide | Paper intercept survey | All IN residents | Recreation participation, barriers, funding, activities |
| **2018 Local Park and Recreation Provider Survey (Ball State University)** | October 2017 through October 2018 | 111 Park professional respondents statewide | Online survey | IN Park superintendents, park board members, local government officials, and others who work with local parks and recreation facilities and programs | Facilities operated, budgets, capital projects, programming, renovations, funding, competition, staffing |
| **2017 Trails User Survey(Survey America)** | September 2016 through August 2017 | 1,033 respondents statewide | Paper intercept survey | All IN residents | Trail activities, motivations, barriers, connectivity, surfaces, funding preferences |
| **2019 National Recreation and Parks Association "Agency Performance Review"** | Database began in 2010; current data gathered between 2016 and 2018 | 1,075 Park Systems Reporting data so far: Nationwide | Self-reported local data on park systems and programs | All US park departments, big or small | Park sites, budgets, amenities, staff, management, Trends, etc. |

comparative benchmarking between parks agencies and in parks research and planning of all types. The yearly Agency Review from NRPA uses a Park Metrics database analysis to create a valuable synopsis of national trends and statistics gleaned from thousands of individual community datasets from communities big and small, all over the country. This is the second SCORP to use this database-driven NRPA survey to double check and verify DNR's statewide research surveys against a national data source.

## 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.

### Walking/Jogging/Running Now a 25-year #1 Hoosier Recreation Favorite

Since the 1995 SCORP, Walking/Jogging/Running is the No. 1 most popular outdoor recreation activity for Hoosiers. In the Outdoor Recreation Participation Survey, 49% of respondents said they participated in walking for exercise or pleasure more than once per week. In the Trail User Survey, 80% of respondents said they walked on trails at least once per year, and 25% said that they walked on trails once per week or more. As noted in the 2016 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 travelling as a pedestrian.

### Hoosiers Are Still Experiencing 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, 36% (the single largest percentage of respondents, up from 28% in the 2014 survey) said that they spend less than $100 annually on their favorite recreation activity. A total of 32% of Trails Activity Survey participants (the single largest percentage of respondents in that survey) said the top amount they would be willing to spend to support trail upkeep

Table 2.2 **Common Survey Themes**

| Survey Name | Preferred Recreation or Recreation Facility | Financial Constraints Still Affect Recreation Choices | "Still Doing more with less" |
|---|---|---|---|
| **2018 Outdoor Recreation Participation Survey (Survey America)** | Walking (#1 by a huge margin) | Largest single percentage of respondents (36%) spend less than $100 annually on the favorite recreation activity (Up from 28% in 2013) | Respondents are actually participating at higher rates in mostly very low-cost/no-cost activities (like walking); while they say that the activities they hope to do in the future are more costly traditional outdoor activities, like camping |
| **2018 Local Park and Recreation Provider Survey (Ball State University)** | Trails or walking paths are STILL a major priority for many park systems | Vast majority of respondents again reported seeking funding beyond tax revenues | Innovation for funding, staffing, programming, partnerships, etc. determines success or failure of the systems |
| **2017 Trail User Survey (Survey America)** | Walking/Hiking | 32% of respondents say they would only pay less than $5 to support trail upkeep and new trail development via an annual trail fee | Top 3 trail activities were low-cost/no-cost: Walking, biking, alternative transportation; future uses include higher-cost activities like hiking/backpacking. |
| **2019 National Recreation and Parks Association Field Report** | Trails or walking paths | Nationwide, many public park systems report budgets still very tight or shrinking | Park agencies report having to add more programs, and more responsibilities, with no additional funds |

and new trail development, via an annual fee, was less than $5. Local parks and recreation providers indicated they currently used mostly non-tax-based funding strategies to pay for their parks: 82% applied for grants, 96% received donations, 40% pursued a Community Foundation, 47% levied taxes, and 27% said that they closed facilities (up from 14% in 2014).

It's evident that many Hoosiers are still struggling financially and adjusting expenditures to compensate. This factor may be driving the continuing increases in the use of local parks and recreation facilities, services and programs. Local sites have the advantage of reduced travel costs, low-or-no entry fees, minimum travel time and easier, more convenient access, as opposed to outdoor recreation activities far from home. Continued low fuel prices may be easing this to some degree, but high-cost recreation options still appear to be much less used by those surveyed.

In Indiana, anecdotal data obtained through local parks and recreation master plans indicate that park use in all but the largest communities is stable, and, in many cases, is increasing. This likely reflects a complex set of variables, including individual community population growth/decline, local economic circumstances, size and variety of amenities in local park systems, availability of programming in the parks, and competition for local recreation participation from local non-profits, commercial businesses or larger-scale recreation sources (such as state or national parks or recreation sites).

## Hoosiers Are Doing More With Less

All three primary surveys in this SCORP show that both the Hoosier public and park professionals are doing more with less. The Participation Survey clearly indicates that respondents are participating at higher rates in many low-cost or no-cost outdoor recreation activities, including, but not limited to walking, gardening, relaxation/spiritual renewal, bicycle touring (casual, tour or both), and outdoor pool swimming or water park use. The survey reported that respondents or others in the household participated in these activities more than once per week.

Growing user participation in these inexpensive outdoor recreation activities may be driven by a num-

ber of factors. These might include either small or no entry fees, low equipment costs, minimal skill needed to participate, no expensive training or assistance needed to start, short time commitments, and little or no travel costs.

Ordinary outdoor recreation activities commonly considered traditional include camping, fishing, canoeing, etc. The traditional public outdoor recreation activities were reported by respondents as having significant participation rates. These activities often have moderate entry fees, involve much higher equipment costs, require some skill or training, require taking vacation time from work, and usually take place far enough from home to require some travel cost.

These may be a few of the reasons why this Participation Survey in particular had a significant difference between the activities that participants actually do often versus the activities that they say are their favorites. It is possible that tight budgets at home may restrict some Hoosiers from actually doing some of the more traditional outdoor recreation activities, versus those activities that are close-to-home and cost less. Another possible explanation for the difference between the actual and preferred participation in outdoor recreation activities might be human nature. An example would be survey respondents' wishful thinking about what would be fun and adventurous outdoor recreation versus what life's circumstances often result in or allow. Fabulous vacations in exotic locales are something that many people dream of in the future, but most seldom actually get to a location more exotic than a local amusement park.

Doing more with less has become a vital skill for outdoor recreation providers. Due to tight budgets, limited revenues, minimal or reduced staff, and increasing public demand for facilities, services and programs, providers are innovating by necessity. In the Outdoor Recreation Provider Survey, public park operators reported that new methodologies for obtaining funds, acquiring staff, creating and operating programs, and forging new partnerships are necessary and key to providing sustainable, high-quality recreation services and amenities in these difficult economic times.

Trails users may also be doing more with less. Similar to the results of the Participation Survey, respondents to the Trail User Survey said that their top three trail activities were Walking, Using Trails as Alternative Transportation Routes, and Bicycle Touring (Casual, tour, or both). All three uses are low-cost or no-cost to the user. Asked what trail activity they would like to participate in at least 12 times in the future, Trail User Survey respondents said Walking/Running/Jogging, Hiking/Backpacking, and Bicycle Touring (Casual, tour, or both). As a predicted future trail use, Hiking/Backpacking can have a significantly higher equipment/gear cost.

This difference in activities completed versus activities intended coincides with the Provider Survey results. Cost of activity is possibly one of the factors in this difference, but the complexity of the variables involved makes this possibility conjecture. Another possibility is the previously mentioned idea of doing what is immediately available and easy within the constraints of daily life versus the more difficult to achieve but more attractive "dream" future activity. With only one activity different between "what we do" versus "what we intend/hope to do" results in this survey, that difference is more likely to be circumstantial. This difference may be something that can be further investigated in future SCORP/Trails Plan research.

### NRPA Research Results Support 2019 SCORP Findings

The 2019 Agency Performance Review published by the National Recreation and Park Association (NRPA) includes a fascinating chapter, Issues and Trends. The chapter lists a series of five trends and includes a discussion of how each affects public outdoor recreation for better or worse. The trends observed and documented in the chapter support the public survey findings in this SCORP. In the following text, the trends will be listed. Some discussion will be listed for each, as will a few examples of how some of these trends are playing out in Indiana.

**Trend 1:** *Investments in Park Infrastructure Will Rise in 2019 – 2020*

- "Economic conditions are expected to remain favorable for new investments in park and recreation infrastructure if local and state tax collections continue to rise and interest rates remain relatively low. As a result, parks and recreation agencies – regardless of size, location, population served or budget – will likely be able to plan for and construct more recreation facilities, expanding the proven social and economic benefits parks and recreation bring to every community."

  - Anecdotal data from local parks and recreation master plans statewide indicate that all sizes of community are carefully working to improve and even expand their parks and recreation facilities. This work is often attributed at least in part to attempts to improve local quality of life, with an eye toward better economic-development competitiveness, in addition to greater community pride and positive community image.

**Trend 2:** *Greater Impact of Technology on Agency Efficiency, Costs, and Performance*

- "Technology is having a greater impact on parks than ever before. Lower costs, technological simplification and mass production are making highly sophisticated technology more accessible and less expensive for parks and recreation agencies."
  - All sorts of new technology are now being seen across the state, in parks at all levels, including DNR properties. Parks are using Wi-Fi, drones, GPS surveying, commercial LED lighting, and many more developing technologies that offer parks lower costs to own and operate equipment, energy savings, and longer service life for new products. Even technology-driven media advances like social media (Facebook, Instagram, Twitter, etc.) and park webpages offer recreation professionals new and more effective advertising and improved information-sharing with their users for less cost than old-fashioned brochures, fliers and newsletters.

**Trend 3:** *Consolidation of Public Services Offers Opportunity*

- "Parks and recreation agencies are increasingly affected by efforts to consolidate public services—consolidation which, in theory, reduces costs and allows for greater efficiencies. Consolidations of government services have been occurring for nearly five decades, and include combining park facilities with public schools or consolidating public works functions with park and recreation maintenance and operation. Recent park/school consolidation initiatives look to encourage even greater collaboration to promote access for youth to take advantage of sports fields and playing facilities. This trend presents both threats and opportunities for parks and recreation, and agencies should be fully prepared to address—and perhaps even initiate— such proposals.
  - Local park plans indicate that this is a growing trend in Indiana. Communities as different as Fort Wayne and Mooresville have been doing school/park Joint Use Agreements (JUA) for years. Other types of JUA, such as agreements between parks and sports leagues, or parks and senior centers (among others), are also becoming more common, as both parks and non-profits seek better cost-effectiveness for their programs and services.

**Trend 4:** *Looking Forward*

- "In reviewing emerging trends that will affect agency performance in the coming years, it is clear that parks and recreation agencies must become nimbler and more adaptable to changing conditions and public inputs. The public and their elected officials have greater expectations for sustained, high-level performance from their park and recreation departments. Changing economic, environmental, and social conditions demands that agencies be proactive in assessing emerging trends while continuing to be fully grounded in reliable data to justify their investments and expenditures to benefit the public good."
  - Organizational agility and the ability to be more strategic and proactive are two other sets of reasons why Indiana communities are writing their own local parks and recreation master plans. Communities are listening more closely to the needs and preferences of their user base. Budgets are tight enough to make poor, uninformed decisions too costly to contemplate. DNR is seeing more park plans come in from first-time park planners in communities that want to be more flexible and informed in their parks departments.

**Trend 5:** *"Declining General Fund Support and Increasing Demand for Self-Generated Revenue"*

- "Local government spending on parks and recreation continues to recover from the Great Recession, as agencies have been increasingly challenged to generate more of their operating and maintenance costs from fees and charges. The amount of general fund support from local and state governments for parks and recreation systems across the country has declined, and there are no signs that this trend will be reversed. If anything, it will likely continue as municipal government budgets remain unable to keep up with inflationary pressures, tax-averse citizenry and long-term debt. As noted earlier, the median amount of cost-recovery from self-generated revenues is just over 27 percent. Surprisingly, a quarter of parks and recreation agencies reported 46 percent or more in cost recovery in 2017. The ability to generate revenue (and be less reliant on the whims of elected officials) bodes well for parks and recreation agencies being able to weather economic downturns and further reductions in general funds. At the same time, the need for self-generated revenue could put pressure on agencies as they continue in their mission to serve all members of their communities, including those with little means to pay for parks and recreation services. Balancing financial needs with the social equity mission will be one of the most challenging issues facing parks and recreation professionals in the coming year and beyond."

- Indiana has very much followed this trend, especially after voters statewide passed a

Table 2.3 **Activity Trends**

| | 1989 | 1995 | 2000 | 2005 | 2010 | 2015 | 2020 |
|---|---|---|---|---|---|---|---|
| 1 | Picnicking | Hiking, Walking Jogging | Hiking, Walking Jogging | Hiking, Walking Jogging | Hiking, Walking Jogging | Hiking, Walking Jogging | Walking, Running, Jogging |
| 2 | Pleasure Driving | Picnicking | Fairs, Festivals | Fairs, Festivals | Camping | Camping | Camping RV Camping |
| 3 | Walking | Swimming | Fishing | Swimming SCUBA Snorkeling | Picnicking | Fishing | Hiking Backpacking |
| 4 | Swimming | Camping | Camping | Nature Observation, Photography | Fishing | Swimming | Fishing |
| 5 | Fishing | Fishing Hunting | Picnicking | Camping | Swimming | Canoeing Kayaking Paddle Sports | Boating Wakeboarding Water Skiing Sailing |
| 6 | Bicycling | Bicycling | Swimming SCUBA Snorkeling | Fishing | Boating, Water Skiing, Personal Watercraft | Bicycling | Picnicking, Barbecue/ Cookouts |
| 7 | Camping | Boating | Nature Observation, Photography | Picnicking | Golf | Hunting | Gardening Landscaping Yard Work |
| 8 | Nature Observation | Nature Observation | Playground Use | Bicycling | Bicycling | Fairs/Festivals Outdoor Concerts | Swimming Snorkeling Diving |
| 9 | Motor Boating | Playground Use | Bicycling | Off-road Motorized Vehicle Use | Hunting | Boating Water Skiing Sailing | Bicycling |
| 10 | Golf | Off-road Motorized Vehicle Use | Boating, Water Skiing, Personal Watercraft | Boating, Water Skiing, Personal Watercraft | Horseback Riding | Off-road Motorized Use | Golf |

set of property tax caps in 2010. Many local governments and school districts have struggled to pay for their services, operations, and maintenance since those caps took effect. Accordingly, this has also affected individual government departments, such as parks. The mix of funding used for local parks and recreation has changed enormously over the last 10 years and is still changing. Indiana public parks are likely to continue to innovate, economize and explore new funding paradigms as this trend continues.

## NEEDS ASSESSMENT

This section 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 Goals and Strategies listed at the end of the Introduction.

### Identified Needs From The Surveys

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

- The results of all three surveys showed that many kinds of trails use are growing and are in great demand statewide by a variety of users. This is especially true of trails with a pedestrian emphasis. National data fully agree with this growing trend, now in its third decade in Indiana.
- Recreation programmers and planners should remember that there is a wide diversity of trails users, and that multi-purpose trail facilities are likely to better serve the needs of their public 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, as well as lowering the opportunity cost for each additional trail-use type.

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

- Nonconsumptive 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. In the Participation Survey, all of the top five outdoor recreation activities actually participated in “more than once per week” were non-consumptive.
- More traditional consumptive resource-based recreation uses are still popular but less in demand (hunting, fishing, wild food gathering, etc.). In the Participation Survey, only one of the top five favorite outdoor recreation activities was consumptive.
- 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 using splash pads and waterparks/spray parks.

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 outdoor recreation’s positive effect on their health.
- It is becoming common for health providers (e.g., hospitals, health clinics, physicians) to actively cooperate with parks and recreation agencies for programs, infrastructure and community health/wellness initiatives.
- Health and wellness as motivators for outdoor recreation of all kinds appeared to cross all demo-

graphics—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. Examples are 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.
    - The cost of living is outpacing wage growth.
    - The slow-growing economy is affecting recreation use in households.
    - Health-conscious visitors are using local and regional parks more.
    - Local parks and recreation offer better options to recreate for users limited by time or opportunity.
- Communities are responding to economic and social pressures.
    - Parks and recreation is seen as an economic engine in local communities. Strong parks and recreation programs encourage users to spend their recreation dollars close to home, 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 a strong quality of life, health and wellness for their work force.
    - New residents attracted to a community bring new tax revenues. Residents who leave 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 are vital.

- Users continue to rate increased fees as one of their least favorite ways to pay for access to parks and recreation.
- Due in large part to property tax caps, property tax revenues remain down in many communities. This forces tight budgets, affecting parks and recreation's most traditional funding source.
- Parks and recreation providers who actively seek innovative new ways to fund their programs or partner/cooperate with those who can are the most successful providers. RIF, TIF, COIT and many others offer alternatives for communities to fund not only acquisition, but also development, operations and long-term maintenance of their parks systems.
- State-level grants are both more important than ever for local communities to acquire and develop their future parks and recreation resources, and harder for local governments to find match money to contribute to. Once again, those who can think creatively to amass match funds are 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 is 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 are planned for and taken into account over time 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. Savings must be verified, documented, and analyzed over time (not all privatizations save money over time).
    - Replacing old, outdated equipment can not only save money on things like fuel and maintenance, but also improve speed and efficiency of work, which in turn saves staff time and effort.
- Use of volunteers, creation of friends groups, in-kind donation of equipment and services, donations, bequests, corporate sponsorships, and other innovative 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.