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 Priorities 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.

LIMITATIONS OF THE SURVEYS

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

- Lack of funds and time to create the "ideal" scientific survey before each SCORP planning cycle ends.
- The expense and challenges inherent in successfully surveying an entire state of more than 6.8 million people in a fully random manner.
- The expense and 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.

These mixed-method surveys provide informational, statewide insights but are not statistically random. Results should be interpreted as representative of expressed preferences rather than probability-weighted estimates. Where possible, findings are triangulated with national datasets (e.g., NRPA 2024 Agency Performance Review) to validate key trends.

DNR 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 complete and representative a statewide demographic sample as possible.

EXAMINING THE SURVEYS

Two of the surveys for this SCORP sampled all Indiana residents: the 2023 Outdoor Recreation Participation Survey and the 2023 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 2023 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) 2024 NRPA Agency Performance Review, formerly known as the NRPA Field Report. The Performance Review can be downloaded at: nrpa.org/siteassets/research/2024-agency-performance-review.pdf

The NRPA Agency Performance Review is an

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
2023 Outdoor Recreation Participation Survey (Survey America)	February 2022 through December 2023	6,203 respondents statewide	Paper intercept survey	All IN residents	Recreation participation, barriers, funding, activities
2023 Local Park and Recreation Provider Survey (Ball State University)	October 2022 through March of 2023	153 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
2023 Trails User Survey (Survey America)	February 2022 through November Of 2022	1,089 respondents statewide	Paper intercept survey	All IN residents	Trail activities, motivations, barriers, connectivity, surfaces, funding preferences
2024 NRPA* "Agency Performance Review"	Database began in 2010; 2024 Review data gathered between 2021 and 2023	Nearly 1,200 Park Systems Reporting data: 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.

*NRPA = National Recreation and Parks Association 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 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 third 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 30-year No. 1 Hoosier Recreation Favorite

Since the 1995 SCORP, Walking/Jogging/Running has been the No. 1 most popular outdoor recreation activity for Hoosiers. In the Outdoor Recreation Participation Survey, 48.7% of respondents said they participated in walking/running/jogging for exercise or pleasure more than once per week. In the Trail User Survey, 83.1% of respondents said they walked on trails at least once per year, and 32.4% 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, using a wheelchair, pushing a stroller, running, or simply travelling as a pedestrian.

Financial Constraints Continue to Affect Recreation Choices

Just as in the 2021 SCORP, all three 2026 SCORP surveys had question responses that indicat-

Table 2.2 **Common Survey Themes**

Survey Name	Preferred Recreation or Recreation Facility	Financial Constraints Continue to Affect Recreation Choices	Survey Respondents Are Being Careful With Their Fiscal Spending
2023 Outdoor Recreation Participation Survey (Survey America)	Walking (#1 by a huge margin; over 10-1 over the #10 activity)	Largest single percentage of respondents (36%) spend less than $100 annually on their favorite recreation activity (Up from 35% in 2021)	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/RV camping.
2023 Local Park and Recreation Provider Survey (Ball State University)	Trails or walking paths continue to be a major priority for many park systems	Vast majority of respondents again reported seeking funding beyond local tax revenues	Innovation for funding, staffing, programming, partnerships, etc. is still critical for park system success.
2023 Trail User Survey (Survey America)	Walking/Running/Jogging	30.5% of respondents say they would only pay less than $5 to support new trail development via an annual trail fee	Top 3 (done more than once per week) trail activities were low-cost/ no-cost: Walking, biking, alternative transportation; future uses included higher-cost activities like Horseback Riding.
2024 NRPA* Agency Performance Review (formerly the Field Report)	Trails or walking paths are still one of the most desired new park amenities	Nationwide, many public park systems report limited budgets and use of non-tax revenue	Park agencies report having to add amenities, programs, and more events, with no additional funds, owr using non-tax funds

ed 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 35% in the 2021 survey) said that they spend less than $100 annually on their favorite recreation activity. A total of 30.5% 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 new trail development, via an annual trails fee, was less than $5. Local parks and recreation providers indicated they regularly used non-tax-based funding strategies to help pay for their parks: 75% applied for grants, 64% received donations, 43% worked with a Community Foundation, 12% levied taxes, and 7% said they closed facilities.

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. Moderate fuel prices may be affecting this to some degree, but high-cost recreation options still appear to be used much less by those surveyed.

In Indiana, anecdotal data obtained through local parks and recreation master plans indicate that park use is continuing to be 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 nonprofits, commercial businesses, or larger-scale recreation sources (such as state or national parks or recreation sites). It should be kept in mind that many of the smallest public park systems in the state (the majority of park systems statewide) have the least acreage of park land per system, the least number of park amenities per park, and may have smaller tax bases to support park operations and maintenance, all of which can negatively affect park user experience and park attendance.

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 number 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 still has 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, but most seldom actually get to a location more exotic than a local amusement park.

Doing more with less is 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 creative 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, Bicycle Touring (Casual, tour, or both), and using Trails as Alternative Transportation Routes. All three uses are of low-cost or no-cost to the user. Asked what trail activity they would like to participate in at least once per year, Trail User Survey respondents said Canoeing/Kayaking, Hiking/Backpacking, Walking/Running/Jogging, Horseback Riding, and Bicycle Touring (casual, tour, or both). As occasional trail uses, Canoeing/Kayaking, Hiking/Backpacking, and Horseback Riding can all 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 2026 SCORP Findings

The 2024 Agency Performance Review published by the National Recreation and Park Association (NRPA) is somewhat less useful to the SCORP than in previous iterations. A chapter on trends and issues in the 2019 Review listed a series of five trends and includes a discussion of how each affects public outdoor recreation for better or worse. The 2024 Review does not contain much of this sort of analytical summation, and concentrates on purely reporting numbers, averages, and data for public parks and recreation nationwide. That said, the 2024 NRPA Agency Performance Review did largely agree with and support some of the data gathered in this SCORP. As one example, the Review reported that the national data agreed that public park systems (“agency,” as they are often referred to in the Review) nationally have a heavy investment in and inventory of trails and walking facilities. The Review reported that: “… many agencies provide trails, greenways, and other walking areas for community members. The typical park and recreation agency is responsible for managing 16 miles of trails. This figure increases as the jurisdiction population an agency serves increases. Agencies serving populations of more than 250,000 people typically manage 97 miles of trails.” The Review in 2024 reports that public park systems nationwide are having to use non-tax revenue to support their parks, with communities under 20,000 in population achieving a median cost recovery of 29.5% of their operating expenditures. The median figure for park systems serving populations more than 250,000 people was only 17.9%.

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 Priorities 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.

- Recreation programmers and planners should remember that there is a wide diversity of trail users, and that multi-purpose trail facilities are likely to better serve the needs of their many 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, as well as lowering the opportunity cost for each additional trail- use type. One example of a newer trail type/use is water trails or blueways, and support for this type of trail and trail use exists in Indiana.

- 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 focus or emphasis. National data fully agree with this growing pedestrian trail use trend, now in its third decade in Indiana.

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

- Water-based recreation of all kinds is still extremely popular and has expanded beyond traditional activities such as boating; kayaking; canoeing; and swimming in lakes, ponds and rivers, to more developed urban water recreational activities such as using splashpads and waterparks/spray parks.
- Nonconsumptive natural-resource-based recreation is a strongly growing area of use that includes activities such as birdwatching, 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 nonconsumptive.
- 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.

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 demographics—all types of people were recreating for health reasons.

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.
    - Local parks and recreation offer better options to recreate for users limited by time or opportunity.
    - The slow-growing economy is affecting recreation use in households, and local parks and recreation options are often free or low-cost.
    - Health-conscious visitors are using local and regional parks more.
- 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. while those park users are in the area.
    - 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.
- 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 extend the useful life of amenities by carefully caring 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 considered 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).

- 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.
- Due in large part to property tax rate cuts and 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, 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.

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.

Table 2.3 **Activity Trends**

	1995	2000	2005	2010	2015	2020	2025
1	Hiking/Walking/ Jogging	Hiking/ Walking/ Jogging	Hiking/Walking/ Jogging	Hiking/Walking/ Jogging	Hiking/ Walking/ Jogging	Walking, Running, Jogging	Hiking, Walking, Running
2	Picnicking	Fairs/Festivals	Fairs/Festivals	Camping	Camping	Camping, RV Camping	Camping, RV Camping
3	Swimming	Fishing	Swimming/ SCUBA/ Snorkeling	Picnicking	Fishing	Hiking, Backpacking	Boating, Kayaking, Canoeing
4	Camping	Camping	Nature Observation/ Photography	Fishing	Swimming	Fishing	Swimming, Water Activities
5	Fishing/Hunting	Picnicking	Camping	Swimming	Canoeing, Kayaking, Paddle sports	Boating, Wakeboarding, Water Skiing, Sailing	Fishing
6	Bicycling	Swimming/ SCUBA/ Snorkeling	Fishing	Boating/ Water Skiing/ personal watercraft	Bicycling	Picnicking, Barbecue/ Cookouts	Golf
7	Boating	Nature Observation/ Photography	Picnicking	Golf	Hunting	Gardening, Landscaping, Yard Work	Bicycling
8	Nature Observation	Playground Use	Bicycling	Bicycling	Fairs/Festivals, Outdoor concerts	Swimming, Snorkeling, Diving	Gardening, Landscape & Yard Work
9	Playground Use	Bicycling	Off-road Motorized vehicle use	Hunting	Boating, Water skiing, Sailing	Bicycling	Fairs, Festivals, Concerts
10	Off-road Motorized Use	Boating/ Water Skiing/ personal watercraft	Boating/Water Skiing/personal watercraft	Horseback Riding	Off-road Motorized Use	Golf	Parks and Playgrounds