



CHAPTER 1

The Surveys

The introductory chapter of this SCORP examined some of the changes Indiana has undergone since publication of the 2016-2020 SCORP and looked briefly at some of the state and national trends that affect how we use and provide outdoor recreation in Indiana. This chapter will look at the backbone of this SCORP: the surveys administered by our third-party surveyors, the methods used, and the results.

There's a difference between Indiana's SCORPs and those created by other states. How is the Indiana SCORP different?

- We actually try to directly “count” (via local government self-reported data) the supply of public outdoor recreation acreage, both by county and by level of government.
- We hire objective, unbiased, professional third-party surveyors to do our surveys.
- We ask members of the public what preferences they have for outdoor recreation activities, as well as gather opinions and ideas from professional outdoor recreation providers.

What do these differences mean for this SCORP? This SCORP looks at what public outdoor recreation acreage actually exists, both geographically and by cumulative “type” of acreage, so that SCORP readers can cross-compare themselves against their peers

in multiple ways. The way we survey both the public and outdoor recreation professionals allows the Indiana DNR to look at what real people actually want to do, as well as how real recreation professionals provide those activities. We also look at the needs and challenges faced by both groups. The Indiana SCORP has always essentially been a multi-purpose informational touchstone—for researchers looking for data on recreation preferences, for park professionals writing park plans or strategic documents, for local government leaders seeking to compare their community against local and regional competition, and even for interested members of the public who want to know what activities their friends and neighbors enjoy doing while visiting public outdoor recreation sites.

Once again, this SCORP was created using three main surveys:

- **The Outdoor Recreation Participation Survey:** Asks the public about their outdoor recreation activities and frequency of use.
- **The Trail User Survey:** Asks the public about how they use one of our most popular amenities.
- **The Local Parks and Recreation Provider Survey:** Asks professional and non-profit local outdoor recreation providers about their challenges, issues, and solutions.

THE OUTDOOR RECREATION PARTICIPATION SURVEY

Outdoor Recreation Participation Survey Methods

- The survey took place from April 2017 through April 2018.
- The completed respondent database consists of 6,276 valid respondents.
- The survey used a paper intercept questionnaire.
- The questionnaire contained 18 regular questions and one large, multi-part question containing 28 separate recreational activity categories.
- The estimated time needed to take the survey was eight to 10 minutes.
- Paper survey results were manually entered into the database post-survey.
- Respondents were chosen on a next-available basis.
- People younger than age 17 were not discouraged from taking the survey, but were not actively recruited.
- The survey was conducted at county fairs, libraries, and other public locations throughout the state.

Outdoor Recreation Participation Survey Demographic Results

- Respondents were 61.4% female, 38.6% male.
- The average age of respondents was 42.7 years.
- Every county in Indiana was represented in the data.
- 50.7% of survey respondents were married, 26.1% were single (never married), and 10.9% were single (divorced). [Results all somewhat comparable to current U.S. Census estimated demographic data for Indiana]
- 76.6% of respondents reported themselves as white, 12.8% as black, 6.1% as Hispanic/Latino, and 2.3% as multi-racial.
- 64.6% of respondents stated that they had between two and four family members living in their household.
- 40.5% of respondents reported having no persons younger than age 18 living in their household.

Outdoor Recreation Participation Survey Results

- The top three reasons why respondents participate in outdoor recreation were:



- 1. To be with family and friends 38%
- 2. Physical health..... 37%
- 3. Mental health..... 34%

NOTE: In the last several SCORP Participation surveys, by public request, DNR reported Mountain Biking separately from all other reported bicycle-related activities. Per stakeholder feedback, to make the Bicycle activity participation data more comparable to the Walking/Hiking/Jogging/Running data, this SCORP will report Bicycling data as Bicycling – All and Bicycle Touring (road, touring, casual, etc.) with Mountain Biking reported separately. As shown below, this change creates some differences in the Participation Survey results.

- The top five outdoor recreation activities participated in more than once per week by the survey respondent and/or by others in the household (if Mountain Biking were not included as part of Bicycling – All) were:

- 1. Walking/Hiking/Jogging/Running
- 2. Relaxation/Spiritual Renewal
- 3. Gardening/Landscaping
- 4. Bird/Wildlife Watching
- 5. Health-Related Activities (Exercise, Yoga, Tai Chi, Pilates, etc.)

- If Mountain Biking were added to all other types of Bicycle-related activities, then the top five activities participated in more than once per week by the survey respondent and/or by others in the household were:

- 1. Walking/Hiking/Jogging/Running
- 2. Relaxation/Spiritual Renewal
- 3. Gardening/Landscaping
- 4. Bicycle Activities (All)
- 5. Bird/Wildlife Watching

- The outdoor recreation activities most selected as something respondents did “once a year” were possibly related to the seasonal aspect of those activities (With Bicycle – All including the respondents from Mountain Biking):

- 1. Fall Foliage Viewing18.80%
- 2. Picnicking.....14.30%
- 3. Family/Friends/Group Outdoor Gatherings/ Reunions.11.80%
- 4. Gathering (Berries, Mushrooms, etc.) .11.30%

- 5. Bicycle Activities - All11.20%

- The potentially seasonal outdoor recreation activities most selected as something respondents did “once a year” changed with Mountain Biking separated from Bicycle Touring (road, touring, casual):

- 1. Fall Foliage Viewing18.80%
- 2. Picnicking14.30%
- 3. Family/Friends/Group Outdoor Gatherings/ Reunions.11.80%
- 4. Gathering (Berries, Mushrooms, Etc.) .11.30%
- 5. Outdoor Pool Swimming or Water Park. .9.10%

- The top 10 “favorite” outdoor recreation activities described by respondents were:

- 1. Walking , Running, Jogging
- 2. Camping/RV Camping
- 3. Hiking/Backpacking
- 4. Fishing
- 5. Boating, Wakeboarding, Sailing, Tubing, Jet Skiing, Water Skiing
- 6. Picnicking, Barbecuing/Cookout
- 7. Gardening, Landscaping, Yard Work, Mowing
- 8. Swimming, Snorkeling, Diving, Scuba, Splash Pad
- 9. Bicycling
- 10. Golf

- The No. 1 “favorite” outdoor recreation activity, “Walking, Running, Jogging,” was more than five times more popular than the No. 10 activity, Golf.

- The top methods of travel used to reach the outdoor recreation activity they participated in the most were:

- 1. Car/Truck64.1%
- 2. Walk/Jog/Run.....29.3%
- 3. Bike.....5.8%
- 4. Other.....5.3%
- 5. Motorcycle1.5%
- 6. Horseback1.0%

- Asked in which county in Indiana they most often participated in outdoor recreation activities, the respondents most commonly cited the counties with the highest population. This may indicate that people recreate outdoors most often close to where they live.

- Asked how much money they were willing to spend per year on their favorite outdoor recreation activity

(including cost of equipment, training, travel, etc.), respondents said:

1. Less than \$100 35.7%
2. \$101-\$250 20.4%
3. \$251-\$500 15.7%
4. \$501-\$750 8.2%
5. \$751-\$1,000 6.2%
6. Over \$1,001 13.8%

- Asked what primary sources for funding the development of new outdoor recreation facilities (after first pursuing all federal funds, grants, and donations), respondents preferred:

1. State general taxes 28.8%
2. Trail-use fee 20.0%
3. Local taxes 14.6%
4. None 13.6%
5. Land development set-asides 11.5%
6. State tax on recreation equipment 9.2%
7. Other 8.6%
8. Local bond issue 3.0%

- Asked what primary sources for funding the operations/maintenance of existing outdoor recreation facilities (after first pursuing all federal funds, grants, and donations), respondents preferred:

1. Trail-use fee 29.4%
2. State general taxes 24.4%
3. Local taxes 17.0%
4. None 14.0%
5. State tax on recreation equipment 18%
6. Other 10%

- Asked how far they were willing to travel one way to participate in their favorite outdoor recreation activity, respondents said:

- 0-5 miles 11.4%
- 6-10 miles 9.1%
- 11-15 miles 7.6%
- 16-25 miles 11.7%
- 26-35 miles 7.7%
- 36-50 miles 14.7%
- 51-75 miles 9.6%
- 76-100 miles 7.8%
- More than 100 miles 20.5%

- The main reason given why respondents did not participate in outdoor recreation activities more often was:

1. None, I participate as much as I want to 39.2%
2. Personal barriers, no time, no motivation, lack of skills, physical, mental or emotional health, etc. 26.9%
3. Cost barriers, lack of money/economic factors 11.9%
4. No recreation facilities close to my home 9.9%
5. Social barriers, no one to participate with, family conflict, responsibilities to others, etc. 8.3%
6. Structural barriers, poor setting/physical environment, lack of facilities or programs, transportation, safety, etc. 4.9%
7. Disability-related access prevents me from participating as much as I would like 5.2%
8. Customs, cultural barriers, etc. 8%

- Asked if they or any of their immediate family have any type of physical or intellectual disability that prevents them from participating in outdoor recreation activities, 18% said yes, and 82% said no (comparable to current U.S. Census statistical estimates on the percentage of Indiana residents with a disability).

- Respondents who answered “yes” to the previous question reported having the following type(s) of disability:

1. Walking 61.3%
2. Lifting 30.8%
3. Bending 26.8%
4. Other 25.4%
5. Breathing 24.7%
6. Hearing 10.6%
7. Seeing 7.9%

THE LOCAL PARK AND RECREATION PROVIDER STUDY

Local Park and Recreation Provider Study Methods

- Individual survey respondents were invited via email, from a DNR statewide list of over 755 public parks and recreation providers.
- After an initial email invitation, potential respondents were also mailed a survey invitation postcard containing a QR code that provided an anonymous

link to the online survey, or respondents could access the survey via a survey website or a link printed on the postcard.

- Potential respondents from the initial list were also emailed an invitation to participate in the survey from the SCORP planning staff at DNR.
- The survey used an online survey with a ZIP code question to group responses by region.
- The main questionnaire was approximately 44 questions long, followed by an optional set of 12 demographic questions.
- The estimated time needed to take the online survey was 20 minutes.
- Survey results were entered into a survey database and tabulated.
- The survey took place from October 2017 through February 2018.
- The completed database consists of 111 respondents representing the entire state.

Local Parks and Recreation Provider Survey Demographic Results in the Communities Surveyed

- 63% have a Park Board or Parks & Recreation Board.
- 60% have a Parks & Recreation Department with paid staff.
- 27% have a “Friends of Parks” or similar non-governmental management group.
- 15% have an agency (other than a Parks Department) that manages local public parks and recreation. Asked what other agencies managed their local parks, respondents answered: City/Town Councils, DNR, County Parks & Recreation Departments or Boards, and Township Park Boards.

The Respondents

- 43% are employees of municipal park departments.
- 24% are employed by “other units of local government. (e.g., Streets, Public Works).
- 10% are employees of county park departments.
- 5% are employees of township park departments.
- 10% were municipal park board members.
- 2% were county park board members.
- 4% were township park board members.
- 13% were park directors.
- 9% had various municipal government positions.

- Of those who answered the Question: “What was your highest level of education?”
 - 38% reported finishing a bachelor’s degree.
 - 33% reported finishing a graduate-level degree.

Local Park & Recreation Provider Survey Results

- Which units of government provide local recreation in your community?
 - 73% reported that their community had municipal-provided parks and recreation facilities.
 - 27% reported that their community had county-provided parks and recreation facilities.
 - 13% reported that their community had township-provided parks and recreation facilities.
 - 9% reported that their community had “other” organizations or groups that provided park and recreation facilities.
- Respondents reported operating park systems from as small as 1.0 acre up to park systems of over 11,000 acres; 80% of respondents managed less than 1,000 acres of parks.
- 27% of respondents reported counting visitor attendance in some way.





- The methods to count visitor attendance included: attendance at events or programs; car counts; visitor center counts; gate admissions; registrations; spot counts and estimates; rentals; parking fees; vehicle and trail counters; and attendance at pools, golf courses, and other activities.
- 86% of respondents hire seasonal staff for their park system.

Asked how many people their facilities serve annually, respondents reported:

Table 1.1 **User Served as Reported by Respondents**

Number of Users Served Annually	Percentage of Respondents
16,000 - 280,000	44%
300,000 - 500,000	28%
700,000 - 800,000	11%
2,000,000 - 8,000,000	17%

- 15% of respondents said that their organization reached statewide.

- Respondents reported that the populations of their service areas ranged from 455 to 500,000 residents. The average number of residents in their service area was 97,520, and the mode number (number reported most often) was 38,710.

NOTE: The following tables are based on survey questions that were open ended, so the groupings of responses below may not always follow a set or even scale, but are simply gathered into ranges based on the answers given by respondents.

Table 1.2 **2018 Budgets as Reported by Respondents**

Revenue Ranges Reported	Percentage of Respondents Reporting Each Range
\$0	12%
\$350 - \$700	7%
\$1,400 - \$10,000	16%
\$19,100 - \$66,000	14%
\$90,000 - \$821,000	28%
\$1,100,000 - \$9,900,000	21%

The average reported revenue was \$948,148, and the mode (most reported) revenue was \$78,180.

- Asked about changes in their yearly budgets since 2016, respondents reported:
 - 63% Reported an Increase
 - 14% Reported a Decrease
 - 23% Reported No Change
- 65% of respondents reported using non-reverting funds for part of their finances.

Table 1.3 Total Acres Managed

# of Acres	# of Responses	Total Percentage of Responses
1-14	10	16%
15-30	5	8%
31-50	6	10%
51-80	6	10%
81-130	5	8%
131-200	6	10%
201-450	6	10%
451-1000	9	15%
1001-1500	5	8%
1501-11,000	3	5%

NOTE: As could be expected, there was a correlation between the number of acres and the budgets reported by respondents. Pearson Correlation: .663; Correlation is significant at the 0.01 level (2-tailed).

Table 1.4 Number of Properties in Respondent's Park System

Number of Properties	Percentage of Responses
1-10 Properties	66%
11-20 Properties	14%
21-31 Properties	13%
60-62 Properties	3%
100 Properties	1.6%
211-212 Properties	3%

Table 1.5 Forest Acres Used for Recreation

Number of Acres	Percentage of Responses
0-10	32%
20-30	24%
40-150	14%
200-800	24%
1200-3828	5%

Table 1.6 Recreational Open Green Space

Number of Acres	Percentage of Responses
1-50	60%

Table 1.7 Prairie Acres Used for Recreation

Number of Acres	Percentage of Responses
0-30	74%
50-234	26%

Table 1.8 Acres of Ponds and Lakes Used for Recreation

Number of Acres	Percentage of Responses
0-30	81%
50-200	11%
230-1384	8%

Table 1.9 Wetland Acres Used for Recreation

Number of Acres	Percentage of Responses
0-20	67%
25-200	30%
336	3%

Reported Miles of Trail by Trail Type

Table 1.10 Paved Walking or Hiking Trails

Miles of Paved Trail	Percentage of Respondents
0 Miles	6%
0.3 - 1.1 Mile	26%
1.2 - 3.1 Miles	19%
3.5 - 5.1 Miles	24%
5.5 - 20 Miles	14%
More than 20 Miles	8%

Table 1.11 Unpaved Walking or Hiking Trails

Miles of Unpaved Trail	Percentage of Respondents
0 Miles	18%
0.7 – 3.1 Miles	38%
5.0 – 10.1 Miles	23%
12.0 – 18.1 Miles	13%
More than 18.1 Miles	8%

Table 1.12 Bicycle Trails

Miles of Bicycle Trail	Percentage of Respondents
0 Miles	20%
1.0 – 3.5 Miles	28%
4.0 – 7.0 Miles	25%
8.0 – 13.0 Miles	19%
More than 24 Miles	8%

Several trail types had very low reported miles of trail: Motor Vehicle Trails, Equestrian Trails

Table 1.13 Types of Trails Offered by Respondents:

Types of Trails Offered in Their Trail System	Percentage of Respondents Who Offered This Type of Trail
Multi-Use Natural Surface Trail: e.g., Bike/Ped; Equestrian, etc. (Not Including Motorized)	60%
Multi-Use Natural Surface Trail: All Above Uses, Including Motorized Use	11%
Nature/Interpretive Trail	55%
Connector Trails to Other Existing Trails	61%
Multi-Use Paved Trail: e.g., Bike/Ped; Equestrian, etc. (No Motorized)	71%
ADA-Compliant Accessible Trail	80%
Water Trails	22%
Greenways or Other Paved Trail	47%

Asked about collaboration with other providers of recreation in their community, respondents reported:

Table 1.14 Partner Collaboration

Type of Organization Partnered With	Percentage of Respondents Who Collaborated With This Type of Organization
Privately Owned Neighborhood Parks in Subdivisions	19%
Private, For-Profit Providers	28%
No-Profit Provider	62%
School Systems Providing Recreation	65%
State Properties	31%
Federal Properties	13%
Other Types	22%

60% of respondents reported offering in-house recreation programs for their users.

ADA Compliance Responses

- 31% of respondents dedicated some portion of their yearly budgets to ADA Compliance.
- Budget Percentages dedicated varied from 1% to 10%.
- Recent ADA barrier removals or improvements included:
 - Accessible Routes and Ramps
 - Accessible Trail Upgrades
 - Parking & Paving
 - Upgrading Existing Facilities; Especially Restrooms
 - Adding New Facilities that Comply with the ADA

THE TRAILS USER SURVEY

Trails User Survey Methods

- The survey used a paper intercept questionnaire.
- The questionnaire was 20 questions long.
- The estimated time needed to take the survey was between 3 and 6 minutes.
- Paper survey results were manually entered into the database post-survey.
- Respondents were chosen on a next-available basis.
- People under the age of 17 were not discouraged

Table 1.15 **Funding Alternatives Tried and Used**

Funding Types	Percent Who Tried/Used a Funding Type	Percent Who Plan to Try/Use a Funding Type in the Future	Percent Who Did Not Use or Plan to Use a Funding Type
Worked with Park Foundation	40%	12%	48%
Levied Taxes	47%	6%	47%
Bond Fund	27%	12%	61%
Engaged in Fundraising	73%	8%	19%
Approach Small Local Businesses for Funds	76%	11%	13%
Pursued Non-Park Foundations	56%	6%	38%
Closed Facilities	27%	0%	73%
Received Donations	96%	4%	0%
Applied for Grants	82%	13%	5%
Pursued Public-Private Partnership	54%	26%	20%
Sold Advertising Space to Local Businesses	54%	6%	40%
Sold Naming Rights to Individuals or Local Businesses	19%	37%	44%

from taking the survey, but they also were not actively recruited.

- The survey was conducted at county fairs, libraries and other public locations throughout the state.
- The survey took place from September of 2016 through August of 2017.
- The completed database consists of 1,033 respondents, representing every county in the state.

Trails User Survey Demographic Results

- 47.7% of respondents were male, and 52.3% were female.
- Average age of respondents was 49.
- 80% of respondents were white (non-Hispanic), 10% Black/African-American and 6% Hispanic (Demographics of responses roughly track with statewide data according to 2017 U.S. Census estimates).
- Every county statewide across Indiana was proportionally represented in the data.

Trails User Survey Results

- Walking is the trail activity most participated in.
- The general public is 3-4 times more likely to use trails for walking than for most other activities.
- Over 80% of respondents use trails for walking sometime during the year.
- The top 3 trail activities are:
 - Walking
 - Using trails for alternative transportation routes
 - Bicycle touring (Casual, tour, or both)
- The top 3 reasons why respondents used trails were:
 1. Pleasure, relaxation, recreation 31%
 2. Health/Physical training 28%
 3. Family or social outing. 24%
- Asked what trail activity they would like to participate in at least 12 times per year in the future, respondents said:

1. Walking/running/jogging. 75%
 2. Hiking/backpacking. 42%
 3. Bicycle touring (casual, touring or both). . 40%
 4. Canoeing/kayaking on water trails 35%
- 68% of respondents said there was a trail within 5 miles or 10 minutes of their home.
 - 32% selected asphalt as their preferred trail surface, 31% prefer native soil, and 23% had no preference for trail surface type.
 - 81% of those who had an opinion said that they either strongly or somewhat agreed that trail connectivity should be an important part of a community's infrastructure (up from 79% in the last SCORP).
 - Respondents believed that trail connectivity was extremely important for:
 1. Personal health 60%
 2. Community Health 59%
 3. Environmental Health 47%
 4. Alternative Transportation Corridors. 35%
 - Word of mouth was the top way that respondents found out about trail opportunities. Signage at parks was 2nd; Trail websites was 3rd.
 - Asked why they do not use trails as much as they would like:
 - Personal barriers (no time, no motivation, lack of skills, physical /mental/emotional health, ability level, etc.) were cited by 33% of respondents.
 - 36% of respondents said they participated as much as they wanted to.
 - 17% of respondents said that there were no trails close to their home.
 - Respondents who reported being limited in participating in trail activities by health factors cited issues with walking as their most common limitation. Breathing issues were the second most cited limitation.
 - 38% of respondents stated that there were no improvements that would increase their use of trails,

Table 1.16 Respondents were asked how well the current supply of trails in Indiana met their needs:

Type of Trail	Supply is More Than Enough	Supply is Just Right	Supply is OK for Now but Needs to be Increased in the Future	Supply Does Not Meet my Needs	Uncertain, Don't Know Current Supply	Don't Use
Using Trails for Alternative Transportation Routes	3.5%	8.9%	17.4%	13.8%	12.0%	44.3%
Walking/Running/Jogging	8.9%	25.1%	33.5%	6.3%	8.7%	17.5%
Hiking/Backpacking	5.6%	16.2%	22.1%	8.8%	12.6%	34.8%
Bicycle Touring (Casual, Tour or Both)	4.5%	15.0%	23.7%	9.9%	9.3%	37.6%
Mountain Bike Riding	2.5%	8.5%	10.2%	6.6%	12.3%	59.9%
In-Line Skating	0.7%	5.1%	6.4%	4.8%	14.0%	68.9%
Cross Country Skiing	0.6%	4.3%	5.0%	4.9%	14.6%	70.6%
Snowmobiling	0.7%	4.0%	5.2%	4.1%	15.1%	71.0%
Off-Road Vehicle Riding (Motorcycle, 4-Wheel, ATV, etc.)	1.4%	6.4%	6.5%	5.4%	15.1%	65.2%
Canoeing/Kayaking on Water Trails or Blueways	2.6%	14.0%	13.5%	8.8%	14.2%	46.9%
Horseback Riding	1.0%	7.6%	7.0%	7.3%	14.8%	62.4%

22% would like to see better trail surfaces, and another 22% would like increased personal safety measures.

- 49% of respondents are only willing to spend less than \$100 annually on trail activities. 24% are willing to spend between \$100 and \$500.
- Asked the distance trail users are willing to travel (one way) to participate in trail activities;
 - 20% said 0-5 miles.
 - 14% said 36-50 miles.
 - 12% said 11-15 miles.
 - 11% said 16-25 miles.
 - 10% said more than 100 miles.
- Asked what primary sources for funding the development of new trails, (after first pursuing all federal funds, grants, and donations) respondents preferred:



1. State general taxes 28%
2. None 18%
3. Land development set-asides 17%
4. Local taxes 15%
5. State tax on recreation equipment 11%
6. Trail use fee 10%
7. Other 6%
8. Local bond issue 3%

- Asked what primary sources for funding the operations/maintenance of existing trails, (after first pursuing all federal funds, grants, and donations) respondents preferred:

1. State general taxes 28%
2. Local taxes 18.1%
3. None 18.0%
4. Trail use fee 17.6%
5. State tax on recreation equipment 15%
6. Other 7%

- Respondents were asked how much would they be willing to pay for an annual trail fee if money was spent in their local area to help support trail upkeep and new trail development. Their responses were:

- Less than \$5: 32%
- \$5.00 - \$9.99 26%
- \$10.00 - \$14.99 18%
- \$15.00 - \$19.99 11.8%
- \$20.00 or more 12.3%

The next chapter will compare and contrast these datasets with selected research from outside sources. Emergent themes and trends as well as the limitations of the surveys will be discussed.

If any readers wish to obtain the entire dataset from any of the SCORP surveys for their own use, please contact the Division of Outdoor Recreation for copies: Greg Beilfuss, 317-232-4071; gbeilfuss@dnr.IN.gov or by mail at Division of Outdoor Recreation 402 W. Washington St., W271, Indianapolis, IN 46204-2782.