



## EXECUTIVE SUMMARY- DEMOGRAPHIC & RECREATION TRENDS ANALYSIS

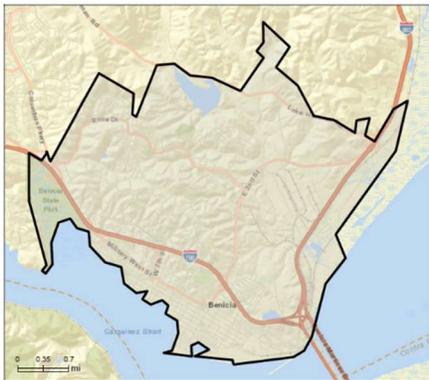
### INTRODUCTION

A key component of the Parks, Trails, & Open Space Master Plan is a Demographic & Recreation Trends Analysis. This provides the Parks & Community Services Department (“Department”) insight into the general makeup of the population served and identifies market trends in recreation. It also helps quantify the market in and around the City of Benicia (“City”) and understand of the types of parks, facilities, waterfront opportunities, and programs / services that are most appropriate to satisfy the needs of residents.



This analysis is two-fold - it aims to answer the *who* and the *what*. First, it assesses the demographic characteristics and population projections of City residents to understand *who* the Department serves. Secondly, recreational trends are examined on a national, regional, and local level to understand *what* the population served wants to do. Findings from this analysis establish a fundamental understanding that provide a basis for prioritizing the community need for parks, trails, facilities, and recreation programs.

### DEMOGRAPHIC ANALYSIS



The Demographic Analysis describes the population within the City. This assessment is reflective of the City’s total population and its key characteristics such as age segments, race, ethnicity, and income levels.

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI). All data was acquired in February 2021 and the City boundary was utilized for the demographic analysis.

### RECREATION TRENDS ANALYSIS

The Trends Analysis provides an understanding of national, and local recreational trends. Trends data used for this analysis was obtained from Sports & Fitness Industry Association’s (“SFIA”), National Recreation and Park Association (“NRPA”), ESRI, and internal participation data. The following trends were evaluated.

- National participatory trends for more than 120 recreational activities
- Programming trends for the Pacific Southwest region
- Local market potential (MPI) for more than 40 recreational activities
- Historic data on athletic field usage within the City of Benicia

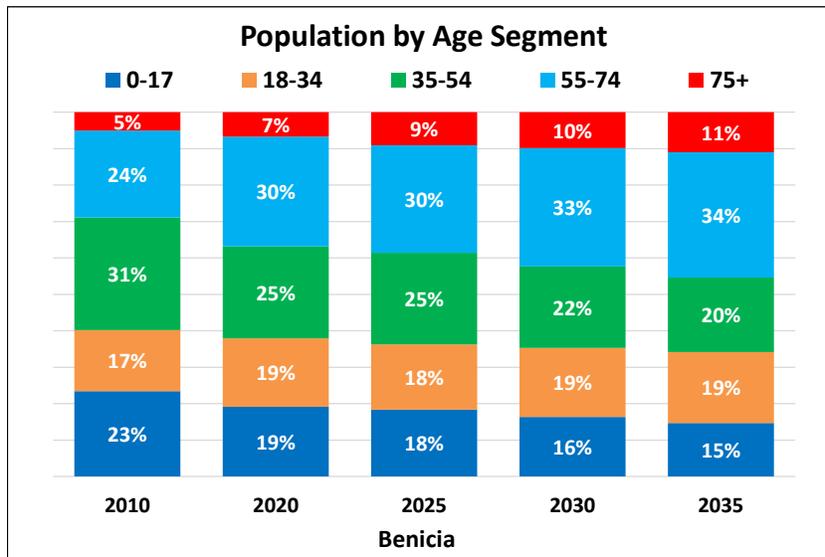
DEMOGRAPHICS & TRENDS KEY FINDINGS

Based on the information presented in the Demographics & Trends Analysis, the following key findings are of particular interest and/or have significant implications for the Department.

SUMMARY OF DEMOGRAPHICS

**Population:** The City population is growing slowly, at nearly one-fourth of the national growth rate. As the population increases, the Department must pay attention to demographic shifts in the future to ensure that offerings continue to evolve to meet the changing community needs.

**Age:** City residents are much older than the national median age and there is a strong presence of older adults over 55 years old. By 2035, the population will continue to age, as the oldest age segments (55-74 and 75+) are expected to be the only groups that will experience growth. The Department must continue to provide services for all ages and regularly reevaluate its programming mix to effectively serve the aging population.



**Race / Ethnicity:** The City’s populace continues to get more diverse with a majority 68% of the current population as White Alone; however, the Asian (13%) and Two or More Races (8%) populations have representation above the national levels. The racial composition of City residents is expected to slowly become more diverse over the next 15 years. People of Hispanic / Latino ethnicity represent 15% of the total population, which about 20% less than the national average (19%), but this group is expected to undergo steady growth by 2035. The Department should continue to monitor program participation to ensure that offerings are adequately serving residents and are representative of the race / ethnicity distribution of City residents.

**Income Levels:** The income characteristics of City residents are significantly higher than the state and national levels for per capita income and median household income. The increased earning capabilities of the population may suggest a greater presence of disposable income for residents and a willingness to pay for high-quality parks and facilities offerings. Although it is significantly less than the national percentage of the population below poverty (13.4% nationally), approximately 7.1% of Benicia residents are below the poverty level. Therefore, the Department should pay close attention the pricing of offerings and access to recreational opportunities to ensure they are equitable and that households with lower income are not victim to barriers for participation, such as ability to pay, transportation, and access to technology.



## DEMOGRAPHIC COMPARATIVE SUMMARY

The table below is a summary of the City’s demographic figures. These figures are then compared to the state and U.S. populations for perspective on a regional and national scale. The highlighted cells represent key takeaways from the comparison between the City and the national population.

= Significantly higher than the National Average

= Significantly lower than the National Average

2020 Demographic Comparison		Benicia	California	U.S.A.
Population	Annual Growth Rate (2010-2020)	0.22%	0.64%	0.81%
	Projected Annual Growth Rate (2020-2035)	0.32%	0.58%	0.74%
Households	Annual Growth Rate (2010-2020)	0.26%	0.57%	0.80%
	Average Household Size	2.51	2.92	2.58
Age Segment Distribution	Ages 0-17	19%	23%	22%
	Ages 18-34	19%	25%	23%
	Ages 35-54	25%	25%	25%
	Ages 55-74	30%	21%	23%
	Ages 75+	7%	6%	7%
Race Distribution	White Alone	68.3%	54.3%	69.4%
	Black Alone	6.0%	5.9%	13.0%
	American Indian	0.5%	0.9%	1.0%
	Asian	13.0%	15.1%	5.9%
	Pacific Islander	0.4%	0.4%	0.2%
	Some other Race	4.1%	18.0%	7.1%
	Two or More Races	7.7%	5.5%	3.6%
Hispanic/Latino Population	Hispanic / Latino Origin (any race)	14.8%	39.8%	18.8%
	All Others	85.2%	60.2%	81.2%
Income Characteristics	Per Capita Income	\$55,530	\$37,302	\$34,136
	Median Household Income	\$109,854	\$77,500	\$62,203

## PARKS, TRAILS, & OPEN SPACE MASTER PLAN

### SUMMARY OF RECREATION TRENDS

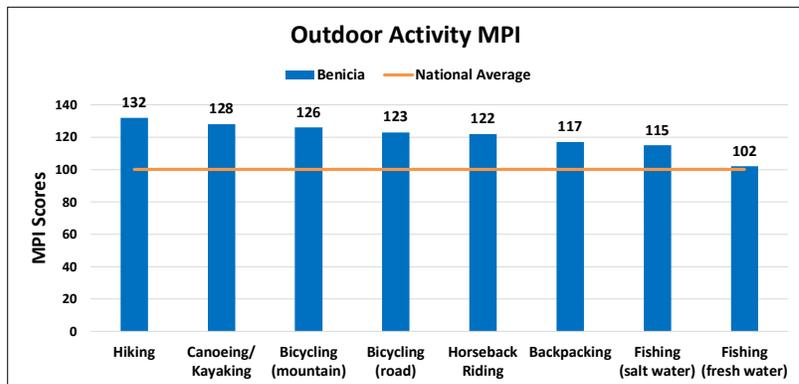
**National Participatory Trends:** National participatory trends are promising for the Department, as many of the activities aligned with core offerings are trending positively in recent years. Despite the facility closures due to the pandemic, in general, people are recreating more and the importance of living an active, healthy lifestyle is on the rise. The City must continue to provide active recreation opportunities and seek out new, trending activities that will pique interest and meet the demand for parks, facilities, and recreation programs among City residents for many years to come. The adjacent table highlights national participation trends for recreational activities offered through Department.

National Participatory Trends					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Fitness Walking	112,583	111,001	111,439	-1.0%	0.4%
Hiking (Day)	36,222	47,860	49,697	37.2%	3.8%
Running/Jogging	54,188	50,770	49,459	-8.7%	-2.6%
Bicycling (Road)	39,725	39,041	39,388	-0.8%	0.9%
Camping (< 1/4 Mile of Vehicle/Home)	28,660	27,416	28,183	-1.7%	2.8%
Basketball	23,067	24,225	24,917	8.0%	2.9%
Tennis	17,904	17,841	17,684	-1.2%	-0.9%
Baseball	13,152	15,877	15,804	20.2%	-0.5%
Fishing (Saltwater)	11,817	12,830	13,193	11.6%	2.8%
Birdwatching (>1/4 mile of Vehicle/Home)	13,179	12,344	12,817	-2.7%	3.8%
Soccer (Outdoor)	12,592	11,405	11,913	-5.4%	4.5%
Kayaking (Recreational)	8,855	11,017	11,382	28.5%	3.3%
Trail Running	7,531	10,010	10,997	46.0%	9.9%
Backpacking Overnight	10,101	10,540	10,660	5.5%	1.1%
Bicycling (Mountain)	8,044	8,690	8,622	7.2%	-0.8%
Softball (Slow Pitch)	7,077	7,386	7,071	-0.1%	-4.3%
Football, (Flag)	5,508	6,572	6,783	23.1%	3.2%
Skateboarding	6,582	6,500	6,610	0.4%	1.7%
Volleyball (Court)	6,304	6,317	6,487	2.9%	2.7%
Soccer (Indoor)	4,530	5,233	5,336	17.8%	2.0%
Football, (Touch)	6,586	5,517	5,171	-21.5%	-6.3%
Football, (Tackle)	5,978	5,157	5,107	-14.6%	-1.0%
Bicycling (BMX)	2,350	3,439	3,648	55.2%	6.1%
Stand-Up Paddling	2,751	3,453	3,562	29.5%	3.2%
Pickleball	2,462	3,301	3,460	40.5%	4.8%
Surfing	2,721	2,874	2,964	8.9%	3.1%
Kayaking (Sea/Touring)	2,912	2,805	2,652	-8.9%	-5.5%
Softball (Fast Pitch)	2,424	2,303	2,242	-7.5%	-2.6%
Lacrosse	2,011	2,098	2,115	5.2%	0.8%
Boardsailing/Windsurfing	1,562	1,556	1,405	-10.1%	-9.7%
Rugby	1,276	1,560	1,392	9.1%	-10.8%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Legend: ■ Large Increase (greater than 25%) ■ Moderate Increase (0% to 25%) ■ Moderate Decrease (0% to -25%) ■ Large Decrease (less than -25%)

**Local Participatory Trends:** Local participatory trends expect strong participation across all categories assessed, with only 4 out of 42 activities having MPI scores below the national average. This is very promising for the Department, as market potential data suggests that City residents are more inclined to participate in a wide variety of recreational activities related to



sports, fitness, outdoor recreation, and commercial recreation. Assessing historic data on athletic field use, overall participation was up 8% from 2015 to 2019. During the same period, participation was up for activities such as bocce ball, adult baseball, and youth football, while youth baseball and softball have both experienced decreased participation.