



**BALLARD\**KING***  
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Recreation Facility Planning and Operation Consultants

## **Arts & Recreation Programming Analysis & Findings Report**

For: Your Parks, Your Future Project  
City of Walnut Creek  
Arts & Recreation Department

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## **Part A: Key Findings**

The following section provides a summary of the key findings from the Arts & Recreation Programming Analysis described in Part B of this report.

Based on all the programming information gathered and analysis conducted, the following strengths, limitations and opportunities were identified for each program category.

### **Program Strengths**

The City of Walnut Creek and the Arts & Recreation Department provide a broad base of arts and recreation programs to the region. Their program categories cover many topics and address the needs of youth, teens, young adults, adults, families, retirees, and seniors. The Department is unique in that they are a regional provider for all their programs. The Department is also unique in their strong focus on arts programming, a key differentiator between them and other public providers in the area. The arts programs they offer cross a broad spectrum of disciplines, skill levels, and are offered to all ages. In addition to their arts programming, they also have a history of offering the more traditional recreational pursuits. Some of the recreation programs they are most well-known for are their camp programs, which also includes a focus on the arts, aquatics, and athletic fields that support their own programming and are rented to outside groups. As a department they are one of the most well rounded in the area in the balance they maintain between their arts and recreation programming and addressing the needs of all age groups.

- Performing/Visual Art Classes (beg, int, adv) – During 2016 and 2017, over 7,500 individuals took classes and participated in workshops with an approximate 60/40% split between adults and youth. There were another 2,200+ participants in outreach activities and events. The greatest level of participation by disciplines are in painting and ceramics. Ceramics draws people because of the facilities and the instruction. The focus, volume of class offerings and success of Performing/Visual Art Classes is unique from a regional and national perspective.
- Senior Social Services/Drop-In Services & Recreation Classes (seniors) – From 2014-2017 recreation classes for seniors has maintained approximately 4,700 participants. While Adult 50+ program have seen an increase of almost 1,000 participants in that same time. The number of individuals registered points to the popularity of the program.
- Instructional Aquatics – The focus of this plan is on the Clarke Swim Center. In total the learn to swim program in Walnut Creek serves over 3,000 students annually (group lessons, private lesson, day camp group lessons, etc.) In comparing 2015-2017 numbers there was an approximate 18% increase in participation at both aquatic facilities combined.



- Preschool – This program is unique in its format of offering a ½ day option for those interested. Annually it has approximately 180 registrants in the program, and it is one of the few program categories that has locations at Shadelands, Civic Park and Heather Farm Park.
- Camps – The Department offers camps in the summer and during fall, winter and spring breaks. Between 2014 and 2018 the camp program had 800-1,000 registrants. While there has been some variation from year to year in registration, the camp revenue total continues to increase. Compared to a national perspective the region is unique in offering camps year-round. From a regional perspective the number of camp options and permutations offered the Department is unique.
- Indoor Rentals – This program area is one that backfills indoor spaces when they are not being used for programs, but it is an area that the community identifies with the Department. It is also important to note that all three locations that are part of the master plan process can accommodate this program area. Total revenue for indoor rentals has remained relatively static since 2014.
- Aquatic Rentals – The Department excels at masters swimming, summer swim team, age group competitive swimming, and synchronized swimming. There are three primary reasons for the Department exceling in this area. First, the competitive groups that they identify with have helped build this reputation. Second, the existence of a 50M pool at the Clarke Swim Center allows the Department to provide significant lanes and lap lane time that these groups can capitalize on. Third, the existence of a stand-alone deep-water pool, with only one, 1M diving board that can be used by synchronized swimming is unique.

## **Program Limitations**

The following program areas have potential to expand and meet additional community demand but are limited in their expansion possibilities by the current spaces where they are held.

- Performing/Visual Art Classes (beg, int, adv)
- Health/Fitness Classes (youth, adult)
- Personal Enrichment (youth, adult)
- Recreation Classes (seniors)
- Preschool
- Specialized Recreation
- Senior Transportation/Meals
- Camps
- Aquatic Instruction





In the case of following areas there are a significant number of alternative public, private and non-profit service providers.

- Health/Fitness Classes (youth, adult)
- Preschool
- Indoor Rentals
- Camps
- Aquatic Instruction

These program areas have unique challenges because of their program type or their program participants.

- Senior Social Services/Drop-In Services – Auxiliary facilities like parking and room configuration present challenges for further market penetration within Walnut Creek.
- Recreation Classes (seniors) – Current programs that are offered take place in rooms that are not purpose built for some of their uses.
- Recreation/Fitness Aquatics – The deep, flat, and cool water limits the appeal of the facility to most pool users that would participate in this type of programming. This facility does not appeal to the portion the public that wants to be in warm, shallow water and views going to the pool as a social/play activity.
- Indoor Rentals – Room size, proximity to other spaces, and auxiliary amenities limit this program area.
- Aquatic Rentals – One limitation on aquatic rentals is the ability to host multiple configurations of age group swim meets. However, the ability to host swim meets and aquatic competitions must be balanced with the demand for community access, programming, and other demands for limited pool time.

A final program limitation for almost every area identified as lines of business for the Department is available indoor storage in proximity of the program.

## **Program Opportunities**

If facilities were renovated, expanded, or replaced to meet specific program needs the following program areas could expand their market penetration in the Primary Service Area. The Primary Service Area is defined as a 15-minute drive time from a central point in Walnut Creek.

- Performing/Visual Art Classes (beg)





- Personal Enrichment (youth)
- Recreation Classes (seniors)
- Preschool
- Specialized Recreation
- Camps (fall, winter, spring specific)
- Indoor Rentals

Other opportunities have been identified for the following program areas:

- Health/Fitness Classes (youth) – The ability to expand the program offerings, strengthen partnerships with outside vendors, and develop more contacts in the market to direct potential participants.
- Senior Social Services/Drop-In Services – Opportunity to continue offering similar programs, while beginning to transition to an environment and operation that is more appealing to the full senior market.
- Instructional Aquatics – The opportunity to continue to expand the reach of aquatic programs, and to cross market between the two aquatic facilities the City operates.
- Performing/Visual Art Classes (int) – The opportunity to consolidate facilities and create a campus-like feel.
- Health/Fitness Classes (adult) – The opportunity to maintain the current drop-in offerings and expand the health and wellness programming. There is also an opportunity for partnerships with the private sector.
- Recreation Classes (seniors) – The opportunity to diversify the senior market that is addressed through programming.
- Preschool – The possibility of more cross-promotion with other programs based on location within the park and proximity to other program venues. The co-location of the preschool with the community centers (Civic Park, Heather Farm Park), would help facilitate the cross-promotion.
- Senior Transportation/Meals – The opportunity to create more appropriate space, further market penetration, and partnerships with neighboring agencies.
- Recreation/Fitness Aquatics – The opportunity to re-develop or replace the Clarke Swim Center so that it has broader appeal to the entire swimming population. This would also create additional fitness opportunities, like in-water group exercise.



- Performing/Visual Arts Classes (adv) – There is also the possibility of partnership with some of the local private providers.
- Personal Enrichment (adult) – The opportunity to diversify programming, potentially through online learning. Also, the potential to strengthen partnerships with other government agencies and their programs.
- Camps –The STEM movement continues to be a significant positive trend and with the Department’s involvement with the Arts it would make sense to begin to offer STEAM camps.
- Aquatic Rentals – A renovated or replaced facility would allow for the potential for aquatic competitions.



## **PART B: ANALYSIS**

### **Section I – Review & Analysis of Existing Programs**

The focus of this section includes:

- Identify the programs that are currently offered by the Department. This will focus on the broad categories identified by the Department, not by the individual programs.
- Identify programs the Arts and Recreation Department would like to offer to the community and surrounding area. This will focus on the results of the community input gathered to date, identify gaps in programming and identify opportunities by categories.
- Identify programs, facilities and services that are offered by other providers in the area. This will work off the information that is in the final section of the report, where many of the other providers were mapped in proximity of the City.





## Local Programming

**Table A – Current Lines of Business for the Arts & Recreation Department**

	Civic Park	Heather Farm Park	Shadelands Art Campus
<b>Core – 30% Recovery</b>			
Performing/Visual Art Classes (beg)			X
Health/Fitness Classes (Youth)	X	X	
Senior Social Services/Drop-In Services	X		
Instructional Aquatics		X	
<b>Important – 31-70% Recovery</b>			
Performing /Visual Art Classes (int)			X
Health/Fitness Classes (adult)	X		
Personal Enrichment (youth)	X		
Recreation Classes (seniors)	X		
Preschools	X	X	X
Specialized Recreation	X		
Senior Transportation/Meals	X		
Recreation/Fitness Aquatics		X	
<b>Value Added – 71+% Recovery</b>			
Performing/Visual Arts Classes (adv)			X
Personal Enrichment (adult)	X	X	
Camps	X	X	X
Indoor Rentals	X	X	X
Aquatic Rentals		X	
<b>Administration</b>	X	X	X

The information in Table-A was produced by the Arts and Recreation Department for the purposes of budget and cost recovery discussion. The purpose of the table is to outline the various areas of business for the Department, categorize those lines of business as primary, secondary, and value added (which also correlates with cost recovery goals), and provide locations for the various program categories.

Within the 17 lines of business that are identified in Table-A, there are hundreds of different programs. The Department produces an arts and recreation program guide four times per year, along with a supplemental camp guide. Despite offering hundreds of different programs throughout the year, the Department is constrained by the lack of available indoor spaces to expand or offer new programs.





A program that is not identified in Table-A is that of drop-in use of facilities. There is a demand for passive, or drop-in use, of both indoor and outdoor facilities from the community. Because of this demand passive use of indoor and outdoor arts and recreation spaces is something the Department is very cognizant of and actively supports through not programming spaces every hour of every day. A key differentiator between municipal recreation and private recreation is drop-in, self-directed, non-paid use of indoor and outdoor facilities. This passive use by the public was further emphasized through the survey that was administered and responses that were received for both the future of Heather Farm Park and Civic Park.

### Program Participation

**Table B – Arts & Recreation Community Center Programming – 2016-17 Budget Cycle**

	Registrations	
	Adults	Youth
<b>Recreation Classes</b>		
Health & Fitness	1,964	141
Personal Enrichment	999	783
Drop-In Events	800	865
<b>Arts Classes</b>		
Performing Arts	156	1,301
Visual Arts	1,895	1,212
Summer Camps	-	250
Preschool	-	215
Specialized Recreation	516	104
<b>Total</b>	<b>6,330</b>	<b>4,871</b>

**Table C – Remodeled Larkey Swim Center Success**

	2015	2017
Rec & Fitness Admissions	3,760	20,243*
*Of this total, 4,010 used the spray ground only during times the pool was utilized for swim lessons.		

The remodeled Larkey Swim Center Participation numbers increased by over 500% as a result of the 2016 remodel according to Table-D.





Tables D-N provide comparison data for specific programs and program areas. This information was derived from Commission reports provided by the Department. With the tables, cells that are highlighted in green illustrate growth while those in red illustrate a decline. It is important when reviewing this information to understand this is only a 3-year comparison in most cases and not necessarily indicative of the overall trend within the department.

**Table D – Facility Rental Hours<sup>1</sup>**

	2015	2016	2017
Heather Farm CC	1,678	1,976	1,647
Civic Park CC	1,426	1,323	1,465
Shadelands Art Center	3,495	4,210	3,370
<b>Totals<sup>2</sup></b>	<b>6,599</b>	<b>7,509</b>	<b>6,482</b>

**Table E – Summer Camp Registrations**

	2014	2015	2016	2017
Camp Tenderfoot	80	89	80	80
Camp Little Walnut	115	183	177	117
Camp Clever Creek	-	-	68	69
Day Camp	305	371	255	241
Sports Camp	348	310	349	390
<b>Totals</b>	<b>848</b>	<b>953</b>	<b>929</b>	<b>897</b>

<sup>1</sup> The Department also rents out spaces in Walnut Creek Library.

<sup>2</sup> Total rentals, including rentals at Walnut Creek Library, account from more than \$450,000 in revenue annually.





The information contained in Tables F-I outline aquatics participation. These numbers are reflective of Clarke Swim Center and Larkey Swim Center combined.

**Table F – Swim Lesson Enrollment**

	2014	2015	2016	2017
Group Lessons (students)	2,267	2,422	2,665	2,832
Prvt. Lessons (students)	442	684	811	871
Competitive Stroke (students)	101	71	71	48
Total Students	<b>2,810</b>	<b>3,177</b>	<b>3,547</b>	<b>3,751</b>
Lifeguard Training (students)	184	120	120	100

**Table G – Total Swim Entries by Purchase Option (Adult Programming)**

	2014	2015	2016	2017
Daily Admission	18,577	19,553	18,500	22,728
15 Swim Punch Pass	22,689	19,405	19,260	19,184
Monthly Pass	2,052	2,788	3,300	3,003
6-Month Pass	-	96	196	165
Annual Pass	187	230	432	436
City Employee Pass	538	380	289	318
<b>Total</b>	<b>44,043</b>	<b>42,452</b>	<b>41,977</b>	<b>45,834</b>

**Table H – Total Swim Entries by Pass Type (Water Exercise)**

	2014	2015	2016	2017
Water Exercise – 20 Punch Pass	79	13	19	29
Water Exercise – 12 Punch Pas	3,913	3,197	2,993	1,952
Water Exercise Daily Drop-In	199	153	183	123
<b>Total</b>	<b>4,191</b>	<b>3,363</b>	<b>3,195</b>	<b>2,104</b>



**Table I – Total Swim Entries by Purchase Option (Adult Programming)**

	2014	2015	2016	2017
Attendance (Youth/Child)	4,792	7,049	5,953	12,223
Day Camp Entries	6,242	5,521	5,234	6,638
15 Swim Punch Pass				
- Child Entries	131	72	34	161
- Youth Entries	67	47	50	62
Family Pass Entries	521	76	-	-
Summer Rec. Pass Entries	-	595	403	1,936
<b>Total</b>	<b>11,753</b>	<b>13,360</b>	<b>11,674</b>	<b>21,020</b>

	2014	2015	2016	2017
Splash Pass (Clarke + Larkey)	-	5,350	5,085	8,992
In/Out Passes	282	73	-	-
<b>Total</b>	<b>282</b>	<b>5,423</b>	<b>5,085</b>	<b>8,992</b>

**Table M – Recreation Classes Performance Measures**

	2015	2016	2017
Recreation Classes	4,706	5,158	4,747
Adult 50 +	1,368	1,633	2,212
Specialized Recreation	715	639	637
<b>Total</b>	<b>6,789</b>	<b>7,430</b>	<b>7,596</b>

**Table N – Visual & Performing Arts Registrations**

	2015	2016	2017
Quarter Totals	-	6,679	7,623
School Year Totals	365	391	396
Outreach Participation	-	2,227	2,393





## Public Input

As part of the master planning process it is important to not only look at the current lines of business that the Department is in, but also hear from the public what they are interested in adding. To accomplish this an interactive community workshop was held, followed by two pop-up workshops, and finally an online survey provided another opportunity.

These events engaged participants in activities on **favorite programs** offered by the City, what the **community values** about these programs, what **trends in programming** they are interested in, and any classes or activities that are currently missing from the City of Walnut Creek Arts and Recreation offerings. The following are the questions asked and key themes from the overall community responses.

1. Values – What do you value about Arts & Recreation Programs? The community expressed a high appreciation for the following traits or characteristics about the programs offered by the City.
  - Affordability: Programs are reasonably priced and most anyone can participate
  - Convenience: Programs take place at locations and during times that are most convenient
  - Program-Specific Locations: Different locations are known for specific types of programs, i.e. Heather Farm Park has a heavy sports focus, Shadelands has an arts focus, Civic Park has many programs for seniors
  - Diversity: Programs cover a range of diverse disciplines and topics
  - Accessibility: Programs are available to a wide spectrum of the population (demographics, skill levels, abilities and disabilities)
  
2. Favorite Programs – What are your favorite programs currently being offered by the City? Participants could select five programs. The categories of programs that received the highest level of interest included the following:
  - Aquatics
  - Adult Programs
  - Youth Programs
  - Special Events

Existing Arts and Recreation Programs receiving significant support/praise include:

- Aquatics: Swim Teams, Lessons, and Recreation/Fitness Swim
- Movies Under the Stars
- Holiday Events
- Drop-In Sports
- Culinary Arts
- Health and Fitness
- Summer Camps





- Sports
  - Physically Active Programs
  - Senior Activities
3. Trends – While considering future programming for individuals, families, households, and the community in general, workshop and survey participants were asked to rank identified trends in programming. The five trends that resonated most with the community were the following:
- Life-Long Learning
  - Do It Yourself / Makers Programs
  - One-Stop Facilities: Programs/Classes for All
  - Aquatic Theme Park Amenities
  - Indoor Aquatics
4. What are we missing? – Are there any programs the City should be offering? The participants offered several ideas/topics/issues. Popular categories include:
- Youth Related Classes and Programs
  - Activities & Programs for Adults and Seniors
  - Aquatic Related Programs
  - Equestrian Related Events and Lessons
  - Family Oriented Programs and Classes



## Alternative Service Providers

Within the Primary Service Area (15-Minute Drive Time) and in some cases beyond to capture more specialized programs, there are a significant number of providers and agencies (public, non-profit and private) offering similar programs to that of the Arts and Recreation Department. See also Appendix A for maps of all the other providers.

**Government Agencies:** The following list identifies other agencies that are located within the Primary Service area and the programs they offer.

- Alamo Parks & Recreation (Operated by Contra Costa County)
  - Facilities
    - Parks
    - School District Indoor Facilities
  - Program Areas: Youth, Adult, Seniors.
- Pleasant Hill Recreation & Park District
  - Facilities
    - Aquatic Park + School Pool
    - Senior Center
    - Community Center
    - Teen Center
  - Program Areas: Community Events, Preschool, Youth, Teen, Adult, Aquatics, Travel, 50+ Travel, 50+ Programming, Camps, Rentals.
- Concord Parks & Recreation
  - Facilities
    - Pool
    - Senior Center
    - Community Center
  - Program Areas: Preschool, Youth, Camps, Teens, Adults, Online Classes, Trips & Tours, 50 & Better, Aquatics, Camp Concord, Rentals, Events.
- Danville Recreation, Arts & Community Services
  - Facilities
    - Pool (school)
    - Senior Center
    - Library / Community Center
  - Program Areas: Special Events, Library, 5 & Under, Youth, Teen, Adult, Adult 55+, Enrichment, Aquatics, Sports.
- Lafayette Parks & Recreation







- Facilities
  - Community Center
  - Preschool
- Program Areas: Special Events, Camps, Birthday Parties, Preschool/Tot Drop, Early Childhood, Children, Afterschool Programs, Youth & Adults, Adult 55+, and Senior Transportation Services.
- Martinez Recreation & Community Services
  - Facilities
    - Pool
    - Senior / Community Center
  - Program Areas: Youth, Aquatics, Seniors, Adult Softball League, Special Events, Camps, Certifications, Library, and Senior Trips.
- San Ramon Parks & Community Services
  - Facilities
    - Pool (2)
    - Senior Center
    - Community Center (4)
    - Preschool
    - Performing Arts Center
  - Program Areas: Performing Arts, Aquatics, Preschool, Elementary, Middle & High School, Therapeutic Recreation, Adult, Adult 55+, and Library.
- Moraga Parks & Recreation Department
  - Facilities
    - The Department uses a variety of outdoor spaces and school district facilities to host their programs.
  - Program Areas: Youth, Adult, Senior, Art, Camps, Cooking, Educational, Instructional, Fitness, Language, Music, Special Events, and Sports.

There are differences in the number and size of facilities and programs that each organization offers. The two organizations that offer a similar number of programs to Walnut Creek are the Concord Parks & Recreation Department and the San Ramon Parks & Community Services Department.

It is not uncommon for government agencies like this to offer the same programs run by the same provider. However, as was conveyed through the public input process residents of communities are looking for a one-stop-shop for programs and facilities. In many cases this translates into wanting programs locally so that they do not have to travel a great distance to participate in the program. More specialized programs, like some of the arts and enrichment programs the City of



Walnut Creek offers, attract participation from a further distance and are not duplicated by other agencies.

**Aquatics:** An area of significant interest expressed through the public input process is aquatics. For purposes of the master plan 50M pools and non-50M pools have been identified.

Public access 50M pools in the area include:

- Clarke Memorial Pool – Walnut Creek
  - 50M Pool, Instructional Pool, and Diving Well
- Concord Community Pool (currently closed for repairs) – Concord
  - 50M Pool
- San Ramon Olympic Pool & Aquatic Park – San Ramon
  - 50M Pool
  - 25Y Pool
  - Play Pool
- Dougherty Valley Aquatic Center – Sam Ramon
  - 50M Pool
  - Play Pool
- Soda Aquatic Center – Moraga
  - 50M Pool
- James Lemos Swim Center – Benicia
  - 50M Pool

Public access non-50M pools in the area include:

- Larkey Park Swim Center – Walnut Creek
- 24 Hour Fitness – Walnut Creek
- Renaissance ClubSport Walnut Creek – Walnut Creek
- Pleasant Hill Swim Center – Pleasant Hill
- Pleasant Hill Educational Center Pool – Pleasant Hill
- Monte Vista High School – Danville
- Rankin Aquatic Center – Martinez
- Irvin Deutscher Family YMCA – Pleasant Hill
- 24 Hour Fitness – Concord
- Big ‘C’ Athletic Club – Concord
- 24 Hour Fitness – San Ramon



The programming of all aquatic facilities locally, regionally, and nationally, regardless of configuration is consistent. Most operators offer swim lessons (group and private), lap swim, open swim, lifeguard training, instructor training, water safety training, and group exercise of some variety. If their aquatic facilities are configured appropriately, there is also an opportunity to accommodate the competitive aquatic pursuits like swimming, diving, synchronized swimming, and water polo.

A significant gap, both locally and regionally, in the aquatic market is the presence of leisure water. Such a space typically includes a zero-depth entry, play features, shallow water and warm water (86+ degrees). This type of facility also has a greater appeal to a wider reach of the aquatic market.

It is also important to note that the providers identified are primarily government agencies, except for a few private health club providers. For purposes of the master plan there was a private provider identified that is in Walnut Creek. That facility is the Splash Swim School, the pool is indoors and is a non-traditional length pool. Privately owned and operated swim schools are becoming more popular across the country, specifically, in communities with demographics like Walnut Creek. In addition to offering swim lessons, both group and private, these facilities also typically offer group exercise classes. Participation in programs is typically based on membership to the facility.



**Private Providers:** There are a significant number of private providers that are in and around Walnut Creek. Their services vary by the market that they pursue, but there is a common factor that is important to note. In many cases public providers offer similar services to the private sector or use instructors from the private sector for arts and recreation programming. The reasoning behind this is simple. The public providers become a gateway into the private providers. Very few public agencies can offer all levels of programming. Because of this they focus on being a one-stop-shop for a variety of entry level programming, with the knowledge that program participants may one day gravitate towards the private sector for more specific or advanced opportunities. The area where this is most easily illustrated is the fitness industry and the transition from the entry level fitness classes and facilities, to the activity specific studios, or full-service fitness facilities.

*YMCA:* There are a few YMCAs in the area:

- San Ramon Valley YMCA
- Strandwood YMCA
- Irvin Deutscher Family YMCA

Most YMCA facilities are membership based and focused on offering a full-service experience for their members. An additional distinguishing characteristic to a full-service YMCA facility is operating at a 100% cost recovery level, which is to say they do not supplement their annual operations. Because of the goal of 100% cost recovery these facilities typically offer a full-spectrum of programming and they are not as concerned with maintaining drop-in availability of facilities like a gymnasium or pool for their members. Another hallmark of most YMCA operations is the presence of a day care program. These day care programs are licensed and a significant source of revenue for the facility.

*Boys & Girls Club:* Two locations in the area:

- Boys & Girls Club of Contra Costa
- East County Boys & Girls Club

The Boys & Girls Clubs typically gravitate towards a different market. They sometimes operate independent facilities, but in other cases operate out of school district facilities, or other joint use agreements. The focus of their programming is on youth, specifically the times after school and into the evening when some need programming. That programming can vary widely and is tailored to a specific market. Another area where the Boys & Girls Clubs provide services are youth camps.



*Child Care:* There are a significant number of child care providers that exist in the Primary Service Area:

- KLA Schools of Walnut Creek
- Walnut Creek KinderCare
- Kids Kastle Child Care Infant-Preschool
- Step Ahead Learning Center
- Sunny Town Family Daycare
- Bancroft Day Care Centre
- Happy Nest Childcare
- Kid Time
- Walnut Creek Kinderworld
- Carriage House Family Day Care
- Safari Kid Walnut Creek
- Little Genius Academy
- Tara Family Child Care
- Love & Care Learning Center
- My Spanish Village
- Walnut Heights Kids Club
- Walnut Boulevard KinderCare
- Nana's Daycare
- Castle Hill Daycare
- New World CDC

It is important to note that this list is not definitive, in fact it is quite possible that there are other providers in the area that identify as Day Care as opposed to Child Care, of which there are no noticeable differences other than the name. The prevalence of this number of child care providers in the area points to a significant number of young families in the area. It also points to the ability for those families to pay the fees associated with such operations.

In addition to these child care providers, some of the government agencies identified in this report also offer preschool opportunities, as does the Arts and Recreation Department in Walnut Creek. There is a significant difference between the full-service child-care providers listed above and the types of services provided by Walnut Creek and other Cities. The services provided by Cities are typically license-exempt by the State and they are typically not full-day operations. These two distinguishing factors identify a niche market for families that cannot afford the cost of full-day child care, but still want to provide that experience for their children. In addition to serving as a Pre-K early childhood education program, the preschool services that Cities operate become a feeder program for their other arts and recreation opportunities.



*Membership Based or Sport Specific Facilities:* There are a few of these in the Primary Service Area:

- Shadelands Sports Mall
- Renaissance ClubSports Walnut Creek
- 24 Hour Fitness – 2

Again, based on the socio-economics of Walnut Creek and the surrounding area it is not uncommon to find a number of these facilities. The YMCAs could also be lumped into the “membership-based” category.

Facilities like the Renaissance ClubSports and 24-Hour Fitness are membership-based operations and are typically focused on fitness. In the case of Renaissance they take the definition of full-service to a higher level by offering spa services as well. A distinguishing characteristic between a full-service public recreation center and a private recreation center is the public facility’s focus on the family and creating an opportunity/place for the entire family to recreate and engage. A distinguishing characteristic of private facilities is a lack of enrichment or arts programming.

The Shadelands Sports Mall is a newer phenomenon in recreation and can be placed into a category of fieldhouse-like or sport-specific operations. The youth sports market continues to grow in Walnut Creek, even as we see a slight decrease in that population across the country. Facilities like Shadelands Sports Mall attract high level athletes with families willing to pay the fees associated with high level facilities and training. The focus of this facility and facilities like it are programs for youth, middle school, high school, and beyond.

*Private Fitness Providers:* There are a significant number of private fitness providers in Walnut Creek, specifically in the downtown area, as is evident by the list below:

- Forma Gym Walnut Creek
- Yoga Works Walnut Creek
- The Yoga and Movement Center – Walnut Creek
- Contra Costa Pilates Center
- My Gym – Walnut Creek
- Curves – Walnut Creek
- Fitness 19 – Walnut Creek
- Organgetheory Fitness – Walnut Creek
- Perpetual Motion – personal training & fitness classes
- Lynch Fitness – Walnut Creek
- Crunch Fitness – Walnut Creek
- 21-Minute for Life – Walnut Creek
- 9-Round (2) – Walnut Creek



- Raw Sports Performance & Center for Strength – Walnut Creek
- Indigo Yoga, Pilates & cycling – Walnut Creek
- Diablo Pilates – Walnut Creek
- Yoga for U – Walnut Creek
- The Hundred & More – A Classical Pilates Studio – Walnut Creek
- Perfect Balance Studio – Walnut Creek
- The Star Method – personal training/functional fitness – Walnut Creek
- CorePower Yoga – Walnut Creek
- PureBarre – Walnut Creek
- Blue Buddha Yoga – Walnut Creek
- YogaWorks – Walnut Creek
- Bikram Yoga – Walnut Creek
- Just Be Yoga – Walnut Creek
- Contra Costa Boxing Club – Walnut Creek
- Contra Costa Pilates Center – Walnut Creek
- Dassanayaka Yoga – Contra Costa County

The common factors amongst all these providers is that they are charging market rates and they typically are focused on a single physical pursuit. There are exceptions to both of those, but the number of providers clearly points to the demand for fitness and/or health and wellness in the area.

Many cities work with private providers like these to provide entry level instructional programs or training through the recreation department. This is done with the knowledge that these participants will probably move into the private sector. The appeal to this cooperative arrangement is that for some, going to a private studio is intimidating. By offering an entry level program through a city, the intimidation factor of the private studio is eliminated.

*Private Dance Studios:* There are a number of private dance studios in the Primary Service Area:

- Dance Fusion
- Ace Dance Academy
- Aurthur Murray Dance Studio
- Sizzling Latin Dance Studio
- The Ballet School Performing Arts
- Mystique Ballroom Company
- Contra Costa Ballet Centre
- Belly Dance! Studio
- Tutu School Walnut Creek
- Dillon Magh Adhair Academy of Irish Dance
- Funkmode Hip Hop Dance Studio



- Kids'n Dance
- Kinderdance
- Spin Sity Pole Dance & Fitness Studio
- Studio A

Again, like with fitness, many of these providers focus on one type or discipline of dance. They may offer a full array of courses in that area, but the genre or style is very specific.

*Private Art Studios:* There are a few private art studios in the Primary Service Area:

- Red Ox Clay Studio – Concord
- Color Me Mine – Walnut Creek
- Lafayette Studio – Lafayette
- The Art Room – Lafayette

Again, these operations are very specific to a single market and offer very specific programs.

*Gymnastics Providers:* There are a few private gymnastics providers in the Primary Service Area:

- EncoreGym
- My Gym
- Luna Gymnastics
- Liberty Gymnastics Training Center

*Youth Sports:* A final area of consideration that is not facility or location specific, is that of youth sports. The Arts and Recreation Department are in the youth sports market and they are focused on offering entry level opportunities for the public. However, as previously mentioned this market continues to grow, and with that growth comes increasing demand. To accommodate that demand, the Department works as a facilitator. In that role, they provide information to the public as to where they can find additional information to participate in activities not offered by the Department. The Department identifies the following partner organizations as:

- Continental Little League
- CYO Sports
- Odyssey/Jrs. Girls Volleyball
- Walnut Creek Little League
- Walnut Creek Soccer Club
- Walnut Creek Youth Athletic Association





In addition to providing information on where individuals can find information, the Department also rents significant field time at Heather Farm Park for these organizations. The Department rented close to 17,000 hours of sports fields in 2017.

The Department does not actively program football or lacrosse to the community, however there are local organizations that provide instructional and competitive opportunities for those individuals interested:

- Skyhawks – Flag Football
- WC Warrior Lacrosse Club – Lacrosse (boys and girls)

The number of alternative service providers in the City and in and around the Primary Service Area point to a vibrant community that is actively seeking out activities. For the Department this means a continued need to be aware of the alternative providers and the programs and services that they are providing. In doing so, the Department can stay within their lines of business, while expanding their program offerings. A variety of those program offerings, like preschool and health/wellness, can then function as a gateway for program participants in the private sector. A benefit of the sheer number of providers is the ability of partnering with those agencies to provide programs in different ways.



## **Section II – Best Practices & Trends in Programming**

The following section provides information on best practices from a local, regional and national perspective. This information is specific to program and provides trends on activities tracked by the National Sporting Goods Association (NSGA) and the National Endowment for the Arts (NEA).

### **Delivery Method**

The first step in discussing programming trends of any variety is identifying the delivery method of programs to participants. The City of Walnut Creek and their Arts & Recreation Department are not unique in that they have identified a tiered structure for the delivery of programs. Most agencies; locally, regionally, and nationally adopt some type of tiered structure for program delivery. While there is no set tier system to follow, it can often be traced back to the facilities that the Department has at its disposal along with resources.

The City's delivery method could be categorized in the following way and should be not confused with the cost recovery model that they have in place:

- Core Service – identified as a program that the City has the facility to accommodate and actively staff and program. Example: summer camp.
- Facilitator/Renter/Contractor – identified as a program that the City either facilitates through offering facility, rents to other groups, or contracts with to provide the program. Example: tennis lessons and much of the arts and enrichment programming.
- Clearing House – identified as the City being a hub of information for programming that they do not offer. Example: information that the City providers in the program brochure on youth and adult sports organizations.

This classification system of core service, facilitator/renter/contractor, and clearing house can apply to both arts and recreation programs that the City offers.



## Cost Recovery

In addition to identifying the method by which the City delivers all their arts and recreation programs it is also important to discuss their cost recovery goals for their programs. Most agencies are moving towards a formal cost recovery plan, or at the very least, a program proposal format that has cost recovery in mind.

The City is consistent with the trend and has a formal cost recovery plan in place that can be outlined as follows (see also table on the following page):

Essential Category – Cost Recovery Target 30% or Less

- Core service
- Serves majority of the community
- High level of contribution offered

Important Category – Cost Recovery Target 31% - 70%

- Important service
- Serves broad segment of the community
- Some level of contribution offered

Value-Added Category – Cost Recovery Target 70%+

- Enhanced community offering
- Serves niche groups
- Limited to no contribution

The City has taken the addition step, within their cost recovery plan to identify various programs that fall within those categories. In the context of the report, the categories of the programs have been provided. The City will want to continue to align program development and cost recovery goals. It is not uncommon for similar agencies to review their cost recovery plan on a consistent basis to determine if categories have expanded or if goals have adjusted.

The Arts & Recreation Department differentiates themselves from other parks and recreation agencies in that they maintain a single-tier fee structure. Some of the other departments in the region them have a two-tier system consisting of a resident and non-resident structure. This single tier fee structure is consistent with the Department viewing themselves as a regional provider of programs. It is also consistent across all program categories the Department offers.



### Cost Recovery Summary

Total cost recovery for Arts & Recreation Divisions – Operating Programs in Study Locations

	<b>Budgeted Expenses</b>	<b>Budgeted Revenue</b>	<b>Direct Cost Recovery</b>	<b>Study Facility<sup>3</sup></b>
Community Arts	\$3,352,612	\$2,198,752	66%	SH
Facility Rentals	\$807,496	\$565,160	70%	CP, HF, SH
Rec Class & Soc Svcs	\$1,843,164	\$760,108	41%	CP, HF
Sports & Camps	\$1,440,377	\$1,437,540	100%	HF
<b>Total</b>	<b>\$7,443,649</b>	<b>\$4,961,560</b>	<b>67%</b>	

This information was provided by the Department and is reflective of the 2016-2017 budget cycle. It is also important to note that the cost recovery percentage the Department maintains rates Average to Strong in comparison to other departments nationwide.

<sup>3</sup> SH – Shadelands, CP – Civic Park Community Center, HF – Heather Farm Community Center





## **National Trends in Programming**

The program categories that have been identified have been condensed in the following pages and should not be aligned with cost recovery. Rather the following information points to trends that are occurring on a local, regional and national level.

### *Performing/Visual Art Classes (beg, int, adv)*

- Looking at the other local government and private providers, the emphasis in this area is a growing trend. On a regional and national level, there are not many locations across the country with such a heavy focus on these program areas. It is not uncommon for agencies to struggle to make this type of programming financially viable. Because of that there is a great deal of consistency in that many who do offer this type of program do so with contract instructors, like Walnut Creek.
- From a national perspective many of these types of programs were offered to school-aged children through the school. As school funding has become more challenging in some areas of the country parks, art, and recreation departments have begun to fill the void as schools have cut these programs. B\*K would anticipate that this trend will continue and that the demand for this type of programming, along with arts and recreation departments working as facilitators, will continue.

### *Personal Enrichment (youth, adult)*

- There is a great deal of variance amongst the local providers in how “personal enrichment” is defined, but all seem to have some programming that could fall within the overall category. Americans are becoming busier each year, as such many of the personal enrichment classes, from youth through adult, are offered in a seminar type format. The concept of committing a significant amount of time for one day, as opposed to shorter amount of time over the course of weeks is much more appealing.
- Again, from a national perspective, most departments are offering enrichment-like programming, and very few make it a primary focus of their program offerings. An area that crosses over into this category that is seeing significant growth is healthy cooking and healthy lifestyle focused programming. Cooking classes, for all age groups, are seeing an increase and a kitchen is not always a pre-requisite, especially for youth programs.



### Health/Fitness Classes (youth, adult)

- Health, Fitness and Wellness programming is exploding across the county, on a municipal, private and collegiate level. Some municipal recreation departments and facilities have taken up the name of wellness center or wellness department. These programs can cover a broad spectrum of activities. They can be as simple as a one-day seminar, to a membership at the local recreation center, to a personal trainer.
- Many organizations address the need for health and fitness opportunities through facilities, while others address the need through programming. In California specifically, arts and recreation departments tend to steer away from full service recreation facilities, in contrast to states like Colorado. They aren't in the business of membership-based fitness opportunities. However, that doesn't deter them from offering health and fitness programming. Again, this focus on programming can take all forms of the service delivery model previously described.
- Fitness classes prefer a facility or studio with some specific amenities such as; floating floor, stand alone AV, mirrors, ballet bars, etc. The benefit of a room set-up like this is that it not only benefits the fitness classes but can also serve as a location for performing arts.

### Senior Social Services/Drop-In Services & Recreation Classes (seniors)

- Most departments nation-wide are offering some type of senior social services and/or drop-in services. The focus for many years has not only been providing these types of program opportunities but adding a social component and combining it with other senior-friendly services.
- While these types of services will continue to be a mainstay within the industry for several years to come, there is a shift happening in the senior/retiree market. There is still much discussion on how to refer to the "new senior" but many departments are taking up the concept of "active aging adult." This is a perfect description of this new senior, Baby-Boomer, that is entering this phase in their life. This group thinks of "seniors" as old and they are not interested in that label. They want to stay active longer. They are interested in more traditional recreation activities, they participate in fitness, they travel, and they avoid most any program with a "senior" label. In many cases, this is causing arts and recreation departments to rebrand many of their programs geared towards this age group.
- Like the social services, the recreation classes still have hallmark programs. At the same time, many recreation programs that were once only geared towards younger adults are now being re-introduced to aging adults. Again, they want to stay active longer, and if the activity comes with a social component it is even more well received. A prime example of



that is pickleball and its explosion of popularity across the country. It is a physical pursuit, that has a significant social component as well. And while there is much debate as to the type of gymnasium that is preferred for this activity, many departments are using a multi-purpose gymnasium with a non-traditional floor. Such an area cannot only support an activity like pickleball or drop-in basketball, but also art shows, craft fairs, and potentially serve as a home base for camp programs.

### Senior Transportation/Meals

- This is a common program, both locally and national, especially when the department is operating a traditional senior center or has access to a kitchen.
- One addition that is taking place in some parts of the country is an educational component. No different that children and non-senior adults, individuals in this age range are interested in cooking classes and healthy options.

### Preschool

- Of the other municipal providers in the immediate area surrounding Walnut Creek, about half of them offer some type of preschool service. Across the country, most departments offer a version of preschool or tot-drop. Often, a preschool setting can be found in conjunction with a community center or in a park setting. Tot-drop is also associated with a full-service recreation center and provides a place for young children to go, while parents or guardians use the facility.
- Very few municipalities get in the business of offering a full-service, full-day, day care. Many take the approach that Walnut Creek has, where the preschool program is in a park or facility, runs for half a day, and does not require monthly membership or annual sign up. This program offers flexibility for stay at home parents and is a low-cost alternative to those that may not be able to afford full-time day care.
- An area of significant growth in the private sector is adult day-care. As older adults are moving back in with their children later in life, there is a need for supervision. That supervision, while the child, now adult, is at work comes in the form of adult day-care. This is not an area of business that municipalities have entered, but some have taken on the role of clearinghouse and provide that information or contact points for those interested.

### Camps

- Across the country camps are a hallmark of arts, parks and recreation agencies. The types of camps and their variety fluctuate from agency to agency, but almost all offer them. Traditionally, camps were thought of as a program that was only offered during the summer





and those camps typically focused on sports, nature or the like. As evidenced by Walnut Creek producing a standalone brochure only for camps, they have become much more diversified and are offered not only during the summer, but during school breaks as well.

- An area where Walnut Creek and areas of California are ahead of the trend is the ability to stack camps with other services. A simple explanation of this “stacking” is the ability for youth participating in a camp at Heather Farm Park to take swim lessons at the pool.
- Another area of camps that is experiencing growth is the area of STEM. Most camp providers are working with a third party to offer this type of camp, and it typically runs for a 1-day or 1-week time frame. Given the City’s arts and enrichment programming it would be very easy to offer both STEM and STEAM camps.

### Specialized Recreation

- This area of recreation is one that a few of the City’s neighboring communities offer, but it is not something that is prevalent across the country. More often departments don’t offer specialized recreation, the same can be said for therapeutic recreation. In both cases it is often the private or non-profit sector that fills the void. The solution from a municipal perspective, is too often try and incorporate those that would normally want specialized recreation into mainstream programming. This is sometimes accomplished by additional staff and/or adjusting the program to meet the individual need.
- The fact that the City of Walnut Creek offers specialized recreation and specialized recreation camps is unique. They have average around 700 participants annual. It also creates a partnership opportunity with neighboring Concord as they offer a similar focused program.

### Indoor Rentals

- The trend across the country with rentals falls into one of two mindsets. The first mindset is one where a facility (indoor or outdoor), lends itself to rentals, or was purpose built in which case a focus of the department is renting the facility. In those instances, renting the facility is the program, and it takes priority over a potentially new program or opportunity. The second mindset, the one that the City of Walnut Creek has adopted, is that rentals are what a department does after they have programmed the facility. If given a choice they offer a new program to the public versus adding or maintaining a rental. This is consistent with the City’s cost recovery policy.
- Again, rentals are often a function of the facilities that a department is offering. The challenge for departments that offer indoor rentals in a mindset like Walnut Creek is revenue generation. Agencies have the potential to generate significant income from





rentals and revenue generation can sometimes come into conflict with delivering new programs.

### Instructional Aquatics

- On a local, regional and national level an agency that operates a pool offers some type of instructional aquatics. That trend will continue if government agencies continue to operate aquatic facilities.
- A trend that is becoming more prevalent across the country, specifically in areas with similar socio-economics as Walnut Creek, is the development of swim schools. These operations are typically indoors and can cater to a host of different needs. The focus of the school is typically learn-to-swim programs along with a variation of private and semi-private swim lessons. Depending on the body, or bodies, of water in the school, they may also offer group exercise classes, therapeutic classes, multi-sport training, swim stroke analysis or the like.
- Another trend that is expanding in popularity is the inclusion of an instructional or therapy pool. These spaces are non-traditional in shape and are typically a warmer water temperature. The temperature makes them appeal for a wide variety of instructional and group exercise opportunities.

### Recreation/Fitness Aquatics

- Recreation aquatics, open swim or family swim programs, are another hallmark of recreation agencies that operate a pool. It is also important to note that the casual swimmer makes up approximately 50% of the swimming community. That statistic is why many newly constructed facilities allow for the traditional aquatic pursuits, but also have a fun-factor. The trend for more engaging recreation aquatic opportunities is increasing.
- Fitness aquatics can mean many different things, but nationally they typically refer to group exercise programs, multi-sport training groups, lap swim, or even masters swim programs. Specific to fitness aquatics the trend is also increasing, but not at the same rate as recreation aquatics.

### Aquatic Rentals

- This program can take the form of; private pool parties, birthday parties, team practice, competitions, etc. The type of rental and the duration of rentals varies by facility and by the cost recovery goals of said facility. The trend specific to competitive aquatics is that most aquatic teams are paying a reduced rate for their practice time and a published market rate for competitions, if the facility can host them. This trend of paying for practice time



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and paying market rates for competition is relatively new, only appearing in some locations in the mid-1990s. However, as more agencies have become cost conscious and aware of cost recovery, the expense of pool operations has come into focus. For other aquatic rentals like private pool parties and birthday parties, they have evolved with facilities. This is a trend that is going to continue throughout the country.





**Table A – National Activity Trends (in millions)<sup>4</sup>**

	2008 Participation	2017 Participation	Percent Change
<b>Yoga</b>	13.0	29.6	+127.7%
<b>Gymnastics<sup>5</sup></b>	3.9	6.0	+53.8%
<b>Running/Jogging</b>	30.9	43.8	+41.7%
<b>Aerobic Exercising</b>	32.2	44.9	+39.4%
<b>Hiking</b>	33.1	43.9	+32.6%
Cheerleading <sup>6</sup>	2.9	3.5	+20.7%
<b>Lacrosse<sup>7</sup></b>	2.6	2.9	+11.5%
<b>Exercise Walking</b>	96.6	104.5	+8.2%
Weight Lifting	33.9	36.5	+7.7%
<b>Soccer</b>	13.5	14.3	+5.9%
Pilates <sup>8</sup>	5.5	5.7	+3.6%
Exercising w/ Equipment	55.0	55.5	+0.9%
<b>Tennis</b>	12.6	12.3	-2.4%
Boxing <sup>9</sup>	3.8	3.7	-2.6%
<b>Football (flag)<sup>10</sup></b>	6.7	6.5	-3.0%
<b>Basketball</b>	25.7	24.6	-4.3%
Workout @ Club	39.3	37.4	-4.8%
<b>Bicycle Riding</b>	38.7	36.4	-5.9%
Martial Arts/MMA <sup>11</sup>	6.4	6.0	-6.3%
<b>Baseball</b>	13.3	12.1	-9.0%
<b>Swimming</b>	53.5	47.9	-10.5%
<b>Volleyball</b>	12.2	10.5	-13.9%
<b>Football (tackle)</b>	9.5	7.5	-21.1%
Golf	23.2	17.9	-22.8%
Table Tennis/Ping Pong	13.3	10.2	-23.3%
<b>Softball</b>	12.8	9.8	-23.4%
<b>Skateboarding</b>	9.8	5.5	-43.9%
Mountain Biking	10.2	5.6	-45.1%

<sup>4</sup> The activities listed that are **BOLD** are those that the Department actively programs or provides facilities for.

<sup>5</sup> Change since 2009.

<sup>6</sup> Change since 2008.

<sup>7</sup> Change since 2010.

<sup>8</sup> Change since 2014.

<sup>9</sup> Change since 2013.

<sup>10</sup> Change since 2012.

<sup>11</sup> Change since 2013.





B\*K has used information from the NSGA since we were founded in 1992. As such we can access historical data dating back to 1990 for some activities. The following provides a long-range picture of various activities.

**Table B – Historical Perspective<sup>12</sup>**

	1990	1995	2000	2005	2010	2015
Aerobic Exercising	23.3	23.1	26.7	33.7	38.5	45.1
Baseball	15.6	15.7	15.6	14.6	12.5	11.8
Basketball	26.3	30.1	27.1	29.9	26.9	24.8
Bicycle Riding	55.3	56.3	43.1	43.1	39.8	36.0
Boxing	40.1	41.9	43.1	45.4	39.0	35.2
Cheerleading				3.3		3.7
Exercise Walking	71.4	70.3	81.3	86.0	95.8	106.3
Exercise w/ Equipment	35.3	44.3	44.8	54.2	55.3	56.3
Football (flag)						6.6
Football (tackle)		8.3	8.0	9.9	9.3	7.8
Golf	23.0	24.0	26.4	24.7	21.9	18.6
Gymnastics					4.8	5.8
Hiking	22.0	25.0	24.3	29.8	37.7	42.0
Lacrosse					2.6	2.9
Martials Arts/MMA		4.5	5.4			6.6
Mountain Biking		6.7	7.1	9.2	7.2	5.6
Pilates						5.6
Running/Jogging	23.8	20.6	22.8	29.2	35.5	44.5
Skateboarding	7.5	4.5	9.1	12.0	7.7	5.7
Soccer	10.9	12.0	12.9	14.1	13.5	14.1
Softball	20.1	17.6	14.0	14.1	10.8	9.8
Swimming	67.5	61.5	58.8	58.0	51.9	46.3
Table Tennis/Ping Pong	11.8	9.3			12.8	10.5
Tennis	18.4	12.6	10.0	11.1	12.3	12.8
Volleyball	23.2	18.0	12.3	13.2	10.6	10.7
Weight Lifting			22.8	35.5	31.5	34.8
Workout @ Club				34.7	36.3	36.6
Yoga					20.2	30.7
Did Not Participate						64.4

<sup>12</sup> Numbers are in millions.





**Table C – Historical Perspective National Endowment for the Arts**

<b>Adult Reading</b>	<b>2002</b>	<b>2008</b>	<b>2012</b>	<b>2017</b>
Any Type	56.6%	54.3%	54.6%	52.7%
Novel/Short Story	45.1%	47.0%	45.2%	41.8%
Poetry	12.1%	8.3%	6.7%	11.7%
Plays	3.6%	2.6%	2.9%	3.7%

<b>Visual Art</b>	<b>2002</b>	<b>2008</b>	<b>2012</b>	<b>2017</b>
Art Museums/Galleries	26.5%	22.7%	21.0%	23.7%
Historic or Notable Parks, Monuments, Buildings	31.6%	24.9%	23.9%	28.3%
Craft Fairs or Visual Arts Festivals	33.4%	24.5%	22.4%	23.8%

<b>Performing Arts</b>	<b>2002</b>	<b>2008</b>	<b>2012</b>	<b>2017</b>
Jazz	10.8%	7.8%	8.1%	8.6%
Classical Music	11.6%	9.3%	8.8%	8.6%
Latin Music	-	4.9%	5.1%	5.9%
Opera	3.2%	2.1%	2.1%	2.2%
Ballet	3.9%	2.9%	2.8%	3.1%
Other Dance	6.3%	5.2%	5.6%	6.3%
Musical Plays	17.1%	16.7%	15.2%	16.5%
Non-Musical Plays	12.3%	9.4%	8.3%	9.4%
Outdoor Performing Arts Festivals	-	20.8%	20.8%	24.2%



## **Section III – Demographics & Participation Statistics**

### **Demographics**

The following information is a demographic analysis of service areas around the City of Walnut Creek.

B\*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2018-2023 projections. In addition to demographics, ESRI also provides data on housings, recreation, and adult participation in activities.

#### **Service Areas:**

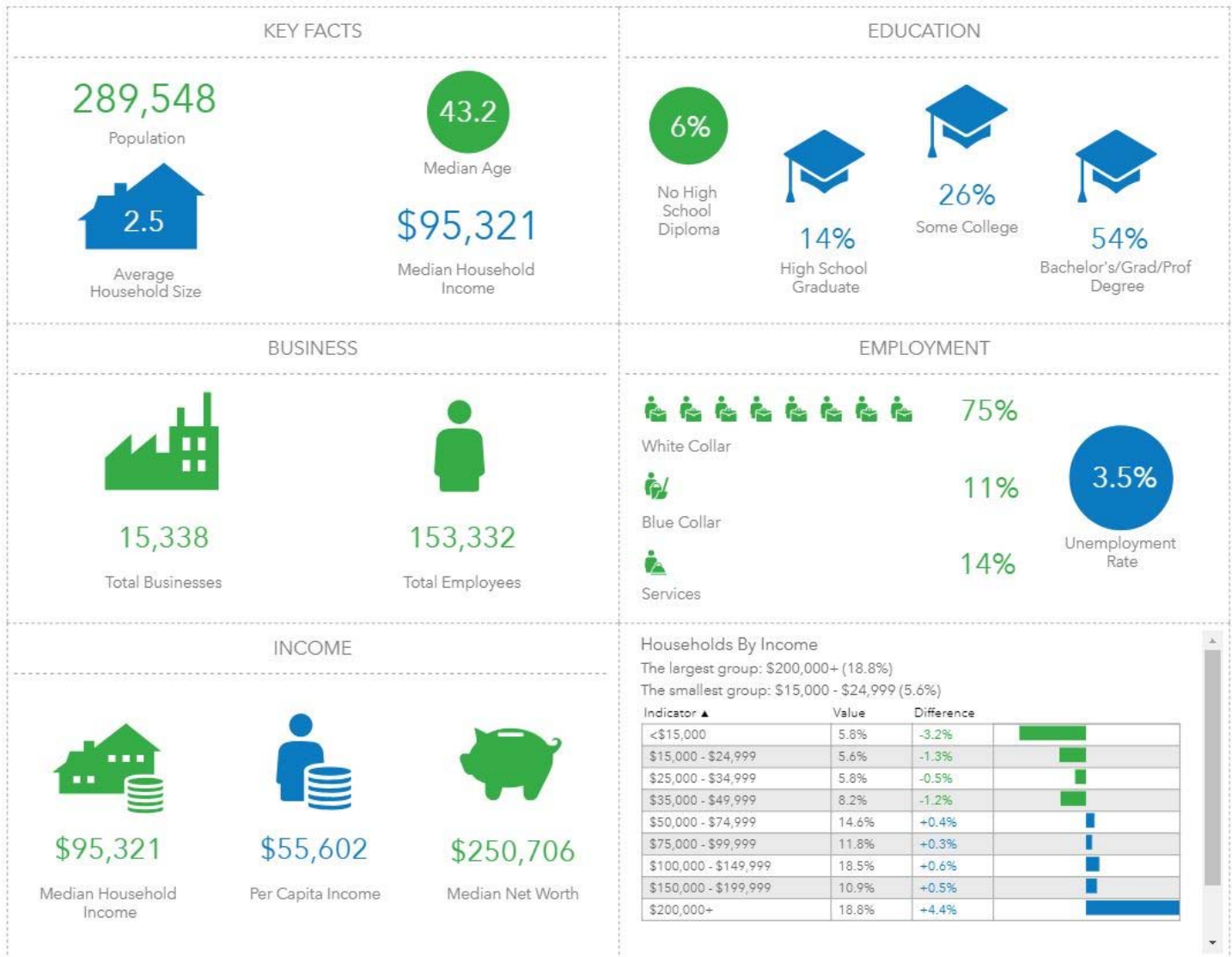
Based on information already gathered by the City of Walnut Creek, 5-Minute, 10-Minute and 15-Minute Drive Times were identified as the service areas for the demographic analysis. The drive times were developed from a central point in Walnut Creek and are based on ideal traffic conditions. The 15-Minute Drive Time is used as the Primary Service Area and is the focus of the more detailed analysis in this document.

B\*K defines a Primary Service Area as the distance people are willing to drive on at least a weekly basis to use arts and recreation services. There are facilities and programs within each of the three locations that can be identified as regional attractions, hence the use of the 15-Minute Drive Time as a Primary Service Area, which reaches well beyond the City boundaries.

Service areas can expand, or contract based upon a facility's proximity to major thoroughfares, which is the case in Walnut Creek. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can influence membership, daily admissions and the associated penetration rates for programs and services.



**Figure A - Key Indicators Associated with the Primary Service Area**

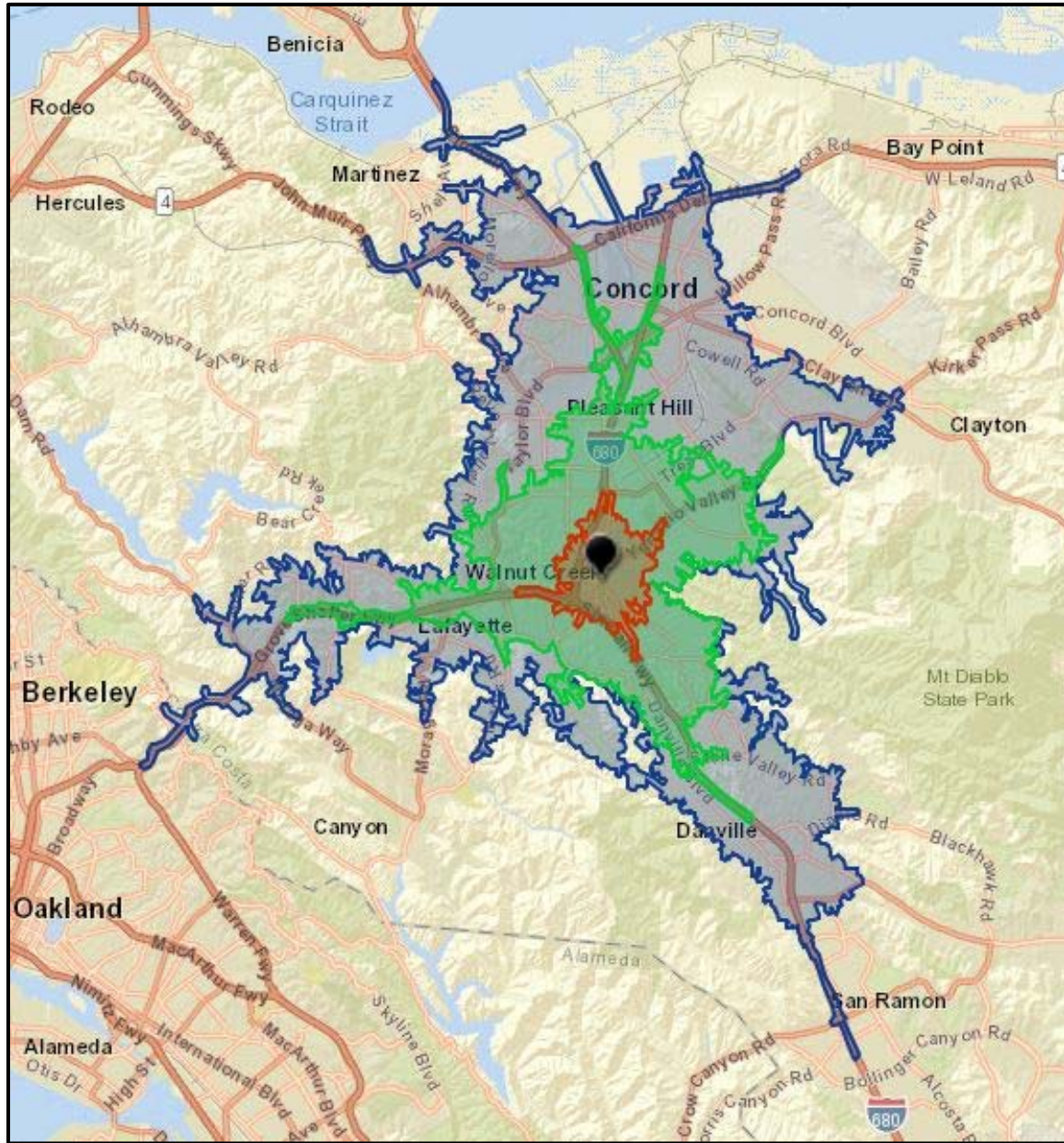


*This infographic provides a 1-page snapshot of some key indicators associated with the 15-Minute Drive Time. Household by Income comparison uses the Primary Service Area and compares it to Alameda County.*





**Map A – Service Areas Comparison**



- Red Boundary – 5-Minute Drive Time
- Green Boundary – 10-Minute Drive Time
- Blue Boundary – 15-Minute Drive Time (Primary Service Area)







**Table A – Demographic Summary**

	<b>5-Minute Drive Time</b>	<b>10-Minute Drive Time</b>	<b>15-Minute Drive Time</b>
<b>Population:</b>			
2010 Census	16,295	94,775	270,576 <sup>13</sup>
2018 Estimate	18,809	102,935	289,548
2023 Estimate	20,297	107,788	302,150
<b>Households:</b>			
2010 Census	8,312	41,327	108,994
2018 Estimate	9,581	44,731	115,877
2023 Estimate	10,336	46,791	120,675
<b>Families:</b>			
2010 Census	3,911	23,847	69,003
2018 Estimate	4,424	25,505	72,940
2023 Estimate	4,741	26,577	75,769
<b>Average Household Size:</b>			
2010 Census	1.95	2.26	2.46
2018 Estimate	1.95	2.27	2.47
2023 Estimate	1.95	2.27	2.48
<b>Ethnicity (2018 Estimate):</b>			
Hispanic	13.5%	12.8%	19.2%
White	71.5%	72.1%	69.4%
Black	2.2%	2.1%	2.4%
American Indian	0.3%	0.3%	0.4%
Asian	15.6%	15.4%	13.9%
Pacific Islander	0.3%	0.3%	0.4%
Other	4.5%	4.1%	7.4%
Multiple	5.7%	5.8%	6.0%
<b>Median Age:</b>			
2010 Census	38.4	42.2	41.6
2018 Estimate	39.8	43.7	43.2
2023 Estimate	40.5	43.8	43.6
<b>Median Income:</b>			
2018 Estimate	\$87,004	\$100,575	\$95,321
2023 Estimate	\$102,729	\$114,400	\$109,028

<sup>13</sup> From the 2000-2010 Census, the 15-Minute Drive time experienced a 1.7% increase in population.



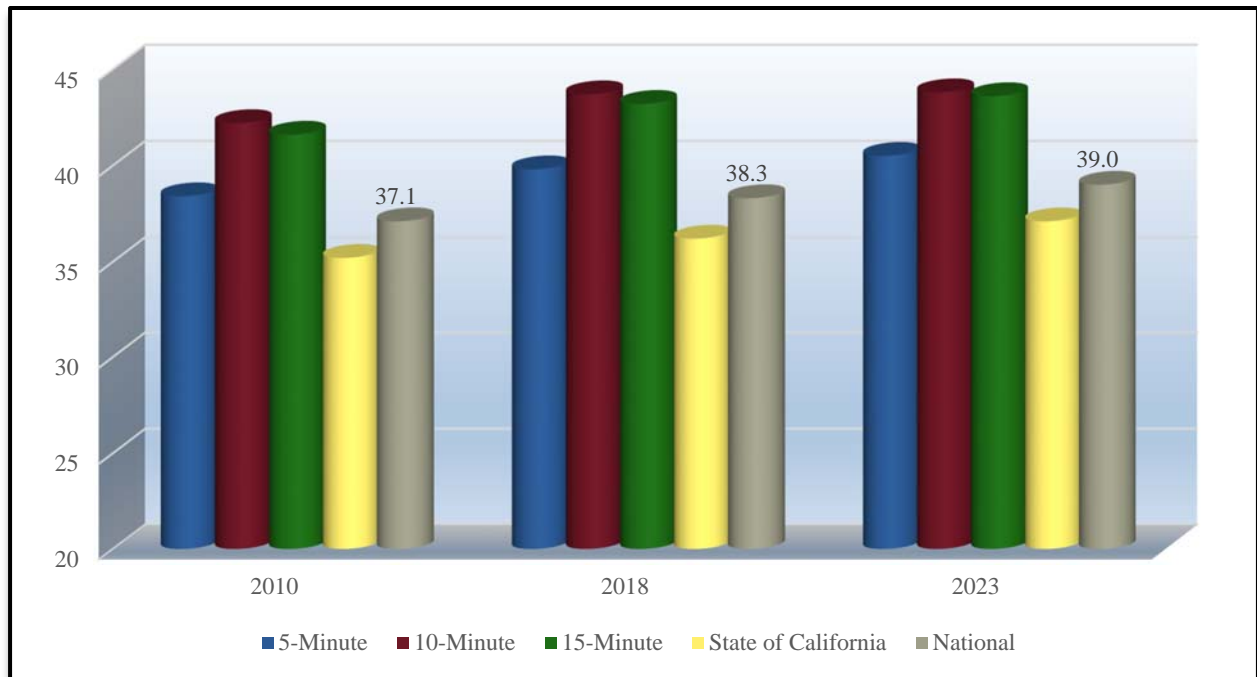


**Age and Income:** The median age and household income levels are compared with the national number as both factors are indicators of success for participation in arts and recreation activities and facilities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

**Table B – Median Age:**

	2010 Census	2018 Projection	2023 Projection
5-Minute Drive Time	38.4	39.8	40.5
10-Minute Drive Time	42.2	43.7	43.8
15-Minute Drive Time	41.6	43.2	43.6
State of California	35.2	36.2	37.1
Nationally	37.1	38.3	39.0

**Chart A – Median Age:**



The median age in the State of California is less than the National number while the median age in all the drive times is higher than the national number, with the highest being the 10-Minute Drive Time. While a higher median age typically points to the presence of older adults some with children still in the home and some without, it doesn't eliminate young children from the market. It does point to the idea that the City of Walnut Creek will want to continue to offer arts and recreation programs and facilities for the full age spectrum.





The following chart provides the number of households and percentage of households in the service areas with children. This information is based off the 2010 Census, which is the most recent data B\*K has access to at this time.

**Table C – Households w/ Children**

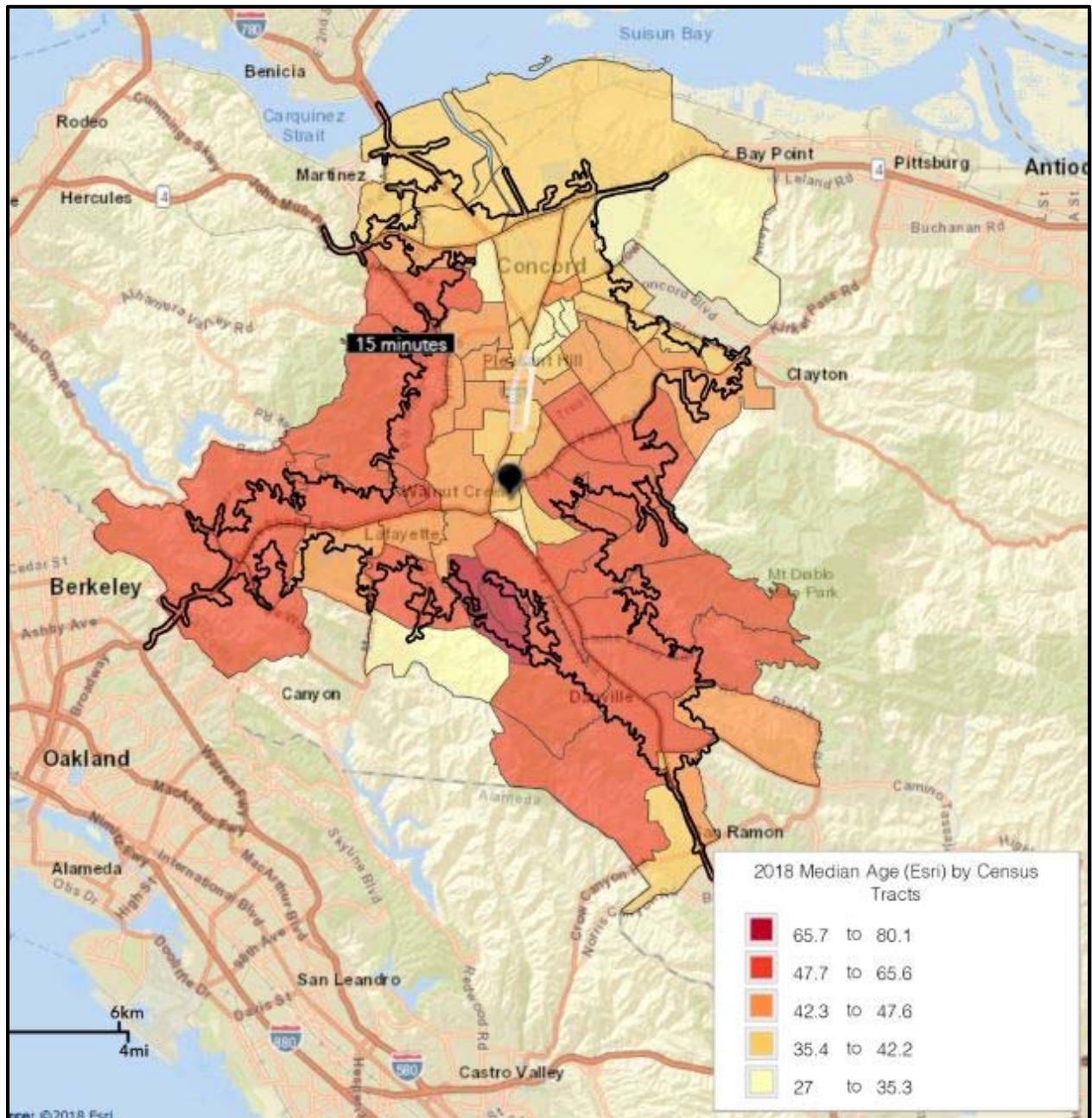
	<b>Number of Households w/ Children</b>	<b>Percentage of Households w/ Children</b>
5-Minute Drive Time	1,745	21.0%
10-Minute Drive Time	10,878	26.3%
15-Minute Drive Time	32,520	29.8%

The information contained in Table-C helps further outline the presence of families with children. As a point of comparison in the 2010 Census, 37.5% of households in California and 33.4% of households nationally had children present.





**Map B – Median Age by Census Tract**

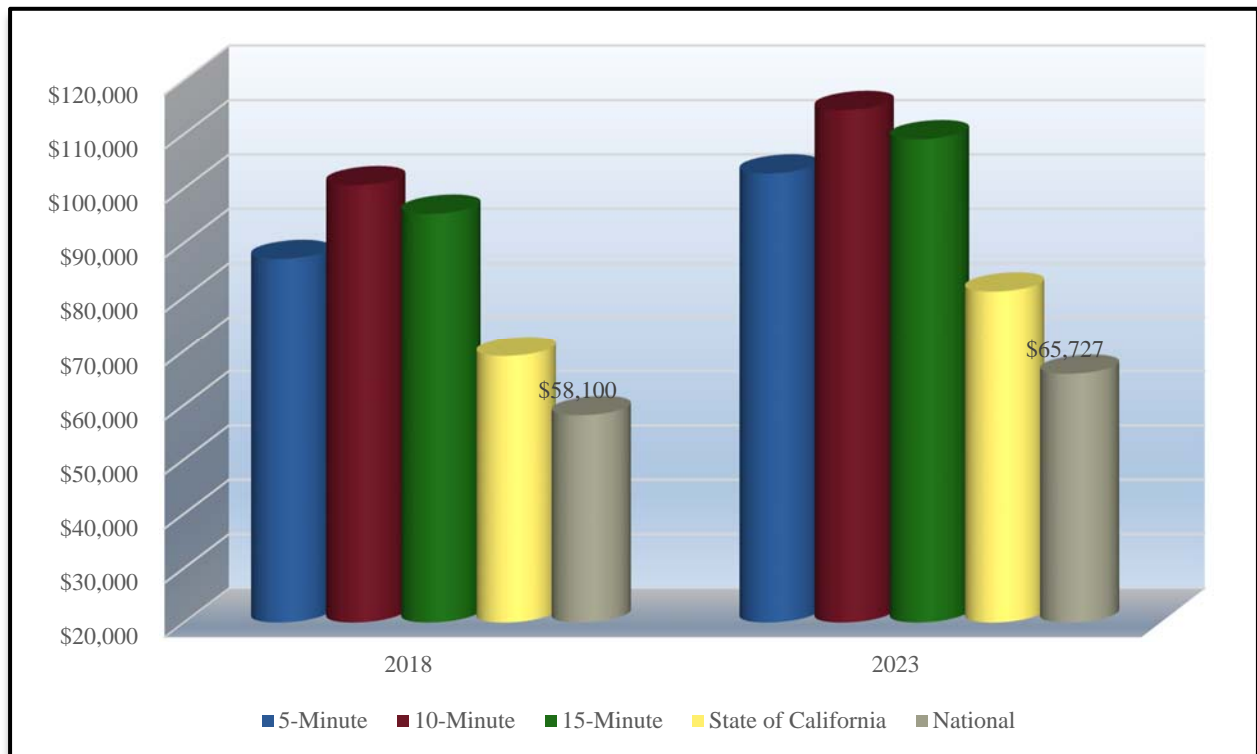




**Table D – Median Household Income:**

	2018 Projection	2023 Projection
5-Minute Drive Time	\$87,004	\$102,729
10-Minute Drive Time	\$100,575	\$114,400
15-Minute Drive Time	\$95,321	\$109,028
State of California	\$69,041	\$81,023
Nationally	\$58,100	\$65,727

**Chart B – Median Household Income:**



The median income level in the State of California is higher than the National number with the income level in all three service areas being significantly higher than that of the State. This is consistent with work that B\*K has done in the area and with information provided by the City. While a higher median household income points to the ability to pay for arts and recreation programs and services it must be balanced with the cost of living in the area.



Based on 2018 projections for median household income the following narrative describes the service areas:

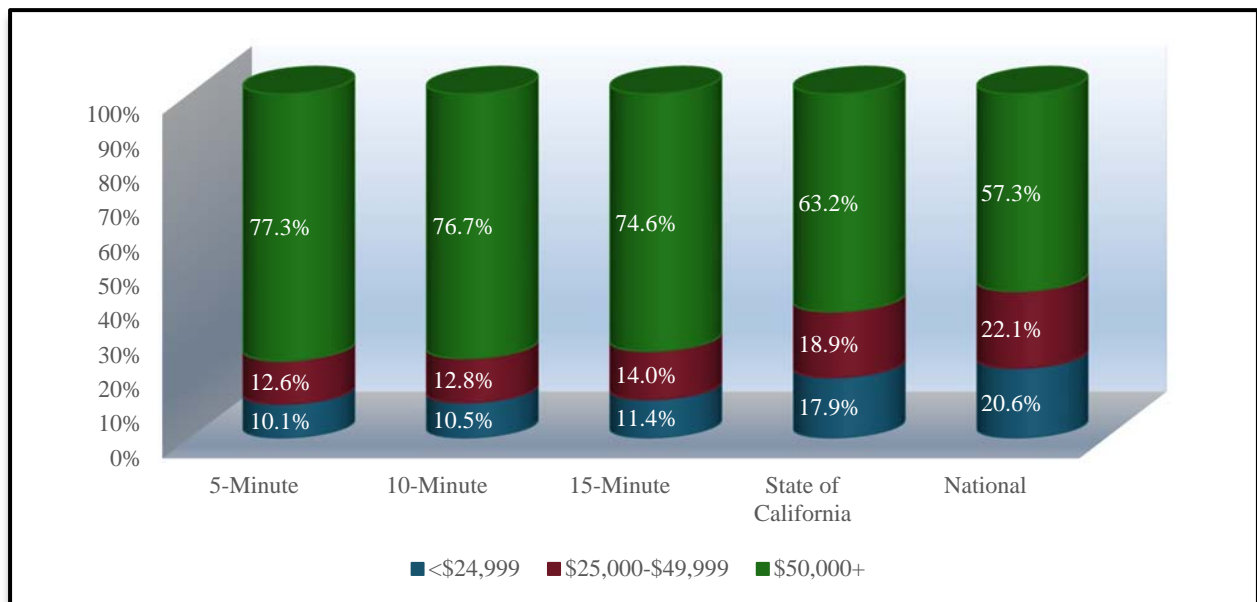
In the 5-Minute Drive Time, the percentage of households with median income over \$50,000 per year is 77.3% compared to 57.2% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 10.1% compared to a level of 20.6% nationally.

In the 10-Minute Drive Time, the percentage of households with median income over \$50,000 per year is 76.7% compared to 57.2% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 10.5% compared to a level of 20.6% nationally.

In the 15-Mile Radius, the percentage of households with median income over \$50,000 per year is 74.6% compared to 57.2% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 11.4% compared to a level of 20.6% nationally.

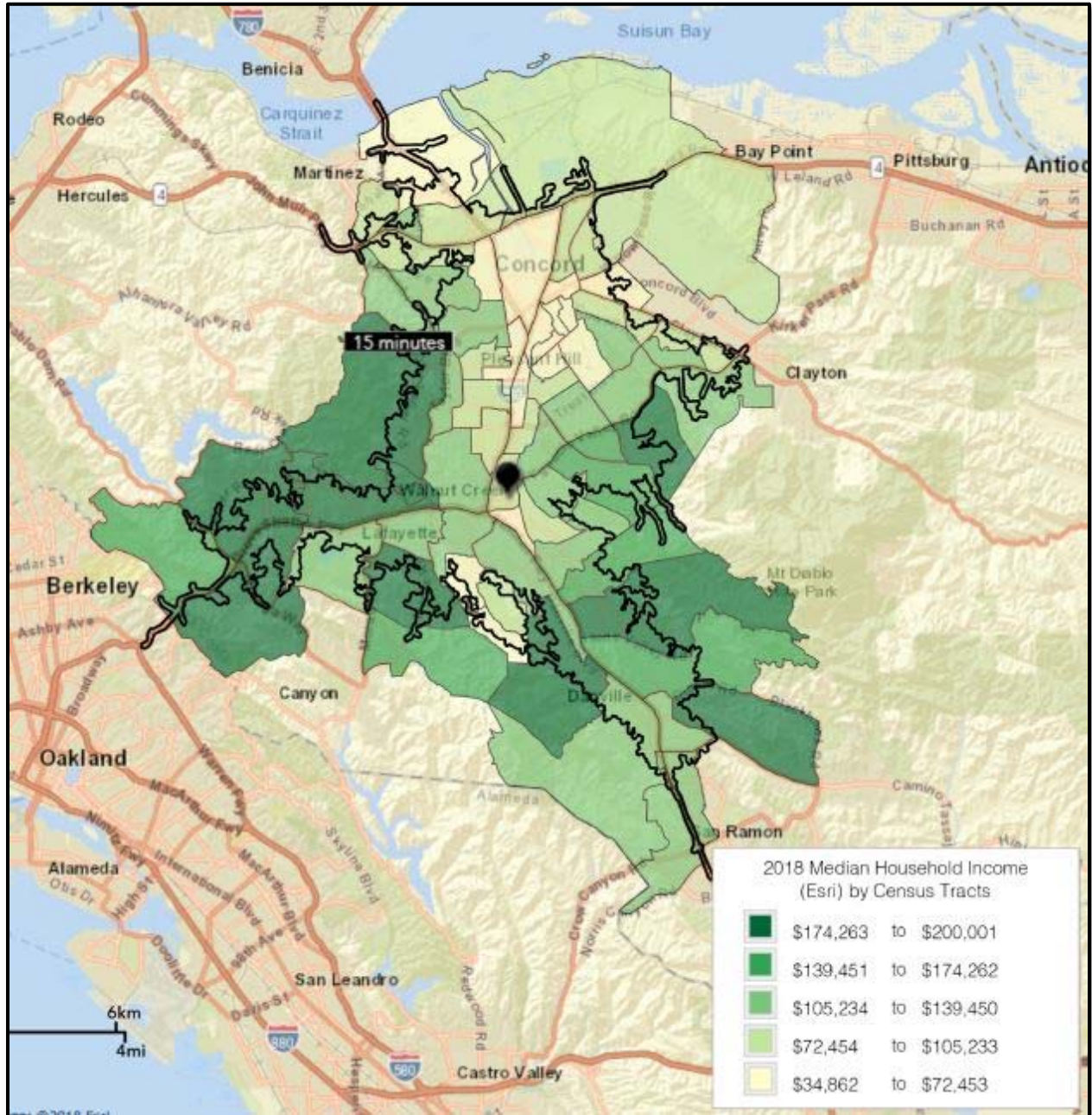
While there is no perfect indicator of use of arts and recreation programs and facilities, B\*K has identified over time that the higher the percentage of households with median income over \$50,000 the great odds of success. The chart below compares the income distribution in each of the service areas.

**Chart C – Median Household Income Distribution**





**Map C – Median Household Income by Census Tract**





In addition to looking at Median Age and Median Income, it is important to examine Household Budget Expenditures. Reviewing housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas to the State and the National Spending Potential Index of 100.

**Table E – Household Budget Expenditures<sup>14</sup>:**

5-Minute Drive Time	SPI	Average Amount Spent	Percent
Housing	148	\$32,182.80	31.4%
<i>Shelter</i>	153	\$25,624.02	25.0%
<i>Utilities, Fuel, Public Service</i>	132	\$6,558.78	6.4%
Entertainment & Recreation	141	\$4,526.73	4.4%

10-Minute Drive Time	SPI	Average Amount Spent	Percent
Housing	169	\$36,688.84	31.0%
<i>Shelter</i>	173	\$29,074.08	24.6%
<i>Utilities, Fuel, Public Service</i>	154	\$7,614.76	6.4%
Entertainment & Recreation	164	\$5,267.61	4.5%

15-Minute Drive Time	SPI	Average Amount Spent	Percent
Housing	164	\$35,709.46	30.9%
<i>Shelter</i>	168	\$28,163.15	24.4%
<i>Utilities, Fuel, Public Service</i>	152	\$7,545.31	6.5%
Entertainment & Recreation	160	\$5,144.33	4.5%

State of California	SPI	Average Amount Spent	Percent
Housing	122	\$26,579.93	31.1%
<i>Shelter</i>	124	\$20,896.79	24.5%
<i>Utilities, Fuel, Public Service</i>	115	\$5,683.14	6.7%
Entertainment & Recreation	118	\$3,790.19	4.4%

**SPI:** Spending Potential Index as compared to the National number of 100.  
**Average Amount Spent:** The average amount spent per household.  
**Percent:** Percent of the total 100% of household expenditures.

*Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.*

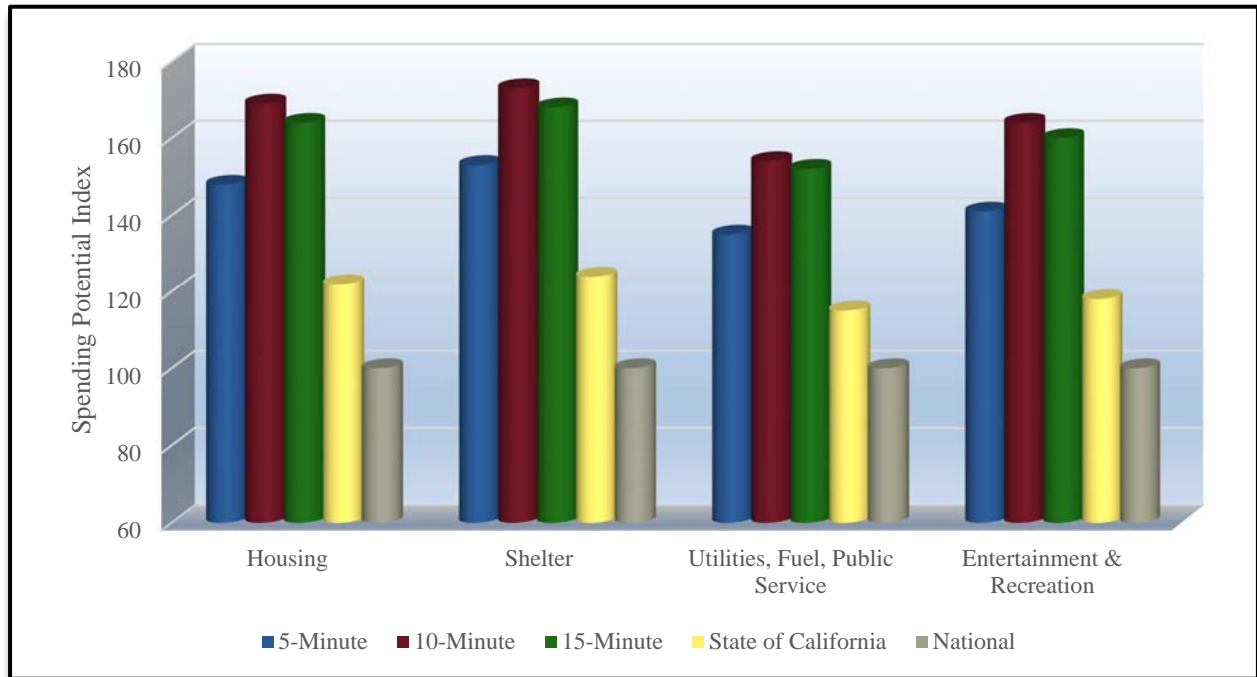
<sup>14</sup> Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2018 and 2023.







**Chart D – Household Budget Expenditures Spending Potential Index:**



The consistency between the median household income and the household budget expenditures is important. It also points to the fact that compared to a National level the dollars available, and the dollars being spent in the service areas and the State are significantly greater than the National number. It is also important to note that regardless of the service area, approximately 4.5% of household budget expenditures is spent on entertainment & recreation. While this is a broad category it gives a framework of dollars being spent.

**Household Information:**

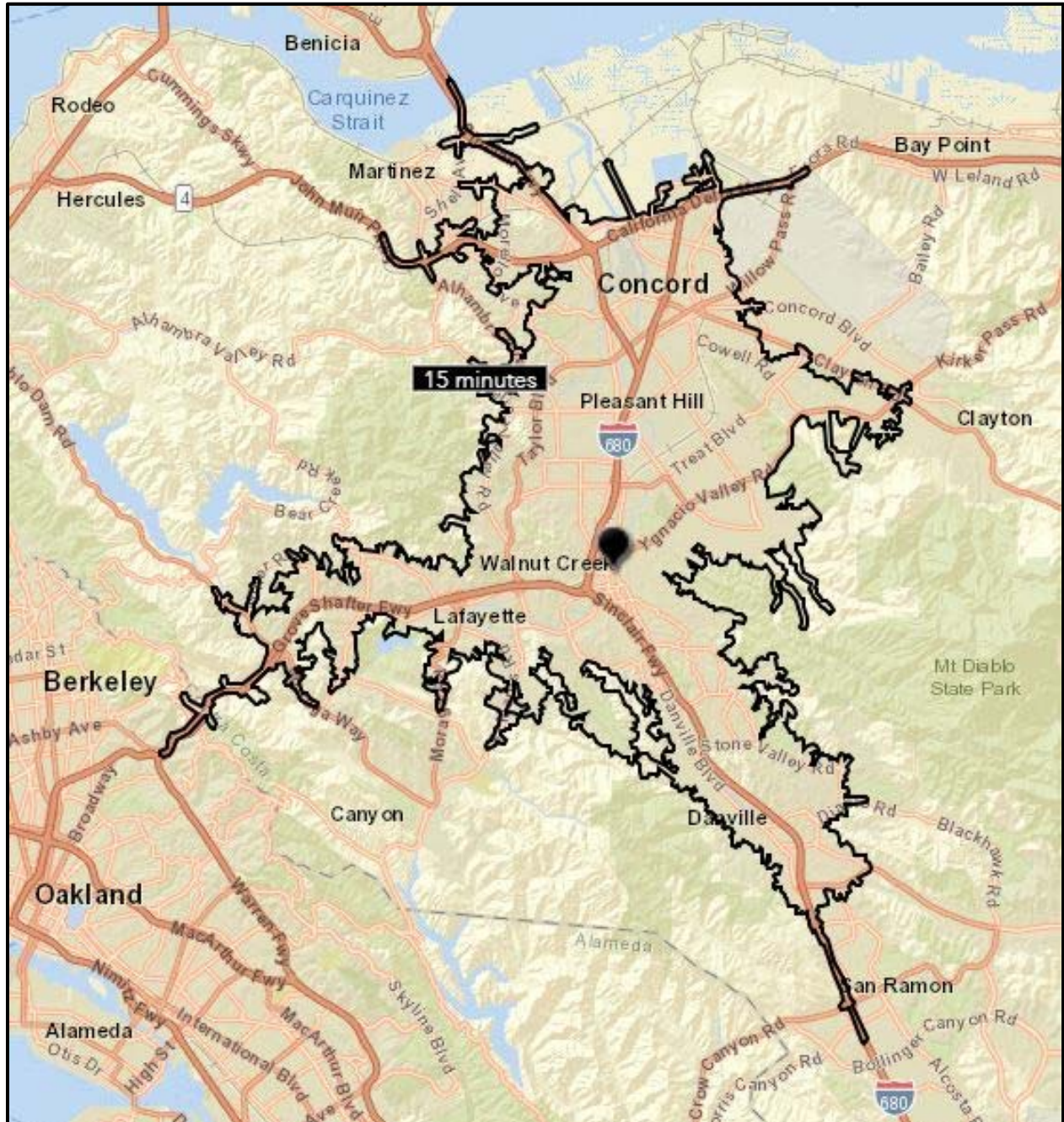
- 5-Minute Drive Time – 9,094 housing units, 91.4% are occupied or 8,312 housing units.
- 10-Minute Drive Time – 43,886 housing units, 94.2% are occupied or 41,327 housing units.
- 15-Minute Drive Time – 115,485 housing units, 94.4% are occupied or 108,994 housing units.

The household information indicates a steady and consistent community in and around Walnut Creek. This information does not consider the significant housing development that will take place adjacent to Civic Park and bring thousands of new residents to the doorstep of that park.





**Map D – Primary Service Area**



*The Primary Service Area is identified as the 15-Minute Drive Time from a central point in Walnut Creek.*





**Population Distribution by Age:** Utilizing census information for Primary Service Area the following comparisons are possible.

**Table F – 2018 Primary Service Area Age Distribution**

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	14,361	4.9%	6.0%	-1.1%
5-17	43,725	15.1%	16.3%	-1.2%
18-24	22,339	7.7%	9.7%	-2.0%
25-44	70,698	24.3%	26.4%	-2.1%
45-54	39,224	13.6%	12.8%	+0.8%
55-64	41,820	14.5%	13.0%	+1.5%
65-74	31,384	10.9%	9.4%	+1.5%
75+	25,997	9.0%	6.5%	+2.5%

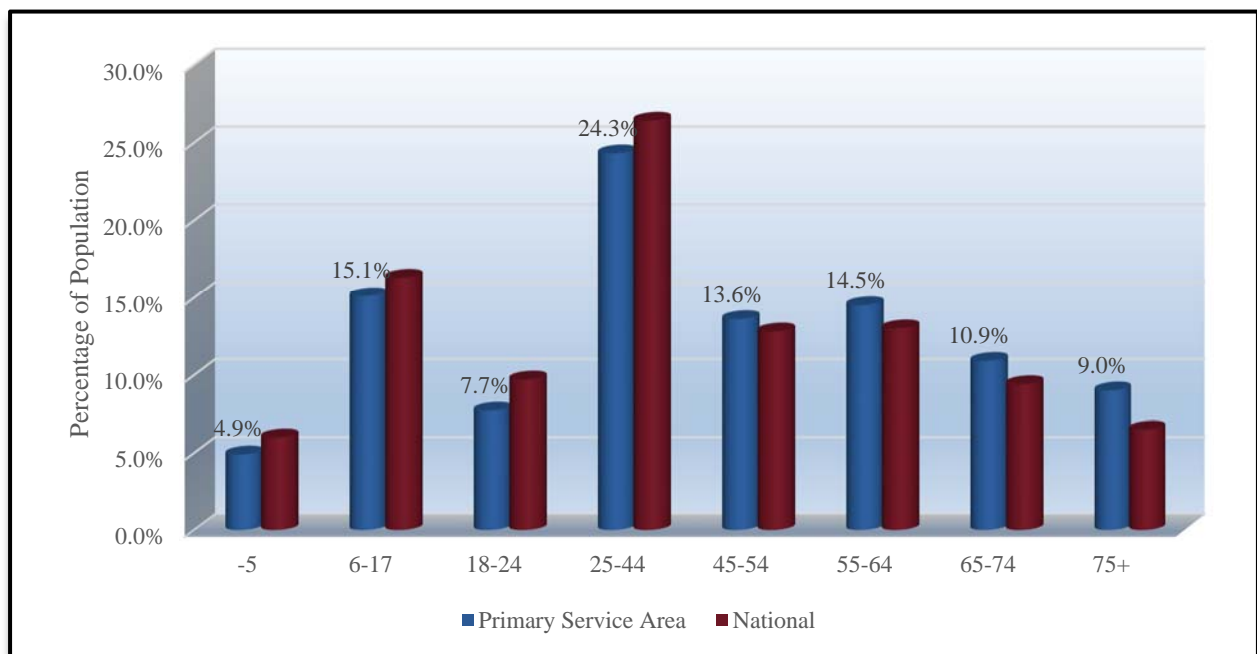
**Population:** 2018 census estimates in the different age groups in the Primary Service Area.

**% of Total:** Percentage of the Primary Service Area population in the age group.

**National Population:** Percentage of the national population in the age group.

**Difference:** Percentage difference between the Primary Service Area population and the national population.

**Chart E – 2018 Primary Service Area Age Group Distribution**





The demographic makeup of Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the age groups of 45-54, 55-64, 65-74 and 75+ and a smaller population in the age groups of -5, 5-17, 18-24 and 25-44. The greatest positive variance is in the 75+ age group with +2.5%, while the greatest negative variance is in the 25-44 age groups with -2.1%.

Again, the age distribution further emphasizes the higher median age in the 15-Minute Drive Time from Walnut Creek. And while the median age is higher with a greater percentage of individuals in all age categories age 45+ compared to the national number, it also points to 20% of the population being under the age of 18. The City of Walnut Creek is providing and should continue to provide arts and recreation programs and facilities to this full age spectrum.

As the population of service areas grow, the deviation from the U.S. population percentages decreases.



**Population Distribution Comparison by Age:** Utilizing census information from Primary Service Area the following comparisons are possible.

**Table G – 2018 Primary Service Area Population Estimates**

(U.S. Census Information and ESRI)

Ages	2010 Census	2018 Projection	2023 Projection	Percent Change	Percent Change Nat'l
-5	15,122	14,361	15,121	+0.0%	+2.5%
5-17	42,725	43,725	42,910	+0.4%	+0.9%
18-24	19,983	22,339	21,636	+8.3%	+0.7%
25-44	70,428	70,698	76,957	+9.3%	+12.5%
45-54	42,741	39,224	37,577	-12.1%	-9.5%
55-64	36,098	41,820	41,446	+14.8%	+17.2%
65-74	21,173	31,384	36,027	+70.2%	+65.8%
75+	22,306	25,997	30,476	+36.6%	+40.2%

**Chart F – Primary Service Area Population Growth**

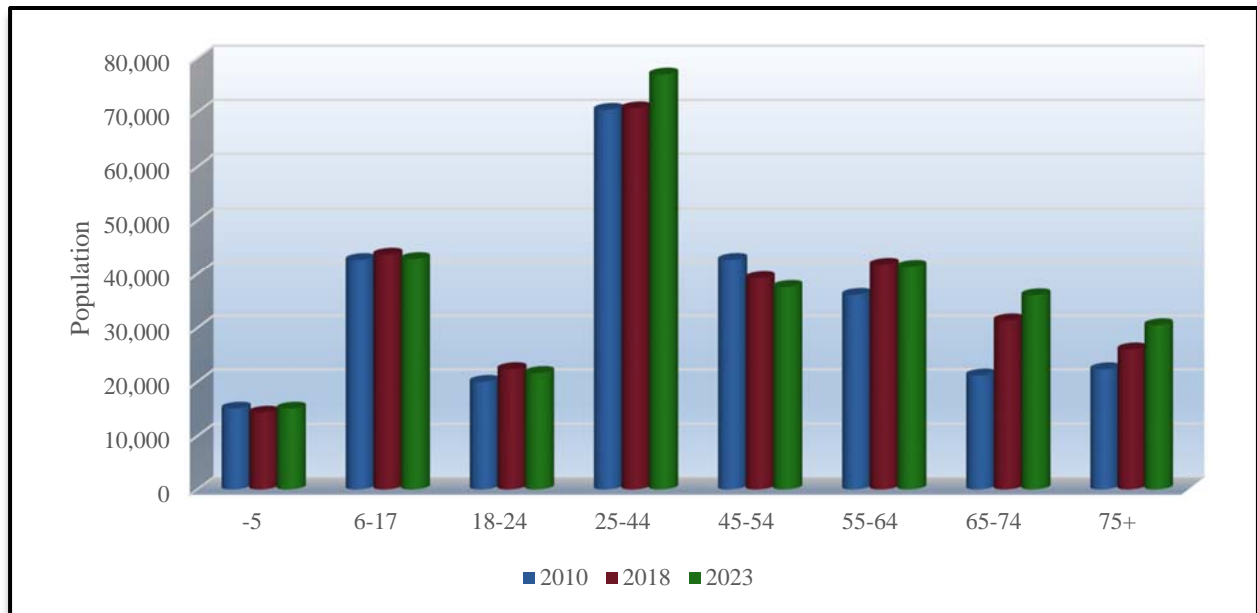


Chart-F illustrates the growth or decline in age group numbers from the 2010 census until the year 2023. It is projected that all age categories, except 45-54 will see an increase in population. The population of the United States is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45+ age groupings in communities which are relatively stable in their population numbers.



The information contained in Table-G and Chart-F point to a healthy community that continues to experience growth. Reflecting 5 years it was not uncommon to see growth numbers in the 55+ age categories with percentages well in the hundreds. Communities are now seeing the Baby Boomer generation continue to move into retirement, but not with the same level. Again, as has been illustrated in this report, the City and surrounding areas are older in age, but the growth chart also points to an increase in the younger age groups. This would indicate that as the City moves forward, they will still have a focus of programming to older adults, but the demand for youth programming is going to see an increase.



Below is listed the distribution of the population by race and ethnicity for Primary Service Area for 2018 population projections. Those numbers were developed from 2010 Census Data.

**Table H – Primary Service Area Ethnic Population and Median Age 2018**

<b>Ethnicity</b>	<b>Total Population</b>	<b>Median Age</b>	<b>% of Population</b>	<b>% of CA Population</b>
Hispanic	55,643	29.3	19.2%	39.6%

**Table I – Primary Service Area by Race and Median Age 2018**

<b>Race</b>	<b>Total Population</b>	<b>Median Age</b>	<b>% of Population</b>	<b>% of CA Population</b>
White	200,984	48.1	69.4%	55.0%
Black	7,018	36.5	2.4%	5.9%
American Indian	1,251	38.4	0.4%	0.9%
Asian	40,310	41.5	13.9%	14.6%
Pacific Islander	1,182	33.8	0.4%	0.4%
Other	21,342	28.7	7.4%	17.8%
Multiple	17,461	21.6	6.0%	5.4%

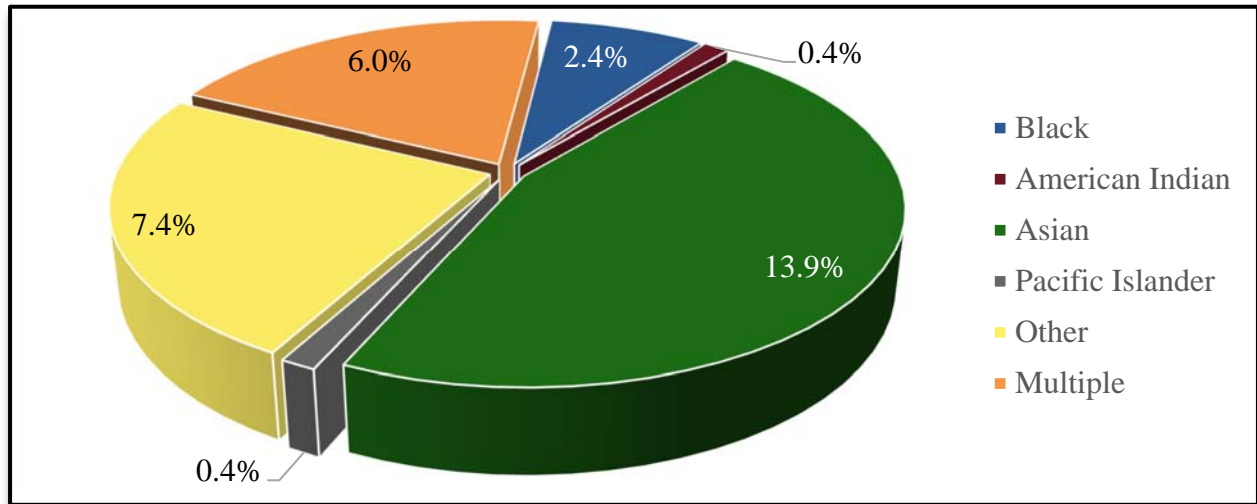
2018 Primary Service Area Total Population:

289,548 Residents





**Chart G – 2018 Primary Service Area Population by Non-White Race**



The discussion of race and ethnicity can make some uncomfortable, but it is important to look at in the full context of the demographic profile. Not all ethnicities and races will use arts and recreation facilities in the same fashion, nor will they participate in various programs at the same level. The report uses information from the National Sporting Goods Association (NSGA) in the next section and based on their findings Hispanic and Black participation in the activities they track differs from the National averages. As Table-H illustrates there is a significant, greater than 10%, Hispanic population in the Primary Service Area. There is also a significant Asian population, however at this time the NSGA does not collect data on that race and their participation preferences.





## Tapestry Segmentation

Tapestry segmentation represents the 4<sup>th</sup> generation of market segmentation systems that began 30 years ago. The 65-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. While the demographic landscape of the U.S. has changed significantly since the 2000 Census, the tapestry segmentation has remained stable as neighborhoods have evolved.

There is value including this information for the Primary Service Area. The data assists the organization in understanding the consumers/constituents in their service area and supply them with the right products and services. It adds another layer of description to the community and the demographic profile that has been produced.

**Table J – Primary Service Area Tapestry Segment Comparison**

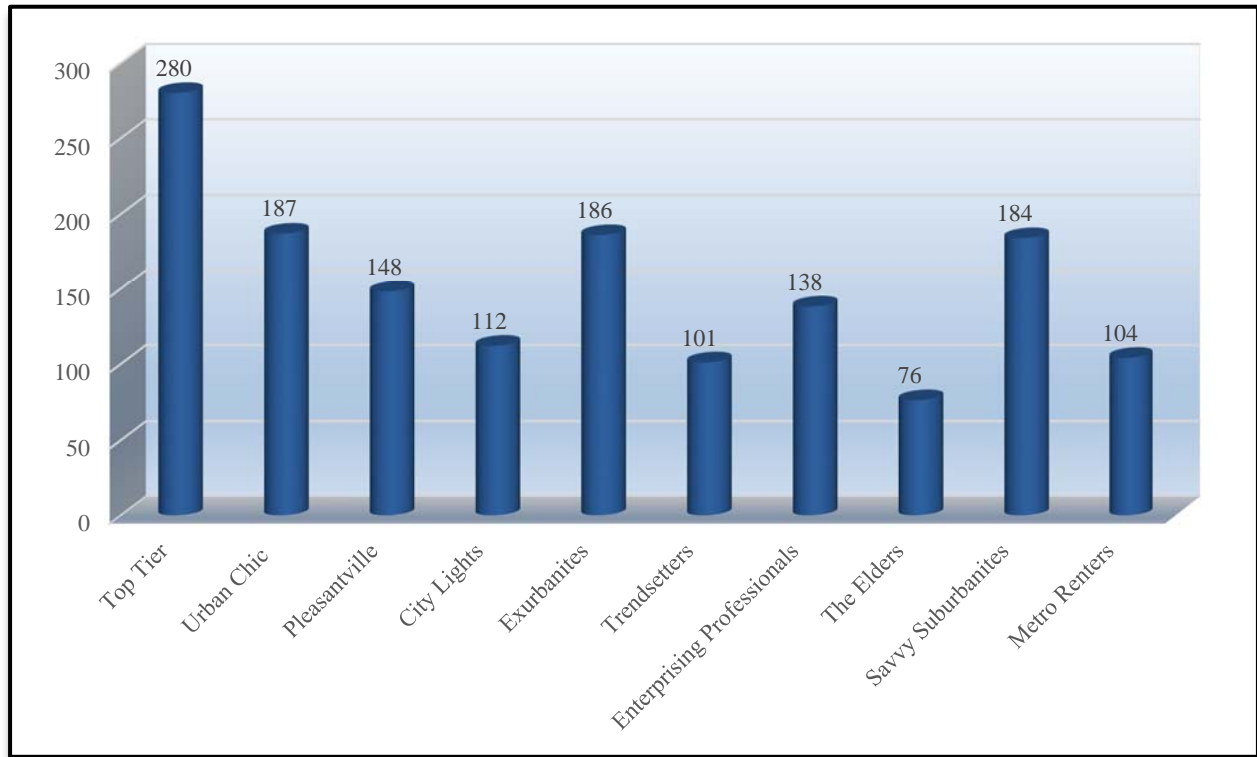
(ESRI estimates)

Tapestry Categories	Primary Service Area		Demographics	
	Percent	Cumulative Percent	Median Age	Median HH Income
Top Tier (1A)	15.8%	15.8%	46.2	\$157,000
Urban Chic (2A)	11.4%	27.2%	42.6	\$98,000
Pleasantville (2B)	9.1%	36.3%	41.9	\$85,000
City Lights (8A)	8.2%	44.5%	38.8	\$60,000
Exurbanites (1E)	7.8%	52.3%	49.6	\$98,000
Trendsetters (3C)	6.1%	58.4%	35.5	\$51,000
Enterprising Professionals (2D)	4.2%	62.6%	34.8	\$77,000
The Elders (9C)	4.0%	66.6%	71.8	\$35,000
Savvy Suburbanites (1D)	4.0%	70.6%	44.1	\$104,000
Metro Renters (3B)	3.9%	74.5%	31.8	\$52,000

Table-J provides the top 10 Tapestry segments in the Primary Service Area. There are additional segments that comprise the remaining 25.5% not illustrated above, but in very small percentages.



**Chart H – Average Household Budget Index for Entertainment & Recreation<sup>15</sup>**



Within the 4-page Tapestry description for each segment there is information provided on average household budget index for entertainment and recreation. Chart-H compares the index number from each of the top 10 segments in the Primary Service Area. It is important to note that the National index number is 100, which means that all the Tapestry segments, except 1, have a higher index number. Top Tier, which comprises 15.8% of the Primary Service Area, has an index more than double the national number. This points to a strong interest and willingness to pay for arts and recreation programs and facilities in the Primary Service Area.

**Top Tier (1A)** – Married couples without children or married couples with older children dominate this market. These consumers spend money on themselves which includes exercise at exclusive clubs. They frequent book club meetings, classical music concerts, opera shows and visit art galleries.

<sup>15</sup> The national number for Entertainment & Recreation is 100.





**Urban Chic (2A)** – More than half of households in this segment include married couples, 30% are singles. These residents embrace city life by visiting museums and art galleries. In their downtime, they enjoy activities such as yoga, hiking and tennis.

**Pleasantville (2B)** – Households are composed of older married-couple families, more without children under 18, but many with children over 18. There is a significant Hispanic (16.4%) population in this segment. They enjoy gardening, frequenting museums and attending concerts.

**City Lights (8A)** – Households include families, both married couples and single parents, as well as singles. This distribution is like the U.S. with slightly more single-person households. There is a significant Hispanic (24.2%), Asian and Pacific Island (12.1%) and Black (10.5%) population in this segment.

**Exurbanites (1E)** – This segment is a larger market of empty nesters and married couples with no children. They are active supporters of the arts.

**Trendsetters (3C)** – These residents are singles, living alone or with roommates or partners. There is a significant Hispanic (23.3%), Asian and Pacific Islander (13.3%), and Black (11.8%) population in this segment. These residents' jog, run, or walk for exercise and occasionally attend a yoga class. They explore local arts and culture and take on new hobbies such as drawing or painting.

**Enterprising Professionals (2D)** – Almost half of households are married couples, and 30% are single person households. There is a significant Hispanic (14.5%), Asian and Pacific Islander (20.8%), and Black (12.0%) population in this segment.

**The Elders (9C)** – Within this segment, 44% are married couples without children and 44% are single households. Vacancy rates are higher in this segment due to the number of seasonal or vacation homes. Residents are sociable seniors partial to a variety of clubs and organization and generous with their time and support.

**Savvy Suburbanites (1D)** – This segment is comprised of married couples with no children or older children. Physically fit, residents actively pursue several sports from skiing to golf and invest heavily in sports gear and exercise equipment.

**Metro Renters (3B)** – Over half of all households are occupied by singles, resulting in the smallest average household size among the markets. There is a significant Hispanic (11.1%), Asian and Pacific Islander (12.7%), and Black (10.7%) population in this segment. Participation in leisure activities includes yoga and Pilates.



## Demographic Key Findings:

- The population grows as the service areas expand from the 5, 10, and 15-minute drive times from the City of Walnut Creek. The population numbers are consistent with many communities across the country that offer robust arts and recreation programming to the residents.
- Along with the increase in population there is also an increase in the percentage of household with children. While the percentage of households within the identified service areas is lower than the percentage in the State of California and the National number it is still significant at almost 30%.
- The City of Walnut Creek addresses the need for youth AND adult arts and recreation programming through their programming efforts. It is not uncommon for communities to hyper-focus on the age groups that are more prevalent, which the City has not done.
- The median age in the service area further enforces the percentage of children present. While the country is aging, the older population is staying active longer and is much more engaged in arts and recreation program in comparison to 20 years ago. That trend of older adults staying engaged and participating in programming is expected to continue and increase.
- The median household income is consistent with the pricing structure and cost recovery philosophy that the City of Walnut Creek employs in the Arts and Recreation Department. They have identified as a regional provider of programs and services and have priced themselves accordingly.
- The age distribution further emphasizes the median age and the growth by age distribution points to a community and area that is expected to continue to grow.
- The Tapestry segments are provided to further describe the service area. It is uncommon that B\*K finds a community with as many Tapestry segments with such strong interests in entertainment and recreation. While the category is very broad it points to a community that will be strong advocates and participants in arts and recreation programs.



## National Participation Data for Entertainment and Recreation

This information will help outline not only the willingness for individuals and households within the Primary Service Area to participate in various activities, but also the market for various activities within the service areas.

**Recreation Expenditures Spending Potential Index:** Using information produced by ESRI we can examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible by service areas.

**Table II-A – Recreation Expenditures Spending Potential Index<sup>16</sup>:**

<b>5-Minute Drive Time</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	142	\$160.92
Fees for Recreational Lessons	157	\$217.16
Social, Recreation, Club Membership	153	\$344.71
Exercise Equipment/Game Tables	150	\$86.42
Other Sports Equipment	146	\$11.28

<b>10-Minute Drive Time</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	170	\$128.08
Fees for Recreational Lessons	186	\$192.58
Social, Recreation, Club Membership	185	\$417.74
Exercise Equipment/Game Tables	173	\$99.55
Other Sports Equipment	166	\$12.76

<b>15-Minute Drive Time</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	167	\$189.05
Fees for Recreational Lessons	182	\$251.52
Social, Recreation, Club Membership	180	\$407.79
Exercise Equipment/Game Tables	168	\$96.56
Other Sports Equipment	158	\$12.17

<sup>16</sup> Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.





State of California	SPI	Average Spent
Fees for Participant Sports	120	\$135.53
Fees for Recreational Lessons	131	\$181.09
Social, Recreation, Club Membership	124	\$280.75
Exercise Equipment/Game Tables	122	\$69.91
Other Sports Equipment	119	\$9.14

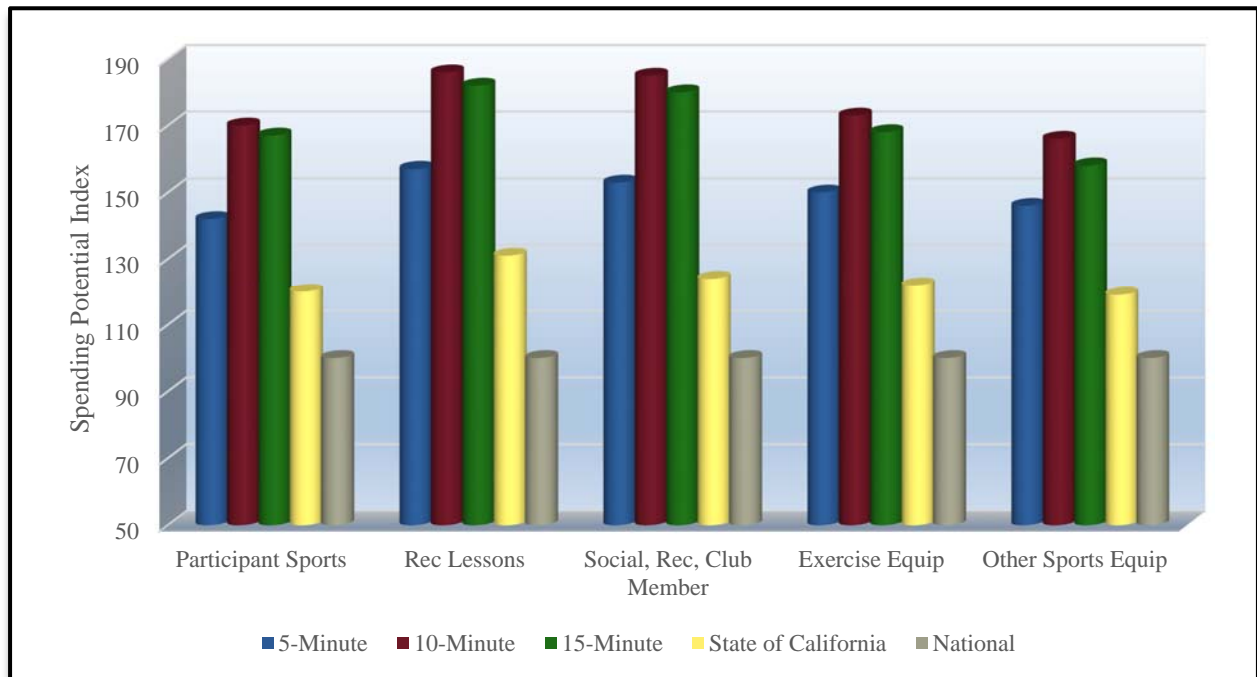
**Average Amount Spent:**

The average amount spent for the service or item in a year.

**SPI:**

Spending potential index as compared to the national number of 100.

**Chart II-A – Recreation Spending Potential Index:**



The spending potential index for recreation is very similar to the pattern established for household budget expenditures in the demographic section of the report. The SPI for the State is higher than the National number with all service areas being higher than the State, with the highest rate of spending being in the 10-Minute Drive Time.

In examining these numbers, it is important to note that these dollars are already being spent. As such if the City adds programs or facilities, spending for those may either increase the SPI, or it may cut into dollars being spent with other communities or dollars currently being spent on arts and recreation programs in Walnut Creek.





**Market Potential Index for Adult Participation:** In addition to examining the participation numbers and the Spending Potential Index for Entertainment & Recreation, B\*K can access information about Sports & Leisure Market Potential using ESRI. The following information illustrates participation rates for adults in sports and recreation-like activities.

**Table II-B – Market Potential Index for Adult Participation in Activities in Primary Service Area**

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobic Exercising	22,247	9.6%	122
Baseball	9,285	4.0%	97
Basketball	18,515	8.0%	97
Bicycle Riding (mountain)	11,432	4.9%	121
Bicycle Riding (road)	29,018	12.5%	124
Football	8,448	3.6%	83
Frisbee	9,451	4.1%	98
Hiking	38,562	16.7%	138
Horseback Riding	4,650	2.0%	89
Jogging/Running	39,057	16.9%	131
Pilates	9,014	3.9%	139
Ping Pong	10,014	4.3%	114
Soccer	11,707	5.1%	123
Softball	5,894	2.5%	92
Swimming	43,902	19.0%	117
Tennis	11,233	4.9%	139
Volleyball	7,288	3.1%	96
Walking for Exercise	66,524	28.7%	118
Weight Lifting	30,933	13.4%	127
Yoga	27,207	11.8%	144
Zumba	10,573	4.6%	123

**Expected # of Adults:** Number of adults, 18 years of age and older, participating in the activity in Primary Service Area.

**Percent of Population:** Percent of the service area that participates in the activity.

**MPI:** Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the activities listed is less than the national number of 100 in seven of twenty-one instances. In many cases when a participation number is lower than the National number, primary factors include a lack of facilities, an inability to pay for services and programs, or the activity popularity is trending downward.





**Recreation & Sport Participation Numbers:** On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto the Primary Service Area to determine market potential. The information contained in this section of the report, utilizes the NSGA's most recent survey. For that report, data was collected in 2017 and the report was issued in May of 2018.

B\*K has developed a unique participation percentage for a list of activities in the Primary Service Area. That unique participation percentage is the average of; participation based on the Primary Service Area age distribution, median household income, region of the country and national participation percentage. This participation percentage when applied to the population of the Primary Service Area then provides an idea of the market potential for various activities.

It is important to note that the City of Walnut Creek already offers some of these activities and for those activities they can take the participation number and determine the percentage of the market that they are capturing. For other activities that the City is not offering it provides them information on how many people may be participating in an activity and opportunities for new programs and/or new partnerships. The activities identified in this section of the report were vetted through City staff and build off, or compliment, other City offerings.





**Participation Rates:** The following activities could take place at an indoor facility or an outdoor facility, they may require specific programming or could be individually directed.

**Table II-C –Participation Rates for Primary Service Area**

	Age Distribution	Median Income	Region of Country	Nation Percentage	Average
Aerobic Exercise	15.0%	14.6%	16.5%	15.2%	15.3%
Baseball	3.7%	6.2%	6.0%	4.1%	5.0%
Basketball	7.5%	10.4%	8.8%	8.3%	8.8%
Bicycle Riding	11.9%	14.9%	12.6%	12.3%	12.9%
Boxing	1.1%	2.5%	1.6%	1.3%	1.6%
Cheerleading	1.0%	1.5%	0.8%	1.2%	1.1%
Exercise Walking	36.5%	34.1%	35.8%	35.4%	35.4%
Exercise w/ Equipment	19.0%	17.8%	18.8%	18.8%	18.6%
Football (flag)	1.9%	2.7%	2.5%	2.2%	2.3%
Football (tackle)	2.3%	4.1%	1.9%	2.5%	2.7%
Golf	6.1%	7.7%	5.6%	6.1%	6.4%
Gymnastics	1.8%	2.9%	2.5%	2.0%	2.3%
Hiking	1.1%	15.6%	19.2%	14.9%	12.7%
Lacrosse	0.9%	1.5%	1.4%	1.0%	1.2%
Martial Arts/MMA	1.9%	2.8%	3.1%	2.0%	2.4%
Mountain Biking	1.7%	2.5%	2.8%	1.9%	2.2%
Pilates	0.3%	2.1%	2.5%	1.9%	1.7%
Running/Jogging	13.8%	15.6%	15.2%	14.8%	14.8%
Skateboarding	1.7%	2.6%	2.8%	1.9%	2.2%
Soccer	4.3%	7.4%	6.1%	4.9%	5.7%
Softball	3.0%	4.0%	3.3%	3.3%	3.4%
Swimming	15.8%	18.2%	15.2%	16.2%	16.3%
Table Tennis/Ping Pong	3.2%	3.8%	3.9%	3.5%	3.6%
Tennis	3.9%	5.2%	5.0%	4.2%	4.6%
Volleyball	3.2%	5.5%	4.0%	3.6%	4.1%
Weight Lifting	12.0%	12.7%	12.3%	12.4%	12.4%
Workout @ Club	12.5%	13.2%	13.6%	12.7%	13.0%
Yoga	9.6%	11.6%	11.5%	10.0%	10.7%



	Age Distribution	Median Income	Region of Country	Nation Percentage	Average
Did Not Participate	23.4%	17.6%	20.8%	22.8%	21.1%

**Age:** Participation based on individuals ages 7 & Up of the Primary Service Area.  
**Income:** Participation based on the 2018 estimated median household income in the Primary Service Area.  
**Region:** Participation based on regional statistics (Pacific).  
**National:** Participation based on national statistics.  
**Average:** Average of the four columns.

**Note:**

- Based on the survey instrument it is possible that respondents could identify ALL the activities they participated in.

The “Did Not Participate” category is a common topic of discussion for agencies in the master plan process. This percentage of the population references did not participate in ANY of the 55 activities that the NSGA tracked in their most recent survey. This does not mean that these individuals are not taking advantage of the parks and facilities that the City offers. However, it does mean that they are not using them in traditional ways.



**Anticipated Participation Number:** Utilizing the average percentage from Table II-C above plus the 2010 census information and census estimates for 2018 and 2023 (over age 7) the following comparisons are available.

**Table II-D – Participation Growth or Decline in Primary Service Area**

	Average	2010 Population	2018 Population	2023 Population	Difference
Aerobic Exercise	15.3%	38,186	41,233	43,049	+4,863
Baseball	5.0%	12,452	13,445	14,038	+1,586
Basketball	8.8%	21,813	23,553	24,591	+2,778
Bicycle Riding	12.9%	32,180	34,748	36,278	+4,098
Boxing	1.6%	4,052	4,375	4,568	+516
Cheerleading	1.1%	2,830	3,056	3,190	+360
Exercise Walking	35.4%	88,297	95,342	99,541	+11,245
Exercise w/ Equipment	18.6%	46,337	50,034	52,238	+5,901
Football (flag)	2.3%	5,777	6,237	6,512	+736
Football (tackle)	2.7%	6,705	7,240	7,559	+854
Golf	6.4%	15,875	17,142	17,897	+2,022
Gymnastics	2.3%	5,750	6,209	6,482	+732
Hiking	12.7%	31,610	34,133	35,636	+4,026
Lacrosse	1.2%	2,980	3,217	3,359	+379
Martial Arts/MMA	2.4%	6,099	6,586	6,876	+777
Mountain Biking	2.2%	5,568	6,012	6,277	+709
Pilates	1.7%	4,240	4,578	4,780	+540
Running/Jogging	14.8%	36,959	39,908	41,665	+4,707
Skateboarding	2.2%	5,579	6,024	6,289	+710
Soccer	5.7%	14,159	15,289	15,962	+1,803
Softball	3.4%	8,495	9,173	9,577	+1,082
Swimming	16.3%	40,712	43,960	45,896	+5,185
Table Tennis/Ping Pong	3.6%	8,990	9,707	10,135	+1,145
Tennis	4.6%	11,381	12,289	12,830	+1,449
Volleyball	4.1%	10,155	10,965	11,448	+1,293
Weight Lifting	12.4%	30,784	33,240	34,704	+3,920
Workout @ Club	13.0%	32,370	34,953	36,492	+4,122
Yoga	10.7%	26,588	28,709	29,974	+3,386



	Average	2010 Population	2018 Population	2023 Population	Difference
Did Not Participate	21.1%	52,649	56,850	59,354	+6,705

**Notes:**

- These figures do not necessarily translate into use figures for various activities or programs in Walnut Creek.
- “Did Not Participate” statistics refers to all 55 activities outlined in the NSGA 2017 Survey Instrument.



In addition to the participation percentages that are listed in Table-II-D the NSGA also identifies participation within the overall percentages as Frequent, Occasional and Infrequent. Within each of those categories there are additional percentages of the overall participation percentages and day per year. Utilizing that information, B\*K can drill-down to determine not only individuals, but total number of visits from the population for an activity.

**Table II-E – Participation Frequency Swimming**

The NSGA classifies Swimming based on how often individuals participate:

	<b>Frequent</b>	<b>Occasional</b>	<b>Infrequent</b>
Swimming Frequency	110+	25-109	6-24
Swimming Percentage of Population	6.8%	40.5%	52.7%

In Table-II-E one can look at Swimming and how it is defined with respect to visits being Frequent, Occasional or Infrequent and then the percentage of population that participates.

**Table II-F – Participation Numbers**

	<b>Frequent</b>	<b>Occasional</b>	<b>Infrequent</b>	<b>Total</b>
Swimming key	112	67	15	
Population	2,989	17,804	23,167	
<b>Visits</b>	<b>334,800</b>	<b>1,192,857</b>	<b>347,504</b>	<b>1,875,161</b>

Table-II-F takes the frequency information one step further and identifies the number of times individuals may participate in the activity, applies the percentage from Table-II-E to the 2018 Swimming population (43,960) and then gives a total number of swimming days. This would indicate that a total of 1,875,161 swimming days are available within the 15-Minute Drive Time Service Area. It is also important to note that those are being absorbed, on some level, by the pools the City of Walnut Creek operates.





**Participation by Age Group:** Within the NSGA survey, participation is broken down by age groups. As such B\*K can identify the top 3 age groups participating in the activities reflected in this report.

**Table II-G – National Participation by Age Group:**

Activity	Ntl Rank	Largest	Second Largest	Third Largest
Exercise Walking	1	55-64	45-54	65-74
Exercising w/ Equipment	2	45-54	35-44	25-34/55-64
Swimming	3	35-44	45-54	12-17
Aerobic Exercising	4	35-44	25-34	45-54
Hiking	5	25-34	45-54	35-44
Running/Jogging	6	25-34	35-44	18-24
Workout @ Club	8	25-34	35-44	45-54
Weight Lifting	9	25-34	35-44	45-54
Bicycle Riding	10	7-11	45-54	55-64/35-44
Yoga	13	25-34	35-44	45-54
Basketball	14	12-17	25-34	18-24
Golf	17	55-64	45-54	35-44
Soccer	20	7-11	12-17	25-34
Tennis	22	25-34	35-44	45-54
Baseball	23	12-17	7-11	25-34
Volleyball	24	12-17	25-34	18-24
Table Tennis/Ping Pong	25	25-34	18-24	35-44
Softball	27	12-17	25-34	7-11
Football (tackle)	34	12-17	25-34	18-24
Football (flag)	35	7-11	12-17	25-34
Gymnastics	36	7-11	12-17	25-34
Martial Arts / MMA	37	7-11	25-34	18-24/35-44
Pilates	40	25-34	35-44	45-54
Mountain Biking	41	25-34	35-44	45-54
Skateboarding	42	12-17	18-24	7-11
Boxing	48	25-34	18-24	35-44
Cheerleading	49	12-17	7-11	18-24
Lacrosse	52	12-17	7-11	25-34

**Largest:** Age group with the highest rate of participation.  
**Second Largest:** Age group with the second highest rate of participation.  
**Third Largest:** Age group with the third highest rate of participation.

The information above is a national perspective.





## **National Recreation and Entertainment Key Findings:**

- The Spending Potential Index (SPI) for Entertainment & Recreation is greater than the national number of 100 in all three service areas that were identified. This points to a community in and around Walnut Creek that is willing to spend to participate in activities that they feel are most important to them and their household.
- Specific to adult-only participation in activities the Market Potential Index (MPI) for adults is greater than the national number of 100 in 14 of 21 activities identified. Some of these activities are actively programmed by the Arts and Recreation Department, others are drop-in participation focused, and for some the private sector addresses the need. The overall theme is that the adult population in the primary service area is active and engaged. This allows for the Arts and Recreation Department to pursue a myriad of activities to offer to the community.
- Based on the statistics from the National Sporting Goods Association and the unique participation percentage developed by B\*K, there is a significant market for indoor and outdoor activities in the service area.
- According to the National Sporting Goods Association, the population within the primary service area accounts for 1.875 million pool visits per year. This is a significant number of visits that helps sustain the pools in Walnut Creek and the surrounding public and private providers.



## National Participation Data for Arts & Enrichment

This information will help outline the willingness for individuals and households within the Primary Service Area to participate in various activities.

**Arts Participation:** In contrast to the National Sporting Goods Association (NSGA), it is difficult to locate one source for all information on participation in the arts. An added challenge in that participants are not surveyed with the frequency of those participating in the NSGA survey. The National Endowment for the Arts (NEA) is the source that B\*K uses to provide insight into how Americans are spending their time with art and art-like activities.

However, the City of Walnut Creek is unique in that they have embraced the arts, and arts programming, the result of which is a significant focus on programs and facilities that address those programs. There is a benefit of timing is on the City's side and their master plan efforts, as the NEA has recently released their 2017 survey findings which compare participation from 2002-2017.

It is important to note that the information that is produced by the NEA is not as specific as the information from the NSGA by comparison. As such, all the participation numbers that are reflected in this section of the report are national participation numbers and reflective of national trends.

An important national trend is that parks and recreation departments are becoming the home for arts and enrichment programming in communities. Many school districts are having to make the hard decision to limit or eliminate art, music, theater and the like from their curriculum. Subsequently, it has created an opportunity for many agencies to provide those programs. Many agencies have embraced this opportunity, but few as enthusiastically as the City of Walnut Creek. Art and theater programs are something that the community is known for and the City has aptly named their Department Arts & Recreation.





## National Data by Discipline:

### Dance

- Attendance
  - 6.3% of adults attended a dance performance other than ballet.
  - 3.1% of adults attended a ballet performance.

### Literature

- Reading
  - 11.7% of adult read poetry an increase of 76% from 2012.
  - 3.7% of adults read a play an increase of 28.2% from 2012.
  - 52.7% of adults read a book not required for work.
  - 41.8% of adults read a novel or short story a decrease of 7.6% from 2012.

### Museums

- Attendance
  - 23.7% of adults visited an art museum or art gallery an increase of 12.9% from 2012.

### Music

- Attendance
  - 8.6% of adults attended a classical music performance.
  - 8.6% of adults attended a jazz concert.

### Opera

- Attendance
  - 2.2% of adults attended an opera performance.

### Theater

- 16.5% of adults attended a musical theater performance.



**Table III-A – Adult Reading 2012-2017:**

<b>Books</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	54.6%	52.7%	No
Male	44.7%	44.3%	No
Female	63.7%	60.5%	Yes

<b>Literature<sup>17</sup></b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	47.0%	44.2%	Yes
Male	37.0%	35.2%	No
Female	56.1%	52.5%	Yes

<b>Novels or Short Stories</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	45.2%	41.8%	Yes
Male	35.1%	33.0%	No
Female	54.6%	50.0%	Yes

<b>Poetry</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	6.7%	11.7%	Yes
Male	5.2%	8.7%	Yes
Female	8.0%	14.5%	Yes

<b>Plays</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	2.9%	3.7%	Yes
Male	2.3%	2.9%	No
Female	3.4%	4.5%	Yes

<sup>17</sup> Novels or short stories, poetry, or plays.





**Table III-B – Adult Visual Arts 2012-2017:**

<b>Visit Art Museum or Gallery</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	21.0%	23.7%	Yes
Male	18.7%	21.1%	Yes
Female	23.1%	26.2%	Yes

<b>Toured Parks, Buildings, or Neighborhoods<sup>18</sup></b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	23.9%	28.3%	Yes
Male	23.1%	26.6%	Yes
Female	24.6%	29.9%	Yes

<b>Attended Craft Fairs or Visual Arts Festivals</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	22.4%	23.8%	No
Male	18.2%	19.5%	No
Female	26.4%	27.8%	No

<sup>18</sup> For historic nature or design value.





**Table III-C – Adult Performing Arts 2012-2017:**

<b>Jazz Music</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	8.1%	8.6%	No
Male	7.9%	8.7%	No
Female	8.3%	8.5%	No

<b>Classical Music</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	8.8%	8.5%	No
Male	8.0%	6.8%	No
Female	9.5%	10.3%	No

<b>Latin, Spanish, or Salsa</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	5.1%	5.9%	No
Male	4.8%	5.5%	No
Female	5.2%	6.2%	No

<b>Opera</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	2.1%	2.2%	No
Male	1.8%	1.5%	No
Female	2.4%	2.8%	No

<b>Ballet</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	2.8%	3.1%	No
Male	2.1%	2.2%	No
Female	3.4%	4.0%	No

<b>Dance other than Ballet</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	5.6%	6.3%	No
Male	4.6%	4.4%	No
Female	6.6%	8.0%	No



<b>Musical Plays</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	15.2%	16.5%	No
Male	12.9%	12.8%	No
Female	17.3%	19.9%	Yes

<b>Non-Musical Plays</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	8.3%	9.4%	No
Male	7.3%	8.2%	No
Female	9.2%	10.5%	No

<b>Outdoor Performing Arts Festivals</b>	<b>2012</b>	<b>2017</b>	<b>Statistically Significant Change</b>
All Adults	20.8%	24.2%	Yes
Male	19.8%	24.1%	Yes
Female	21.8%	24.4%	Yes



### **National Endowment for the Arts Key Findings:**

- In comparison to the 2012 findings the 2017 findings are much more positive.
  - Adults attending visual or performing arts activities grew by 3.6%.
- The top three forms of arts attendance in the performing arts are:
  - Outdoor performing arts festivals.
  - Musicals.
  - Other performing arts events.
- It is important to note that there are a significant number of arts and enrichment programs that do not provide statistical or historical data on participation.



## Local Participation Data for Senior Services

**Market Potential Index for Adult Participation:** The following information about Sports & Leisure Market Potential using ESRI is reflective of the Primary Service Area. These activities either are being offered or could be offered by the Arts and Recreation Department. B\*K would classify these activities as enrichment and/or social activities.

**Table IV-A – Market Potential Index for Adult Participation in Activities in Primary Service Area**

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Member of AARP	33,555	14.5%	122
Attend Adult Ed. Course	23,000	9.9%	127
Went to Art Gallery	28,935	12.5%	158
Played Bingo	8,300	3.6%	89
Did Birdwatching	11,309	4.9%	110
Played Board Games	38,602	16.7%	114
Participated in Book Club	9,692	4.2%	142
Played Cards	37,586	16.2%	101
Danced/Went Dancing	21,798	9.4%	124
Did Furniture Refinishing	8,712	3.8%	102
Indoor Garden/Plant Care	33,463	14.5%	112
Attend Horse Race	10,340	4.5%	133
Went to Museum	45,412	19.6%	152
Played Musical Instrument	19,814	8.6%	114
Painting/Drawing	21,121	9.1%	120
Photo Album/Scrapbook	11,668	5.0%	113
Photography	31,021	13.4%	129
Woodworking	9,293	4.0%	89

**Expected # of Adults:** Number of adults, 18 years of age and older, participating in the activity in Primary Service Area.

**Percent of Population:** Percent of the service area that participates in the activity.

**MPI:** Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the activities listed is greater than the national number of 100 in all but two instances. In many cases when a participation number is lower than the National number, primary factors include a lack of facilities, an inability to pay for services and programs, or popularity is trending downward.





The information contained in the previous table are what B\*K would define as more traditional activities for seniors. The bulk of these type of activities, or traditional senior programming, take place at Civic Park. While these activities in Civic Park take place in the community center, many members of the public refer to this facility as the Senior Center, separate from Assembly Hall.

The senior market is changing drastically as new seniors, Baby Boomers, are entering the market. There is still the need for traditional senior activities like those listed above, but the trend is to provide more active programming for this market. Programs like group exercise, trips, seminars, DIY, etc. are becoming more popular. As these adults age, they are unwilling to give up their active lifestyle. From a programming perspective providing this age group with wellness opportunities and drop-in use of indoor and outdoor facilities is important.

A primary differentiator between the old senior and new senior is they do not want to be referenced as a “senior.” The new senior is not interested in going to a traditional senior center. While they may be willing to participate in programs that take place in a facility like that, the mere notion that it is a senior center will drive some participants away. Many of B\*K’s clients have worked to develop facilities that are geared towards adult programming but are unwilling to call the facility a senior center for this very reason. The City of Concord has taken an interesting approach in referencing their programs for this age group as “50 & Better.”

As the population of the U.S. continues to age, a growth area in the private sector is all-day adult care. This adult care is geared towards adults who may be living with their children, but may need supervision, special services, or social interaction during the day that their children simply cannot provide.





## Local Participation Data for Child Care Programming

**Home & Household Expenditures:** Using information produced by ESRI we can examine the overall propensity for households to spend dollars on household operations. The following comparisons are possible by service areas.

**Table IV-B – Household Operations<sup>19</sup>:**

Child Care	SPI	Average Spent
5-Minute Drive Time	156	\$805.15
10-Minute Drive Time	177	\$909.45
15-Minute Drive Time	170	\$875.98
State of California	125	\$641.24

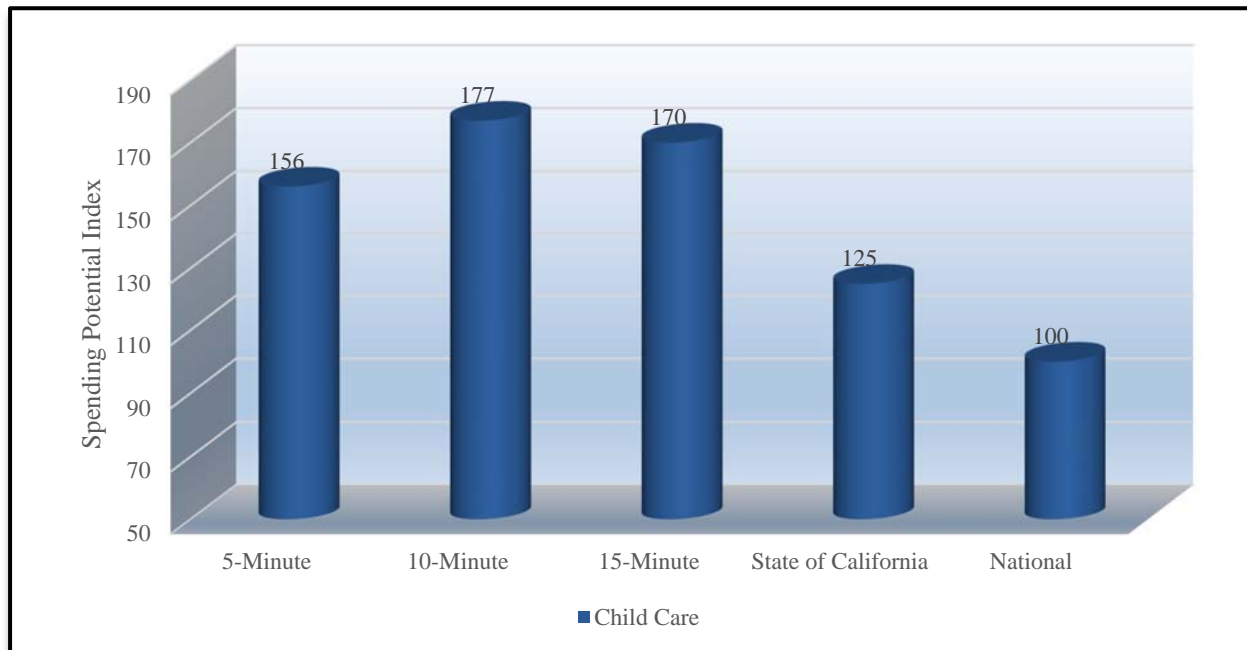
**Average Amount Spent:**

The average amount spent for the service or item in a year.

**SPI:**

Spending potential index as compared to the national number of 100.

**Chart III-A – Child Care Spending Potential Index:**



<sup>19</sup> Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.



While child care is not the same as the preschool programs that the City offers, the statistics for child care does provide a framework for spending and the need for that service.

The spending potential index for child care is very similar to the pattern established for household budget expenditures and entertainment and recreation. The SPI for the State is higher than the National number with all service areas being higher than the State, with the highest rate of spending being in the 10-Minute Drive Time.

The numbers in Table III-B illustrate the dollars that are being spent by household on child care services. The City has developed a unique market for preschool services by providing a half-day service. While this does not accommodate every household in need of services, there is a niche market that wants this half day service. Currently the Department offers preschool at Heather Farm Park, Civic Park and Shadelands. The preschool program that the Department offers is not the same as the private child care providers.

The City may wish to consider the potential for expansion of this program at Civic Park. Because of the mixed-use housing that is in development adjacent to Civic Park, there is the possibility of a significant number of young families moving into the area that will need services like this.



## Senior Services and Child Care Participation Key Findings

- There are a significant number of adults in the senior population within the Primary Service Area and they are active based on the Market Potential Index report for various adult activities.
- While not evident in the data, there are two distinct sets of seniors. The first are the older seniors, who are interested in traditional senior pursuits, which are addressed by many of the drop-in activities that take place at the Civic Park Community Center. The second are the new seniors, who are not interested in the traditional senior pursuits, nor are they interested in being referred to as a senior. They are staying active longer and are influencing arts and recreation departments to reinvent themselves in terms of branding and programming.
- In addition to the significant senior population, there is also a significant population of families with young children that need child-care-like services.
- The preschool services offer half day services that serve a niche market with flexible schedules and/or the inability or unwillingness to pay for full-time, licensed day care services.

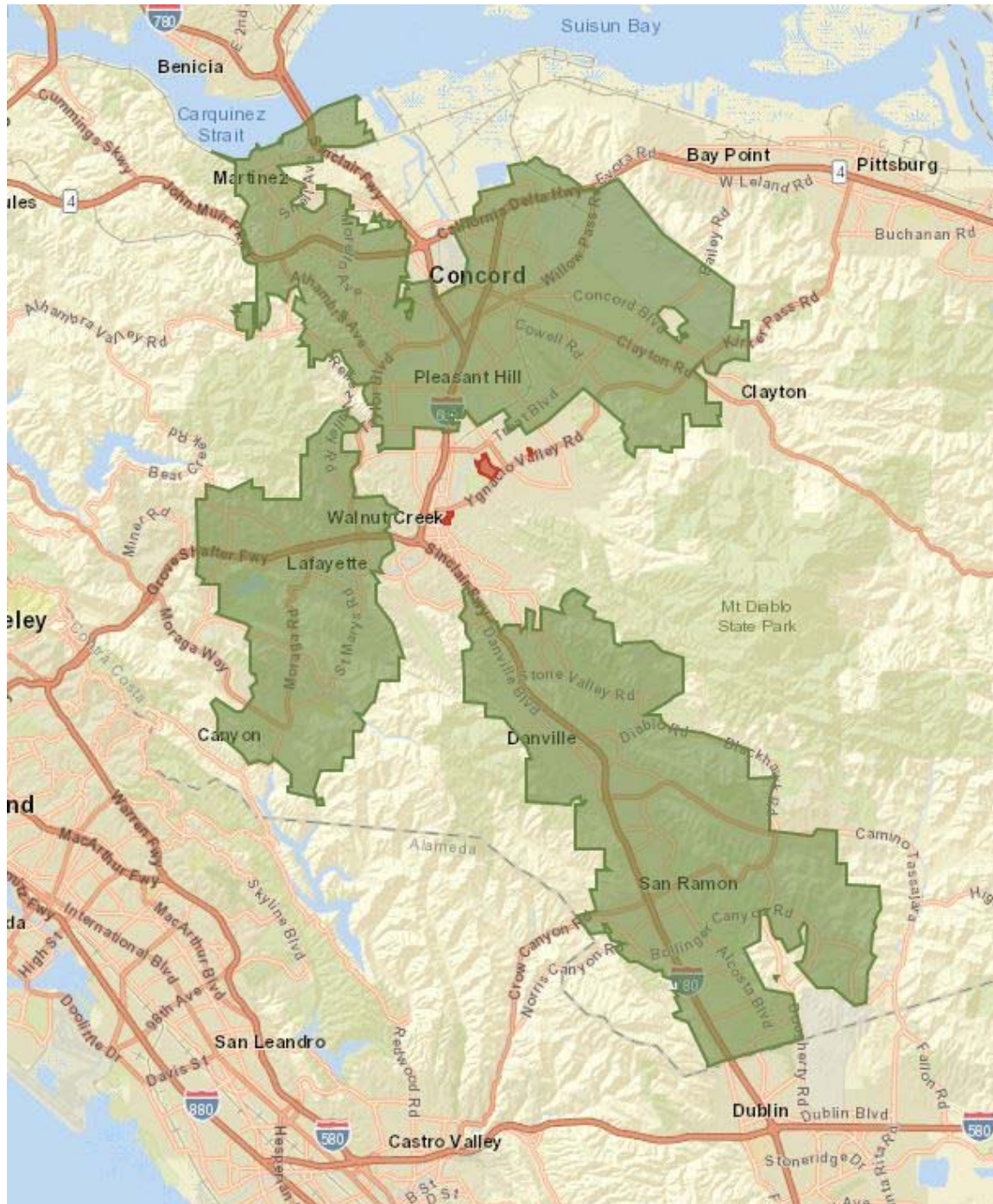


## **APPENDIX A – Current Facilities & Alternative Providers**

The following pages identify the alternative service providers within the region. The public, private and non-profit agencies that have been identified in the following maps are not a comprehensive list. For larger facilities and program providers, facilities that fall within the 15-minute drive time have been identified. For more specialized programs, providers within Walnut Creek, or in proximity have been identified.



**Map A – Other Government Agencies**



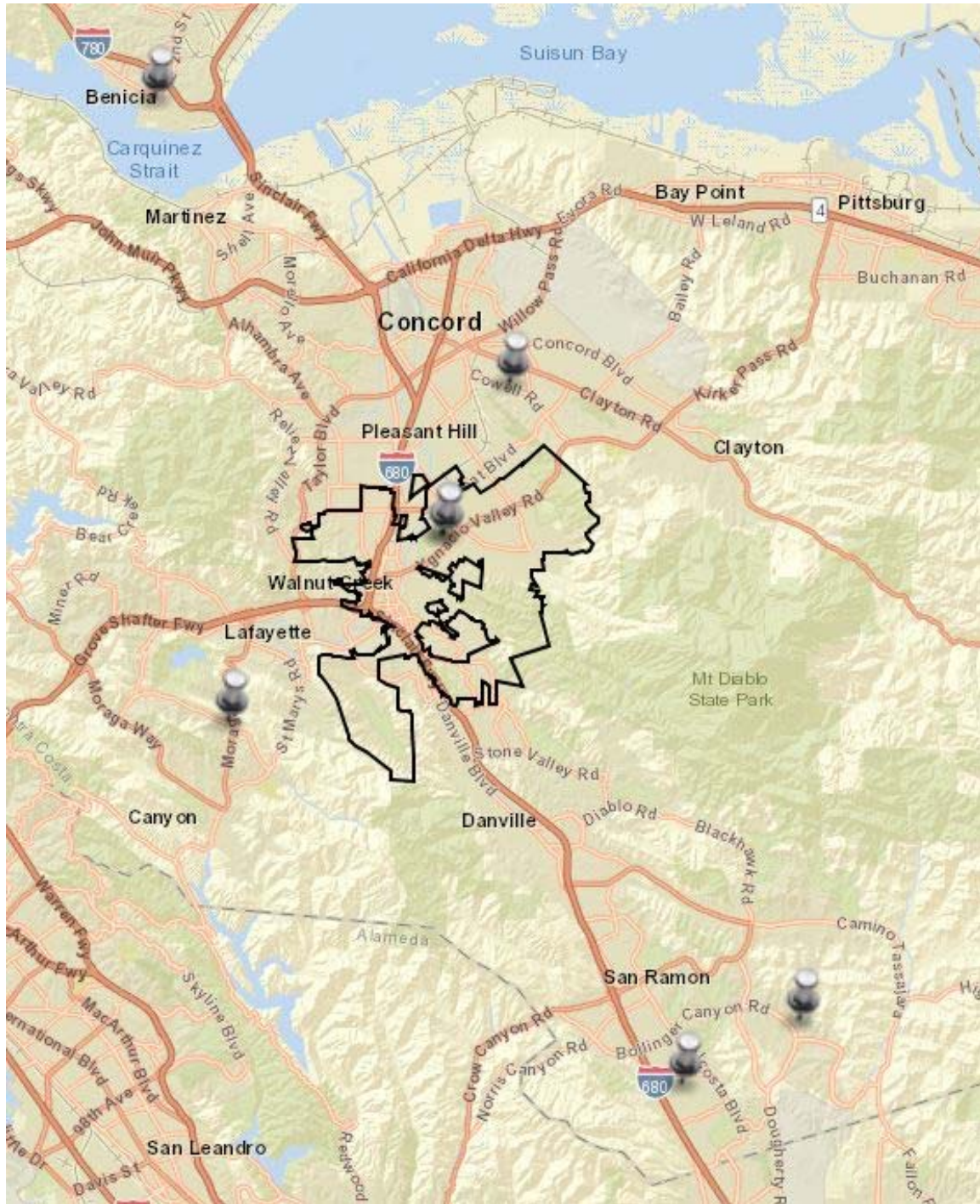


The areas in green from Map-A highlight the parks and recreation departments that have been researched. These departments fall within the 15-Minute Drive Time that is identified as the Primary Service Area within the demographic section of the report. It is not uncommon to find consistency from community to community, in terms of their program categories or offerings.

- Alamo Parks & Recreation
- Pleasant Hill Recreation & Park District
- Concord Parks & Recreation
- Danville Recreation, Arts & Community Services
- Lafayette Parks & Recreation
- Martinez Recreation & Community Services
- San Ramon Parks & Community Services
- Moraga Parks & Recreation Department



**Map B – 50M Pools**





Map-B identifies the 50M pools that are in operation, plus the boundaries of Walnut Creek:

- Clarke Memorial Pool – Walnut Creek
  - 50M Pool + Additional Instructional Pool
- Concord Community Pool (currently closed for repairs) – Concord
  - 50M Pool
  - Home to Terrapins Swim Team
- San Ramon Olympic Pool & Aquatic Park – San Ramon
  - 50M Pool
  - 25Y Pool
  - Play Pool
- Dougherty Valley Aquatic Center – Sam Ramon
  - 50M Pool
  - Play Pool
- Soda Aquatic Center – Moraga
  - 50M Pool
- James Lemos Swim Center – Benicia
  - 50M Pool

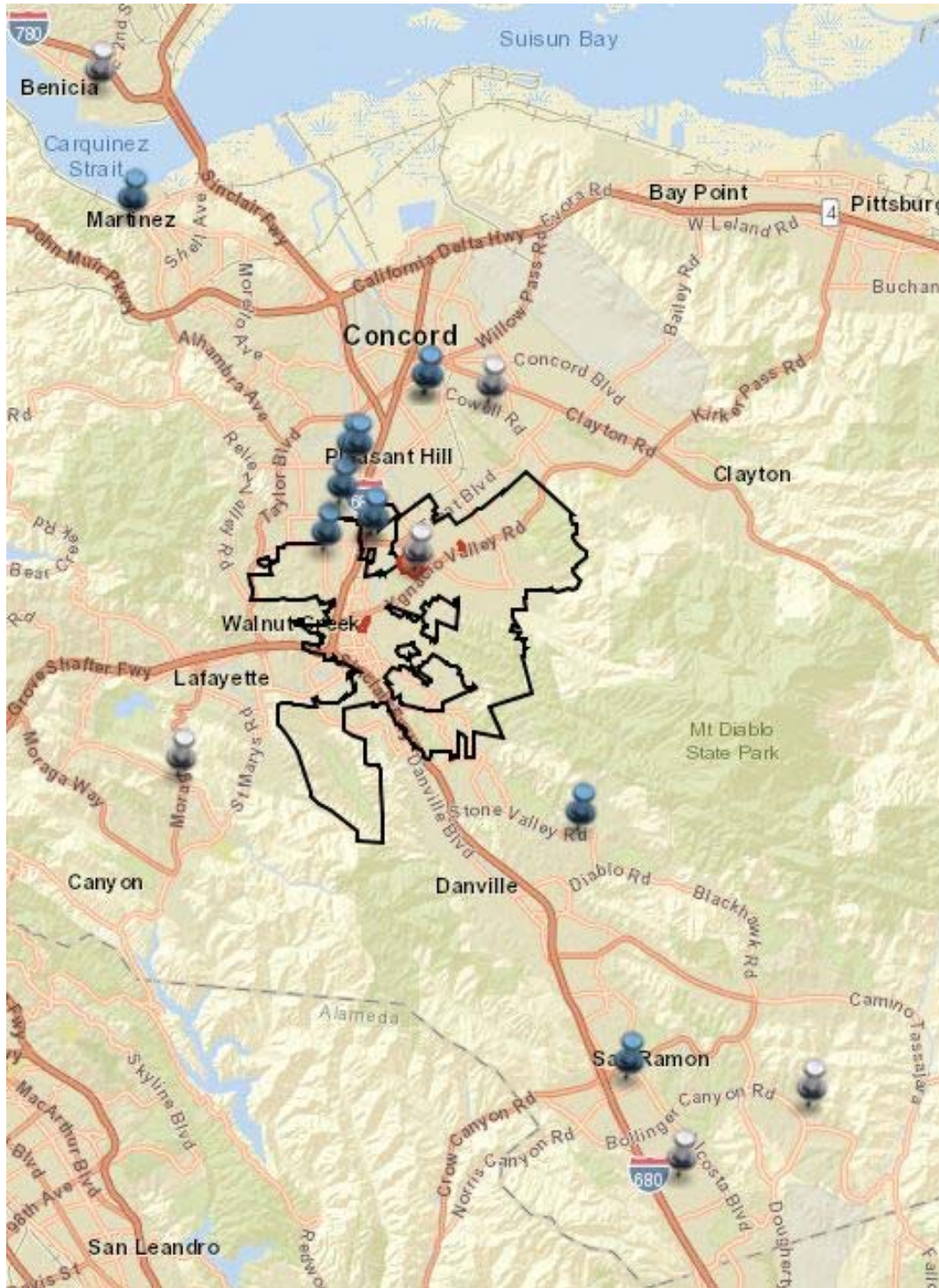
Notes:

- While the James Lemos Swim Center is outside of the 15-minute drive time, it is in close enough proximity that it was included on the map.
- For facilities like the San Ramon Olympic Pool & Aquatic Park all the amenities identified are within the same facility.
- The facilities listed are those that the public can access.





**Map C – All Aquatic Facilities**





Map-C identifies the 50M pools that are in operation and listed in Map-B, all the other identified aquatic facilities, plus the boundaries of Walnut Creek:

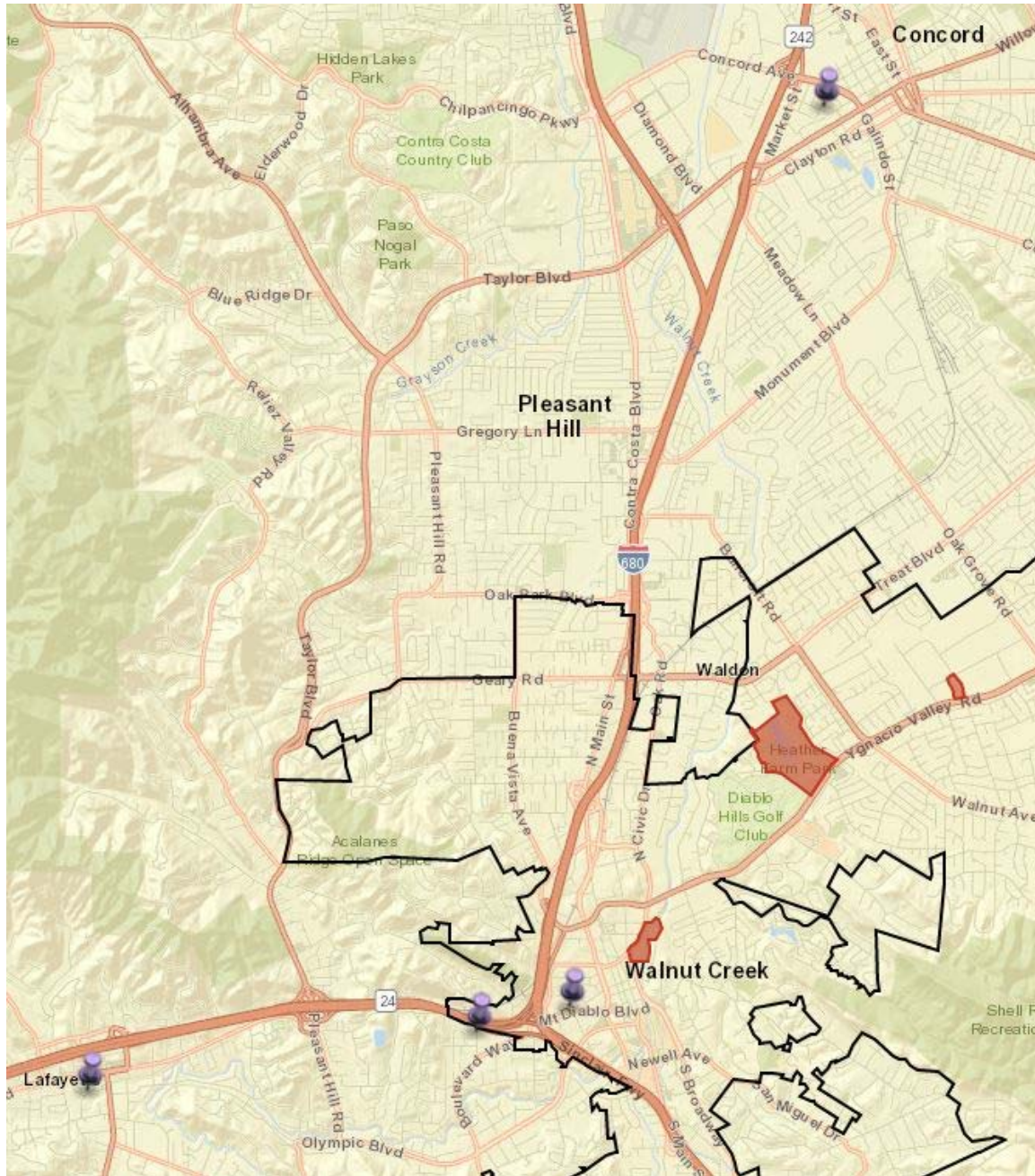
- Larkey Park Swim Center – Walnut Creek
- 24 Hour Fitness – Walnut Creek
- Renaissance ClubSport Walnut Creek – Walnut Creek
- Pleasant Hill Swim Center – Pleasant Hill
- Pleasant Hill Educational Center Pool – Pleasant Hill
- Monte Vista High School – Danville
- Rankin Aquatic Center – Martinez
- Irvin Deutscher Family YMCA – Pleasant Hill
- 24 Hour Fitness – Concord
- Big ‘C’ Athletic Club – Concord
- 24 Hour Fitness – San Ramon

Notes:

- The following website was utilized when identifying pools in the area, <https://www.swimmersguide.com/>.
- This is not an exhaustive list of aquatic facilities, but rather those facilities that were open to the public, or a day membership could be purchased.



**Map D – Private Art Program Providers**



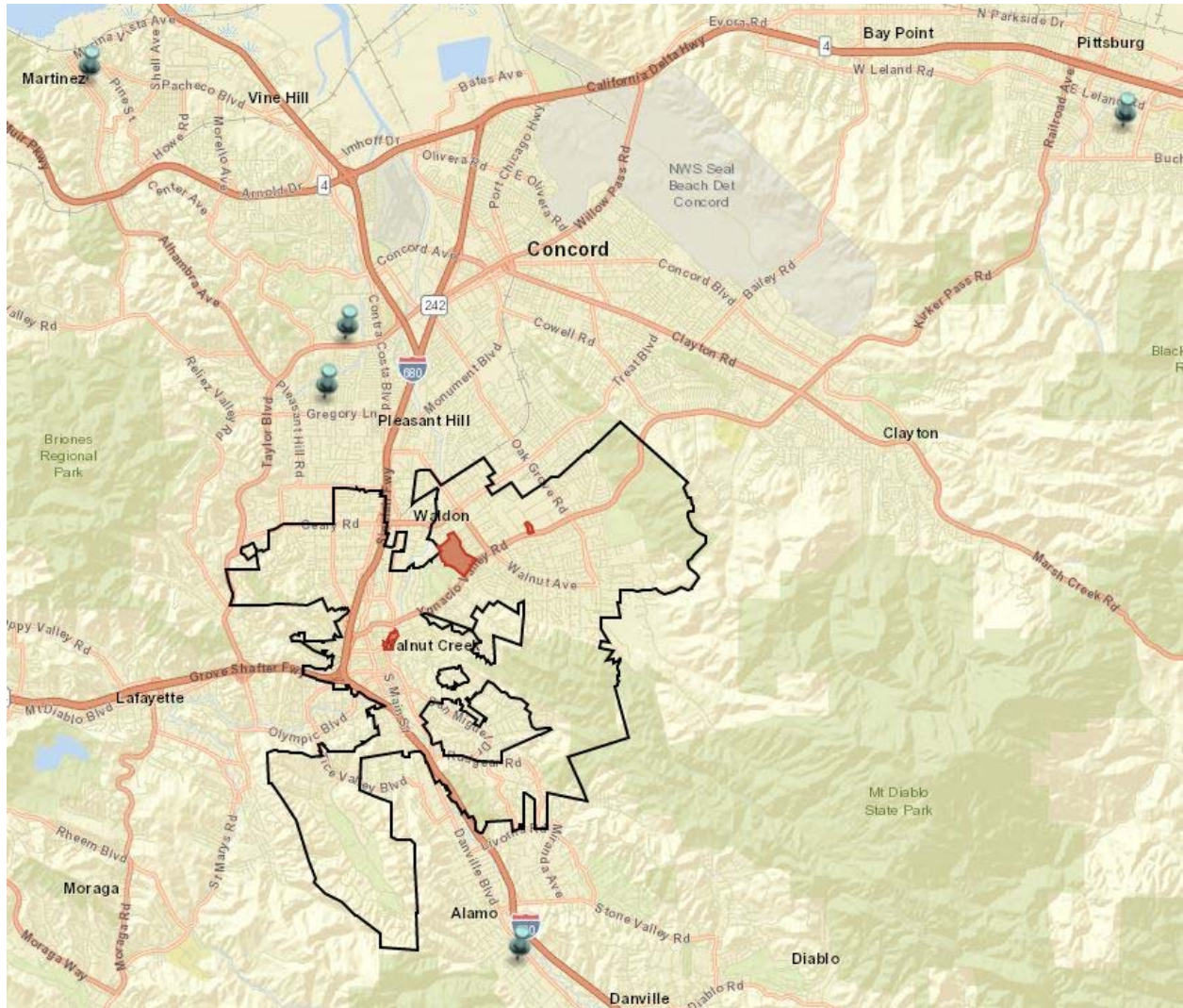


Map-D identifies other art program providers in the area, the boundaries of Walnut Creek in black, and the boundaries of Civic Park, Heather Farm Park, and the Community Center for the Arts Shadelands Campus in red.

- Red Ox Clay Studio – Concord
- Color Me Mine – Walnut Creek
- Lafayette Studio – Lafayette
- The Art Room – Lafayette



**Map E – YMCA and Boys & Girls Club**



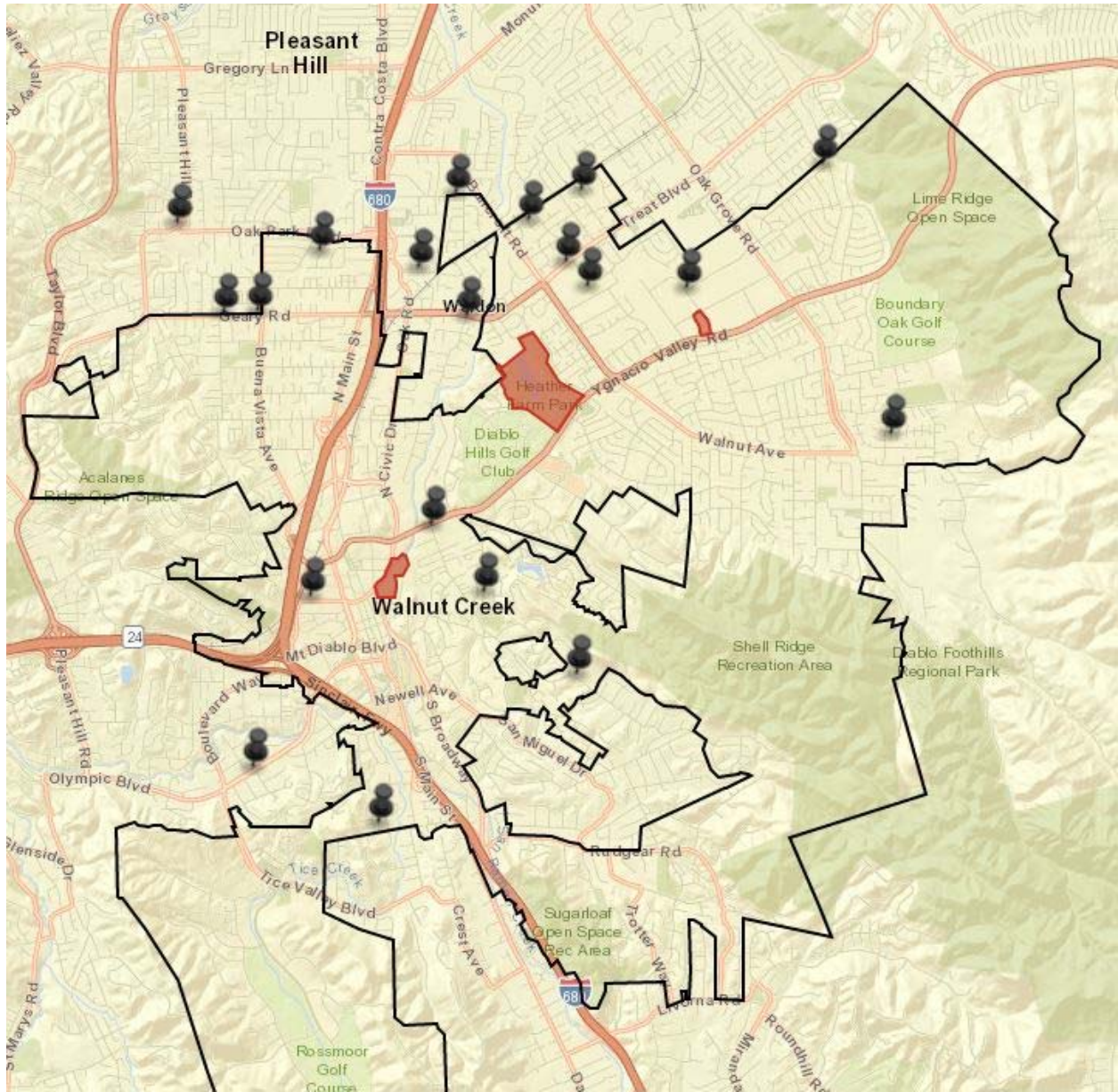
Map-E identifies the Boys & Girls Club locations along with the known YMCA locations. This map does not identify schools where either program may offer after-school care.

- San Ramon Valley YMCA
- Strandwood YMCA
- Irvin Deutscher Family YMCA
- Boys & Girls Club of Contra Costa
- East County Boys & Girls Club





**Map F – Child Care Providers**





Map-F identifies child care providers in the area, the boundaries of Walnut Creek in black, and the boundaries of Civic Park, Heather Farm Park, and the Community Center for the Arts Shadelands Campus in red.

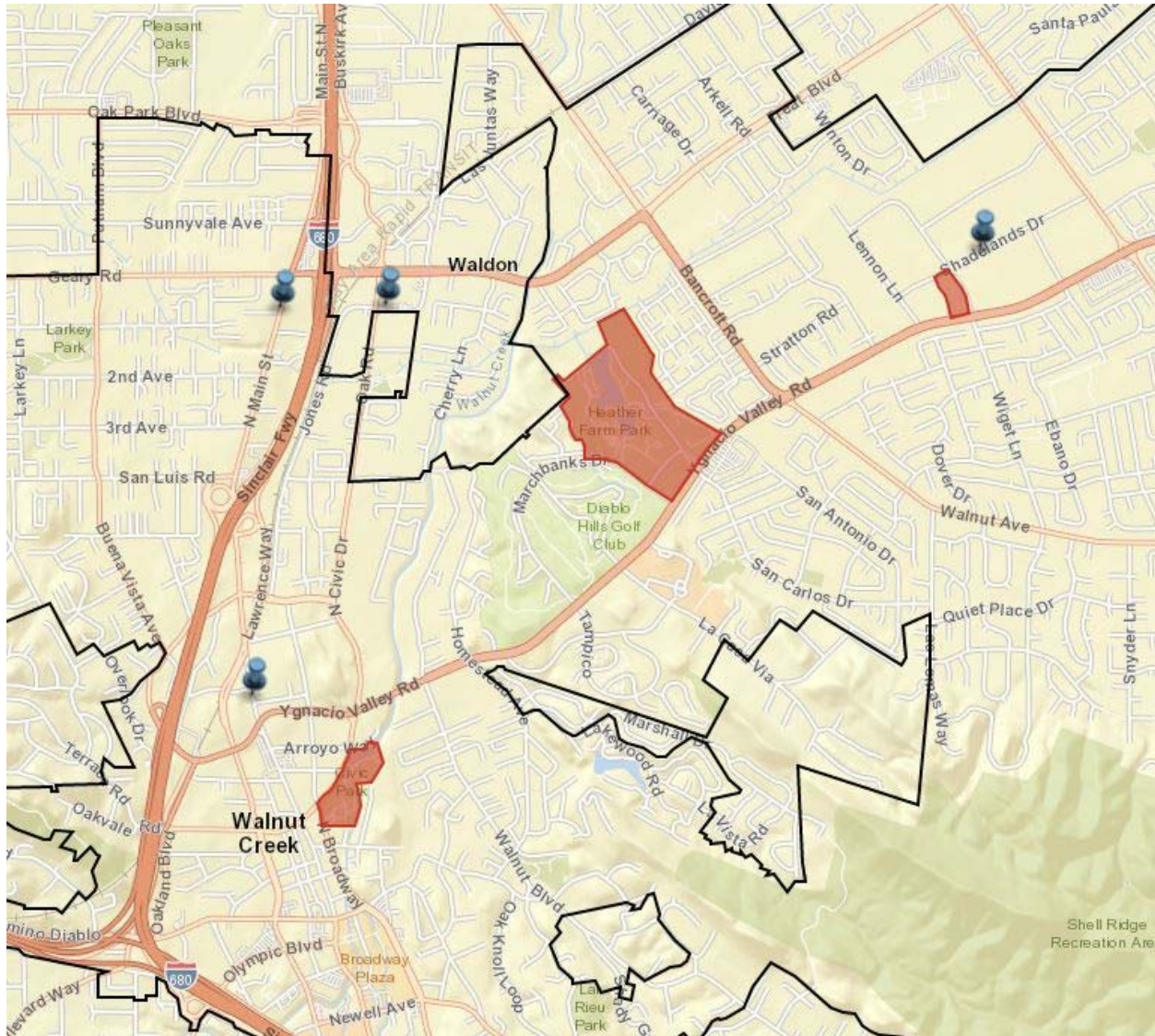
- KLA Schools of Walnut Creek
- Walnut Creek KinderCare
- Kids Kastle Child Care Infant-Preschool
- Step Ahead Learning Center
- Sunny Town Family Daycare
- Bancroft Day Care Centre
- Happy Nest Childcare
- Kid Time
- Walnut Creek Kinderworld
- Carriage House Family Day Care
- Safari Kid Walnut Creek
- Little Genius Academy
- Tara Family Child Care
- Love & Care Learning Center
- My Spanish Village
- Walnut Heights Kids Club
- Walnut Boulevard KinderCare
- Nana's Daycare
- Castle Hill Daycare
- New World CDC

Notes:

- This is not an exhaustive list, but rather the information that was found when searching for “child care” providers in the area.



**Map G – Indoor Full-Service Membership Based, or Sport Specific Facilities**



Map-G identifies indoor, full-service, membership based and sport specific facilities in the area, the boundaries of Walnut Creek in black, and the boundaries of Civic Park, Heather Farm Park, and the Community Center for the Arts Shadelands Campus in red.

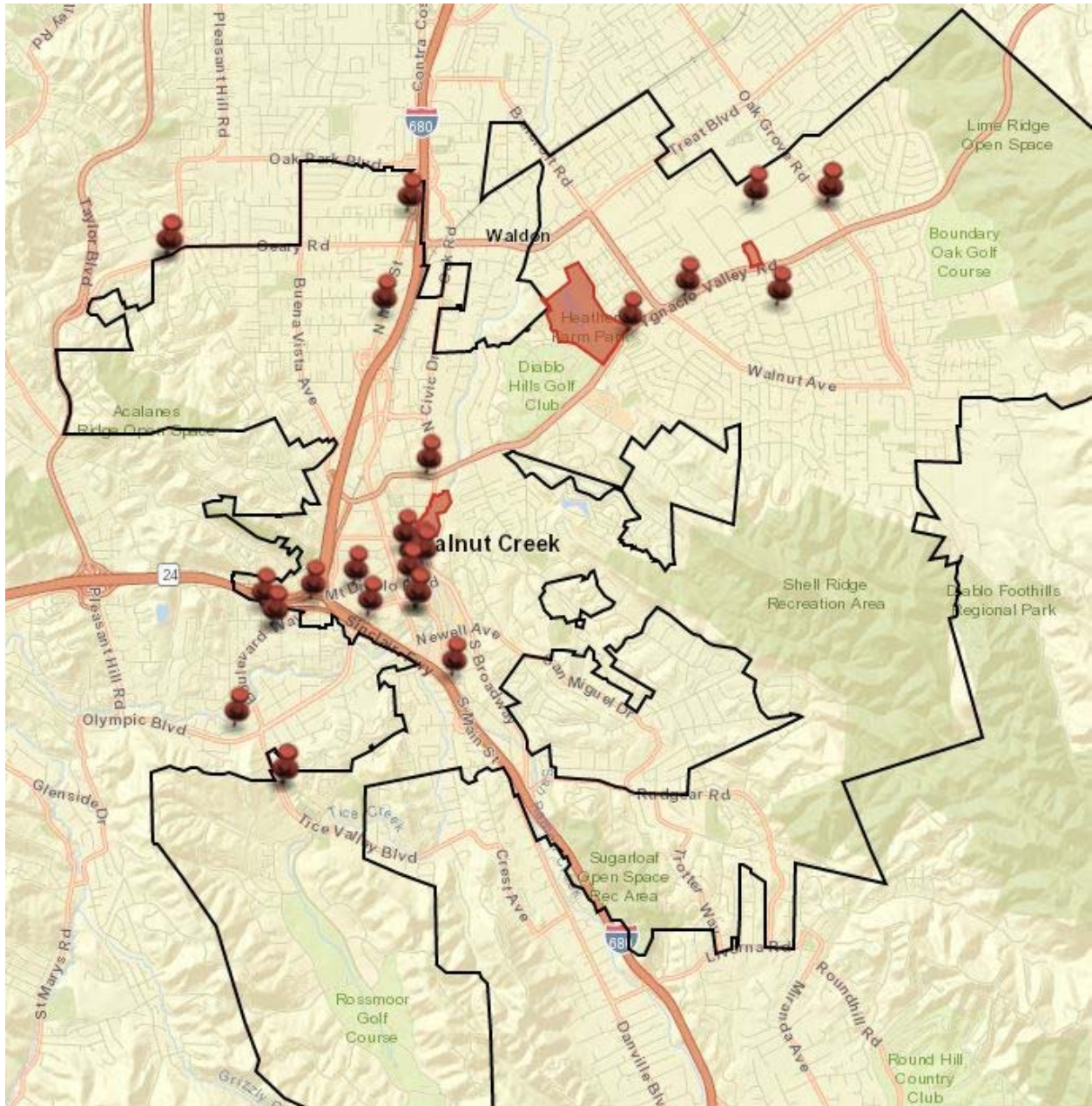
- Shadelands Sports Mall
- Renaissance ClubSports Walnut Creek
- 24 Hour Fitness – 2







**Map H – Private Fitness Specific Providers**





Map-H identifies private fitness specific providers in the area, the boundaries of Walnut Creek in black, and the boundaries of Civic Park, Heather Farm Park, and the Community Center for the Arts Shadelands Campus in red.

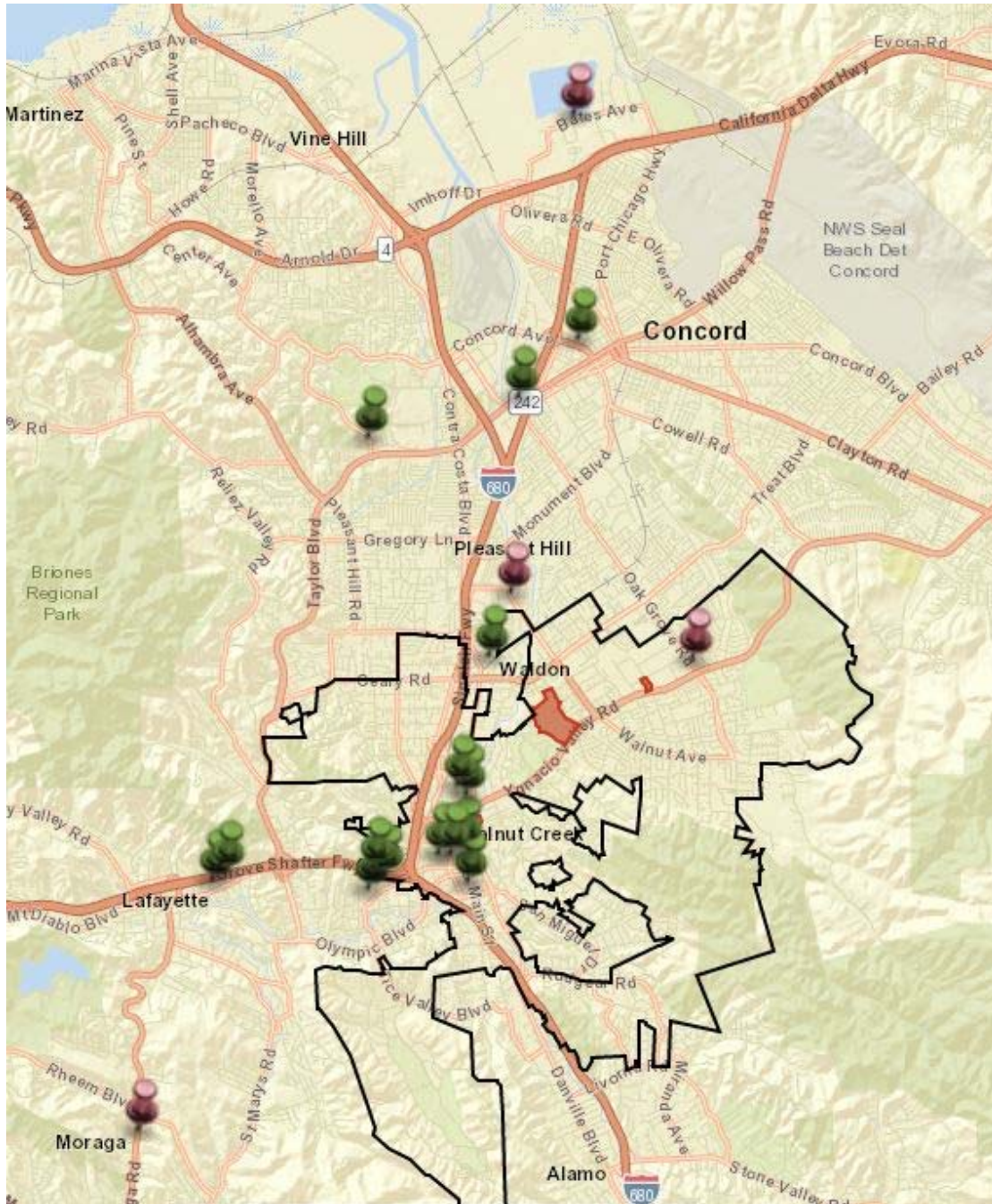
- Forma Gym Walnut Creek
- Yoga Works Walnut Creek
- The Yoga and Movement Center – Walnut Creek
- Contra Costa Pilates Center
- My Gym – Walnut Creek
- Curves – Walnut Creek
- Fitness 19 – Walnut Creek
- Organgetheory Fitness – Walnut Creek
- Perpetual Motion – personal training & fitness classes
- Lynch Fitness – Walnut Creek
- Crunch Fitness – Walnut Creek
- 21-Minute for Life – Walnut Creek
- 9-Round (2) – Walnut Creek
- Raw Sports Performance & Center for Strength – Walnut Creek
- Indigo Yoga, Pilates & cycling – Walnut Creek
- Diablo Pilates – Walnut Creek
- Yoga for U – Walnut Creek
- The Hundred & More – A Classical Pilates Studio – Walnut Creek
- Perfect Balance Studio – Walnut Creek
- The Star Method – personal training/functional fitness – Walnut Creek
- CorePower Yoga – Walnut Creek
- PureBarre – Walnut Creek
- Blue Buddha Yoga – Walnut Creek
- YogaWorks – Walnut Creek
- Bikram Yoga – Walnut Creek
- Just Be Yoga – Walnut Creek
- Contra Costa Boxing Club – Walnut Creek
- Contra Costa Pilates Center – Walnut Creek
- Dassanayaka Yoga – Contra Costa County

Notes:

- There is a strong possibility that this is not an exhaustive list of providers, but identifies the majority in the area.



**Map I – Private Dance & Gymnastics Providers**



*Gymnastics locations are highlighted in pink and dance locations are highlighted in green.*





Map-I identifies private gymnastics and dance providers in the area, the boundaries of Walnut Creek in black, and the boundaries of Civic Park, Heather Farm Park, and the Community Center for the Arts Shadelands Campus in red.

Dance locations included are as follows:

- Dance Fusion
- Ace Dance Academy
- Aurthur Murray Dance Studio
- Sizzling Latin Dance Studio
- The Ballet School Performing Arts
- Mystique Ballroom Company
- Contra Costa Ballet Centre
- Belly Dance! Studio
- Tutu School Walnut Creek
- Dillon Magh Adhair Academy of Irish Dance
- Funkmode Hip Hop Dance Studio
- Kids'n Dance
- Kinderdance
- Spin Sity Pole Dance & Fitness Studio
- Studio A

Gymnastics locations included are as follows:

- EncoreGym
- My Gym
- Luna Gymnastics
- Liberty Gymnastics Training Center

Notes:

- Specific to dance there are more studios to the north in Concord and to the south, as such this map is not comprehensive, but gives an idea of the number of providers.