

## **Section II – Demographic Analysis**

The following is a summary of the demographic characteristics within North Clackamas Parks and Recreation District (NCPRD) and the four recreation facility sites.

B\*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2019-2024 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities.

### **Service Areas:**

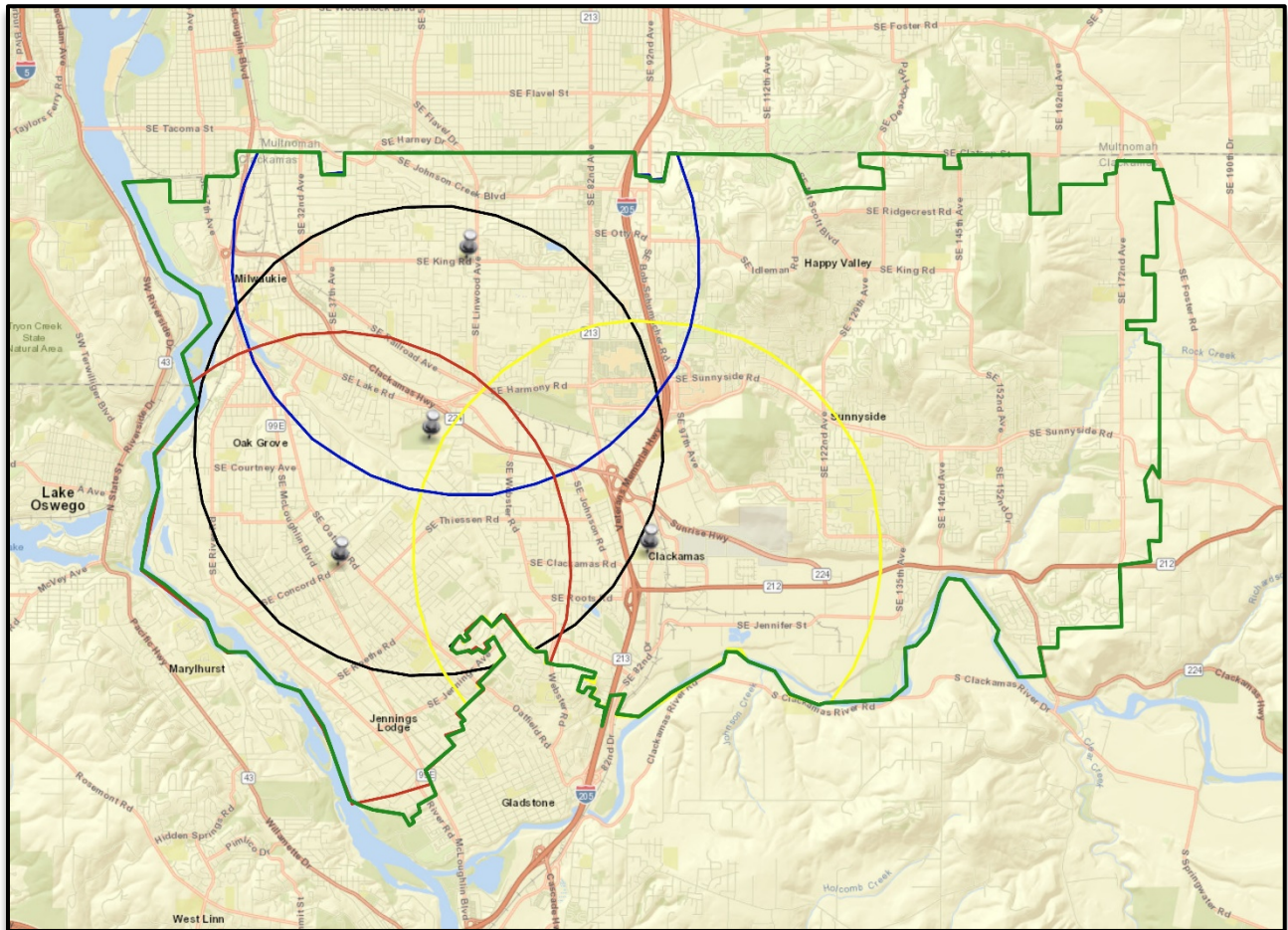
The information provided includes the basic demographics and data for North Clackamas Parks and Recreation District as well as the State of Oregon and the United States.

Service Areas are defined as the distance people will travel on a regular basis (a minimum of once a week) to utilize recreation facilities. Use by individuals outside of this area will be much more limited and will focus more on special activities or events.

Service areas can flex or contract based upon a facility's proximity to major thoroughfares. 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.

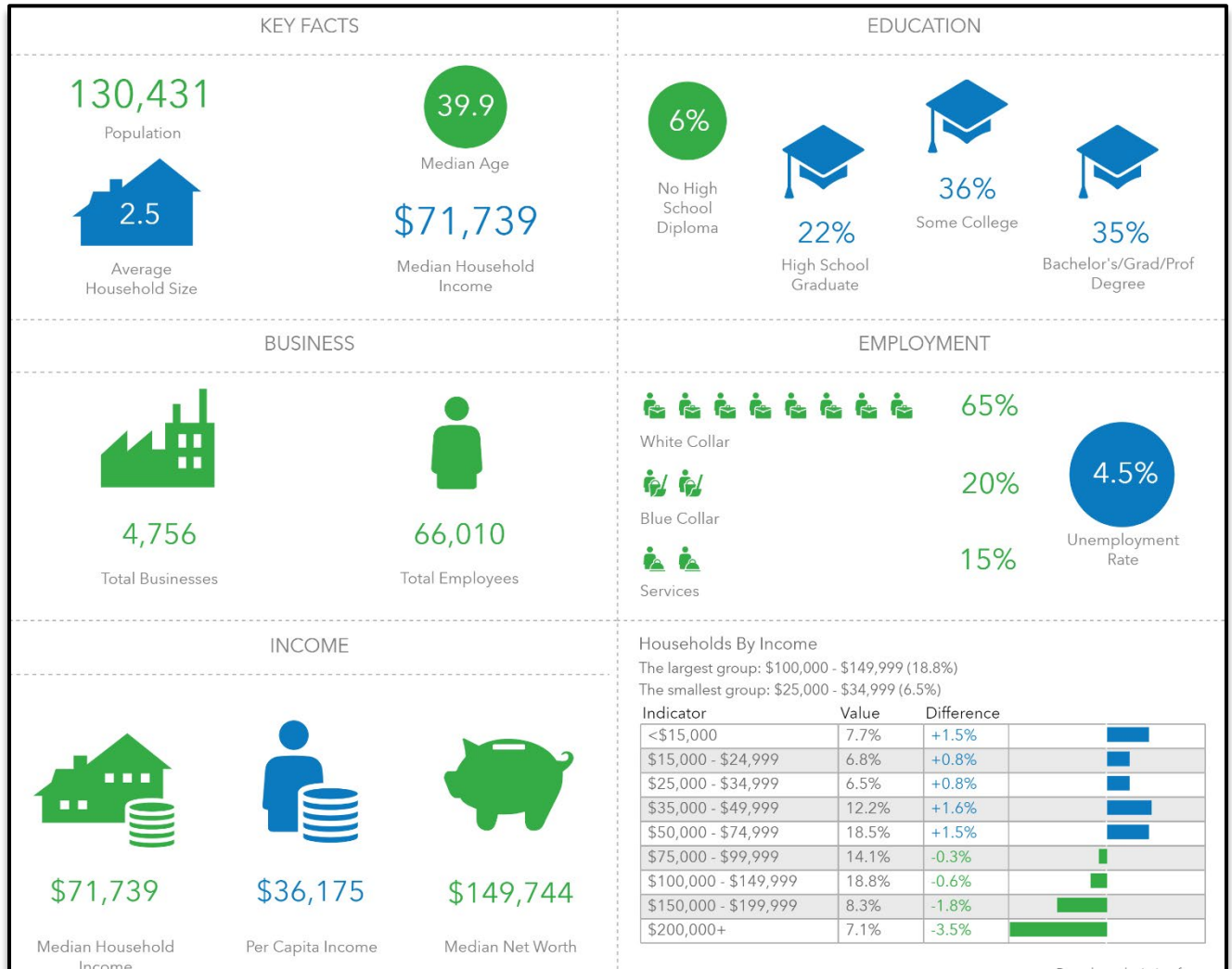
Service areas can vary in size with the types of components in the facility.

**Map A - Service Area Maps**



- Green Boundary – NCPRD
- Red Boundary – Concord Property
- Blue Boundary – Wichita Center
- White Boundary – Milwaukie Center
- Yellow Boundary – Clackamas Elementary

**North Clackamas Parks and Recreation District Infographic**



- Household by Income comparison uses NCPRD and compares it to Clackamas County.

## Demographic Summary

	NCPRD	Concord Property	Wichita Center	Milwaukie Center	Clackamas Elem
<b>Population:</b>					
2010 Census	115,179 <sup>1</sup>	37,096 <sup>2</sup>	39,631 <sup>3</sup>	51,641 <sup>4</sup>	29,663 <sup>5</sup>
2019 Estimate	130,431	39,362	42,468	55,216	31,923
2024 Estimate	139,188	41,055	44,483	57,596	33,430
<b>Households:</b>					
2010 Census	45,573	15,426	16,346	21,351	11,897
2019 Estimate	50,780	16,323	17,438	22,664	12,763
2024 Estimate	53,938	17,026	18,245	23,626	13,357
<b>Families:</b>					
2010 Census	29,544	9,713	9,721	13,242	7,686
2019 Estimate	32,748	10,094	10,167	13,786	8,110
2024 Estimate	34,713	10,457	10,563	14,275	8,430
<b>Average Household Size:</b>					
2010 Census	2.51	2.37	2.40	2.39	2.47
2019 Estimate	2.55	2.38	2.41	2.40	2.48
2024 Estimate	2.56	2.38	2.41	2.41	2.48
<b>Ethnicity (2019 Estimate):</b>					
Hispanic	10.3%	9.8%	13.8%	11.9%	13.4%
White	79.5%	86.6%	80.2%	83.8%	78.9%
Black	1.9%	1.5%	2.4%	1.8%	2.2%
American Indian	1.0%	0.9%	1.3%	1.1%	1.1%
Asian	8.4%	2.8%	4.5%	3.2%	6.6%
Pacific Islander	0.3%	0.3%	0.4%	0.3%	0.4%
Other	4.0%	3.6%	5.9%	4.8%	5.5%
Multiple	4.9%	4.3%	5.2%	4.8%	5.3%
<b>Median Age:</b>					
2010 Census	38.7	42.5	37.5	40.2	37.8
2019 Estimate	39.9	44.5	39.4	42.0	38.6
2024 Estimate	40.4	45.3	40.2	42.7	39.2
<b>Median Income:</b>					
2019 Estimate	\$71,739	\$67,781	\$57,093	\$63,094	\$70,295
2024 Estimate	\$82,391	\$78,983	\$65,970	\$75,446	\$82,698

<sup>1</sup> From the 2000-2010 Census, the NCPRD experienced a 13.2% increase in population.

<sup>2</sup> From the 2000-2010 Census, the Concord Property area experienced a 4.8% increase in population.

<sup>3</sup> From the 2000-2010 Census, the Wichita Center area experienced a 3.2% increase in population.

<sup>4</sup> From the 2000-2010 Census, the Milwaukie Center area experienced a 3.3% increase in population.

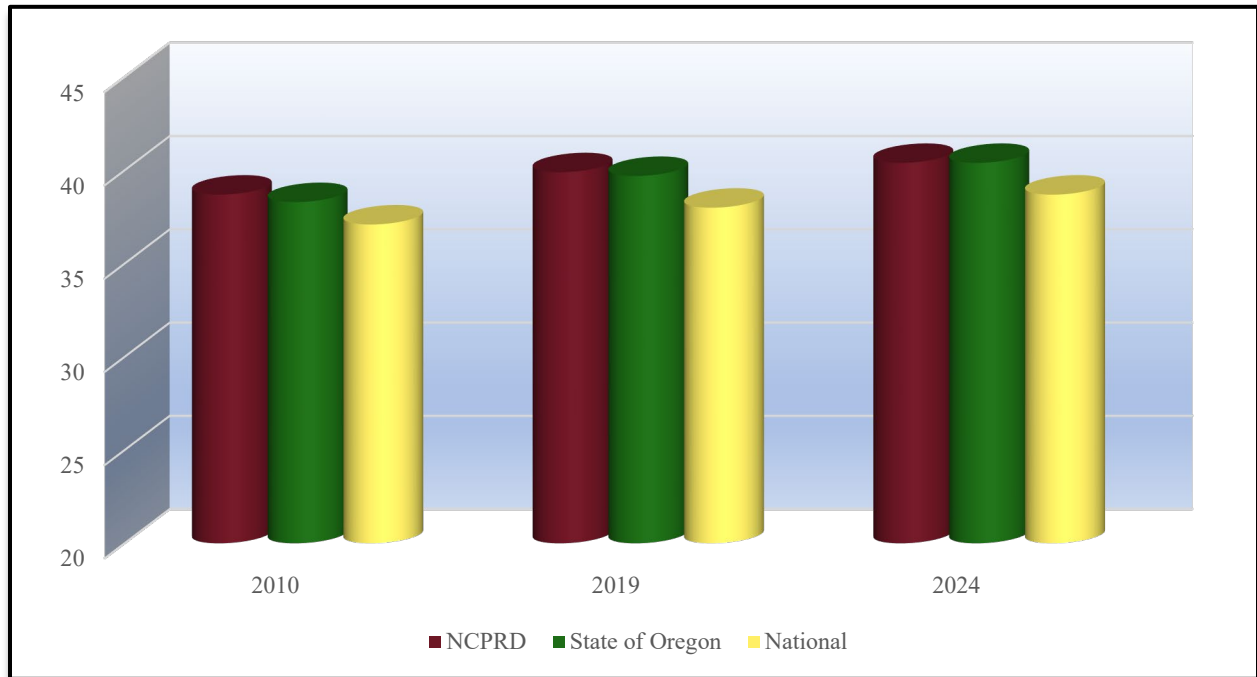
<sup>5</sup> From the 2000-2010 Census, the Clackamas Elementary area experienced a 6.7% increase in population.

**Age and Income:** The median age and household income levels are compared with the national number as both of these factors are primary determiners of participation in recreation activities. 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 A – Median Age:**

	2010 Census	2019 Projection	2024 Projection
NCPRD	38.7	39.9	40.4
State of Oregon	38.3	39.7	40.4
Nationally	37.1	38.3	39.0

**Chart A – Median Age:**



The median age is higher in the NCPRD, than the State of Oregon and the National number. A higher median age typically points to the presence of more middle aged and seniors.



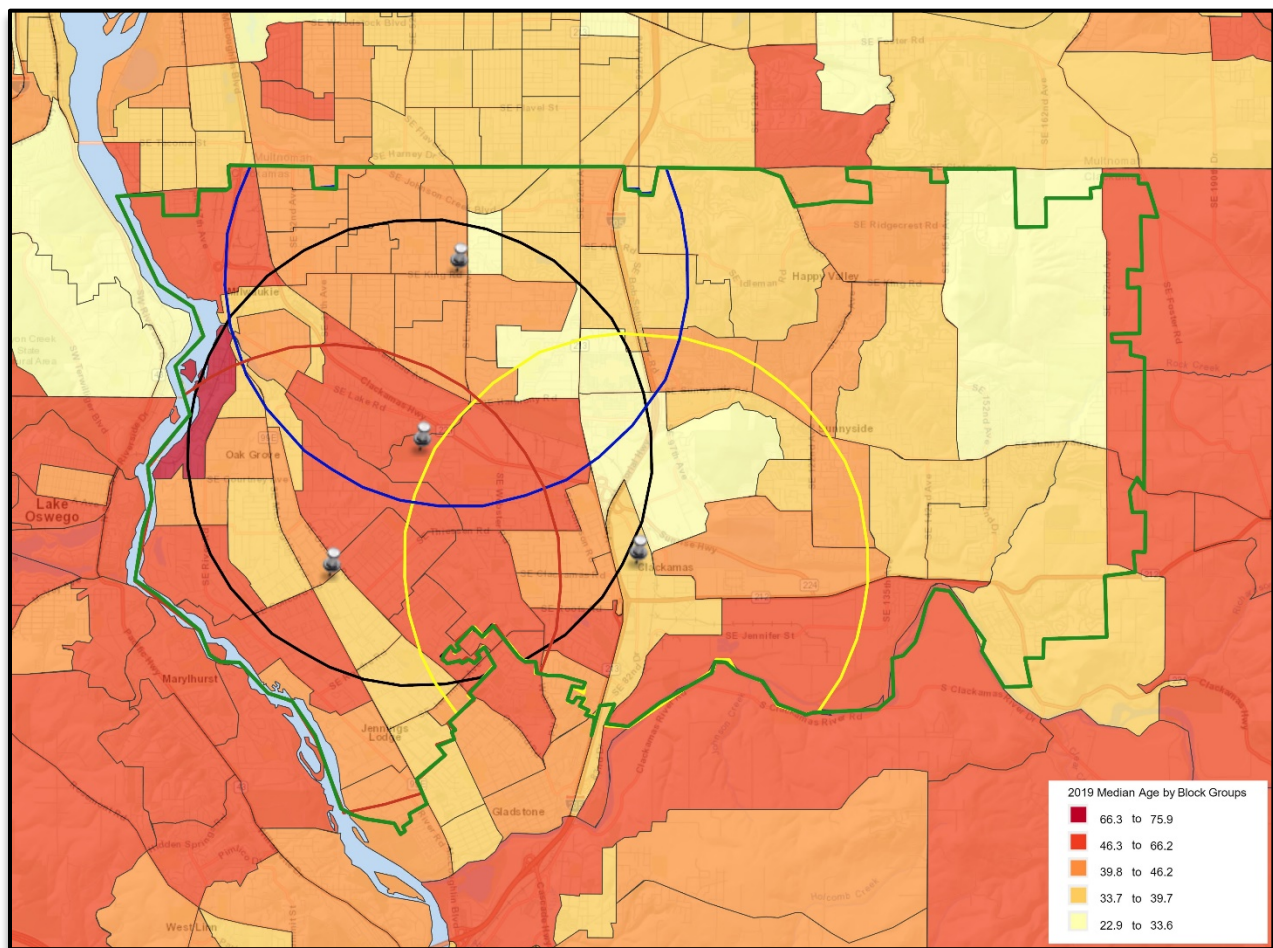
**Households with Children:** The following chart provides the number of households and percentage of households in the NCPRD with children.

**Table B – Households w/ Children**

	Number of Households w/ Children	Percentage of Households w/ Children
NCPRD	14,634	32.1%
State of Oregon	456,775	30.1%

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

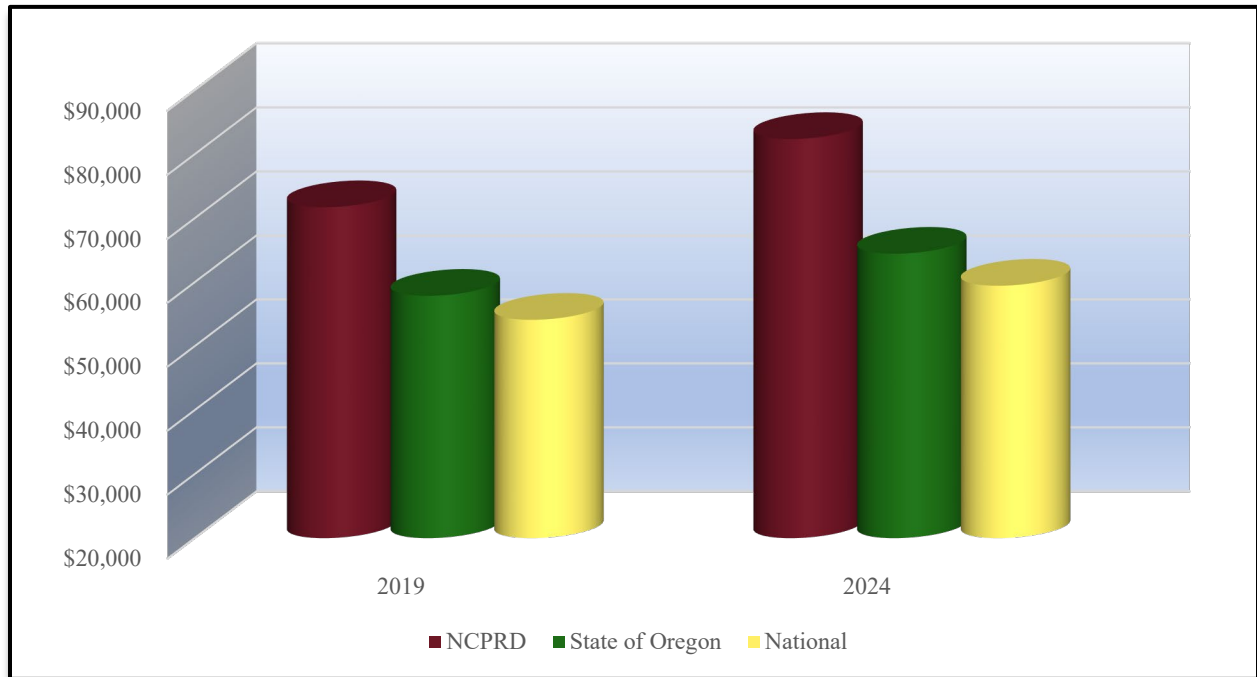
**Map B – Median Age by Block Group**



**Table C – Median Household Income:**

	2019 Projection	2024 Projection
NCPRD	\$71,739	\$82,391
State of Oregon	\$57,902	\$64,471
Nationally	\$58,100	\$65,727

**Chart B – Median Household Income:**

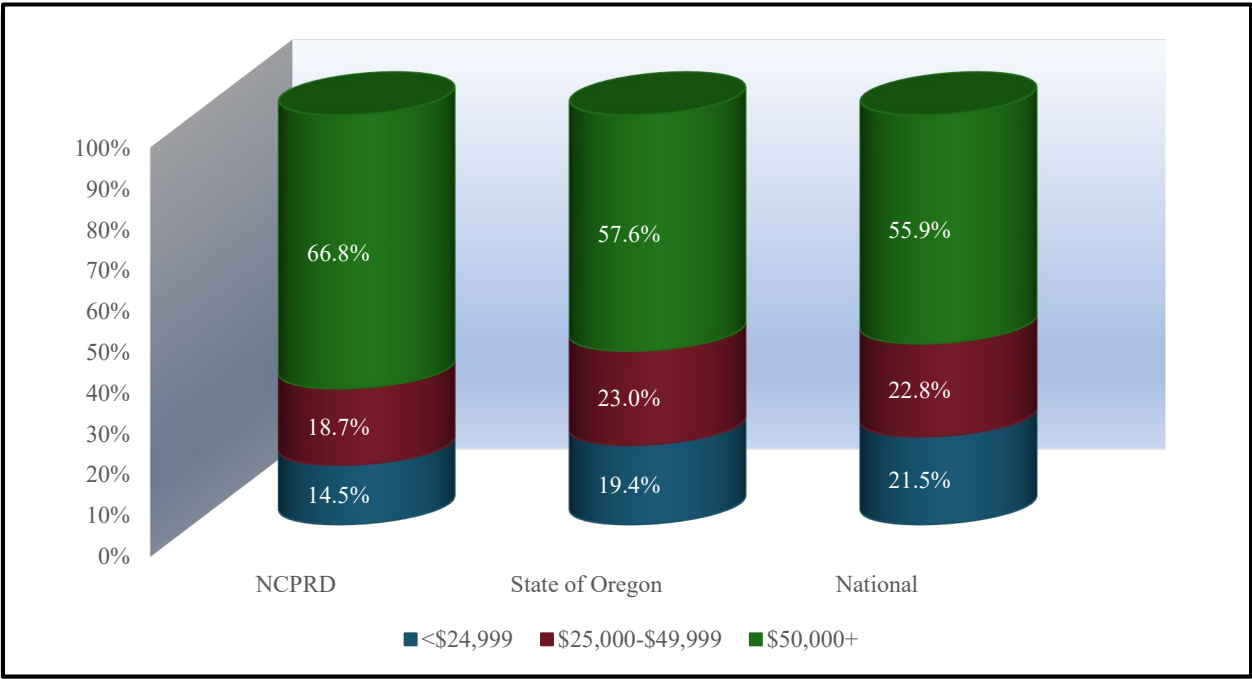


Based on 2019 projections for median household income the following narrative describes the service areas:

In the NCPRD, the percentage of households with median income over \$50,000 per year is 66.8% compared to 55.9% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 14.5% compared to a level of 21.5% nationally.

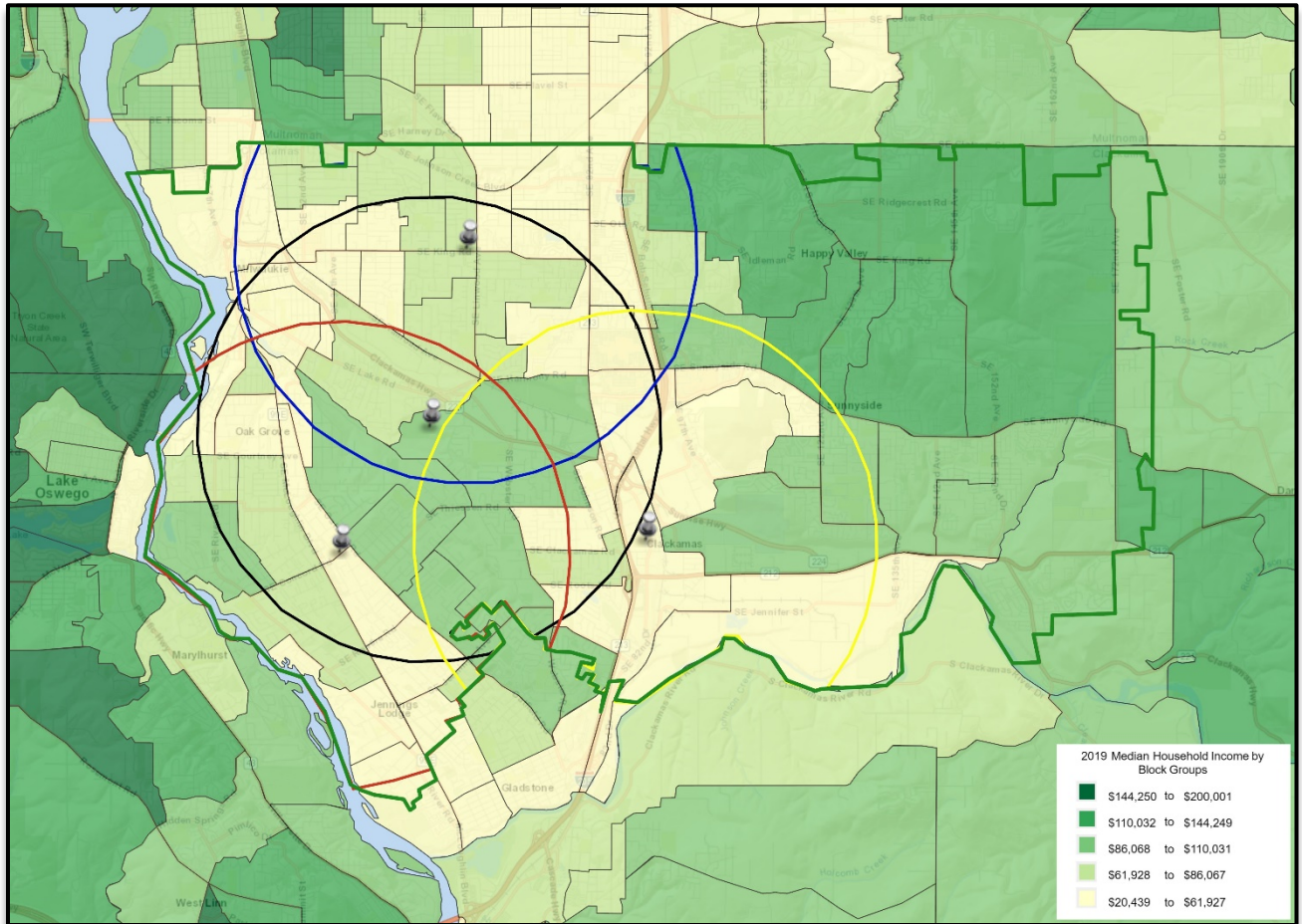
While there is no perfect indicator of use of an indoor recreation facility, the percentage of households with more than \$50,000 median income is a key indicator. Therefore, those numbers are significant and balanced with the overall cost of living.

**Chart C – Median Household Income Distribution**





**Map C – Household Income by Block Group**



**Household Budget Expenditures:** In addition to taking a look at Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular, 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.

**Table D – Household Budget Expenditures<sup>6</sup>:**

NCPRD	SPI	Average Amount Spent	Percent
Housing	106	\$24,861.46	31.3%
<i>Shelter</i>	107	\$19,717.52	24.8%
<i>Utilities, Fuel, Public Service</i>	106	\$5,143.94	6.5%
Entertainment & Recreation	106	\$3,479.21	4.4%

State of Oregon	SPI	Average Amount Spent	Percent
Housing	96	\$20,908.09	30.5%
<i>Shelter</i>	96	\$16,111.59	23.5%
<i>Utilities, Fuel, Public Service</i>	97	\$4,796.50	7.0%
Entertainment & Recreation	96	\$3,104.91	4.5%

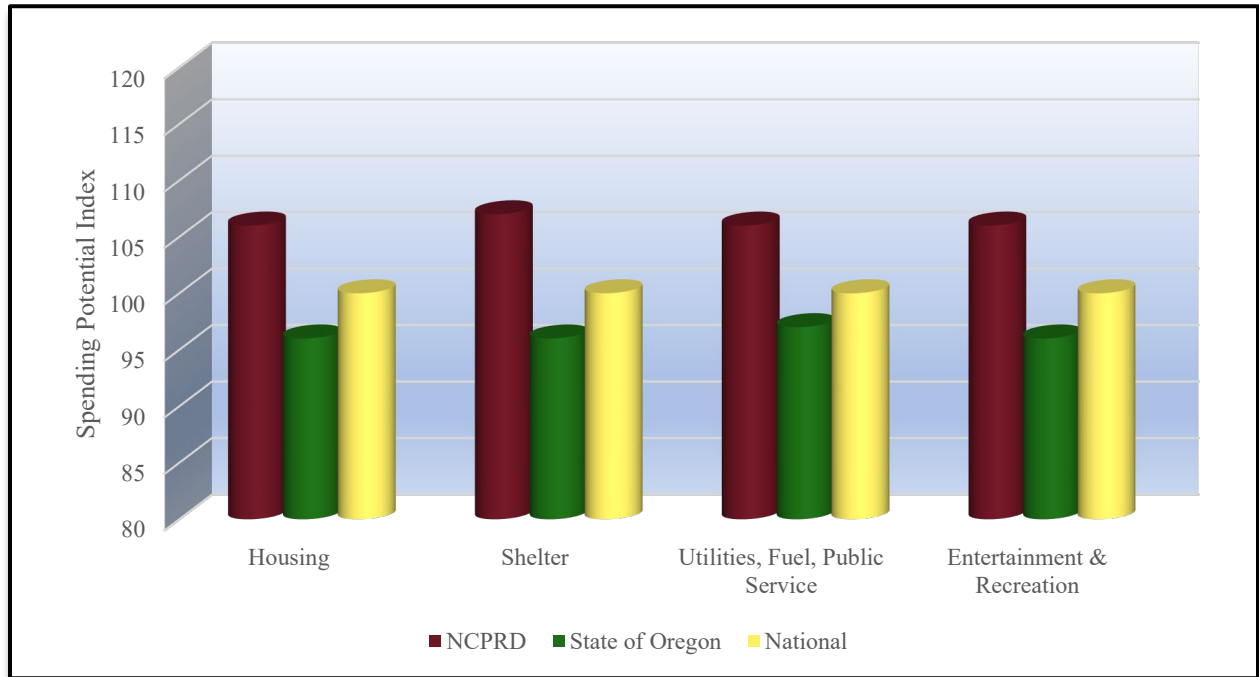
**SPI:** Spending Potential Index as compared to the National number of 100.  
**Average Amount Spent:** The average amount spent per household.  
**Percent:** Percent of the total 100% of household expenditures.

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

---

<sup>6</sup> Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2019 and 2024.

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



The total number of housing units in the NCPRD is 48,347 and 94.3% are occupied, or 45,573 housing units. The total vacancy rate for the service area is 5.7%. Of the available units:

- For Rent 2.4%
- Rented, not Occupied 0.1%
- For Sale 1.3%
- Sold, not Occupied 0.2%
- For Seasonal Use 0.3%
- Other Vacant 1.5%

**Recreation Expenditures Spending Potential Index:** Finally, through the demographic provider that B\*K utilizes for the market analysis portion of the report, we can examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

**Table E – Recreation Expenditures Spending Potential Index<sup>7</sup>:**

<b>NCPRD</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	109	\$117.40
Fees for Recreational Lessons	110	\$157.32
Social, Recreation, Club Membership	108	\$255.23
Exercise Equipment/Game Tables	109	\$70.98
Other Sports Equipment	111	\$7.36

<b>State of Oregon</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	95	\$107.43
Fees for Recreational Lessons	91	\$125.74
Social, Recreation, Club Membership	94	\$211.80
Exercise Equipment/Game Tables	94	\$54.08
Other Sports Equipment	97	\$7.49

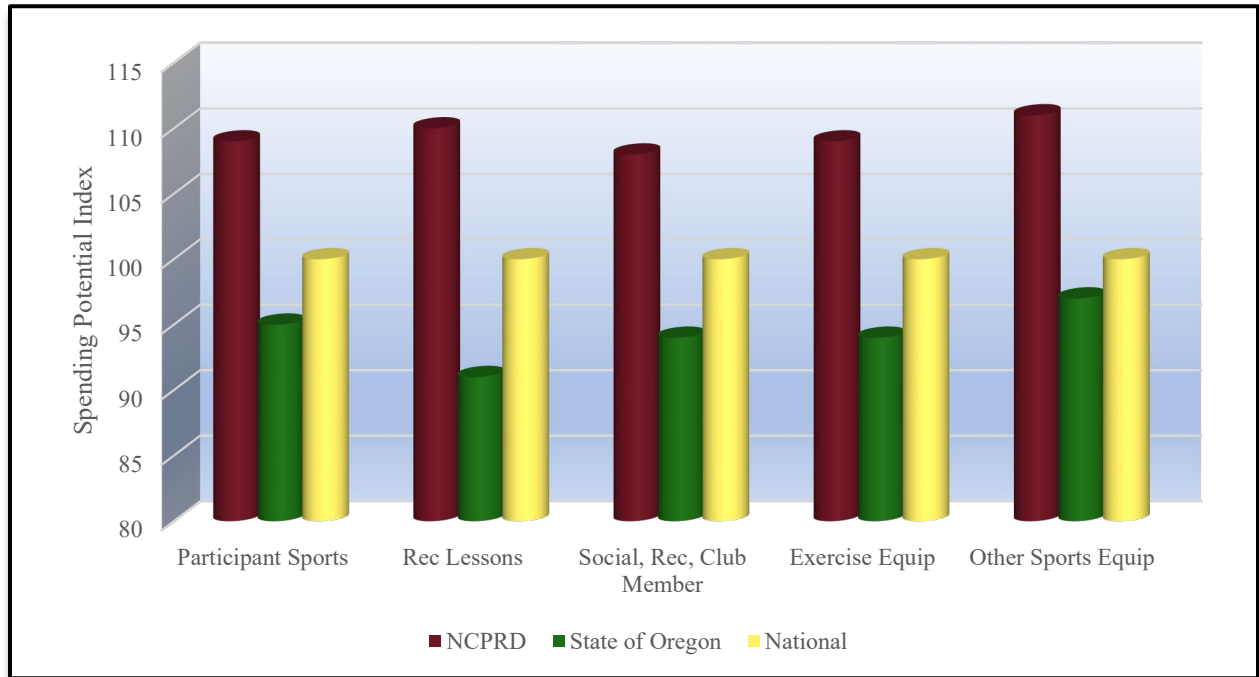
**Average Amount Spent:** The average amount spent for the service or item in a year.

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

---

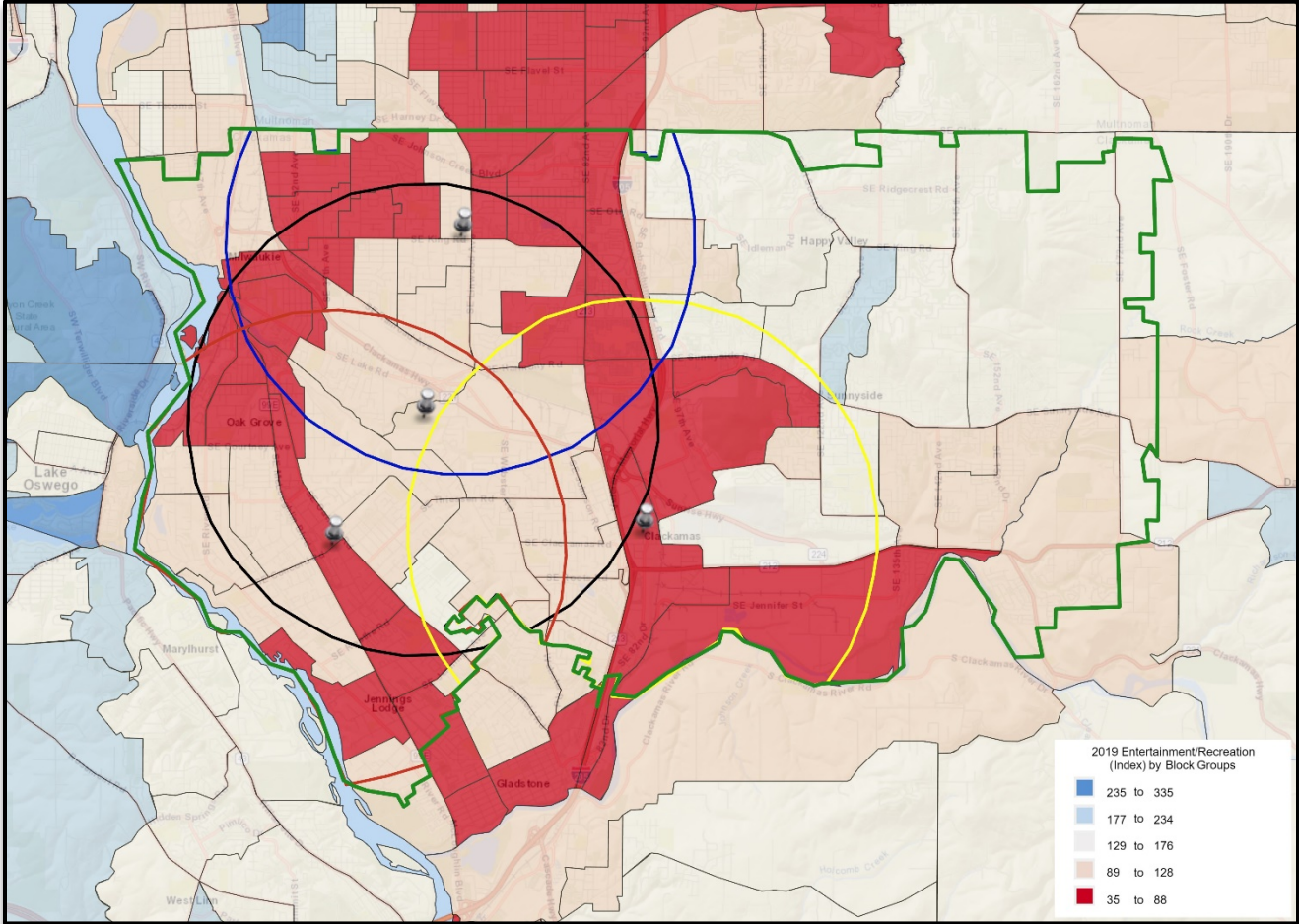
<sup>7</sup> Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

**Chart E – Recreation Spending Potential Index:**





**Map D – Entertainment and Recreation Spending by Block Group**



**Population Distribution by Age:** Utilizing census information for the NCPRD, the following comparisons are possible.

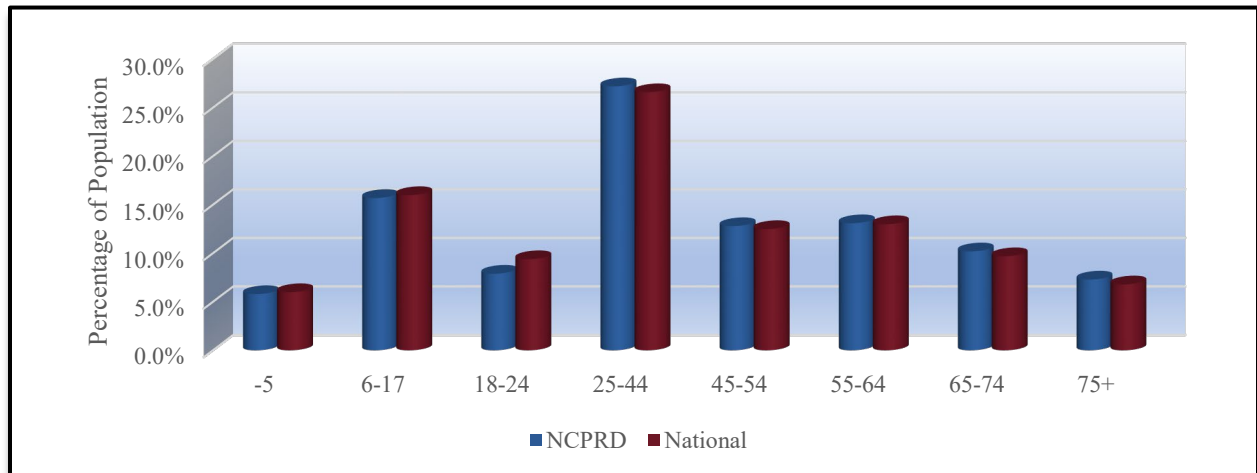
**Table F – 2019 NCPRD Age Distribution**

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	7,519	5.8%	6.0%	-0.2%
5-17	20,277	15.7%	16.0%	-0.3%
18-24	10,425	7.9%	9.4%	-1.5%
25-44	35,527	27.2%	26.6%	+0.6%
45-54	16,779	12.8%	12.5%	+0.3%
55-64	17,126	13.1%	13.0%	+0.1%
65-74	13,281	10.2%	9.7%	+0.5%
75+	9,496	7.3%	6.8%	+0.5%

- Population:** 2019 census estimates in the different age groups in the NCPRD.
- % of Total:** Percentage of the NCPRD population in the age group.
- National Population:** Percentage of the national population in the age group.
- Difference:** Percentage difference between NCPRD population and the national population.

**Chart F – 2019 NCPRD Age Group Distribution**



The demographic makeup of the NCPRD, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the age groups 25-44, 45-54, 55-64, 65-74 and 75+. There is a smaller population in the 5 and Under, 6-17 and 18-24 age groups. The greatest positive variance is in the 65-74 and 75+ age group with +0.5%, while the greatest negative variance is in the 18-24 age group with -1.5%.

**Population Distribution Comparison by Age:** Utilizing census information from the NCPRD, the following comparisons are possible.

**Table G – 2019 NCPRD Population Estimates**

(U.S. Census Information and ESRI)

Ages	2010 Census	2019 Projection	2024 Projection	Percent Change	Percent Change Nat'l
-5	7,073	7,519	8,046	+13.8%	+2.6%
5-17	19,702	20,277	21,278	+8.0%	+0.9%
18-24	9,835	10,425	10,154	+3.2%	+0.7%
25-44	31,030	35,527	38,612	+24.4%	+12.9%
45-54	17,103	16,779	17,111	0.0%	-9.8%
55-64	14,966	17,126	16,917	+13.0%	+16.3%
65-74	7,929	13,281	15,068	+90.0%	+68.0%
75+	7,539	9,496	12,004	+59.2%	+46.4%

**Chart G – NCPRD Population Growth**

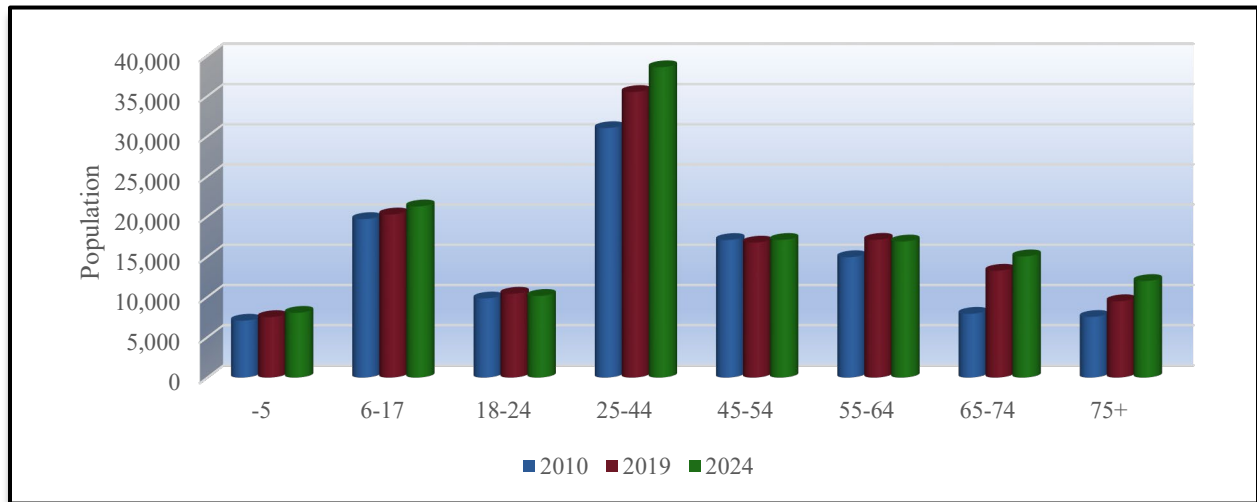


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2024. It is projected that all age categories, except 45-54, will see an increase. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

**Ethnicity and Race:** Below is listed the distribution of the population by ethnicity and race for the NCPRD for 2019 population projections. Those numbers were developed from 2010 Census Data.

**Table H – NCPRD Ethnic Population and Median Age 2019**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of OR Population
Hispanic	13,487	25.3	10.3%	13.2%

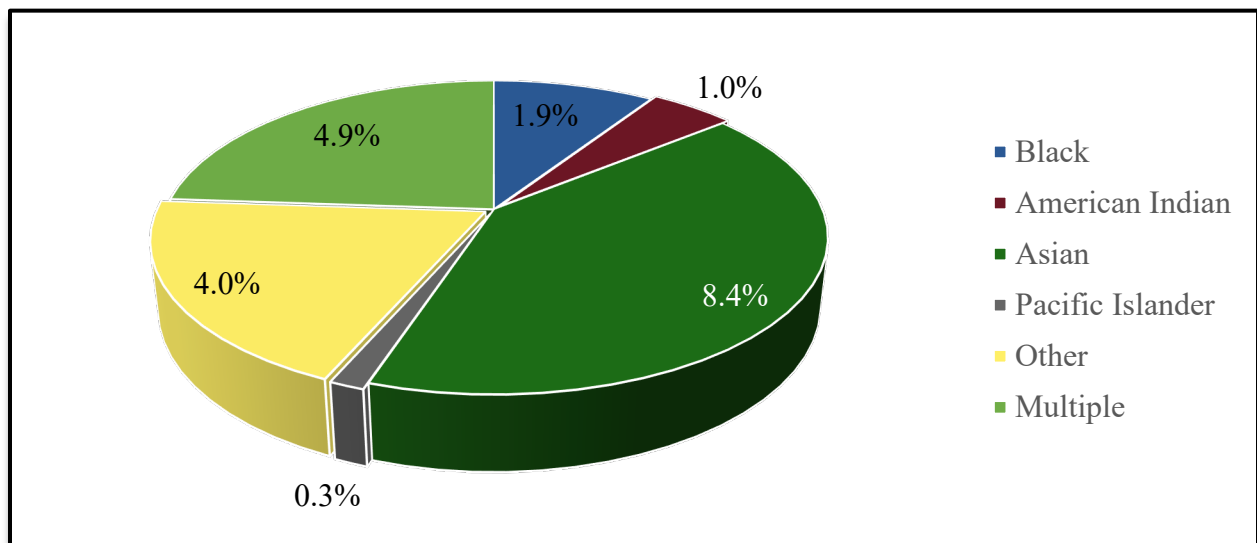
**Table I – NCPRD by Race and Median Age 2019**

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of OR Population
White	13,723	43.0	79.5%	81.2%
Black	2,518	33.7	1.9%	2.0%
American Indian	1,242	33.2	1.0%	1.4%
Asian	10,928	38.2	8.4%	4.6%
Pacific Islander	435	31.9	0.3%	0.4%
Other	5,244	26.4	4.0%	6.0%
Multiple	6,344	19.8	4.9%	4.4%

2019 NCPRD Total Population: 130,431 Residents

**Chart H – 2019 NCPRD Population by Non-White Race**



## 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.

The Tapestry segmentation system classifies U.S. neighborhoods into 65 unique market segments. Neighborhoods are sorted by more than 60 attributes including; income, employment, home value, housing types, education, household composition, age and other key determinates of consumer behavior.

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provide a brief description of each. This information combined with the key indicators and demographic analysis of each service area help further describe the markets that the NCPRD looks to serve with programs, services, and special events.

For comparison purposes the following are the top 10 Tapestry segments, along with percentage in the United States:

1. Green Acres (6A)	3.2%
2. Southern Satellites (10A)	3.2%
3. Savvy Suburbanites (1D)	3.0%
4. Salt of the Earth (6B)	2.9%
5. Soccer Moms (4A)	<u>2.8%</u>
	<b>15.1%</b>
6. Middleburg (4C)	2.8%
7. Midlife Constants (5E)	2.5%
8. Comfortable Empty Nesters (5A)	2.5%
9. Heartland Communities (6F)	2.4%
10. Old and Newcomers (8F)	<u>2.3%</u>
	<b>12.5%</b>



**Table J – NCPRD Tapestry Segment Comparison**

(ESRI estimates)

	NCPRD		Demographics	
	Percent	Cumulative Percent	Median Age	Median HH Income
Front Porches (8E)	12.5%	12.5%	34.2	\$39,000
Parks and Rec (5C)	12.5%	25.0%	40.3	\$55,000
Soccer Moms (4A)	10.9%	35.9%	36.6	\$84,000
Comfortable Empty Nesters (5A)	6.8%	42.7%	46.8	\$68,000
Old and Newcomers (8F)	6.3%	49.0%	38.5	\$39,000

**Front Porches (8E)** – A blended demographic with young families with children and single households. Limited incomes and not adventurous shoppers. Strive to have fun with sports.

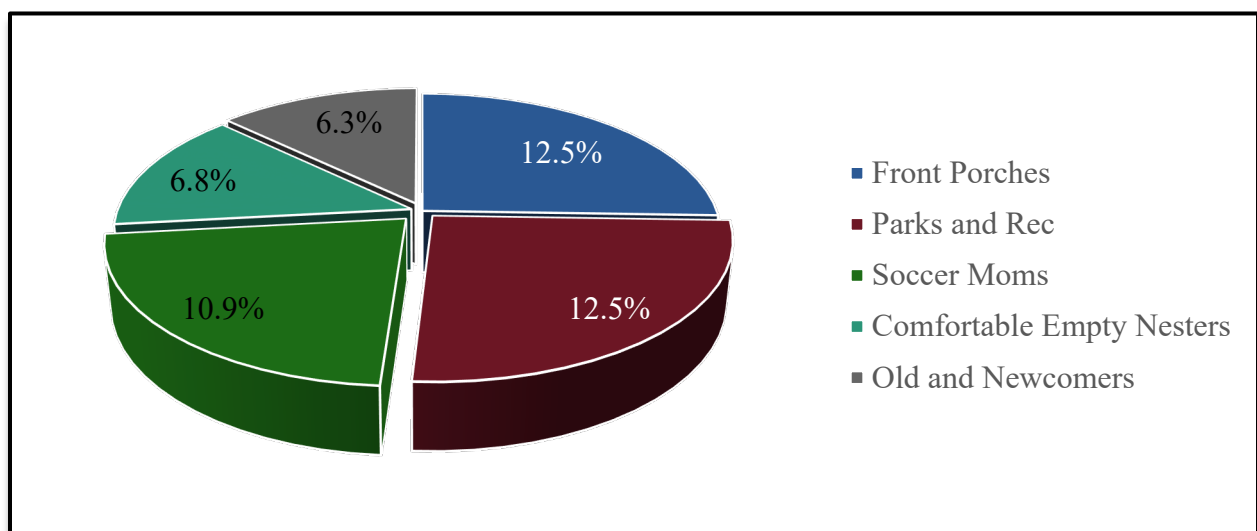
**Parks and Rec (5C)** – Well-established neighborhoods with dual income married couples. They are careful consumers. Take full advantage of the local parks, trails and recreation programs.

**Soccer Moms (4A)** – An affluent family-oriented segment. They have a hectic life chasing children. Outdoor activities and sports are a way of life.

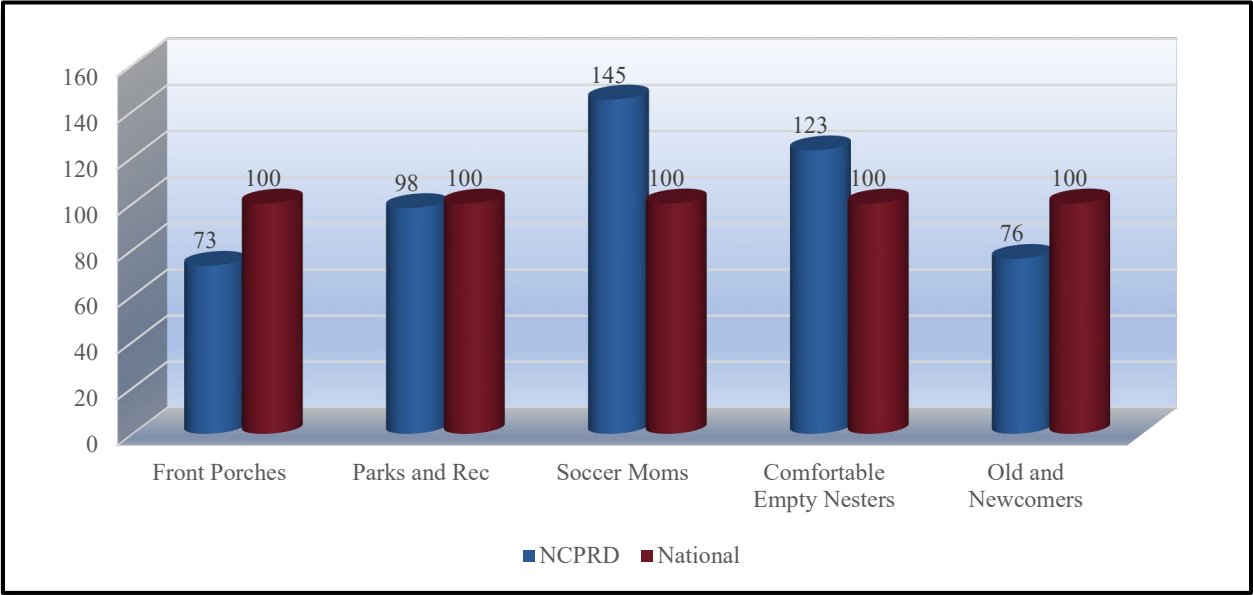
**Comfortable Empty Nesters (5A)** – Baby Boomers earning a comfortable living. Transitioning from raising children to retirement. They value their health and are physically active.

**Old and Newcomers (8F)** – Singles living on a budget. Just beginning careers or taking college/adult education classes. Strong supporters of environmental organizations.

**Chart I – NCPRD Tapestry Segment Representation by Percentage:**



**Chart J – NCPRD Tapestry Segment Entertainment Spending:**



**Demographic Summary**

The following summarizes the demographic characteristics of the North Clackamas Parks and Recreation District.

- The NCPRD has a large population base at over 130,000 people. The population is expected to grow at a strong rate over the next five years.
- Household size indicates the presence of children in the home, but the median age is slightly older than the state and national median age.
- There is a reasonably high median household income level but much of this is on the east side of the District. There are lower income levels in the areas where the new facilities are being planned.
- There is a high spending potential index for recreation purposes.
- There will be significant growth in all age groups in the next five years but especially in the senior age categories.
- While the population of the District is predominately white, there is a measurable Hispanic and Asian population.
- The tapestry segments point to a population that is active in parks and recreation activities.