City of Bellevue

MEMORANDUM

DATE: December 31, 2007

TO: Parks & Community Services Board Members

FROM: Ken Kroeger, Project Manager - Parks & Community Services
Glenn Kost, Planning & Development Manager – Parks & Comm Services

SUBJECT: Bellevue Aquatics Center Feasibility Report Update
(Board feedback requested)

At your meeting on January 8, we will update the Park Board on the status of the aquatic center feasibility study and request feedback on portions of the preliminary draft report and findings.

BACKGROUND:

In 2006, the City was approached by a local non-profit organization - *Swimming Pools for Leisure, Active Sports, and Health (SPLASH)* - which seeks to bring together community partners to plan, construct, and operate a multi-purpose aquatic complex for all ages and experiences. SPLASH presented its goals to the Bellevue City Council and Parks & Community Services Board, and funding was approved to complete a study to determine the feasibility and costs of constructing and operating an aquatic facility.

The City has not yet determined if, or to what extent, it supports the development of an aquatic center. This study is intended to assist the City in reaching that decision, and will explore a range of facility options and operating models.

Ballard*King & Associates (BK) was chosen to lead this effort, and they have assembled a team with expertise in aquatic design, program planning, architecture and site design, cost estimating, public outreach, operational assessment, market research, and economic analysis.

SCOPE OF FEASIBILITY STUDY:

The scope of work for the feasibility study is summarized below:

1. Background and data collection – inventory current aquatic facilities, programs, providers, and plans;
2. Market Analysis – Identify service areas; study demographics; develop cost recovery model(s); explore local, regional and national trends.
3. Conduct Public Outreach – Conduct stakeholder interviews and a statistically valid survey to gauge interest in aquatic facilities;

4. Identify Facility Components/Program – Identify alternative facility program plans with sizing and space allocation, including preliminary capital and operational cost estimates;
5. Site Analysis – Assess up to six potential locations to construct an aquatic facility, addressing traffic impacts, development constraints, constructability, and cost implications;
6. Conceptual Design – Develop alternative conceptual site plans, floor plans, and perspective sketches;
7. Operational Assessment – Prepare pro-forma operating cost models for each facility alternative, including attendance estimates, proposed fee structure, income sources, operational costs, and component profitability assessment;
8. Final Report – Provide a written final report with all information, analysis, and recommendations.

PROGRESS TO DATE:

To date, we have completed most of tasks 1, 2 and 3 above, are actively pursuing items 4 and 5, and will be sharing our progress to date and key findings from this work. The following draft reports are included in your packet:

1. Bellevue Aquatic Center Feasibility Study
   - Section I: Demographic & market analysis (pp 1-36)
     - Division 1 – Demographic Analysis
     - Division 2 – Participation Estimates
     - Division 3 – Aquatic Trends
     - Division 4 – Market Assessment
     - Division 5 – Aquatic Event Analysis
     - Division 6 - Conclusions
   - Section II: Market Orientation (pp 37-39)
   - Section III: Public Input, including stakeholder interviews (pp 39-56)
2. Executive Summary of survey results
3. Facility Development Options

Our next steps will be to complete tasks 4-7 above using the identified alternative facility development options. We will return to the Park Board to gain additional feedback after completing these steps, but before completing the report.

Section I –Demographic and Market Analysis

In an attempt to determine the market and potential financial performance of a possible new aquatic center for the City of Bellevue, Washington, an analysis that looks at the demographic realities of the area, as well as reviews the existing indoor and outdoor aquatic facilities in the area has been undertaken.

The following is a summary of the demographic characteristics of the area around Bellevue, Washington and a comparison with basic sports participation standards as produced by the National Sporting Goods Association.

This is a demographic and market analysis that has been completed prior to the identification of the actual components in the proposed aquatic center that would be developed. It is anticipated that five different possible aquatic facility options will ultimately be developed that will vary in focus, size and market approach. As a result the demographic and market information provided in this section will most likely need to be adjusted for each of the proposed options that are developed.

Division I - Demographic Analysis

Service Area: The primary focus for any new aquatic center is to serve the aquatic needs of the citizens of Bellevue first and foremost. As a result the city has been listed as the primary service area for the study. However, an aquatics facility with significant competitive and recreation amenities will be able to draw from a much larger area beyond the city boundaries. As a result a secondary service area that includes Bellevue, Sammamish, Issaquah, New Castle, Renton, Kirkland, Redmond and Mercer Island has been identified. It is expected that the vast majority of potential daily use aquatic center patrons will come from this geographic area. In addition an even larger tertiary service area has been established that includes all of the primary service area but extends north to the intersection of Interstate 5 and 405 and south to the same intersection markings. This tertiary service area also includes most all of the city of Seattle. It will be difficult to draw from this service area on a regular basis due to distance and the presence of other providers.

A service area is usually defined by the distance people will travel on a regular basis (a minimum of once a week) to utilize an aquatics facility or its programs. Use by people outside of the secondary service area will be limited to occasional visits to the facility from the tertiary service area and by individuals and teams participating in competitive aquatic activities. A 15-20 minute secondary service area is not uncommon for a significant aquatic facility. The exact market for an aquatic facility will be dictated by the type and magnitude of the center that is developed and as a result could vary significantly. Within this secondary service area, there are currently a number of indoor and outdoor aquatic facilities available.

Service Area Population: The populations of the service areas are as follows:

Area	2000 Census	2007 Estimate	2012 Projection
City of Bellevue	109,569	112,833	116,373
Households	45,836	47,881	49,826
Secondary Service Area	424,193	464,498	492,743
Households	170,083	187,621	199,289
Tertiary Service Area	1,297,078	1,383,067	1,447,486
Households	545,467	585,064	614,397

Source - U.S. Census Bureau and ESRI.

Based on the fact that a majority of the possible facility options that will be developed for a possible Bellevue Aquatic Center will have somewhat of a regional orientation, the demographic statistics for the secondary service area will be utilized for this report with references to the tertiary service area.

State of Washington, Office of Financial Management, indicates that the 2007 population for the City of Bellevue is estimated to be 118,100 which would also result in higher projections for 2012.

It should also be noted that the work day population in Bellevue itself swells by over 135,000 which provides another potential market for an aquatic center.

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Secondary Service Area

Tertiary Service Area

Population Distribution by Age: Utilizing census information for the secondary service area the following comparisons are possible.

Secondary service area - from 2007 ESRI census estimate

Table- A

Ages	Pop.	% of Tot.	Nat. Pop.	Diff.
-5	28,449	6.1%	7.0%	-.9%
5-17	80,737	17.5%	17.6%	-.1%
18-24	36,607	7.8%	9.9%	-2.1%
25-44	136,127	29.4%	27.6%	+1.8%
45-54	75,111	16.1%	14.6%	+1.5%
55-64	55,629	11.9%	10.8%	+1.1%
65+	51,835	11.2%	12.5%	-1.3%

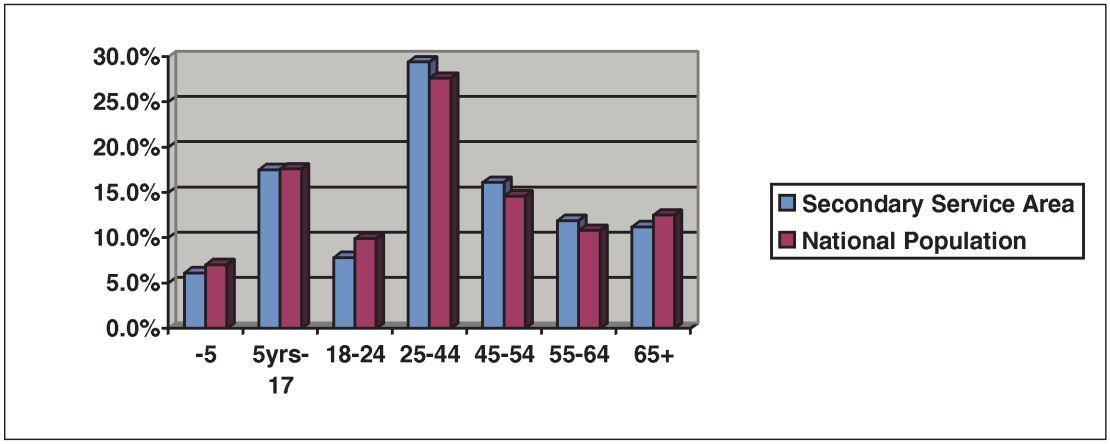
Population- 2007 census estimate in the different age groups in the service area.

% of Total- Percentage of the service area population in the age group.

National Population- Percentage of the national population in the age group.

Difference- Percentage difference between the service area population and the national population.

Chart- A



The demographic makeup of the secondary service area, when compared to the characteristics of the national population, indicates that there are a number of differences. The population in the youth age groups is slightly smaller while the numbers in the adult and middle aged categories are higher than the national numbers. However, there is a smaller senior population. Overall, the population is considerably older than the national population.

When the demographics for tertiary service area are compared with those from the secondary service area there are also a number of differences with a larger young adult (18-24) and adult age group and a smaller youth and senior age group. Overall the population is slightly younger than the secondary service area.

Population Distribution Comparison by Age: Utilizing census information from the secondary service area, the following comparisons are possible.

Secondary service area - from census information and ESRI.

Table- B

Ages	2000 Pop.	2007 Pop.	20012 Pop.	% Change
-5	27,153	28,449	30,406	+12.0%
5-17	74,603	80,737	80,904	+8.4%
18-24	32,042	36,607	40,665	+26.9%
25-44	142,408	136,127	134,985	-5.2%
45-54	65,487	75,111	82,871	+26.5%
55-64	38,225	55,629	63,705	+66.7%
65+	44,273	51,835	59,209	+33.7%

Chart- B

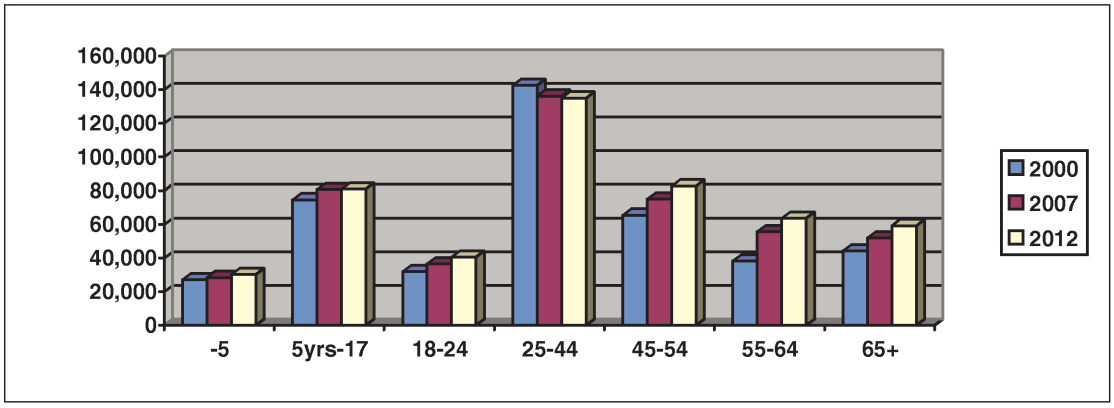


Table-B looks at the growth or decline in age group numbers from the 2000 census until the year 2012. It is projected that in all age categories (except the 25-44) there will be an increase in population. The greatest increase will occur in the 55-64 age category. It must be remembered that the population 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 net gains nearing 30% in the 45 plus age groupings in communities which are more stable in their population numbers. The tertiary service area has similar growth characteristics as the secondary service area but will see a slower rate of increase overall.

Race and Ethnicity: Below is listed the distribution of the population by race and ethnicity for the secondary service area based on the 2007 population estimates.

Table- C

Race	Number	Percent
White	356,345	76.7%
Black/African Amer.	12,229	2.6%
American Indian/Alaska	2,053	.4%
Asian	64,672	13.9%
Native Hawaiian/Pac. Island	1,098	.2%
Other	11,222	2.4%
Two or More Races	16,880	3.6%
Hispanic Origin	26,249	5.7%

Source – U.S. Census Bureau and ESRI.

Note: Total does not add up to 100% as individuals can be classified in several categories.

Race and ethnicity distribution for the secondary service area indicates a very high percentage of White residents followed by Asian. For the tertiary service area the percentages are similar with a somewhat lower White population and a slightly higher African American percentage than the secondary service area. The percentages for the City of Bellevue show a much higher Asian population than the other service areas.

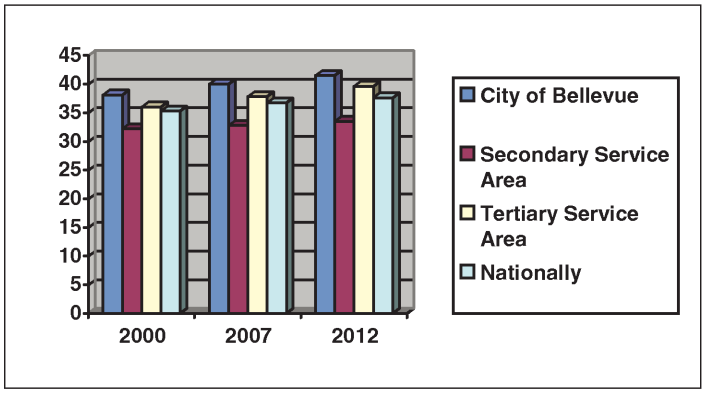
Next, the median age and household income levels are compared with the national numbers. Both of these factors are primary determiners of participation in sports and recreation activities (see Table-D). The lower the median age the higher the participation

rates are for most activities. The level of participation also increases as the income level goes up.

Median Age:

Area	2000 Census	2007 Estimate	2012 Projection
City of Bellevue	38.1	40.0	41.5
Secondary Service Area	36.7	38.6	40.0
Tertiary Service Area	36.0	37.8	39.6
Nationally	35.3	36.7	37.6

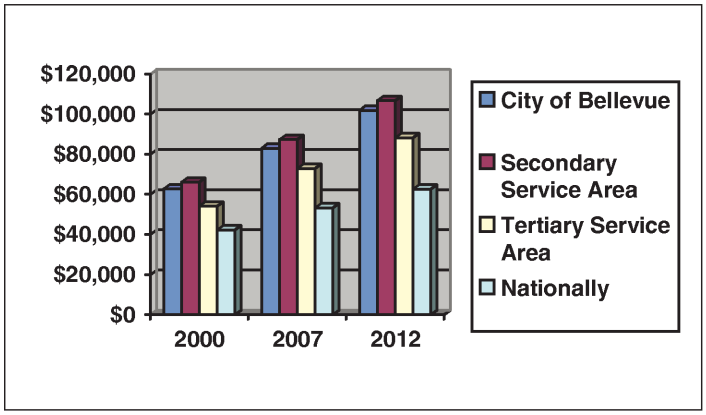
Chart- C



Median Household Income:

Area	2000 Census	2007 Estimate	2012 Projection
City of Bellevue	$62,673	$82,928	$101,747
Secondary Service Area	$66,025	$87,296	$106,726
Tertiary Service Area	$54,010	$72,883	$88,143
Nationally	$42,164	$53,154	$62,503

Chart- D



The median household income level must be balanced against the cost of living for the area to determine possible discretionary income available for recreation purposes. The income levels for all the service areas are substantially higher than the national median number. However, the relative high cost of living in the area reduces some of the level of discretionary income for residents of the greater Bellevue area.

It is estimated that only about 9% of the households in the secondary service area have a household income level under $25,000 annually.

Key Demographic Findings:

Secondary Service Area

- The population is expected to increase steadily during the 2000's.
- The population density is low to medium.
- The median age is significantly above the national average.
- Household size is substantially lower than the national average which indicates a smaller number of households with children.

- Median income is much higher than the national levels.

- There is a significant Asian population in the area.

Tertiary Service Area

- The demographic characteristics of the tertiary service area are similar to those of the secondary service area but with a slightly younger population and lower income levels.

City of Bellevue

- The demographic characteristics of the City of Bellevue are similar to those of the secondary service area but with a slightly older population, lower income levels and higher number of Asian residents.

Division II – Participation Estimates

Possible Participation Estimates: The National Sporting Goods Association, a national trade organization representing the sporting goods industry, each year has a professional company survey Americans regarding participation in over 45 sports activities. This information provides useful data regarding possible rates of participation in swimming as well as other sports activities.

Utilizing information from the 2006 National Sporting Goods Association survey and comparing them with the demographics from the secondary service area, the following participation projections can be made (statistics were compared based on age, household income, regional population and national population).

Participation Estimates – Secondary service area from the National Sporting Goods Association (based on 2007 population estimates).

Table- D

	Income	Age (avg.)	Region	Nation	Average
Swimming	28.3%	21.4%	18.7%	21.5%	22.5%

Income- Participation based on the 2007 estimated median household income in the secondary service area.

Age (avg.)- Participation based on averaging participation by different age groups in the secondary service area.

Region- Participation based on regional statistics (Pacific US).

Nation- Participation based on national statistics.

Average- Average of the other four columns.

When looking at participation rates in various recreation activities, the National Sporting Goods Association uses four different determiners for their percentages. Utilizing the average of these four categories takes into consideration each of the factors that can influence participation rates.

Anticipated Swimming Participation Numbers: Utilizing the average percentage from Table- D above plus the 2000 census information and census estimates for 2007 and 2012 (over age 5).

Table- E

	Average	2000 Part.	2007 Part.	2012 Part.	Difference
Swimming	22.5%	88,058	96,770	102,733	+14,675

Note: The estimated participation numbers indicated above do not necessarily translate into expected attendance figures at a new Bellevue aquatic center since many participants utilize other pools or natural bodies of water for their aquatic activities. However, it may be possible in the secondary service area for the center to capture between 10%-25% of the participants (depending on the type of facility) which would equate to 9,667 to 24,193 users (using 2007 population estimates). Within the City of Bellevue a facility may be able to capture between 15%-30% of the participants (16,925 to 33,850) and a facility may also draw some users from the tertiary service area but it is more difficult to determine the percentage of draw from this area. However drawing even 1% of the total participants could add another 1,942 potential users. It should be noted that these figures do not include use by organized swim teams or other groups that might come to an aquatic center for a meet or other activities.

Anticipated Number of Times Participating Per Year: By taking the number of annual participants from Table-E, times the average number of times swum per year (from 2006 NSGA standards) will equal the total number of estimated uses per year.

Table- F

	Average	2000 Uses	2007 Uses	2012 Uses	% Change
Swimming	41.1	3,619,184	3,977,247	4,222,326	+16.7%

Average - the average number of times (by region, income, sex and nation) a person will swim in a year.

This table indicates that there is a very high number of annual "swimmer days" from which to capture a sizable market share. It should be noted that many seasonal outdoor aquatic centers often have 60,000 to 90,000 swimmer days while indoor aquatic facilities are usually in the 200,000 range for annual swimmer days. It also must be remembered that many of these "swimmer days" are being satisfied by existing aquatic facilities. It is possible that a new Bellevue aquatic center could capture approximately 5% to 10% of the annual swimmer days in the secondary service area. This could translate into 198,862 to 397,725 swimmer days annually (based on the 2007 population numbers for the secondary service area). It should be expected that the percentage of swimmer days within the City of Bellevue itself could be in the range of 10% to 15% and drawing users from the larger tertiary service area could add additional swimmer days to the facility. If only 1% of the tertiary service area swimmer days were captured this would add approximately 79,819 swimmer days to the facility. The exact number of swimmer days that would be captured from the existing market will vary substantially based on the type of facility that is developed, the site for the center and the fees that are charged for use.

Participation by Ethnicity and Race: Participation in sports activities is also tracked by ethnicity and race. The table below compares the overall rate of participation in swimming nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2006 survey, the following comparisons are possible.

Table- G

	National Rate	Hispanic	Af Amer.
Swimming	21.5%	16.5%	12.4%

National Rate- The national percentage of individuals who participate in swimming.

Hispanic Rate- The percentage of Hispanics who participate in swimming.

African American Rate- The percentage of African Americans who participate in swimming.

It is important to note that the rate of participation in swimming is lower for Hispanics and dramatically less for African Americans. However, considering the relatively low percentage of Hispanics and African Americans in the service area the overall rate of use of a new aquatic center in Bellevue should not be affected. Unfortunately there are no swimming participation numbers available for Asians.

Participation Correlation: With indoor aquatic centers it is not unusual to include other dry activity areas in the facility. With this in mind, and utilizing information provided by the National Sporting Goods Association's 2006 survey, the following correlation between people who participate in swimming and other recreational activities is possible.

Table- H

	% of Swimmers	% of Activity Part.
Aerobics	20.3%	34.1%
Basketball	21.5%	45.4%
Exer. Walking	48.5%	31.3%
Exer/equip	32.7%	35.3%
Running/Jogging	21.5%	42.2%
Volleyball	11.3%	57.4%

Percent of Swimmers- The percentage of swimmers who would participate in the given activity.

Percent of Activity Participants- The percentage of the listed activity participants who would also participate in swimming.

These correlation statistics indicate the strong relationship between those people who participate in aquatics and other activities. These statistics also indicate the cross marketing opportunities that are present in aquatic facilities that include other active use spaces.

To help understand the overall market strength in a number of sports, below are listed a variety of indoor recreation activities and the relative market strength and rate of participation.

Summary of Sports Participation: The following chart summarizes participation in various sports and leisure activities utilizing information from the 2006 National Sporting Goods Association survey. Participation information was utilized for the Pacific region of the country rather than the secondary service area due to the analysis of a wider variety of sports activities beyond just swimming.

Table- I

Sport	Rank	% Part.	Age Group
Exer. Walk	1	36.5%	25 - 34
Swimming	2	18.7%	7 – 11
Exer/equip	3	19.6%	25 - 34
Workout Club	7	14.0%	25 - 34
Aerobics	9	12.1%	25 – 34
Running/jog	14	14.2%	12 - 17
Basketball	15	8.4%	12 - 17
Volleyball	24	4.3%	12 – 17

Rank - Popularity of sport based on national survey.

% Part. - Percent of population that would participate in this sport based on the Pacific region of the US.

Age Group - The age group with the highest level of participation based on national survey.

It is significant that swimming is the second most popular sports activity in the United States (and third in the Pacific region of the country) with nearly 19% of the population in the Pacific area of the country participating in the activity. However it should be noted that the Pacific area has the lowest rate of participation in swimming of all nine regions of the country.

Comparison of State Statistics with National Statistics: Utilizing information from the National Sporting Goods Association, the following charts illustrate the participation numbers in selected sports for the state of Washington.

Washington participation numbers in selected indoor sports - As reported by the National Sporting Goods Association in 2006.

Table- J

Sport Participation		Age Group	Largest #
(in thousands)			
Exer. Walking	2,150	25-44	45-54
Exer. w/Equipment	1,281	25-34	35-44
Workout at Club	1,230	25-34	25-34
Swimming	908	7-11	12-17
Aerobics	746	25-34	25-34
Running/Jogging	658	12-17	25-34
Basketball	386	12-17	12-17
Volleyball	165	12-17	12-17

Participation - The number of people (in thousands) in Washington who participated more than once in the activity in 2006 and were at least 7 years of age.

Age Group - The age group in which the sport is most popular. The age group where the highest percentage of the age span participates in the activity. Example: The highest percent of an age group that participates in exercise walking is 25-34. **This is a national statistic.**

Largest # - The age group with the highest number of participants. Example: The greatest number of exercise walkers is in the 45-54 age group. Note: This statistic is driven more by the sheer number of people in the age group than by the popularity of the sport in the age span. **This is a national statistic.**

When comparing these statistics to the national numbers in Table-I, there are a number of differences with exercising with equipment and workout at club being higher while swimming is lower. Swimming is the number four most popular activity in Washington. There are only state statistics for a limited number of activities.

Another method to measure sports participation statistics compares the percentage of the national population from the state with the percentage of national participation in a variety of sports.

Washington sports percentage of participation compared with the population percentage of the United States -

Washington's population represents 2.2% of the population of the United States (based on 2000 census statistics).

Table- K

Sport Participation Percentages	
Workout at Club	3.3
Exer. Walking	2.5
Exer. w/Equipment	2.4
Running/Jogging	2.3
Aerobics	2.2
Swimming	1.6
Volleyball	1.5
Basketball	1.4

Note: Sport participant percentages refer to the total percent of the national population that participates in a sport that comes from the state of Washington. It is significant that in five sports (workout at club, exercise walking, exercising with equipment, aerobics, and running/jogging) the percentage of participation is at or above the percentage of the national population. The fact that swimming is not one of these sports indicates that the activity is not as popular in the state.

Market Potential Index: Another method to measure possible participation in recreation and fitness activities is through the market potential index where rates of participation by adults in the secondary service area are compared with national numbers through the index rating. Utilizing information provided by ESRI, the following comparisons are possible.

Table- L

	# of Adults	Percentage	MPI
Swimming	76,165	21.4%	126

# of Adults- The number of adults in the secondary service area participating in swimming.

Percentage- The percentage of adults in the secondary service area participating in swimming.

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

The MPI index indicates that the rate of adult participation in swimming (in the secondary service area) is much higher than the national average. This shows a likely higher rate of usage of aquatic facilities.

Recreation Expenditures Index: In addition to participation in recreation activities ESRI also measures recreation expenditures in a number of different areas and then indexes this against national numbers. The following comparisons are possible.

Table- M

	Avg. Spent	SPI
Fees for Participant Sports	$196.53	174
Fees for Recreational Lessons	$241.58	185
Social, Recreation, Club Membership	$280.85	177

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.

The SPI index indicates that in all areas the rate of spending (in the secondary service area) is substantially above the national average. This shows that there is most likely a very high rate of discretionary spending for the types of services that an aquatic center might provide.

Division III – Aquatic Trends

Aquatic Participation Trends: Without doubt the hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, lazy rivers (or current channels), fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings is nearly dead. Leisure pools appeal to the younger kids (who are the largest segment of the population that swims) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 30% more revenue than a comparable conventional pool and the cost of operation while being higher, has been offset through increased revenues. Of note is the fact that patrons seem willing to pay a higher user fee with this type of pool than a conventional aquatics facility.

Despite the recent emphasis on recreational swimming the more traditional aspects of aquatics (including competitive swimming, water polo, synchronized swimming, diving, lessons/instruction, and aqua fitness) remain as a part of most aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive aquatic programs continue to be important.

Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for relaxation, socialization, and rehabilitation. This has been effective in bringing in swimmers who are looking for a different experience and non-swimmers who want the advantages of warm water in a different setting. The development of natural landscapes have enhanced this type of amenity and created a pleasant atmosphere for adult socialization.

The multi-function indoor aquatic center concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of aquatics activities and programs in an open design setting that features a lot of natural light, interactive play features and access to an outdoor sun deck. The placing of traditional instructional/competitive pools, with shallow depth/interactive leisure pools and therapy water, in the same facility has been well received in the market. This idea has proven to be financially successful by centralizing pool operations for recreation service providers and through increased generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting. Indoor aquatic centers have been instrumental in developing a true family appeal for community-based facilities. The keys to success for this type of center revolve around the concept of intergenerational use in a quality facility that has an exciting and vibrant feel in an outdoor like atmosphere.

The family oriented outdoor water park concept has also gained in popularity by providing for a variety of interactive aquatics activities and programs in a park setting that features a lot of grass, shade structures, sand play areas and natural landscapes. This idea has proven to be financially successful with most outdoor aquatic centers being able

to cover their operating costs with revenues generated by the facility itself. This has occurred by increasing the generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting.

This concept has carried over to indoor aquatic facilities as well. While the concept has had to be modified to meet the demands and limitations of an indoor environment, the presence of a family aquatic center has proven to be very popular.

A new concept is the spray ground, where a number of water spray features are placed in a playground setting where there is no standing water but the water is treated and recirculated much like a pool. This provides a fun yet safe environment where drowning is not a concern and lifeguards are not necessary.

Also changing is the orientation of aquatic centers from stand alone facilities that only have aquatic features to more of a full-service recreation center that has fitness, sports and community based amenities. This change has allowed for a better rate of cost recovery and stronger rates of use of the aquatic portion of the facility as well as the other "dry side" amenities.

Swimming is second behind exercise walking in popularity of sports and leisure activities nationally, meaning that there is a significant market for aquatic activities. Approximately 18.7% of the population in the Pacific region of the country participates in aquatics activities. The largest age group for participation in aquatics activities is in the younger age groups, with over 47% of all kids' ages 7-11 participating in swimming. More than 32% of all swimmers are under the age of 18 years, and nearly half are under the age of 25. Individuals that swim do so on a regular basis with an average of 41 days a year. This indicates that there is not only a large segment of the population that participates in aquatics activities but they do so on a relatively consistent basis. Within the state of Washington, swimming is the number four most participated in sports activity.

Within the Pacific Northwest, and the State of Washington in particular, the newer trends of indoor leisure pools, therapy pools and the outdoor water park concept have been a little slower to catch on compared to other areas of the country. The area also has an unusually large number of stand alone, single purpose indoor aquatics centers than what is found in other areas of the country. The multi-function indoor aquatic center especially in conjunction with other indoor recreation amenities is still a relatively new phenomena in the Pacific Northwest.

As a comparison, below are listed some of the most popular and traditional sports and the percentage of growth or decline that each has experienced nationally over the last 10 years (1996-2006).

Table- N

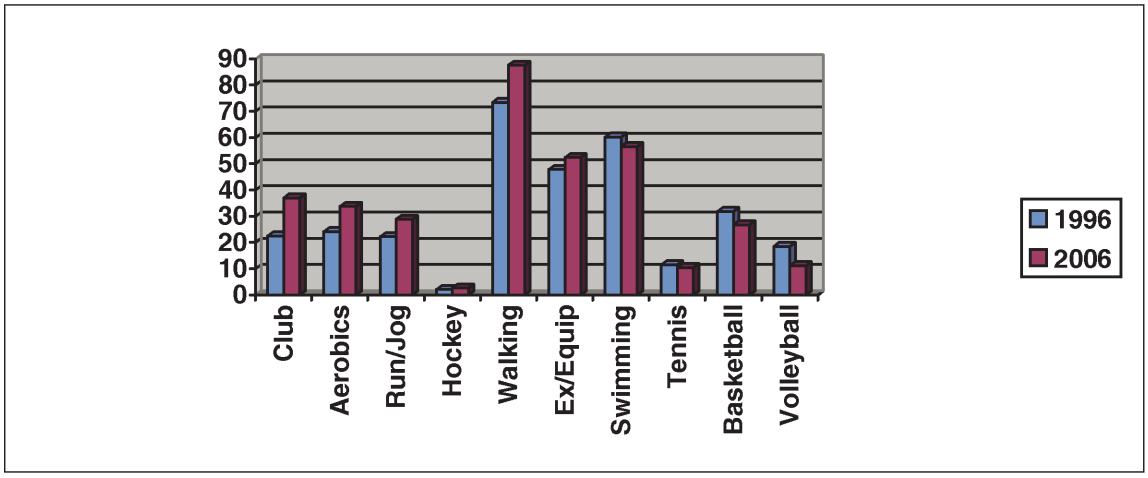
Sport/Activity	1996 Part.	2006 Part.	% Change
Workout at Club	22.5	36.9	+64%
Aerobic Exercising	24.1	33.7	+40%
Running/Jogging	22.2	28.8	+30%
Ice Hockey	2.1	2.6	+24%
Exercise Walking	73.3	87.5	+19%
Exercising w/Equip.	47.8	52.4	+10%
Swimming	60.2	56.5	-6%
Tennis	11.5	10.4	-10%
Basketball	31.8	26.7	-16%
Volleyball	18.5	11.1	-40%

1996 Participation - The number of participants per year in the activity (in millions) in the United States.

2006 Participation - The number of participants per year in the activity (in millions) in the United States.

Percent Change - The percent change in the level of participation from 1996 to 2006.

Chart- E



Despite the recent decline in swimming participation, the sport overall still remains immensely popular. However, the focus of swimming has changed from an activity that was oriented around competitive aquatics with deeper and colder water to a more recreational approach that emphasizes shallow, warm water, socialization and interactive play. Consistent use of an aquatic's facility by families and young children is dependent in large part on the leisure amenities. The sale of daily admissions and more importantly annual/season passes is also tied to the appeal of the leisure pool.

A 50 meter competitive pool allows for a variety of aquatic activities to take place simultaneously and can handle aqua exercise classes, learn to swim programs as well competitive swim training and meets (short course and long course). In communities where there are a number of competitive swim programs, utilizing a 50 meter pool in a yard configuration will allow up to 20 lanes to be available for training. A 50 meter pool that is designed for hosting meets will allow a community to build a more regional or even national identity as a site for competitive swimming. However, it should be realized that regional and national swim meets are difficult to obtain on a regular basis, take a considerable amount of time, effort and money to run; can be disruptive to the regular user groups and can be financial losers for the facility itself. On the other side such events can provide a strong economic stimulus to the overall community.

Competitive diving is an activity that is often found in connection with competitive swimming. Most high school and regional diving competition centers on the 1 meter board with some 3 meter events (non-high school). The competitive diving market, unlike swimming, is usually very small (usually 10% to 20% the size of the competitive swim market) and has been decreasing steadily over the last ten years or more. As a result, many states have or are considering the elimination of diving as a part of high school swimming. Diving programs have been more viable in markets with larger populations and where there are coaches with strong diving reputations. Moving from springboard diving to platform (5 meter and 10 meter, and sometimes 3 and 7.5 meters), the market for diver's drops even more while the cost of construction with deeper pool depths and higher ceilings becomes significantly higher. Platform diving is usually only a competitive event in regional and national diving competitions. As a result the need for inclusion of diving platforms in a competitive aquatic facility needs to be carefully studied to determine the true economic feasibility of such an amenity.

There are a couple of other aquatic sports that are often competing for pool time at aquatic centers. However their competition base and number of participants is relatively small. Water polo is a sport that continues to be reasonably popular on the west coast and uses a space of 25 yards or meters by 45-66 feet wide (the basic size of an 8 lane, 25 yard pool). However a minimum depth or 6 foot 6 inches is required which is often difficult to find for a space this large in more community based facilities. Synchronized swimming also utilizes aquatic facilities for their sport and they also require deeper water of 7-8 feet. This also makes the use of some community pools difficult.

Division IV – Market Assessment

Eastside Aquatic Facilities Assessment: With the large geographic region on the eastside of the Seattle metro area and the high population base there are a wide variety of aquatic facilities that are available.

Public Facilities – The City of Bellevue has the existing Bellevue Aquatic Center which is an older facility that has been expanded and renovated. The conventional 6 lane pool has a diving L attached as well as a separate therapy pool. The 6 lane pool no longer meets basic standards for swim meets but is utilized by a variety of high school and age group swim teams for practice. The therapy pool is a great amenity and is able to support a number of therapy users and other functions. However this is the only public pool in Bellevue and it has to try and support a significant number of aquatic needs for a population of over 100,000. It is also significant that there are no pools in any of Bellevue's four high schools. As a result all high school swim meets are held outside of the city limits.

Only a couple of the communities on the eastside actually own and operate their own pools. Back in the 1970's King County built a number of Forward Thrust pools in eastside communities. These facilities are very similar and consist of a single tank that is approximately 35 meters long with a bulkhead and diving area. Most of these pools also have a raised seating area as well. Over the last 10 years or more King County has been gradually divesting itself of these pools and they have either been taken over by local governments or the non-profit sector. All of these Forward Thrust pools are nearing the end of their life span and will either need to be replaced or renovated. In addition these pools are no longer state of the art and do not include any leisure amenities. Issaquah is one of the few communities that still owns and operates a Forward Thrust pool (Julius Boehm) but the Renton pool is in the process of being taken over by the Renton School District as well as the City of Renton.

The largest and best known public aquatic facility is the Weyerhaeuser King County Aquatic Center which is a highly competitive aquatics oriented center that not only services the swimming needs of the greater Seattle area but also the Pacific Northwest and serves as national venue for aquatic events. This is virtually the only indoor 50 meter pool in the greater Seattle area.

There are also relatively few public outdoor aquatic facilities on the eastside. The best known is the Henry Moses pool in Renton that has a strong recreational orientation and has a very strong market position on the southeast portion of the market area. Beyond this facility there are several smaller more conventional pools but that is it. It is also significant that there is not an outdoor public pool in Bellevue itself.

There are plans currently underway to replace the existing Northshore pool in Bothell with a new aquatic center in the area that would be a partnership with Bothell, Kenmore and Woodinville through a PRSA. Sammamish and Issaquah are also considering starting feasibility studies for new facilities.

Non-Profits – Several of the non-profit agencies have a strong position in the eastside market. Northwest Center has taken over management and operations of three "Forward Thrust" pools including Northshore, Mary Wayte and Hartman. They also operate the St. Edwards pool in Bothell. All of these pools are also nearing the end of their lifespan and will either need to be replaced or renovated in the near future. All of these pools are conventional pools with no strong appeal to recreational swimmers. Due to their age they also are not well configured to handle most swim meets.

The YMCA has facilities in Bellevue and Sammamish that both have small older four lane pools that have difficulty meeting the aquatic needs of their members. It is significant that the Bellevue Family YMCA has to rent pool time at other aquatic facilities in the area to meet the competitive swim needs. The Y hopes to begin construction on a new facility in New Castle in 2008 that will have an indoor lap and leisure pool and they are in the planning phase for a possible new Sammamish YMCA in the future as well.

The Stroum Jewish Community Center in Mercer Island also has an indoor 25 yard pool that not only serves its members but is utilized by local swim teams as a practice site.

The other major non-profit aquatic facility is the Samena Swim and Recreation Club that features an indoor 6 lane pool as well as an outdoor 6 lane pool that is bubbled in the winter months. They support their own swim programs and activities as well as a swim team. Samena also provides some pool time for other teams looking to rent lane time.

School Districts – There are a very small number of high school pools on the eastside. Juanita High School in Kirkland has a 6 lane pool with a bulkhead. This pool serves a wide variety of aquatic programs from around the area and is where most of the Bellevue School District teams hold their meets.

The other high school pool is at Hazen High School in Renton that has a 6 lane indoor pool with a diving L. The existing Renton Pool which is currently owned and operated by King County will be transferred to the school district in the near future.

With the large number of high schools that have swim teams, water polo teams and other aquatic needs, and virtually no pools of their own, school districts are highly reliant on other public, non-profit and private pools to operate their programs.

Private – Most of the private health clubs (Bally's, 24 Hr. Fitness, etc.) have smaller lap pools in their facilities but these mostly serve as fitness pools for their members. However both the Pro Sports Club and Bellevue Club have several indoor 6 lane pools that support swim teams, diving and other aquatic activities.

Private Pools/Swim Clubs – There are a large number of private pools and swim clubs located on the eastside many of which have waiting lists to join. In addition to providing seasonal recreational swimming opportunities to their members there is also a strong

summer swim team program. The Midlakes Swim League has 26 teams from primarily summer swim clubs that participate in their program. In addition, due to the acute lack of pools to support competitive swimming, diving and water polo, a number of these swim clubs have extended their seasons into the fall and winter as well as bubbled over their outdoor pools so they can rent their facilities to local teams. Newport Hills Swim & Tennis, Edgebrook Club, Woodridge Swim Club, Mercer Island County Club and Mercerwood Shore Club are some of these pools. This is a highly unusual situation that is generally not seen in other areas of the country. The majority of private pools and swim clubs have been in existence for a long time and as a result the facilities are now aging and many will need significant renovations in the coming years.

Other – The University of Washington has been in the planning stages for a possible new aquatic facility to support their varsity swim teams. There has been discussion about building an above ground 50 meter pool at Sand Point-Magnuson Park and a possible partnership with the City of Seattle for an outdoor facility to serve their needs. At this point no clear direction has been determined but it is highly probable that there will be a competitive 50 meter pool on the northside to support University of Washington swimming in the coming years.

Other Aquatic Service Providers: Below is a list of pools that are known to be a part of the aquatic market on the eastside of the Seattle area.

Indoor Pools

Public

Bellevue Aquatic Center (Bellevue)

Julius Boehm (Issaquah)

Weyerhaeuser King County Aquatic Center

Renton Pool (King County)

Non-Profits

Bellevue Family YMCA

Mary Wayte Pool (Mercer Island)*

Hartman Pool (Redmond)*

Sammamish YMCA

Samena Swim & Recreation Club

Northshore Pool (Bothell)*

St. Edwards Pool*

Jewish Comm. Ctr. (Mercer Island)

School Districts

Juanita High School

Hazen High School

Private

Bally's Bellevue	Bellevue Club
Epicenter Fitness	24 Hr. Fitness
Columbia Athletic Club (2)	Gold Creek Tennis & Sports Club
Cascade Athletic Club	Sammamish Club
Pro Sports Club	Bally's Kirkland

Outdoor Pools

Public

Henry Moses (Renton)	Cottage Lake Pool
Peter Kirk Pool	

Non-Profits

Samena Club**

Private Pools/Swim Clubs

Newport Hills Swim & Tennis**	Edgebrook Swim Club**
Newport Yacht Club	Norwood Comm. Swim Club
Overlake Country Club	Woodridge Swim Club
Phantom Lake Bath & Tennis	Somerset Recreation Club
Tam O-Shanter	Triangle
Maple Hills	Fairwood Golf & Country Club
Rolling Hills Swim Team	Plateau Club
Klahanie Swim Team	Strattonwood
High Woodlands	Kingsgate Gators
Kingsgate Monarchs	Kingsgate Royals

Mercer Island Beach Club

Mercer Island Country Club**

Mercerwood Shore Club**

* These pools are operated by Northwest Center

** Outdoor pools that are bubbled over during the winter.

Note: This is a representative listing of the pools on the eastside and is not meant to be a total accounting of all facilities. There maybe other pools located within the area that have an impact on the market as well.

Eastside Aquatic Facilities Summary: The following is a summary of the eastside aquatic facilities market.

- The City of Bellevue has one indoor aquatic center to meet the vast variety of aquatic needs in the community. The city does not have an outdoor pool.

- Most school districts do not have their own pools for their programs and are highly reliant on other public, non-profit, and private facilities to serve this need. The four Bellevue high schools must leave the community for all meets and many practices.

- Many of the existing indoor pools are reaching the end of their lifespan. This is particularly true for the Forward Thrust pools. A number of the private summer swim clubs have similar situations.

- Due to their age most of the eastside pools are no longer state of the art and are not configured properly to adequately serve the competitive needs of the area.

- Most public and non-profit indoor aquatic centers (with the exception of Samena, YMCA and the JCC) are stand alone aquatic facilities with very few other dry side amenities. This is highly unusual.

- The King County Aquatic Center is the primary competitive venue for any meets or competitions on a regional, national or international basis. In addition this facility must support a wide range of more local aquatic programs and activities.

- The key indoor pools that support the competitive aquatics market are the Bellevue Aquatic Center, Juanita High School pool, Julius Boehm pool, Mary Wayte pool, and the King County Aquatics Center.

- There are a surprisingly small number of public outdoor pools even though the Henry Moses pool in Renton has proved to be immensely popular and financially viable.

- The recreational swim needs of the eastside are not being well served by existing facilities which are generally more conventional in nature with deeper and colder water.

- Private summer swim clubs have taken advantage of an unmet demand for competitive aquatic facilities and extended their seasons or modified their facilities to serve this market.

Eastside Aquatic Team Assessment: The eastside of the Seattle metro area has a significant number of aquatic organizations and clubs that focus on competitive swimming, diving, water polo and synchronized swimming.

High School – The four high schools in Bellevue each have a swim team and there is one common diving team. In addition there are also 3 water polo clubs. With no school district pools all practices and meets must occur at other facilities. Teams train at the Bellevue Aquatic Center, Newport Hills, Woodridge, Mercerwood and Samena. Meets are held at either Juanita High School in Kirkland or Mary Wayte Pool in Mercer Island.

Other teams such as Mercer Island and Issaquah/Liberty utilize the public pools in their communities (Mary Wayte, Hazen High School, and Julius Boehm) as well as other private swim clubs for their teams practices and meets.

Swim Clubs – There are a significant number of age class swim teams on the eastside that utilize a variety of facilities for their programs some of the larger clubs are noted below.

Chinook Aquatic Club – Has several hundred members and they swim at Mary Wayte, Newport Hills, Bellevue Aquatic Center, Renton, Mercer Island Country Club and the Stroum Jewish Community Center.

WAVE – Has 125 members, and they swim at the Redmond, Northshore and Juanita High School pools.

Issaquah Swim Club – Has 260 members and they swim at Julius Boehm and Hazen High School.

King Aquatic Club – Is the largest swim team in the area with 350 swimmers. They swim at Mary Wayte pool, King County Aquatic Center, and other facilities.

BEST – Uses Samena and the Redmond pools for its program.

Bellevue Club – Has one of the larger swim teams with 300 kids and they use the Bellevue Club's pools for their program.

Midlakes Swim League – Is made up of 26 primarily outdoor swim club teams on the eastside. These teams swim at their respective club pools, however there large summer's end meet has to be held at the King County Aquatic Center.

Other – There are a number of specialty aquatic clubs that also use facilities on the eastside for their programs.

Pacific Northwest Diving – Has 60 divers and they practice and hold their meets at the King County Aquatic Center.

United Water Polo – Has 70-80 team members that practice at the Edgebrook Club and also at the King County Aquatic Center.

Seattle Synchronized Swimming – This team has 50 members that train at the St. Edwards pool and hold competitions at Juanita High School and the King County Aquatic Center.

Eastside Aquatic Team Summary: The following is a summary of the eastside aquatic team situation.

- There are a significant number of swim teams on the east side and a smaller number of diving, water polo and synchronized swimming teams. Many of these organizations are capped on their growth due to the lack of pool time.

- Most teams are dependent on a number of aquatic facilities for their practices and meets. Often these facilities are some distance apart.

- Many of the teams utilize the King County Aquatic Center for certain practices or meets despite the time and distance from their market.

- Most teams are utilizing private swim club facilities for at least a portion of their training.

Division V – Aquatic Event Analysis

Aquatic Event Analysis: Major aquatic facilities can provide an economic impact to the community through the hosting of aquatic events in swimming, diving, synchronized swimming and water polo. But, as the level of event increases from local to national, the likelihood of attracting events decreases in large part due to the number of facilities competing for the events, plus the rotation schedule used by the national aquatic governing bodies designed to distribute national and regional events out over different regions of the country. The number of actual events held at the local and regional level, while more prevalent, are also limited.

The reality of a state of the art aquatic center in Bellevue attracting a national event is probably one a year if all water sports are considered. Bellevue's main competition for these events will come from the King County Aquatic Center, in Federal Way. The National Governing Bodies (NGB's) many times move these events to different locations throughout the country each year. Even for regional events, competition with King County Aquatics Center will again be a strong factor and will limit the market for both facilities. State and local events provide the majority of opportunities including year-round senior/age group meets, summer recreation leagues (both city and county) and high school competitions.

Opportunities **-** Nationally over 20 facilities (see chart below) are all competing for the same events with more facilities coming on line each year. These state of the art facilities are labeled "tier one" and are capable of handling any of the aquatic events in the country scheduled by the NGB's. Bellevue will be competing with all the other tier one facilities in the country (and with King County Aquatics Center locally) when attempting to secure a national event. Most recently the direction has changed regarding the USA Swimming Olympic Trials and World Championships in swimming, where these events are now being held in large stadiums, with temporary pools. The tier one facilities are unable to host these events due to the 10,000-15,000 seat requirements.

Each sport varies slightly regarding regional competitions. The competition increases with the inclusion of "tier two" facilities such as smaller universities, community colleges and recreation departments. Tier two facilities tend to concentrate on more regional events and competitions rather than the national events but often must compete with the tier one facilities for these events as well. Regional competitions vary from sport to sport, as well as the actual region breakdown differs. Regions could include two states or several states, depending on how the NGB chooses to break the regions/zones down. Some sports do not have as much participation as others, so that can be factored into how the country is divided into regions. The size of the region will increase or decrease the number of tier one and tier two facilities competing for the same events.

For many tier two and other aquatic facilities below this level, local competitions are the bread and butter of the events with state competitions at the senior, age group and high school levels. In addition, individual clubs will want to host invitational meets at the

senior and age group levels, as well as high school dual meets can provide revenue-generating opportunities.

The financial reality of hosting major events is that the host facility often absorbs a financial loss in addition to closing the aquatic center over an extended period of time, interrupting normal programs and revenue sources. The upside of hosting major aquatic venues is found in tourism and the economic benefits to the community. Aquatic events will generate a significant amount of economic benefit to the host community. A study conducted by William Beyers of the University of Washington for the King County Aquatic Center in 2002 found that users of the facility spent almost $4.4 million annually. Using the multiplier effect the total benefit to the Washington economy was estimated at $7.5 million in 2001.

Tier One Aquatic Facilities

Facility	Location	Owner
U of Minnesota Aquatic Center	Minneapolis, MN	University of Minnesota
Weyerhaeuser Aquatic Center	Federal Way, WA	King County Parks and Rec
Indiana University Natatorium	Indianapolis, IN.	IUPUI
Pal Alto Aquatic Center	San Antonio, TX.	Pal Alto College
Avery Aquatic Center	Stanford, CA.	Stanford University
Campus Rec Center Natatorium	College Park, MD.	University of Maryland
James E Martin Aquatic Center	Auburn, AL.	Auburn University
Texas A&M Aquatic Center	College Station, TX.	Texas A&M University
Rose Bowl Aquatic Center	Pasadena, CA.	Not For Profit Organization
Mona Plummer Aquatic Complex	Tucson, AZ.	Arizona State University
Goodwill Games Aquatic Center	East Meadow, NY.	
Sonny Werblin Rec Center	Piscataway, NJ.	Rutgers University
Gabrielson Natatorium	Athens, GA.	University of Georgia
Miami University Aquatic Center	Oxford, OH.	Miami University
Indiana University Aquatic Center	Bloomington, IN.	Indiana University
Georgia Tech Aquatic Center	Atlanta, GA.	Georgia Tech
Ohio State Aquatic Center	Columbus, OH.	Ohio State University
Orlando YMCA Aquatic Center	Orlando, FL.	YMCA

Securing an Event - The basic steps for attracting the aquatic events differ with the level of the event. The national events have a bidding process that takes place through the NGB. Each NGB has a different approach to the selection of a site. Some selections are made through a site selection committee; some are selected through direct negotiations with the administrative group charged with the selection by the NGB. This process can change from year to year and with each NGB. The bid packets are very common from sport to sport. Other than the different technical needs of each sport, the packets consist of questions and information regarding a number of different areas.

1. Bid process
2. Facility specifications
3. Host organization
4. Accommodations
5. Transportations
6. Specialized Services
7. Special Events (socials\receptions)
8. Sponsorships (local opportunities, national obligations)
9. Merchandising (local opportunities, national obligations)
10. Actual Event program
11. Financial/Budget (local provides, local pays, local retains, national provides, national pays, national retains, other financial obligations)

Bids are awarded for national events anywhere from 1-4 years out depending on the event and the NGB. Typically, Sports Councils/Convention and Visitor Bureau's submit bids, in conjunction with a local organizing committee. Bids are submitted in advance and in many cases presentations are made at the National Convention or to a designated group. It must be realized that this is a very time consuming process and requires a substantial amount of funding for promotions and entertainment as well as often an upfront payment to the NGB.

Regional events are bid in a similar fashion depending on the NGB, but may have lesser requirements attached to the bidding process. Many times the bid process for a regional competition is to the administrative committee of that region during the National Convention. However, even this level of event can require both a considerable amount of time and money to secure. Securing a partnership with a college or university is required to host NCAA Division II, Division III, or NAIA Championships.

At the local level securing the events will most likely be determined by cost, availability and demand. Since the number of local events generally is far greater than the regional and national schedule, you may find yourself turning away local events depending on the utilization of your facility and program schedule. The easiest way to host a local event is to first identify what events are held each year in the community, county, and state. Then work with the local organizing groups to relocate the event.

Financial Responsibilities- The financial realities of hosting a national level aquatic event vary from sport to sport. Some will generate a small ($200-$40,000) profit, some will break even and some will struggle to break even or take a loss. This will depend on

but is not limited to several factors; the size of the event, interest in the sport, commitment from the community for events of this kind, dedication of the management team to producing a profit, number of participants, contractual obligations to the NGB, NGB restrictions on sponsorships, and budget relief from the value of in kind donations. NGB's do provide seed or advanced administrative money ranging from $500 for a US Collegiate Synchronized Swimming event to $20,000 (or more) for USA Swimming National Championship.

NCAA aquatic championships are break even at best. Contract and sponsorship restrictions make these very difficult events to generate a profit.

Regional events are less restrictive in contractual obligations, can pay for direct costs and generate rental fees and other revenue.

Local meets are the most profitable events over the long haul for a facility. Profits come from rental, fees for equipment use and direct costs are recovered. A steady calendar of local events can produce significant revenue; however pool rental fees vary across the country depending on the market value. Facilities in the event business such as the University of Minnesota charge $2,700 per day plus direct costs (any meet organizer must hire U of M technicians, custodial, etc.). Georgia Tech charges $1,200-$1,500 per day plus direct costs. The revenue for a typical 2½ day swim meet ranges from $3,750 to $6,750 (in each case rental fees were ramped up over time to avoid sticker shock). Many local meets are used as fundraising events for the community organizations that are regular users of the facility and as a result they expect discounted fees for meets and also expect to keep a very large percentage of the revenue generated by the event. It is not uncommon for a local swim club to generate between $4,000 and $6,000 profit per swim event. This can often result in little revenue being generated for the facility itself. It should also be realized that in some instances, revenues from general aquatic operations (lessons, recreation swimming, on-going rentals, etc.) can be greater that the revenues generated from special aquatic events.

As mentioned earlier, aquatic events can provide an economic impact to the community in entertainment, restaurant, and hotel receipts, but these events are also time-consuming endeavors from start to finish not to mention the fact that these benefits do not show up on the facility's bottom line.

To attract national level competitions the facility must be state of the art, it must be equal to or better than the top aquatic facilities in the country. This means first and foremost the pool must be fast. Fast water means fast swimming and fast swimming means records will fall. What makes a fast pool? Engineering. Simply put - water depth, water return, gutter system, lane lines, these all have a great deal to do with the speed of the pool.

The design of a state of the art facility is important to allow for maximum flexibility; creating the ability to host short course events (25yd., 25 meter), long course events (50 meters) and other aquatic sports events (diving, synchronized swimming, and water polo). A pool that meets this criteria will be at least an eight lane (9 feet wide), 50 meter

pool with two movable bulkheads, a separate diving pool with a complete springboard and tower system (two one meter and two three meter spring boards, and a 1,3,5,7.5,10 meter tower system) plus a warm up pool. The facility must have a minimum of 2000 spectator seats and deck space of 20ft around the entire pool. Currently IUPUI Natatorium has spectator seating for 4,700 and 20 ft of available deck space. Georgia Tech seats 2,000 spectators, with 24 ft of deck space. There also need to be state of the art timing systems and scoreboards as well as accommodations for the media.

A cohesive management team with a clearly defined mission, objectives, strategies and tactics must be established at the facility before bidding and conducting national events. This team must be experienced in aquatic event management, and have the ability to establish partnerships and relationships with various groups locally and nationally. The management team should include as part of its mission and objectives to provide an economic impact to the community.

With economic impact as part of the mission, the management teams' development of partnerships and relationships with various groups is critical to the success of every event. This can include community groups and organizations such as the Convention and Visitors Bureau (CVB's), Sports Councils or Sports Corporations (a group who's purpose is to bring sporting events to the city for economic dollars), Local Swim Committee (LSC - the local arm of USA Swimming), other Local Diving, Synchronized Swimming, Water Polo or Masters Swimming Committees, and National Governing Bodies for each of the Aquatic Sports.

Most of the National Governing Bodies in the USA are accepting and awarding bids to City Sports Councils or CVB's. A collaborative partnership with the Council or CVB can only enhance the chances of securing a bid. A solid working relationship with the NGB also needs to be established.

Persistence is a key element to the big picture; it takes time to establish a facility, management team and city. It is rare that a facility gets national events on the first attempt when bidding. There is a learning process that takes place, plus the NGB wants the facility to host local and regional competitions first to validate the facility for a higher level of competition. Understanding the National Governing Bodies wants and needs, the competition (cities and facilities), and the bidding process can take time.

Aquatic Event Conclusion

Careful consideration must be given to the realities of the competitive aquatic event market before deciding on the role that this aspect will have in an aquatic facility's operation. Besides the obvious requirement regarding the facility's physical layout and equipment, the center will need to have a philosophical commitment to these types of events, the staff will need to have the background and time to chase such activities, and the financial implications will need to be clearly understood. The competitive pool by virtue of water depth and temperature will serve primarily the competitive swimming and lap swimming markets but will be of relatively little interest to the general public for recreational swimming.

Bellevue Aquatic Center Recommendations for Aquatic Events

The proponents of the Bellevue Aquatic Center will need to determine the role that they expect competitive aquatic events to hold in the new facility. This role must be balanced with the other desired markets of being an aquatics training facility for a variety of athletes as well as a community based fitness and recreation facility. It is difficult to serve all of these different market areas adequately as each as very different needs and expectations. As a result a prioritization of use will need to be developed that indicates the relative hierarchy of the different activities.

With this in mind the various levels of aquatic competition need to be examined.

It will be difficult and expensive for a Bellevue Aquatic Center to adequately meet the obligations of a tier one facility and adequately support other identified functions of a facility (recreational swimming, therapy, fitness and instructional). The facility will have to include several bodies of water and specialized support spaces for events as well as day to day operations. Events at this level are difficult to obtain, require extensive marketing dollars and an extended amount of time to secure, a broad level of support from a variety of organizations and the events themselves often result in an operating loss. With the King County Aquatic Center in close proximity, attracting one national/international event a year at best is all that should be expected.

Attracting regional and state events as a tier two facility is more realistic but will still be difficult. While there are more events at this level there is still a great deal of competition for these activities (King County Aquatic Center) and there needs to be strong support from local organizing committees, and other organizations. Hosting 2 to 3 such events a year is probably the limit and securing this number of activities will require marketing dollars and considerable time. These events should have a strong economic impact on the Bellevue area but will only result in a relatively small profit margin for the center itself. The more these types of events are scheduled the more disruptive it will be to the everyday operation of the facility and the revenue stream that is the lifeblood of the center.

Local events, while not having the glamour and excitement of the other levels of competition, should really be the mainstay of the competitive event calendar of a future Bellevue Aquatic Center. The demand for these types of events is usually very high and the number of competitors is often greater than the more elite events. However, as was stated earlier most of the organizations are utilizing these activities as fundraisers and are often not willing to pay a high rate of rental and expect to run the event themselves in an effort to keep the vast majority of the revenue that is generated. As a result while the Bellevue Aquatic Center should be able to generate a reasonable revenue stream from local events, this will not be a primary source of overall revenue for the facility. The number of activities of this nature should not be so extensive that it negatively impacts use and revenue from other more critical sources such as community memberships, program and services and long term facility rentals.

Division V – Demographic and Market Conclusions

There is a large population base on Seattle's eastside that could support a large regionally based aquatic center. The secondary service area that basically covers the geographic eastside has nearly a half million residents. The population is expected to increase steadily over the next five years; while the median age is significantly older than the national numbers the median household income level is much higher.

While there are seemingly a large number of aquatic facilities on the eastside the reality is that there are very few public facilities or even non-profit centers. Many of these existing facilities are older buildings that will need to be replaced in the coming 5 to 10 year period and are no longer able to meet the demand and industry standards for such amenities. Bellevue high schools must leave the city for their meets and even at times for practices. There are a large number of private summer swim clubs that have been modified to help meet the demand for competitive swim time.

Many aquatic teams on the eastside can no longer grow in size with the lack of adequate pool time and space and most organizations have to utilize a variety of pools to meet their needs.

Determining the focus for the type and level of aquatic events that a new center should expect to pursue will be critical. It is very difficult to try and secure large national and regional events and with the presence of the King County Aquatic Center a short distance away it will be even more difficult. A new Bellevue Aquatic Center will need to concentrate on more local events and activities and also realize that it is the on-going everyday programs that provide the greatest financial base for the facility and will serve the greatest need.

Overall, there are a number of market opportunities for a new aquatic center in Bellevue. Specific facility options that are developed as part of the next phase of the project study will outline the financial requirements from both a capital and operations standpoint to make the project a reality.

Section II - Market Orientation

Based on the market information, the existing pools, and typical aquatic needs within a community, there are specific market areas that need to be addressed with a new aquatic facility. These include:

1. Leisure/recreation aquatic activities - This includes a variety of activities found at leisure pools with zero depth entry, warm water, play apparatus, slides, seating areas and deck space. These are often combined with other non-aquatic areas such as concessions and birthday party or other group event areas.

2. Instructional programming - The primary emphasis is on teaching swimming and life saving skills to many different age groups. These activities have traditionally taken place in more conventional pool configurations but should not be confined to just these spaces. Reasonably warm water, shallow depth with deeper water (4 ft. or more), and open expanses of water are necessary for instructional activities. Easy pool access, a viewing area for parents, and deck space for instructors is also crucial.

3. Fitness programming - These types of activities continue to grow in popularity among a large segment of the population. From aqua exercise classes, to lap swimming times, these programs take place in more traditional settings that have lap lanes and large open expanses of water available at a 3 1/2 to 5 ft. depth.

4. Therapy – A growing market segment for many aquatic centers is the use of warm, shallow water for therapy and rehabilitation purposes. Many of these services are offered by medically based organizations that partner with the center for this purpose.

5. Competitive swimming/diving - Swim team competition and training for youth, adults and seniors requires a traditional 6 to 10 lane pool with a 1 and/or 3 meter diving boards at a length of 25 yards or 50 meters. Ideally, the pool depth should be no less than 4 ft. deep (7 is preferred). Spectator seating and deck space for staging meets is necessary. This market is usually relatively small in number but very vocal on the demands for competitive pool space and time.

6. Specialized uses – Activities such as water polo and synchronized swimming can also take place in competitive pool areas as long as the pool is deep enough (7 ft. minimum) and the pool area is large enough. However these are activities that have small participant numbers and require relatively large pool areas. As a result it may be difficult to meet the needs of specialized uses on a regular basis.

7. Social/relaxation - The appeal of using an aquatics area for relaxation has become a primary focus of many aquatic facilities. This concept has been very effective in drawing non-swimmers to aquatic facilities and expanding the market beyond the traditional swimming boundaries. The use of natural landscapes and creative pool designs that integrate the social elements with swimming activities has been most effective in reaching this market segment.

8. Special events/rentals - There is a market for special events including kids birthday parties, corporate events, community organization functions, and general rentals to outside groups. The development of this market will aid in the generation of additional revenues and these events/rentals can often be planned for after or before regular hours or during slow use times. It is important that special events or rentals not adversely affect daily operations or overall center use.

Specific market segments include:

1. Families - Within this market, an orientation towards family activities is essential. The ability to have family members of different ages participate in a fun and vibrant facility is essential.

2. Pre-school children - The needs of pre-school age children need to be met with very shallow or zero depth water which is warm and has play apparatus designed for their use. Interactive programming involving parents and toddlers can also be conducted in more traditional aquatic areas as well.

3. School age youth - A major focus of this project should be to meet the needs of this age group from recreational swimming to competitive aquatics. The leisure components such as slides, fountains, lazy rivers and zero depth will help to bring these individuals to the pool on a regular basis for drop-in recreational swimming. The lap lanes provide the opportunity and space necessary for instructional programs and aquatic team use.

4. Teens - Another aspect of this project should be meeting the needs of the teenage population. Serving the needs of this age group will require leisure pool amenities that will keep their interest (slides) as well as the designation of certain "teen" times of use.

5. Seniors - As the population of the United States and the Bellevue area continues to age, meeting the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Aqua exercise, lap swimming, therapeutic conditioning and even learn to swim classes have proven to be popular with this age group.

6. Special needs population - This is a secondary market, but with the A.D.A. requirements and the probable existence of shallow warm water and other components, the amenities are present to develop programs for this population segment. Association with a hospital and other therapeutic and social service agencies will be necessary to reach this market.

7. Special interest groups - This is a market that needs to be explored to determine the use potential from a variety of groups. These could include swim teams (and other aquatic teams), school district teams, day care centers and social service organizations. While the needs of these groups can be great, their demands on an aquatics center can

often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

With the proper utilization of the aquatics area, it is possible to meet all of the varied market orientations as outlined above. However, it is critical that a balance be struck between the different market segments and no one area or market segment should dominate the facility.

Section III – Public Input

An important aspect of determining the need and demand for a Bellevue Aquatic Center is through public input regarding the project. With the help of the City of Bellevue staff and members of the SPLASH committee, a number of different public input mechanisms were utilized to gather information regarding community concerns and desires for such a project.

Stakeholder Meetings – A number of stakeholder meetings were held in person and over the phone during November and December of 2007. Some of these meetings were conducted by Bellevue staff and others by Ballard*King and Associates.

Focus Groups – 9 sessions with various interest groups in the area were conducted on October 29 and 30 of 2007.

Survey – a 400 response statistically valid survey of Bellevue residents was conducted in November of 2007.

What follows is a summation of the findings from these different public input sources.

Stakeholder Meetings: Stakeholder meetings were held with the following groups:

Bellevue Community College
Bellevue School District
King County Parks and Recreation
Bellevue Chamber of Commerce
Bellevue Downtown Association
Neighboring Communities

Each of these groups was asked to provide specific input regarding the Bellevue Aquatic Center planning efforts and the possible role of their organization.

The following is a general summary of the findings from each stakeholder meeting:

Bellevue Community College – This meeting was conducted with Jean Floten, President and CEO, by phone on December 17, 2007. She indicated that there is a need for an aquatic center on the eastside and there seemes to be a great deal of interest in the project.

Bellevue Community College does not have any space to locate an aquatic center on their campus and there appears to be a limited number of locations in Bellevue for a center of this magnitude. The college may be able to provide a limited level of capital funding ($1-$2 million at most) through a matching state fund but the project would have to apply for this grant and will ultimately have to compete with other identified needs in the state. If the center were built in relative close proximity to the college campus then they would probably use the facility for physical education, community education, and to support

some medical programs through hydro therapy. Other uses might include water rescue and kayaking classes.

Ultimately there might be a possibility of using students through a work study program to help with staffing of the center.

Bellevue School District – A meeting was held with Jack McLeod, Facility Manager with the Bellevue School District on Friday December 7th. In this session he reiterated the district's overall support for a new aquatics center, especially one that supported competitive swimming, diving and water polo. However, the Bellevue School District does not have any property that is either large enough for an aquatics center or that they would be willing to sell. The school district would also not be able to contribute any capital funding to build the facility but would be interested in utilizing the center for district aquatic programs and would be willing to pay market rates for pool time.

King County Department of Natural Resources and Parks – This meeting was conducted by phone on December 4th with Margaret Anthony, King County Parks Operations Manager. She noted that the parks division had been short on funding for years and as a result King County has been "giving away" their facilities (including aquatic centers). They will not be building any new pools in the county in the future but do plan to hold on to the King County Aquatic Center.

The King County Aquatic Center was mandated to cover 50% of operating costs but the facility has been unable to meet this requirement. While event revenue has increased steadily it still is not producing enough to meet its goals while at the same time costs for staffing and utilities continue to rise.

There is definitely a strong aquatics market on the eastside for a large aquatics complex. The situation will only get more acute as the Forward Thrust pools reach the end of their usable lives. With the growth in the popularity of water polo the need for more pool time has also grown. The greatest demand for an eastside aquatic center is for practice and training, but the facility should not be oriented toward anything more than local meets as the facility would have to go head to head with the King County Aquatic Center for the other events. The county has a strong concern that the market is not large enough for two aquatic centers that focus on regional and national events.

One of possible limitations to the eastside market will be traffic issues that may impact regular uses by organizations that are some distance from the site. It is important to realize that competitive pools do not pay their own way and teams are not able to pay an hourly rate that is equal to the cost of operation.

Margaret indicated that King County would most likely not be a capital partner in a new eastside aquatic center as their existing capital budgets continue to shrink. However this would ultimately be a decision for the county's elected officials.

Bellevue Chamber of Commerce – This meeting was held on January 8, 2008. Key findings:

TO BE COMPLETED

Bellevue Downtown Association – A phone conversation was held with the president, Leslie Lloyd on December 3, 2007. She indicated that there is a need for a new aquatics center in Bellevue but there are a lot of needs in the community that also have to be funded. Downtown Bellevue is in need of $185 million in funding for a variety of projects and the city has not been able to keep up with the demand. She thinks that the project is a great idea but does not believe that it can compete with other funding needs in the community.

Leslie is not sure what type of facility should be built. Having a recreation focus will help but a competitive pool (if it were to be built downtown) orientation would bring an economic impact to the downtown. She is not sure of the downtown business communities overall support for the project as there are lots of organizations in the area that are trying to raise capital for their projects. This includes a children's museum and a performing arts center.

It is not anticipated that the Bellevue Downtown Association will have much involvement in the project other than helping to get information out to the public and business community.

Neighboring Communities **-** Phone conversations were held with the following organizations.

City of Sammamish – A discussion with Jessi Richardson, Director of Parks and Recreation, indicated that negotiations are still on-going with the city and YMCA over a possible joint recreation center that would include aquatics. Funding by the city would require the passage of a bond issue in November 2008. The city is also preparing to enter into an agreement with the City of Issaquah to complete a feasibility study for a possible aquatic center that would help both communities. This study would also look at the future of the Julius Boehm pool as well.

Jessi indicated that there is a strong need for a competitive aquatic center on the eastside as most of the existing aquatic facilities are old and in need of being replaced. While the needs of competitive swimming must be acknowledged, there are many other aquatic needs that will need to be served by a new aquatic center.

The City of Sammamish is willing to explore a possible partnership with Bellevue on a regional aquatic center as an option to meet some of the aquatic needs of the Sammamish community. Site would be a primary driver on the level of interest. A site in close proximity to Sammamish (Marymoor Park or a site along I-90) would be required. It is possible that the city might be willing to explore some level of capital and operations partnership for an aquatic center that is close to Sammamish.

Issaquah School District – In a phone conversation with Steve Crawford of the school district it was noted that the district does not currently have a swimming pool and they do not plan to build any pools in the future. He noted that there is a general lack of pool time on the eastside and that many of the existing pools were older and in need of being replaced or renovated. Steve also indicated that there have been on-going efforts to try and develop a new pool in the Issaquah/Sammamish area. The cities or Issaquah and Sammamish are preparing to do a joint study on a possible center and the YMCA is also still pursuing a possible new facility with a pool.

The school district does not have any school sites in Bellevue that are large enough to support a regional aquatic center and any possible utilization of a new Bellevue Aquatic Center would depend on not only what happens with local efforts to build a new pool but also where the new aquatic center would be built in Bellevue. A site along the I-90 corridor would make it easier for school district swim teams to utilize a new aquatic center.

Lake Washington School District – A phone conversation was held with Forrest Miller, Director of Support Services regarding aquatic facilities and needs in the district. The school district has four high schools that either utilize Juanita High School's pool or the Hartman Pool. The district is currently assessing the status of the Juanita pool and it is possible that at some point in the future they may not continue to operate this pool.

Lake Washington might be interested in purchasing pool time at a new aquatic center in Bellevue but site would be critical. The new pool would have to be located on the north side of Bellevue to be convenient to their high schools.

Focus Group Sessions: On October 29th and 30th 2007, a series of focus group sessions were held with different segments of the aquatic community. Focus groups included:

Age group swim team coaches
Water polo, diving and synchronized swim teams
High school swim and diving coaches
Local neighborhood association swimming pools
Tri-athlete community representatives
Medical/therapy groups
USA Swimming representatives
Bellevue Family YMCA representatives
Northwest Center representative

Each of these groups was asked a series of questions regarding a Bellevue Aquatic Center. These included what issues were of concern regarding indoor aquatics, and what specific amenities should be included in an indoor facility.

The following is a general summary of the findings from each focus group:

Age Group Swim Teams – this meeting was held with several coaches of local age group swim teams.

In Attendance:

Laura Halter, Issaquah Swim Team
Tom Hutchison, Issaquah Swim Team
John Walker, King Aquatic Club

Key Findings:

- King Aquatic Club – this club covers the area from Tacoma to Mercer Island and has 350 swimmers. They swim twelve months a year at the King County Aquatic Center, Mary Wayte pool, as well as a number of other pools on the south side of the Seattle metro area. They practice seven days a week (both morning and evening) and the rates for pool rentals vary from $40-$45 or more. They pay up to $260,000 a year for pool time. The King Aquatic Club also has a management arrangement with some of the pools that they use.

- Issaquah Swim Club – based in Issaquah, this club has 260 swimmers that utilize three pools including Boehm and Hazen High School. The club swims 11 months a year and have both morning and afternoon practices. They pay a little under $10 per lane/per hour for pool time and their yearly total for pool rental is up to $120,000 a year.

- There is a very strong competitive swimming community on the east side of the Seattle area that is being held back by the lack of pool time. Both teams have grown substantially in the last few years and now have waiting lists.

- There are a number of other swim teams in the area including, Chinook, Best, Wave, and a team at the Pro Club. Most teams have 100 or so swimmers.

- A new aquatic center in Bellevue should have the following:
  - 50 meter pool
  - Seating for 800 – 1,000
  - Ample deck space for swimmers
  - Adequate parking

- While the aquatic center should be designed for swim meets the focus should be more on meeting the specific needs of the east side area. Training time is a bigger issue than meet space but meets will be important. Local and regional meets in the Seattle area should be the emphasis and leave the larger national meets to the King County Aquatic Center.

- Local teams in the area would rent pool time in a new facility but may not entirely leave their home pools for training. Swim teams would be willing to pay rates to

use a new pool at a level that is comparable to other local facilities. A rate as high as $15 to $20 per lane hour was mentioned as being at the high end.

- A new 50 meter pool would grow the market more than move users from existing pools.

- The location of a new competitive pool would be critical. Swimmers are willing to drive a considerable distance for meets and long course training (but not so far for short course training) but the center must be in a central location along the I-90 corridor. They would prefer to see the facility privately managed rather than municipally run.

Triathlete Community – there was one representative of the triathlete community present at this meeting.

In Attendance:

Jill Fry- Triathlete and coach

Key Findings:

- There are a much larger number of triathletes in the Seattle area than in most other metropolitan areas of the United States and there has been a strong growth in the number of triathlons in the Seattle area.

- Triathletes are reluctant to join a masters swim program as they often feel intimidated.

- Triathletes are interested in having an aquatic center where they could train on a regular basis. Many triathletes do use the Bellevue Aquatic Center but there are no day time training times available.

- The Pro-Club also has a significant triathlete training program and there is training time available at Juanita High School, Bellevue YMCA, and the Bellevue Club.

- There needs to be several lap lanes available for training for an hour to hour and half time slot. To serve the mid day market there also needs to be drop-in child care services. Other non-aquatic services that would be of advantage would include cycling/spinning studio, group fitness area, and a weight/cardio equipment area.

- A location that has easy access to the major interstates (I-90 and I-405) is essential.

- Triathletes are willing to pay user fees for lap space.

- There is a greater need for competitive pool space than what the existing pools in the area can provide.

Water Polo, Diving, and Synchronized Swim Teams – representatives of water polo, diving and synchronized swimming were present at this meeting.

In Attendance:

Patti Sutherland, Pacific Northwest Diving
Bruce Glidden, United Water Polo
Craig Penner, Seattle Synchronized Swimming

Key Findings:

Diving

- Representatives of Pacific Northwest Diving (a private diving club) indicated that there were not nearly enough facilities to support competitive diving in the Seattle area. They currently have 60 divers but are handicapped by the lack of pool time which does not allow them to grow. They believe that there is market for up to 250 divers. There used to be 8 diving clubs in Seattle and now there is only one. The only true diving facility is at the King County Aquatic Center. They dive 4 days a week for 2.5 hours and often share the dive tank with synchronized swimming.

- For high school diving all four schools in Bellevue practice at the same time at the Bellevue Aquatic Center on a single board. There are between 20-25 kids total.

- Competitive diving needs a facility with multiple boards, at least two 1 meter boards and one 3 meter board. A dive tower with 3, 5, and 10 meter platforms would be great for national meets but is not essential for a local diving program. A tower would allow recreational slides to be run from this location as well. There also needs to be space for dryland training on the deck as well as other areas of the center.

- There is concern that the market for diving is shrinking as there are not enough facilities to drive increased use. The cost for renting pool space is also going up which further limits the market.

- They would be willing to rent a diving area 5-6 days a week from 4-9pm. They currently pay $54.00 an hour for pool space.

Water Polo

- Representatives from United Water Polo reported that they have 70-80 kids that train year round, approximately 30 hours a week at Edgebrook in the summer and the King County Aquatic Center during the other seasons. The club pays $60 an hour at Edgebrook and $310 an hour and up at KCAC. They host 3-4 competitions a year.

- There are two other water polo clubs in the Seattle area both of which are smaller organizations.

- For the state of Washington north of Pierce County water polo is only a club sport for high schools but in the area of Pierce County and south it is a varsity sport. There are 3 high school teams in Bellevue and another in Mercer Island. Boys compete in the fall and girls in the winter/spring seasons.

- Water polo needs an area that is 25 yards by 30 yards (an 8 lane 25 yard pool) with a depth of at least 9 ft.

- United Water Polo could commit to 30 hrs a week of pool time in a new facility (some of the time would be used strictly for conditioning) if they could get a firm commitment on pool availability.

Synchronized Swimming

- Seattle Synchronized Swimming is a 25 year old club that once had 75-80 members but know has 50. The team members come from all over the Seattle area and they currently swim at St. Edwards pool and host some events (3 to 4 a year) at Juanita High School. They currently pay $46 to $62 an hour for pool time and use 19 hours a week for 10 months a year. Times of use are 5-8pm on Monday and Wednesday, 5-7:30pm on Tuesdays and Thursdays, as well as 5-7pm on Friday, 8am-12pm on Saturday and 3-7pm on Sundays.

- The club would like to have more pool time and believe that the number of members would grow as a result.

- There is only the one synchronized swimming club in Seattle but there are four other clubs in the surrounding area.

- Local big events include a national meet that is held every 6 years and smaller such event every 3 years. Large national meets are held at the King County Aquatic Center.

- Ideally a pool that is 20 meters by 30 meters with a 3 meter depth is needed but at minimum need an area the size of a 6 lane x 25 yard pool and 2.5 meters of depth. Having an elevated spectator seating area is also desired.

- Each of the three groups noted that a central location with easy freeway access would be an important criteria for site selection.

Bellevue Family YMCA – two representatives of the Bellevue Family YMCA were in attendance at this focus group.

In Attendance:

Terry Pollard, Group Executive
Keri Stout, Associate Executive Director

Key Findings:

- For the Bellevue Family YMCA aquatics represents a major portion of their program offerings. However this is difficult with a small 4 lane 25 yard pool. Swimming lessons is the largest aquatic program. They try to achieve a balance between programming and drop in use of their pool. They have time set aside for lap swimming, youth swim team use, as well as for a master's team.

- Due to the small size of their pool the YMCA is forced to rent other pools in the area including Samena and the King County Aquatic Center. Most of the rental time is for their competitive swim teams.

- The YMCA has determined that there is simply not enough pool time available in the east side of the Seattle area due to the general lack of indoor pools.

- The YMCA will be building several new facilities on the east side in the next several years.
    - New Castle – the Y hopes to break ground in 2008 for a new facility that will include three tanks of water, a 4 lane lap pool, therapy pool and recreational pool.
    - Sammamish – this project is still somewhat up in the air but they hope to have a new Y in the next few years. It would definitely have an indoor pool.
    - Bellevue Family YMCA – there is a desire to see some expansion at their current site and they would like to expand the aquatics area as well as other aspects of the center.

- The YMCA had the following opinion on the preliminary SPLASH plan for a new Bellevue Aquatic Center.
    - The facility has a very strong competitive swimming orientation but not as much for other interests.
    - There is some concern that the market may not be large enough to support a center of this size and magnitude. Some of the use may have to come at the expense of other existing aquatic facilities.

  - It should be realized that most people will not drive that far (more than 10 to 15 minutes) to use an aquatic center.
  - The project will need to look for partnerships with other organizations such as the YMCA to succeed.

- The YMCA is interested in a possible partnership on the project. The YMCA would have a capital interest in the project but it would be 2010 or later before a fundraising campaign could begin and the aquatic center would have to compete with other YMCA projects for funding. Any capital commitment by the YMCA will require that they have operational responsibility as well. If the project has this level of financial and operational involvement then it should be a YMCA rather than some other hybrid facility.

- A site would have to be found that is some distance away from their current Bel Red Road site so they do not compete with themselves. A site in the Bel Red corridor area would have a dramatic negative impact on their existing YMCA.

Medical/Therapy Groups – four representatives of local medical therapy groups attended this focus group.

In Attendance:

Harriett Ott, Community Integration Services
Susan Collins, Harbor View Medical Center
Cindy Brennan, Olympic Physical Therapy
Sallie Cowgill, Olympic Physical Therapy

Key Findings:

- Community Integration Services provides aquatic therapy programs at the Bellevue Aquatic Center as well as four other pools in the area. They are currently serving approximately 150 individuals in the program.

- The Bellevue Aquatic Center has the only true therapy pool anywhere on the Seattle eastside area. However there is not enough pool time available (especially in the evenings and weekends) for the therapy needs of the area. The Bellevue pool is currently utilized from 9am till 4pm Monday through Friday. The fee is $18 per hour for a single patient and $48 for a full class. There is a real concern that these rates result in a program that is not affordable for people who need it most.

- Harbor View Medical Center is trauma center that is located in Seattle that provides water therapy for its patients at the Fur Crest State Mental Hospital pool. They rent the pool once a week for an hour and pay $60. Harbor View would like to utilize evening and weekend times (limited to a couple of hours a week) at the

Bellevue Aquatic Center but these times are not available. They serve approximately 200-400 patients a year.

- Olympic Physical Therapy has 9 clinics in the Puget Sound area including 5 on the east side. None of their clinics have therapy pools. They would be interested in referring patients to the aquatic center but are not sure that they would actually do physical therapy on site. If they did Olympic Physical Therapy would be interested in a rental arrangement for pool time.

- Olympic Physical Therapy has a strong interest in being a contract provider of fitness classes and personal training (both aquatic and dryland) for the center.

- There is a belief by some that the Bellevue Aquatic Center is not being used to its full potential and should be marketed better.

- While a new therapy pool would be great in Bellevue there is actually a higher need for this type of pool in Seattle itself.

- A new therapy pool should have:
    - Wide steps for access and exercise use
    - A 10ft long bench in the pool for exercise
    - A pool area that is larger than the current Bellevue pool and needs to handle up to 20 patients and therapists
    - Disinfection should be by other means than chlorine
    - The area will need to have some privacy
    - Lifts and a ramp are both necessary
    - The water temperature should be 92-95 degrees
    - Hot tub that is 95 degrees
    - There is a need for deeper water 4-8 feet as well as shallower depth of 2-3 feet. A current channel could also be utilized by patients
    - Office space for use by therapists.
    - The general locker rooms should be open and easily accessible
    - There will need to be a number of assisted change rooms that have a toilet, shower, sink and large, wide, adjustable height changing bench.

- Community aquatic needs include:
    - Need to teach children how to swim
    - Will need to serve the needs of seniors
    - Need more warm water than cold water

- The aquatic center needs to be in a location that is easily accessible from the entire eastside. A location off of I-90 is preferred. Therapy patients are willing to come from a long distance for a good pool. There will need to be more handicapped parking spaces than what are currently available at the Bellevue Aquatic Center. The site should also be on a main bus line.

- The availability of pool time and cost will determine the level of use of the pool for therapy.

- There are many hospitals in the Seattle area that utilize water therapy but only the VA hospital has its own pool.

Local Neighborhood Association Swimming Pools – several representatives of local swim clubs (Midlakes Swim League) and neighborhood swimming pools attended this focus group.

In Attendance:

Deanndra McKaig, Norwood Community Swim Club
Tonya Swick & Patty Grossbard, Samena Swim & Recreation Club
Laura Halter, Edgebrook Swim & Tennis Club

Key Findings:

- The Midlakes Swim League is made up of 25 smaller (primarily outdoor) swimming pools on the east side of Seattle.

- The Norwood Community Swim Club is located in Bellevue and has an outdoor 4 lane lap pool that it is too shallow for any swim team uses. They have approximately 100-140 families and their season runs from mid May to mid September. Most members come from the immediate area and the yearly fee is $400. Norwood is not overly concerned about a negative impact from a potential new Bellevue Aquatic Center but is not as supportive of the recreational pool aspects of the project.

- Samena Swim & Recreation Club is also located in Bellevue and it has both indoor and outdoor pools (indoor is a 6 lane 25 yard pool and outdoor is a 6 lane pool as well). They serve as a community swimming pool, have a large lesson program, and cosponsor the BEST Swim Team. Many other swim teams train at this facility as well. Membership is 1,600 units or approximately 6,000 individuals. Rental fees for swim team use are $50 an hour for 4 lanes. Samena also has other dry side amenities and programs. They do have some concern as a not for profit organization regarding the potential impact of a new Bellevue Aquatic Center especially any outdoor or recreational elements.

- The Edgebrook Swim & Tennis Club is an outdoor 6 lane pool that is bubbled during the off season for use by swim teams. Their fees are $500 a year. They are not concerned about potential competition from a potential new Bellevue Aquatic Center.

- There is definitely a need for more competitive water but not sure about recreational water.

USA Swimming – two representatives of USA swimming attended this session.

In Attendance:

Ron Van Pool, Past President, USA Swimming
Andy Hathaway, Pacific Northwest Swimming Chairman

Key Findings:

- The representatives of USA Swimming are aware of the need for more competitive swimming pools on the eastside of Seattle. There is also a concern over the likelihood that the Titlow 50 meter pool in Tacoma will be lost in the near future. Most of the swimmers in the Seattle area come from the east side.

- The University of Washington would like to build a new indoor 50 meter pool but the focus for the future is on a new football stadium and not much else. It will be difficult to find a site for the pool until the stadium issue and the other transportation issues are decided. There is the possibility that the City of Seattle might be willing to complete a feasibility study for a new 50 meter pool as part of a partnership with the university.

- It will be critical that a new aquatic center in Bellevue have a multi-use approach. It should not be just a competitive venue but also have recreational and therapy uses as well. A new facility should also focus on a learn to swim program, the development of lifelong aquatic activities, and the promotion of the quality of life that a pool will bring.

- Funding for this project will require a broader base of interest and use than just competitive swimming. The facility should also contain other non-aquatic elements as well to be successful.

- A Bellevue Aquatic Center will need to have a different orientation from the King County Aquatic Center. The Bellevue facility should not pursue and try to host national level events as these are more appropriate for the KCAC.

- Ideally USA Swimming would like to see a regional plan for meeting the needs of competitive swimming in the greater Seattle area adopted.

- Partnerships with other organizations and entities should be strongly pursued.

- There are a very large number of private swim clubs in the area and most have waiting lists. Most of the swim teams in the area are also at capacity and also have wait lists.

Northwest Center – A representative of Northwest Center attended this session.

In Attendance:

Ty Taylor, Vice President

Key Findings:

- A new Bellevue Aquatic center should contain more than just swimming pools. It will need to be a multi-use facility with a variety of components. The leisure pool will drive use and revenues in the center and the competitive aspects of the project should probably be toned down.

- Most of the pools that Northwest Center operates now (Mary Wayte, Northshore, St. Edwards, and Redmond) still have pool time available just not at prime use times of late afternoon or early evening. There is a concern that there may not be enough demand to support a 50 meter pool. Northshore (Bothell) only hosts 3 meets a year and has plenty of capacity. Mary Wayte (Mercer Island) has less time available during prime time but its day time hours are very slow. They rent their pools for $100 an hour. For each one of their pools, they receive a $100,000 payment in public funding from the local jurisdictions that they are located in.

- Most people are not willing to drive very far (less than 15 minutes) to use a pool.

- There is definitely an aging pool inventory on the east side. The bond repayment schedule will be completed for all the Forward Thrust pools by 2010-2011. Northwest Center estimates that their pools have approximately 10 years of functional life left. After this time these pools will need to be replaced.

- Northwest Center would like to be a part of the project team and possibly could contribute up to $5 million but they would have to be operators of the facility.

- The aquatic center will need to be located at a central site within the city.

High School Swimming and Diving Coaches – representatives of high school swim teams that may also coach local swim clubs attended this focus group.

In Attendance:

Eric Bartleson, Newport High School, Newport Swim & Tennis Club
Cory Hilderbrand, Bellevue High School, Bellevue Club
Nick Johnson, Sammamish High School
Kris Daughters, Liberty High School, Overlook Country Club Pool
Laura Halter, Issaquah High School
Jeffrey Lowell, Mercer Island High School

Key Findings:

- The high school swim season is –
  - Boys – mid November to the end of February
  - Girls – Last of August to mid November

- Most high schools pay between $50 and $75 an hour for pool time and usually $500 to $600 a week. The cost for pool time is high.

- All divers in the Bellevue high schools train together at the Bellevue Aquatic Center.

- Newport High School trains in the outdoor pool at Newport Hills Swim & Tennis Center. There are 80 girls and 8 divers and 49 boys and 2 divers.

- Bellevue High School trains at the Woodridge and Mercerwood outdoor pools and at the Bellevue Aquatic Center. There are 58 girls and 2 divers and 40 boys and 1 diver.

- Sammamish High School trains at the Bellevue Aquatic Center and the team has 30 girls and 10 boys.

- Interlake High School trains at Samena or Newport Hills and the team has 24 girls and 20 boys.

- All Bellevue high schools must leave the city for their meets most are held at Juanita High School or at Mary Wayte on Mercer Island.

- Liberty High School in Issaquah trains at Hazen High School and a limited amount of time at Boehm. Their meets are held at Boehm. They would not use a new Bellevue Aquatic Center unless they were swimming against a Bellevue high school team due to the distance from their school. Still there is not enough pool time in the area.

- Mercer Island High School has 77 girls and 55 boys on their team. They use Mary Wayte pool for training and meets and have some use of the Mercer Island Country Club pool as well. They would have limited use of a new Bellevue Aquatic Center; they might host a meet or use the new pool for league championships.

- There is a strong demand for a competitive pool for both training and meets. Pool time becomes most acute during the girls season. Diving is not that strong on the east side.

- There is a strong demand for swimming lessons and the city should focus on making sure all youth have the opportunity to learn how to swim.

- The aquatic facility should serve a variety of aquatic needs.

- There is some concern that public pools in the area have the perception of not being well run.

- Some of the existing pools in the area that are currently renting to swim teams may be hurt financially if a new competitive aquatic center was built in Bellevue. This would be true for Newport Hills Swim and Tennis Club but would not affect other facilities as much.

- Newport Hills Swim & Tennis Club has two pools one of which has a bubble in the winter. They are nearing capacity has a club.

- The Bellevue Club has an extensive aquatic center but it is at capacity and does not have any time available for outside rentals. It would not be affected at all by a new Bellevue Aquatic Center. They have their own 300 member swim team and rent pool time for long course training in Seattle.

- The Overlook Country Club has no concern over the impact of a potential new pool in Bellevue. They are an outdoor, neighborhood based club.

- Many of the outdoor swim clubs have aging facilities and some are struggling financially.

- Specific facility needs include:

    - 50 meter by 25 yard pool
    - Recreational water – this is very important
    - Opportunities to do multiple aquatic activities at the same time and location
    - A swim team coaches office
    - A place for dryland training (either on deck or in another area of the center)

- There is a concern over time that the needs of the local high school swim teams in Bellevue will be squeezed out by other users.

- A site that is on the I-90 corridor is important. It should be close to restaurants, have adequate parking and easy freeway access.

Focus Group Sessions Overall Summary:

The following are common overall comments from the focus group sessions.

- There was consensus that the east side of the Seattle area is a strong region for competitive swimming and there is a need for more pool time. However there

was some concern expressed regarding the depth of need and demand to justify a large new aquatic center.

- A new aquatic center should be a multipurpose facility that meets a broad range of aquatic needs as well as containing some other non aquatic amenities.

- The competitive swim market is relatively large and water polo is acceptable but the diving, and synchronized swimming markets are much smaller.

- All the organizations and teams were willing to pay market rates for the use of an aquatic center. However groups and teams that are outside of the immediate Bellevue market will only use the center on a more occasional basis.

- Some of the existing pools and swim clubs in the area could be adversely affected by the presence of a new aquatic center.

- There are potential partners for the project that could provide some modest levels of capital funding but they will require operational control of the facility.

- The market for a new aquatic center should focus first and foremost on east side needs followed by larger Seattle area events and activities. Large national events should remain the market for the King County Aquatic Center.

- The center should be located in an easily accessible site preferably on the I-90 corridor.

Aquatic Center Feasibility Survey

Executive Summary of Survey Results

Overview of the Methodology

The City of Bellevue conducted an Aquatic Center Feasibility Survey during November of 2007 to help assess the future direction of aquatic facilities and services in the City. The survey was designed to obtain statistically valid results from households throughout the City of Bellevue. The survey was administered by phone.

Leisure Vision worked with City of Bellevue officials, as well as members of the Ballard*King and Associates project team in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future system.

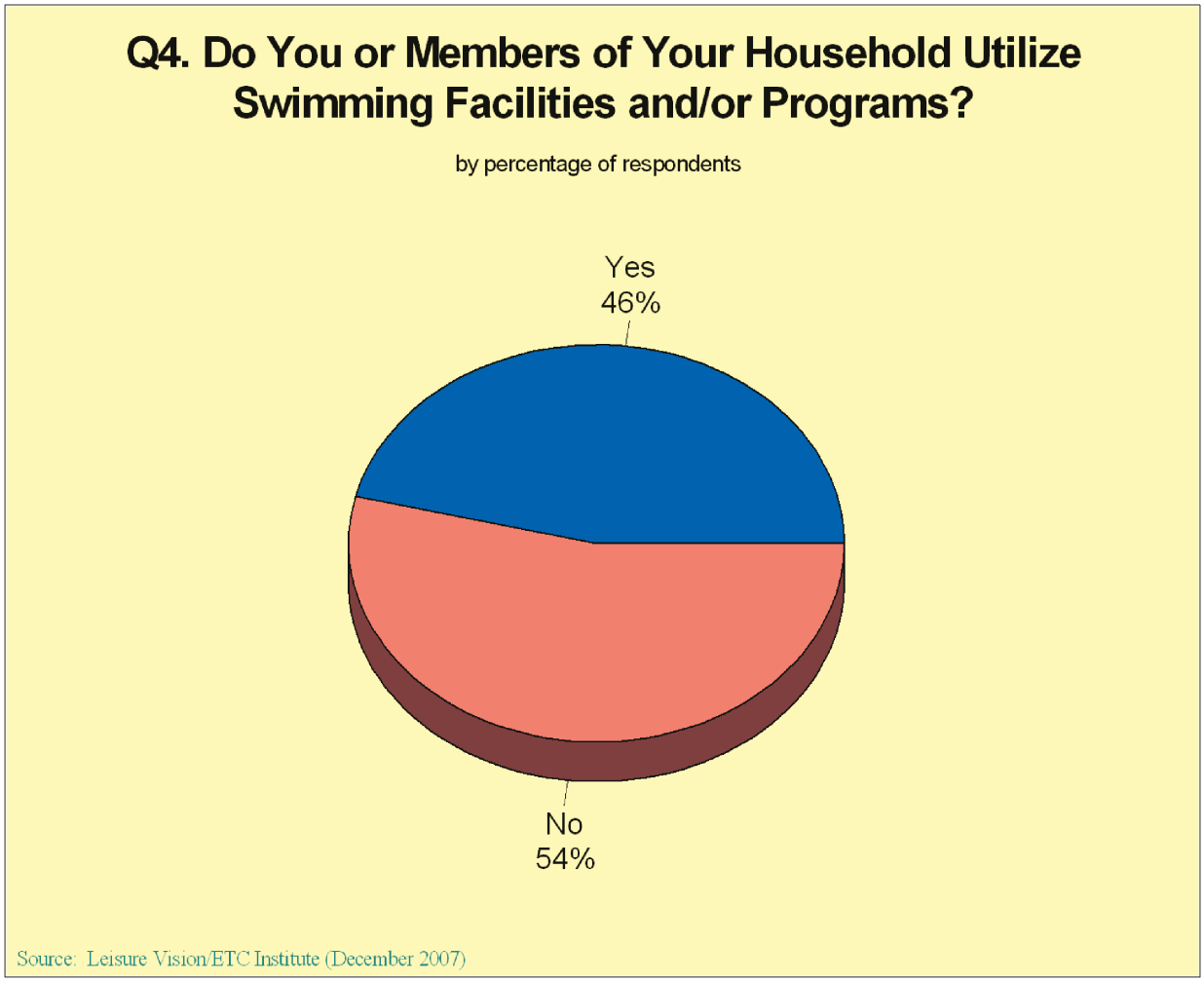
The goal was to obtain a total of at least 400 completed surveys. This goal was accomplished, with a total of 406 surveys having been completed. The results of the random sample of 406 households have a 95% level of confidence with a precision of at least +/-4.9%.

The following pages summarize major survey findings based on 406 completed surveys:

Use of Swimming Facilities and/or Programs

Respondents were asked if any members of their household use swimming facilities and/or programs. The following summarizes key findings:

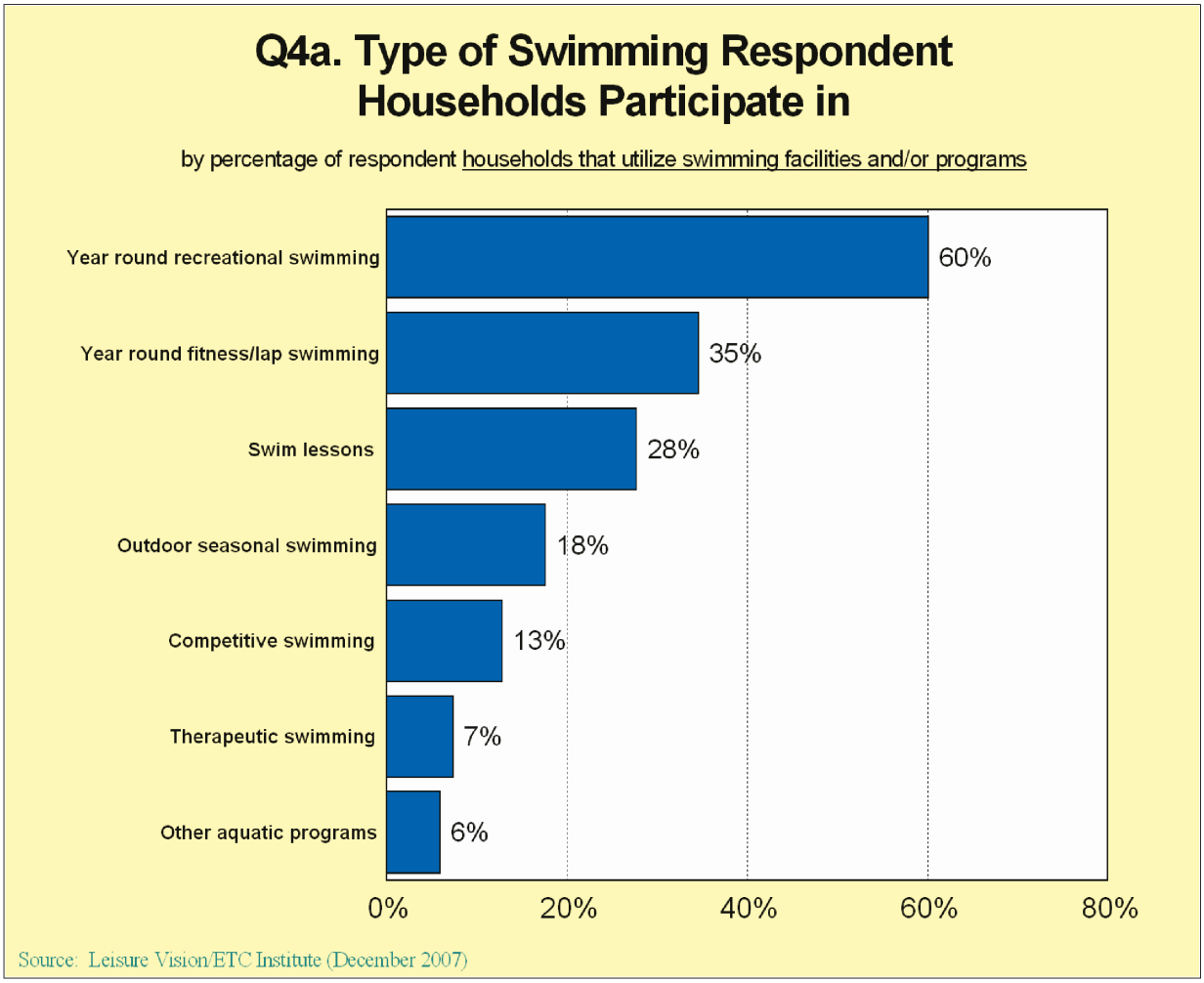
- **Forty-six percent (46%) of respondent households use swimming facilities and/or programs.**



Types of Swimming Participated in

From a list of six types of swimming, respondent households that use swimming facilities and/or programs were asked to indicate all of the types of swimming they participate in. The following summarizes key findings:

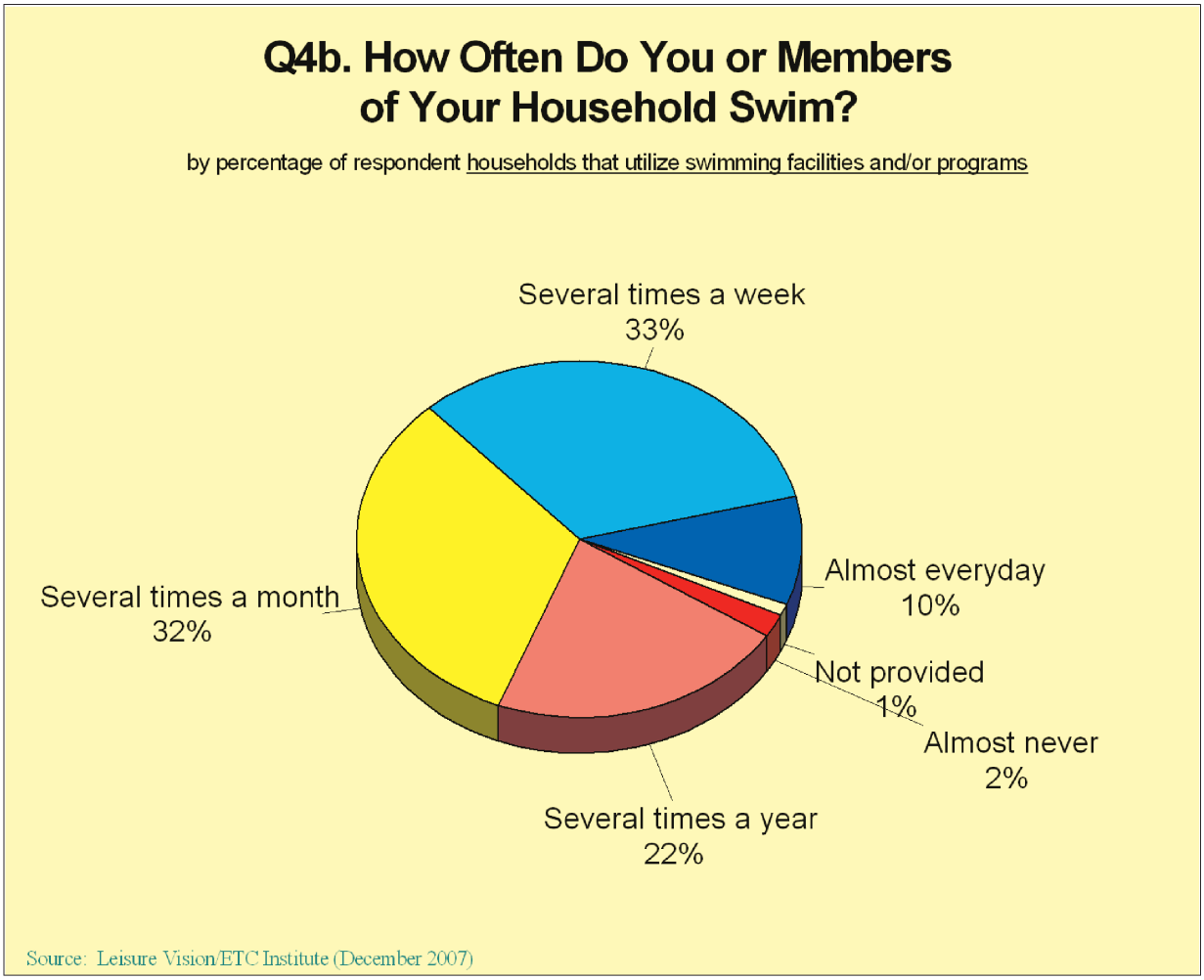
- **Of the 46% of respondent households that use swimming facilities and/or programs, 60% participate in year round recreational swimming.** The other most frequently mentioned types of swimming that respondent households have participated in include year round fitness/lap swimming (35%) and swim lessons (28%).



How Frequently Respondent Households Swim

Respondent households that use swimming facilities and/or programs were asked how often they swim. The following summarizes key findings:

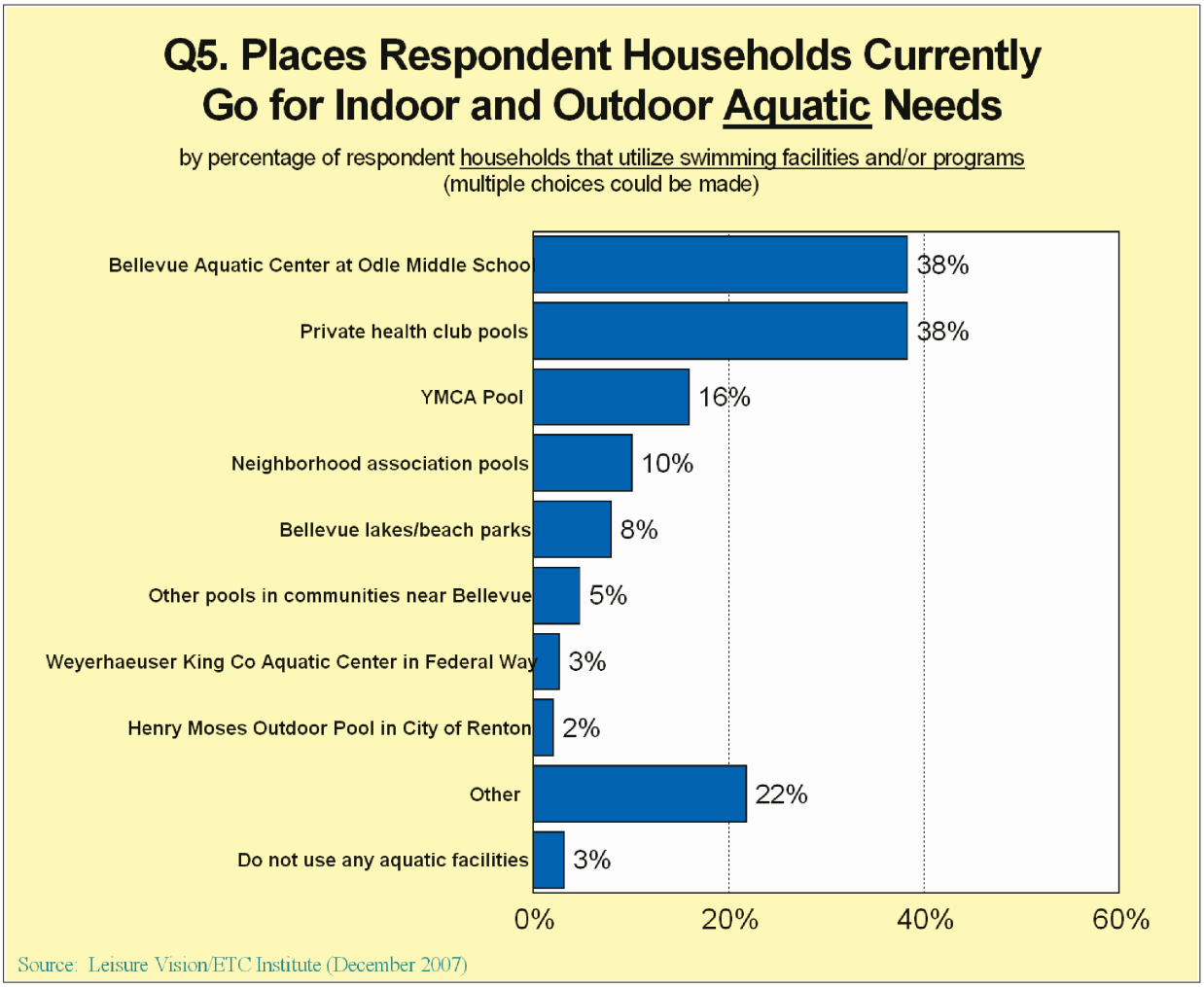
- **Of the 46% of respondent households that use swimming facilities and/or programs, 75% swim at least several times a month.** In addition, 43% of respondent households swim at least several times a week.



Places Used for Indoor and Outdoor Aquatic Needs

From a list of eight options, respondent households that use swimming facilities and/or programs were asked to indicate all of the places they use for indoor and outdoor aquatic needs. The following summarizes key findings:

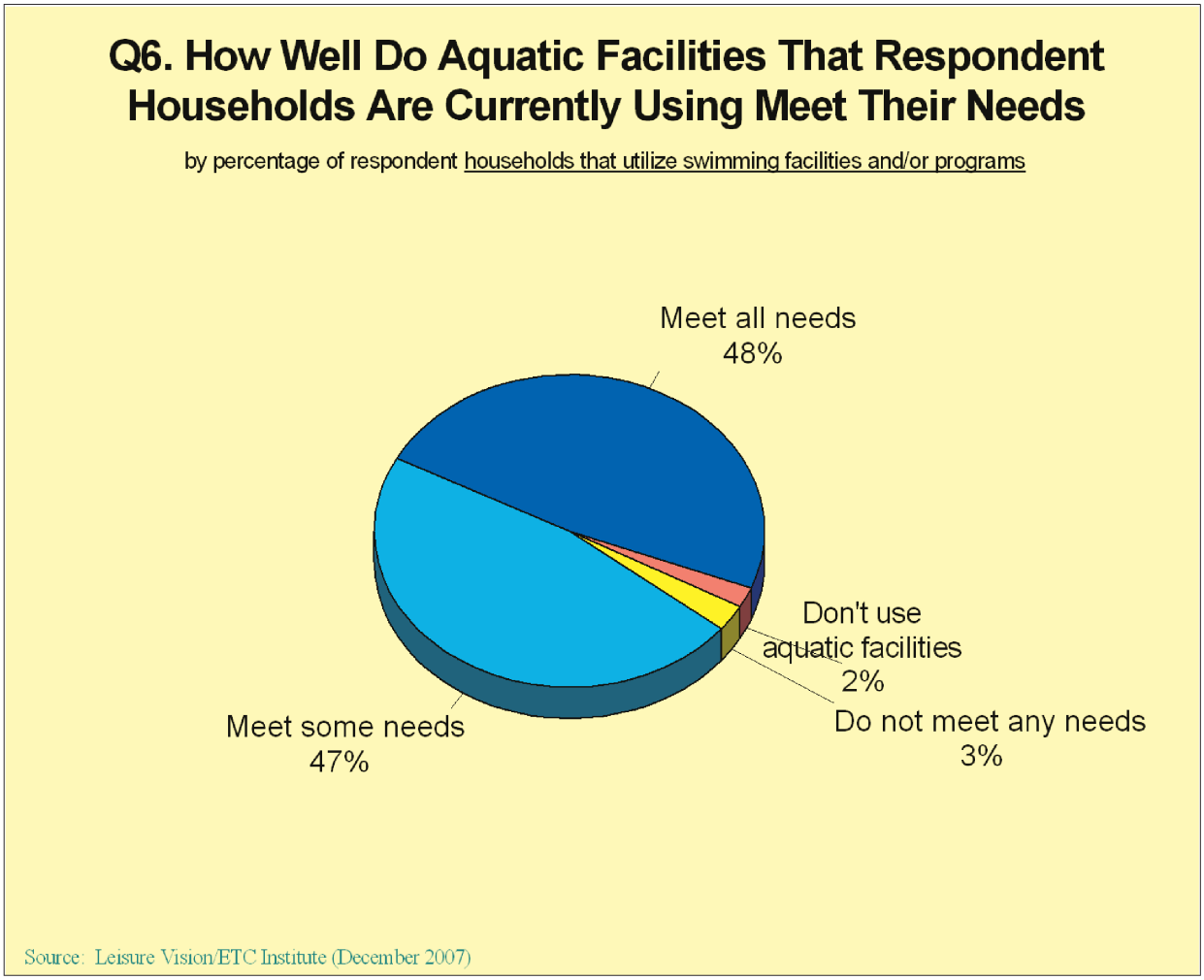
- **Of the 46% of respondent households that use swimming facilities and/or programs, 38% use the Bellevue Aquatic Center at Odle Middle School and 38% also use private health club pools.**



How Well Aquatic Facilities Meet the Needs of Respondent Households

Respondent households that use swimming facilities and/or programs were asked to indicate how well the aquatic facilities they are currently using meet their needs. The following summarizes key findings:

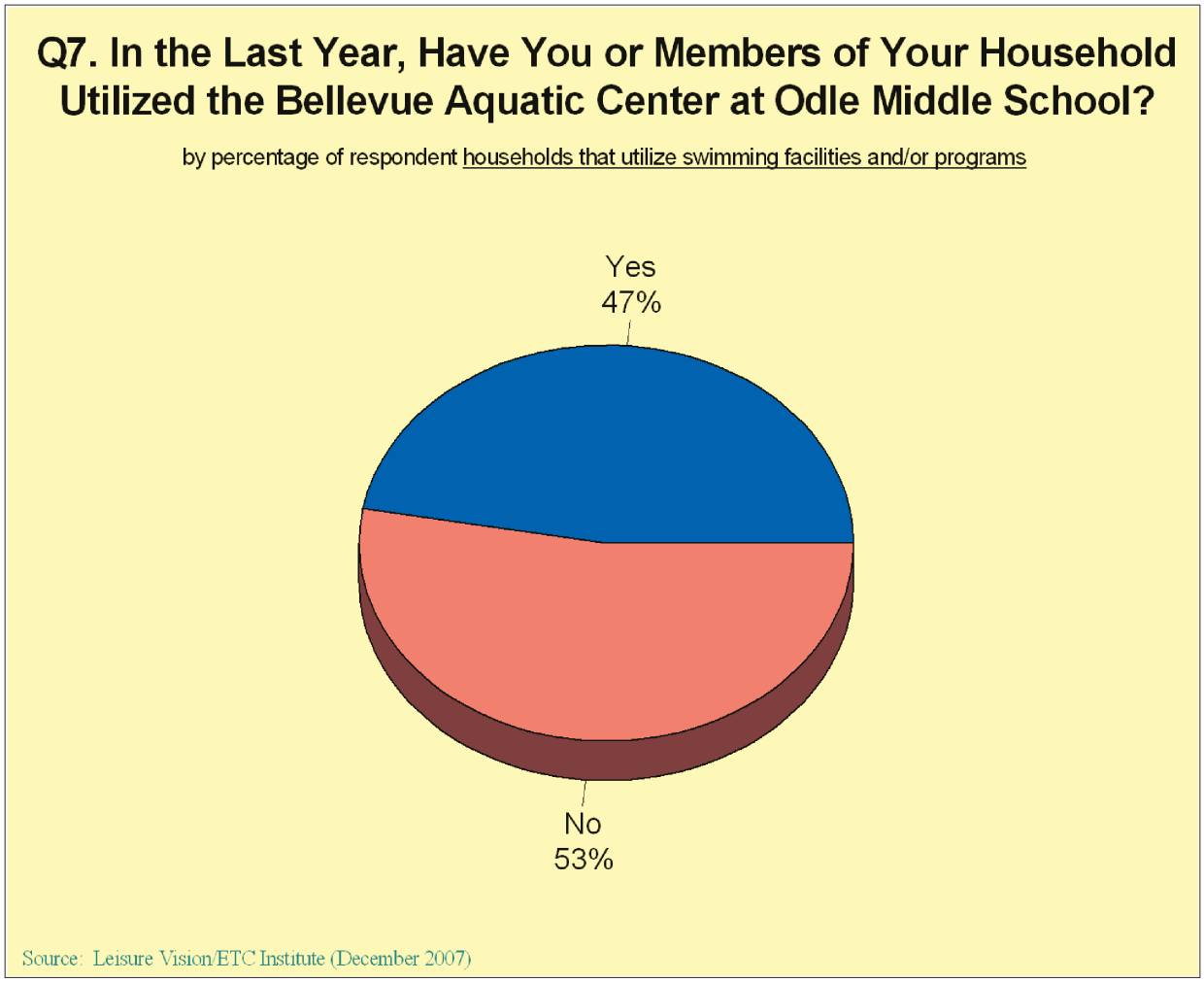
- **Of the 46% of respondent households that use swimming facilities and/or programs, 48% indicated that the aquatic facilities they're currently using meets all of their needs, and 47% indicated that the facilities meet some of their needs.**



Use of the Bellevue Aquatic Center in the Last Year

Respondent households that use swimming facilities and/or programs were asked if they have used the Bellevue Aquatic Center in the last year. The following summarizes key findings:

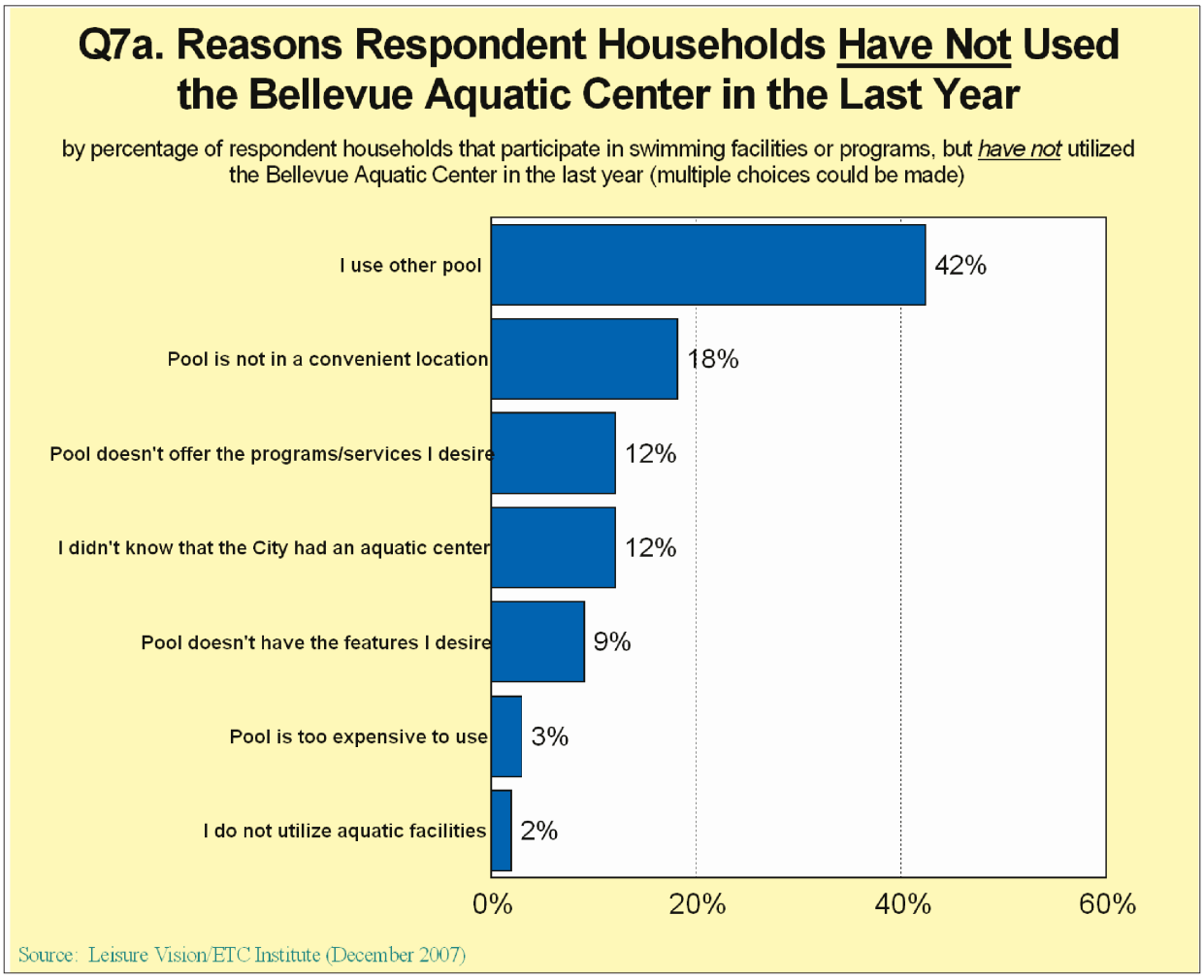
- **Of the 46% of respondent households that use swimming facilities and/or programs, 47% have used the Bellevue Aquatic Center at Odle Middle School during the last year.**



Reasons for Not Using the Bellevue Aquatic Center in the Last Year

From a list of seven options, respondent households that use swimming facilities and/or programs but have not used the Bellevue Aquatic Center in the last year were asked to indicate all of the reasons they have not used the Center. The following summarizes key findings:

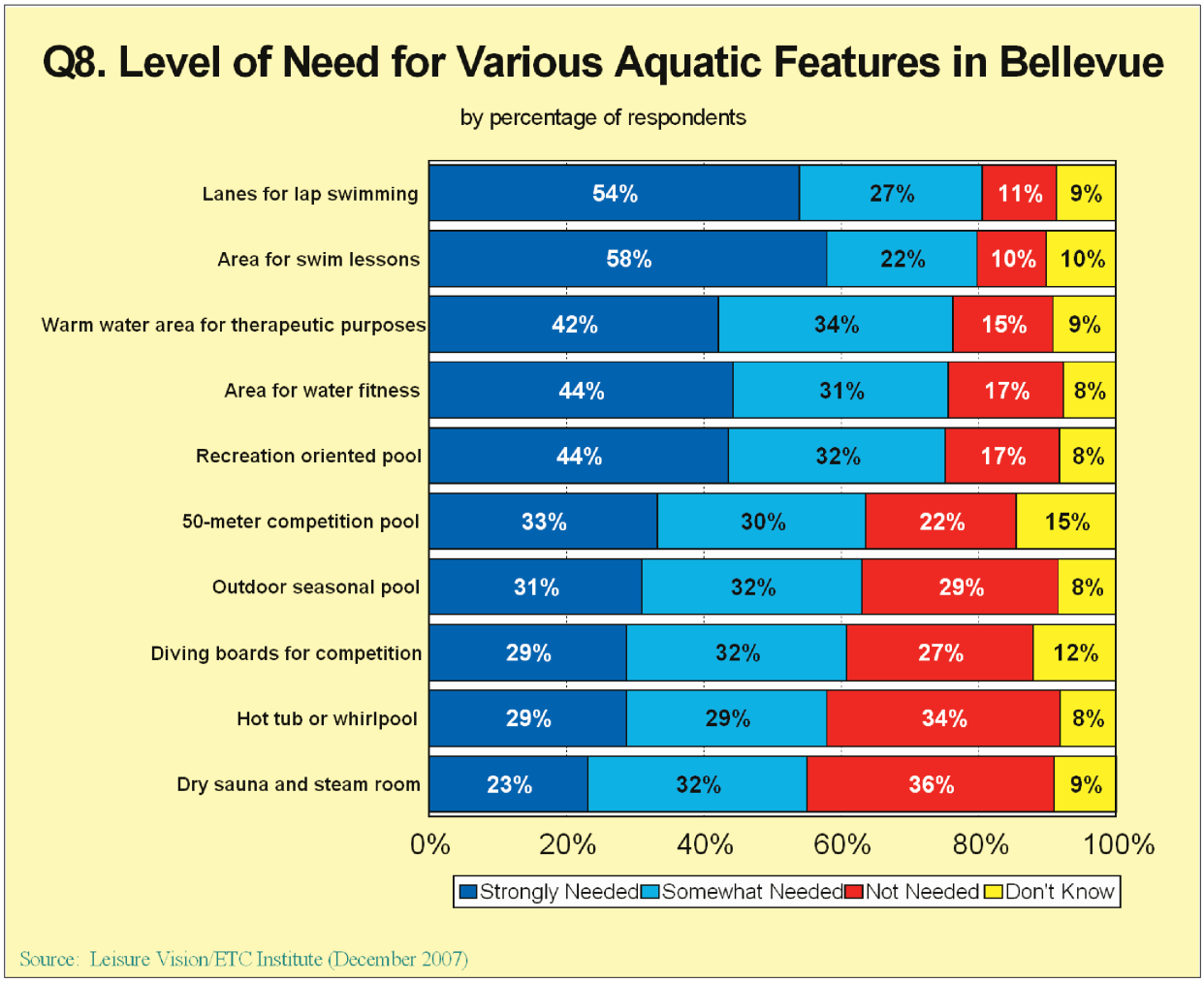
- **Of those that use swimming facilities and/or programs but have not used the Bellevue Aquatic Center in the last year, 42% indicated that they use other pools as the reason they haven't used the Bellevue Aquatic Center.**



Level of Need for Various Aquatic Features

From a list of 10 various aquatic features, respondents were asked to indicate if each feature is strongly needed, somewhat needed, or not needed in Bellevue. The following summarizes key findings:

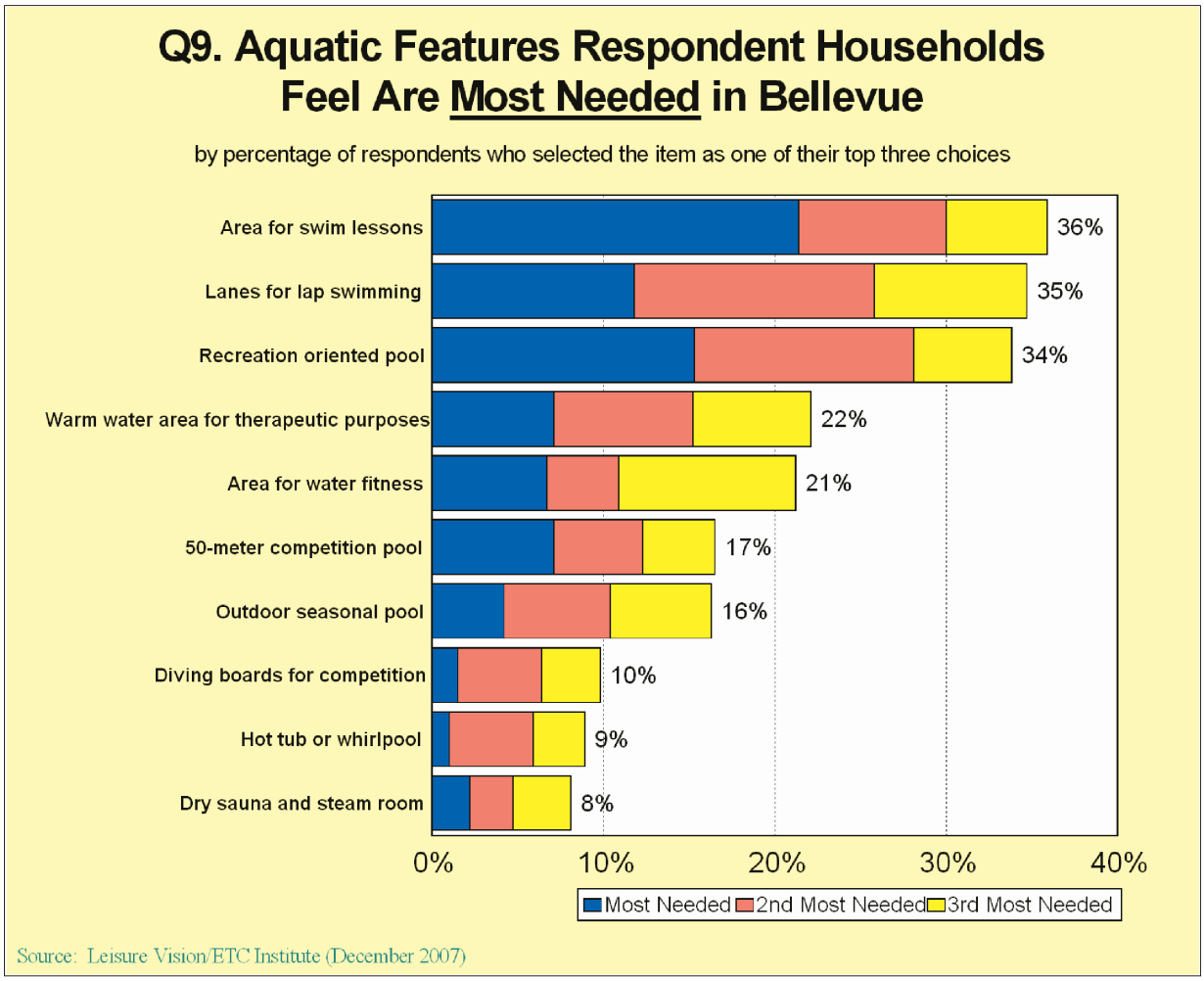
- **The aquatic features that the highest percentage of respondents feel are strongly needed in Bellevue are: area for swim lessons (58%), lanes for lap swimming (54%), area for water fitness (44%) and recreation oriented pool (44%).** It should also be noted that 8 of the 10 features had over 60% of respondents indicate they are either strongly needed or somewhat needed in Bellevue.



Aquatic Features Most Needed

From a list of 10 various aquatic features, respondents were asked to select the three they feel are most needed in Bellevue. The following summarizes key findings:

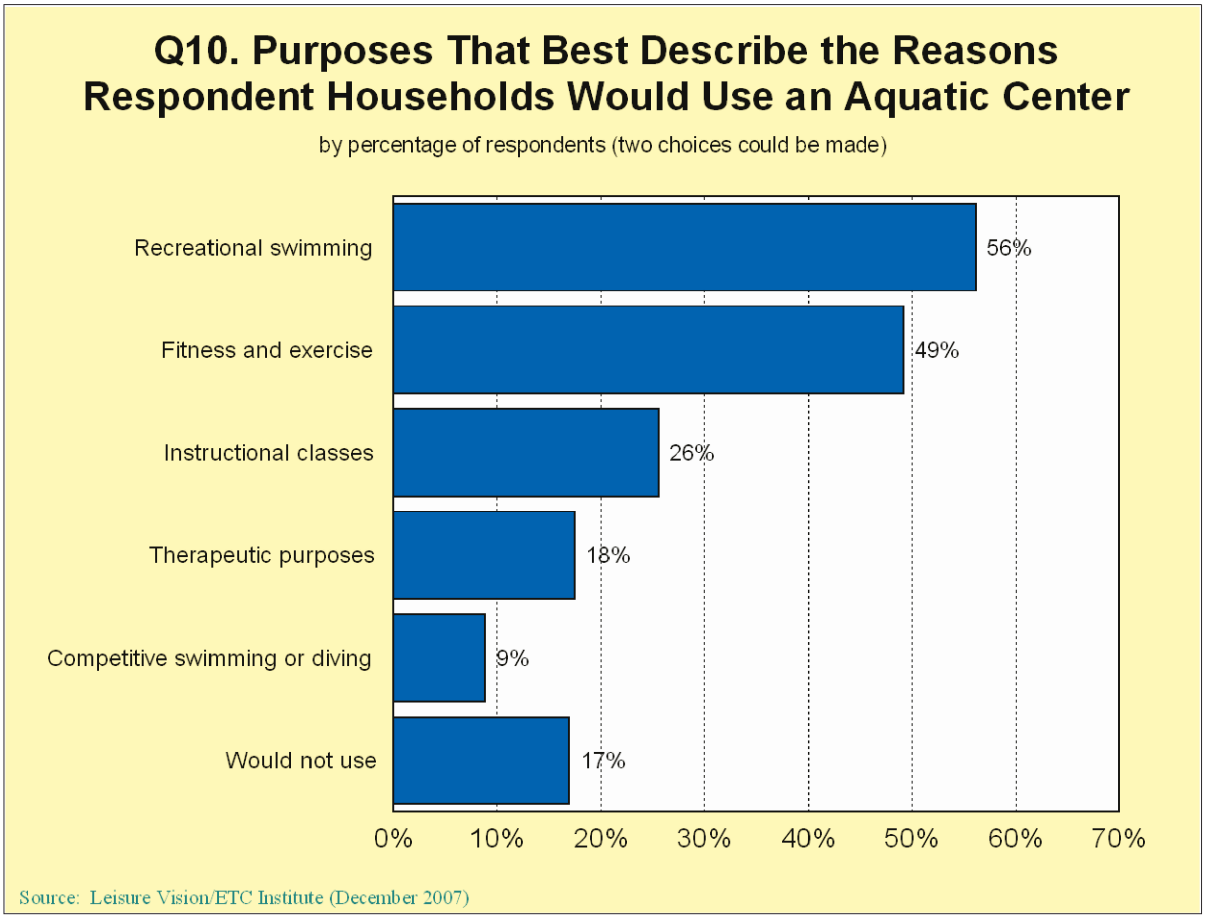
- **Based on the sum of their top three choices, the aquatic features that respondents feel are most needed in Bellevue are an area for swim lessons (36%), lanes for lap swimming (35%), and a recreation oriented pool (34%).** It should also be noted that an area for swim lessons had the highest percentage of respondents select it as their first choice as the feature they feel is most needed in Bellevue.



Reasons Respondents Would Use an Aquatic Center

From a list of five options, respondents were asked to select the two reasons their household would use an aquatic center. The following summarizes key findings:

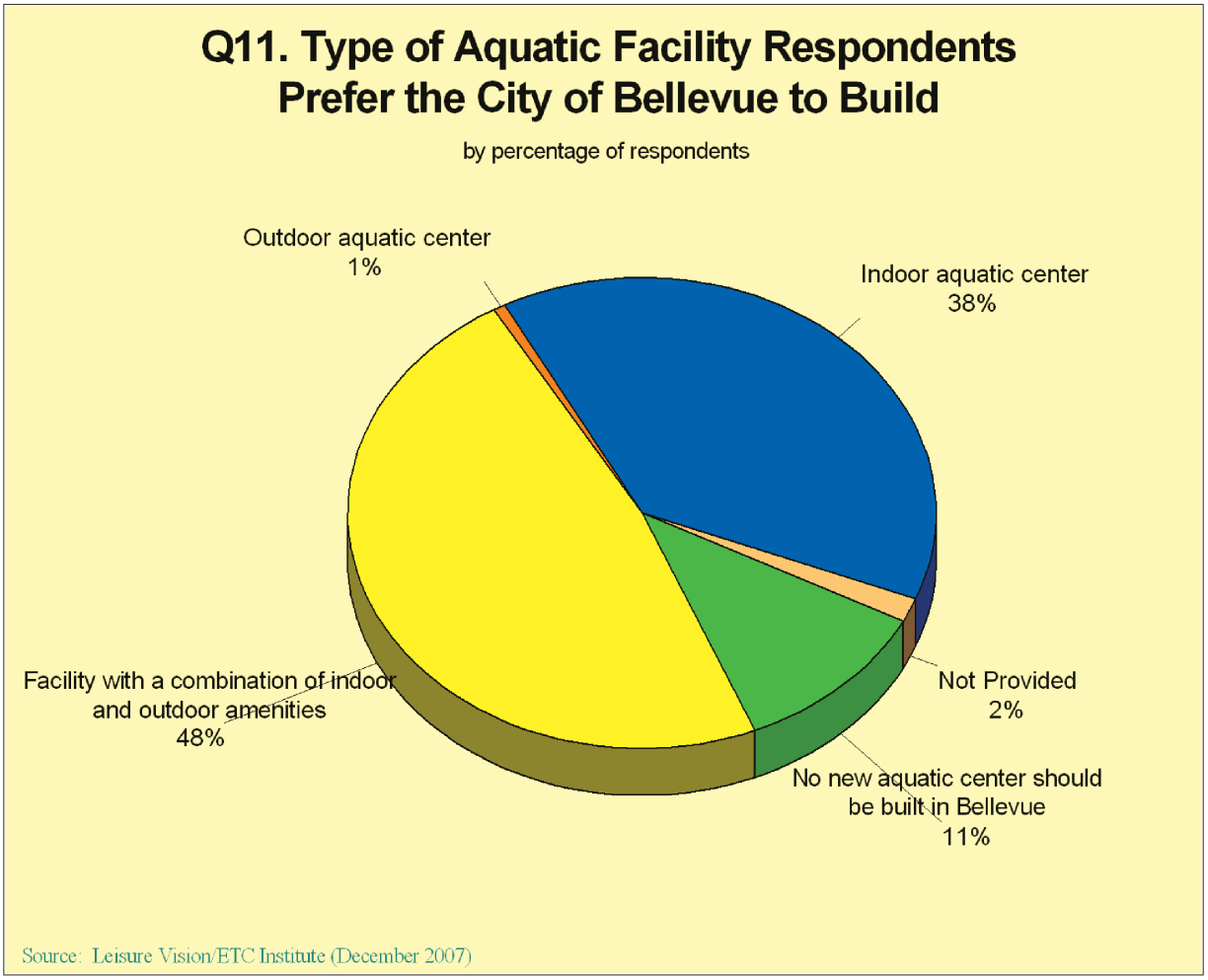
- **Based on the sum of their top two choices, the most frequently mentioned reasons that respondents would use an aquatic center are for recreational swimming (56%) and fitness and exercise (49%).**



Preferred Type of Aquatic Facility to Build

From a list of four options, respondents were asked to indicate the type of aquatic facility they most prefer the City of Bellevue to build. The following summarizes key findings:

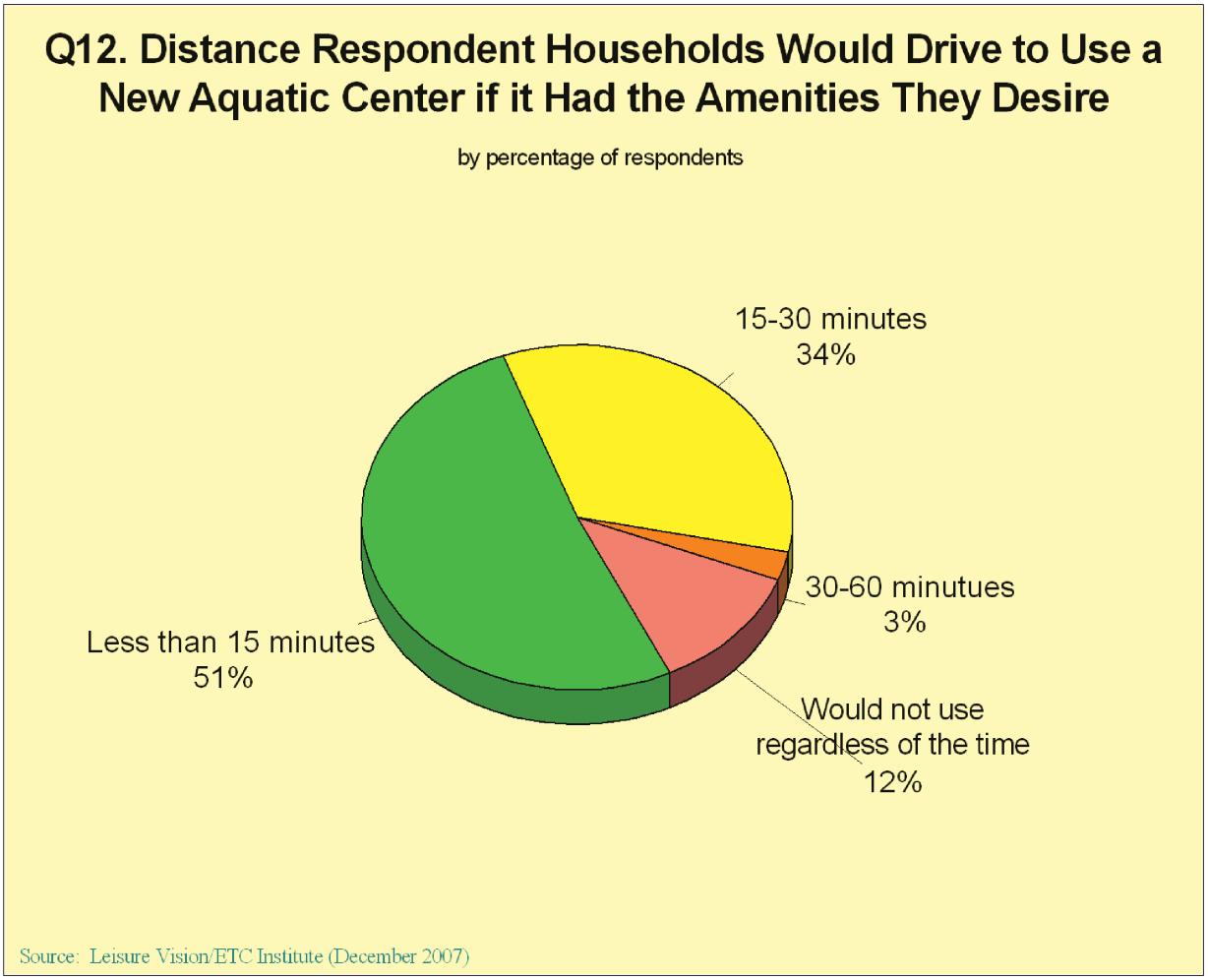
- **Forty-eight percent (48%) of respondents prefer a facility with a combination of indoor and outdoor amenities.** In addition, 38% prefer an indoor aquatic center and 1% prefer an outdoor aquatic center. Only 11% of respondents indicated that no new aquatic center should be built in Bellevue.



Distance Willing to Drive to Use a New Aquatic Center

Respondents were asked how far in minutes they would drive to use a new aquatic center if it had the amenities they most desire. The following summarizes key findings:

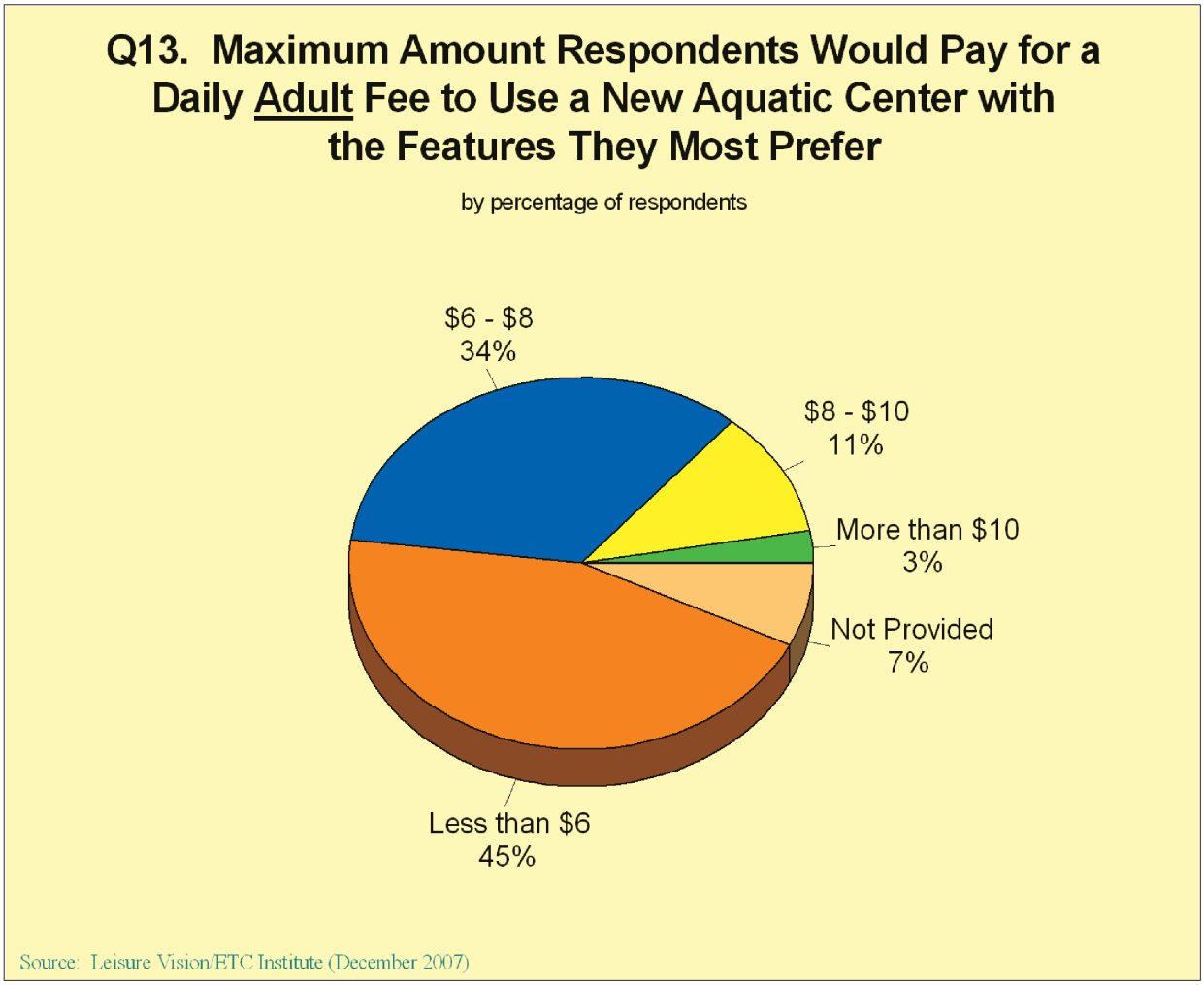
- **Thirty-seven percent (37%) of respondents would drive 15 minutes or more to use a new aquatic center if it had the amenities they most desire.**



Paying with a Daily Adult Fee to Use a New Aquatic Center

Respondents were asked to indicate the maximum amount they would pay for a daily adult fee to use a new aquatic center if it had the features they most prefer. The following summarizes key findings:

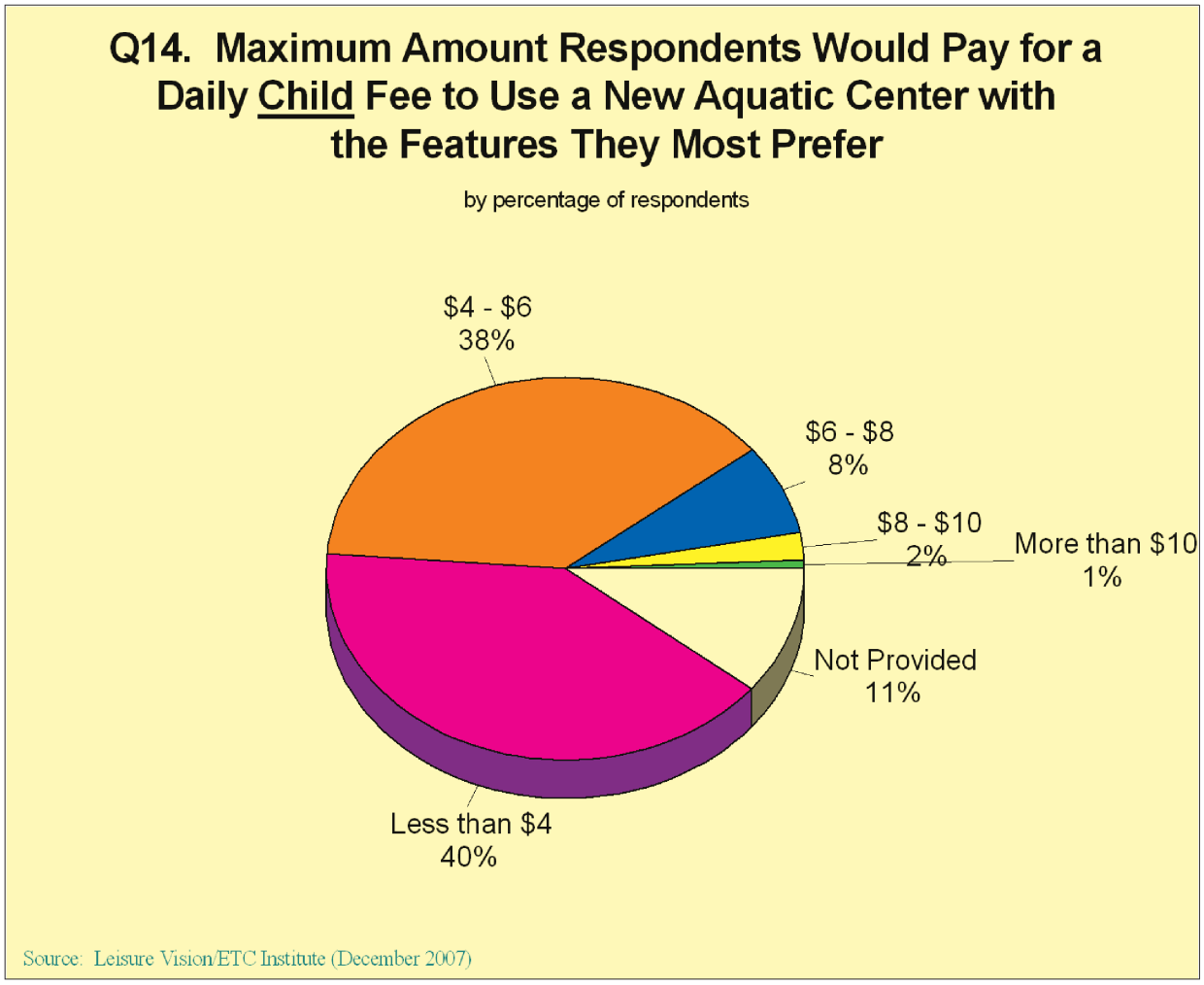
- **Forty-eight percent (48%) of respondents would pay $6 or more for a daily adult fee to use a new aquatic center if it had the features they most prefer.**



Paying with a Daily Child Fee to Use a New Aquatic Center

Respondents were asked to indicate the maximum amount they would pay for a daily child fee to use a new aquatic center if it had the features they most prefer. The following summarizes key findings:

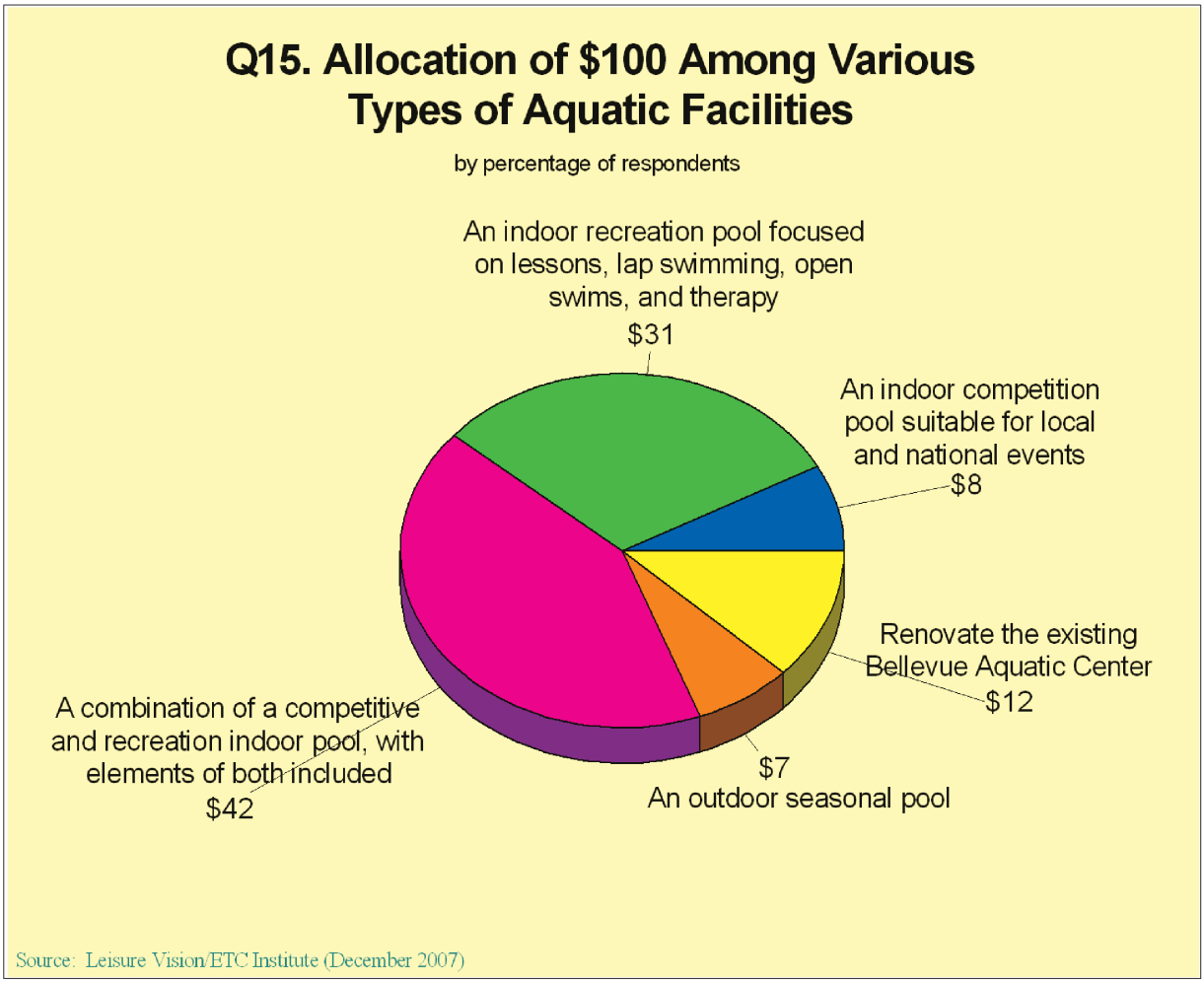
- **Forty-nine percent (49%) of respondents would pay at least $4 for a daily child fee to use a new aquatic center if it had the features they most prefer.**



Prioritizing Various Types of Aquatic Facilities

Respondents were asked how they would distribute $100 among five types of aquatic facilities. The following summarizes key findings:

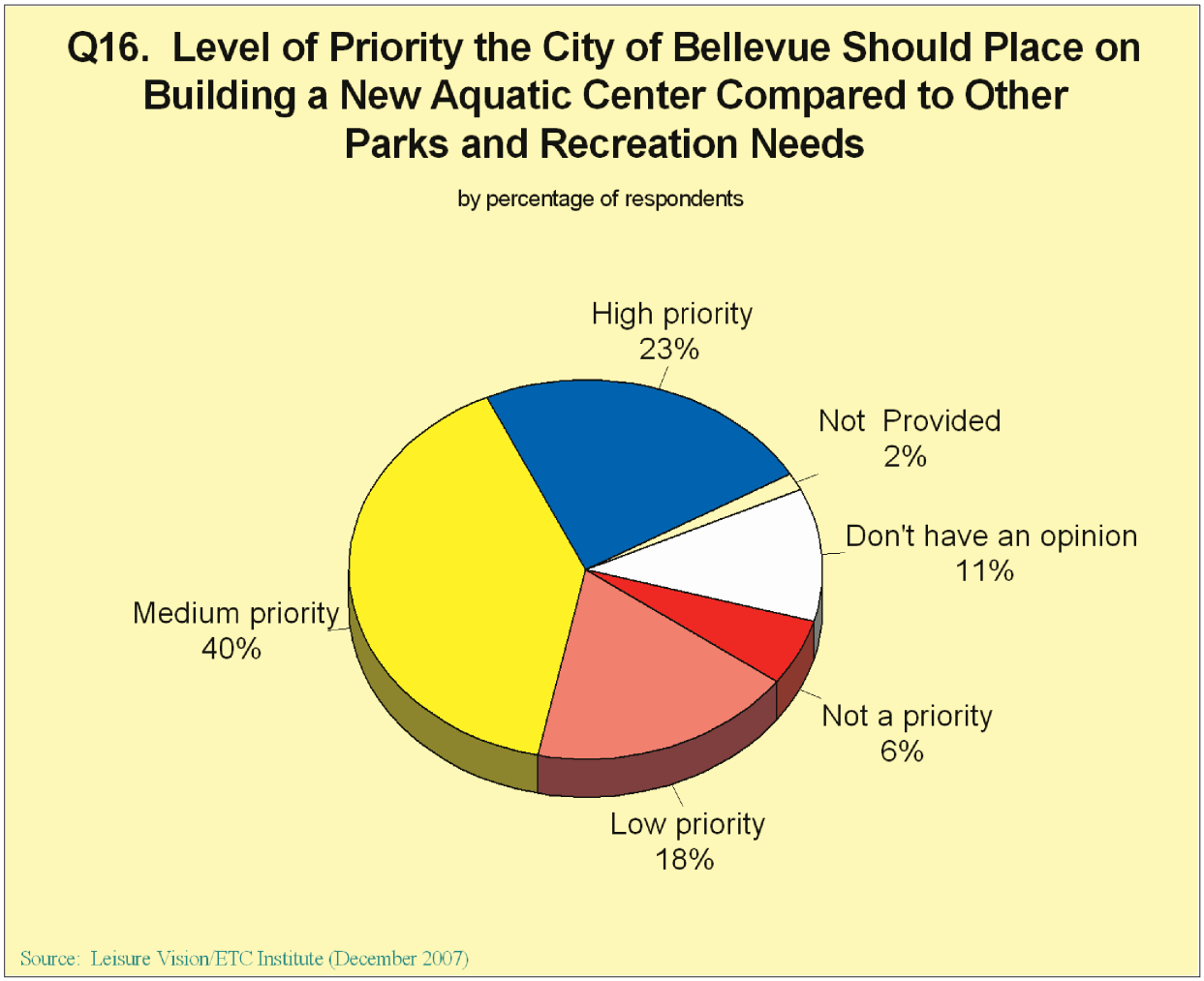
- **Respondents allocated $42 out of $100 to a combination of a competitive and recreation indoor pool, with elements of both included.** The remaining $58 were allocated as follows: an indoor recreation pool focused on lessons, lap swimming, open swims, and therapy ($31), renovate the existing Bellevue Aquatic Center ($12), an indoor competition pool suitable for local and national events ($8) and an outdoor seasonal pool ($7).



Level of Priority to Place on Building a New Aquatic Center

Respondents were asked how high of a priority the City of Bellevue should place on building a new aquatic center compared to other parks and recreation needs. The following summarizes key findings:

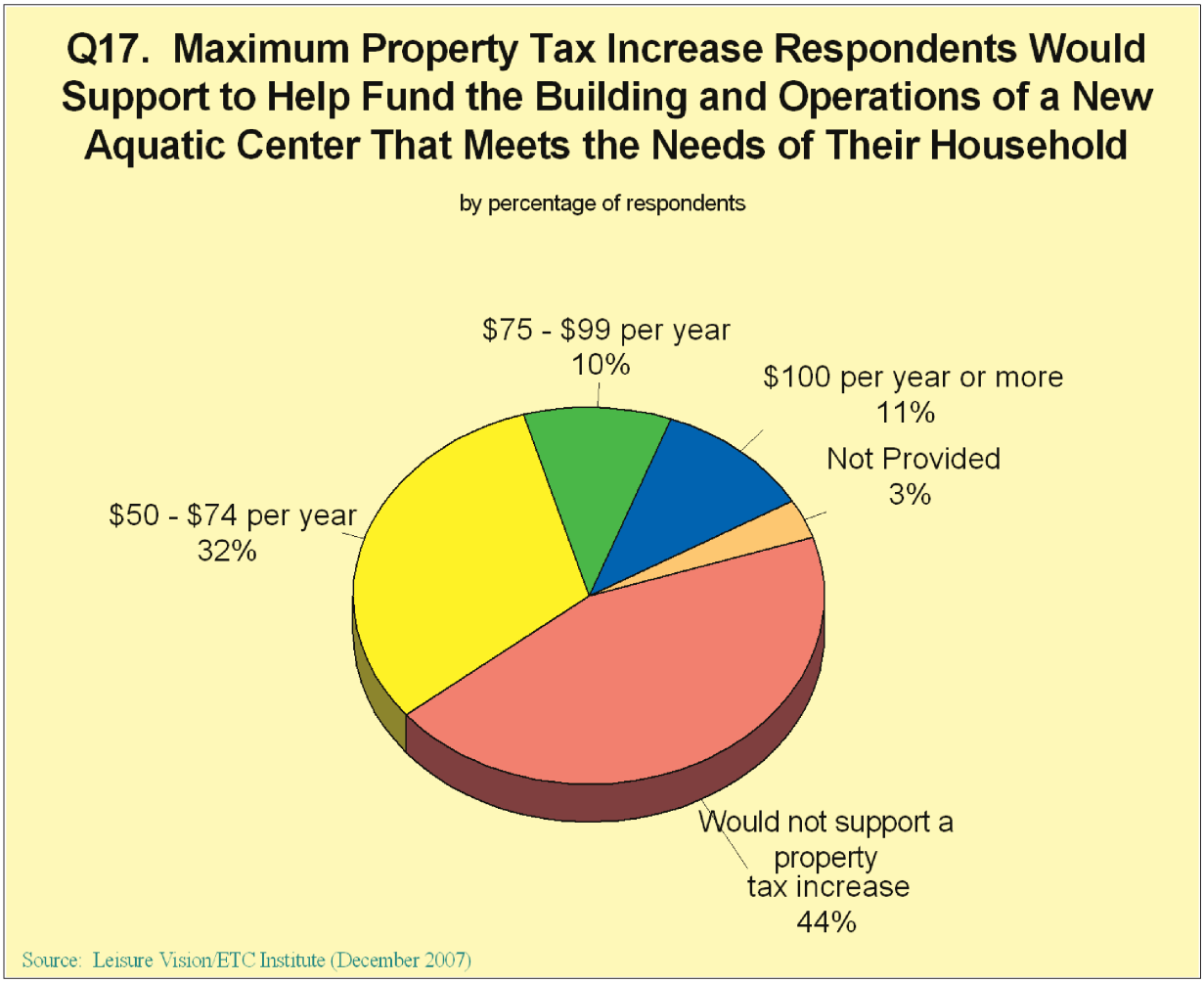
- **Sixty-three percent (63%) of respondents feel the City should place either a medium (40%) or high priority (23%) on building a new aquatic center.** In addition, 18% of respondents feel it should be a low priority, and 6% feel it should not be a priority.



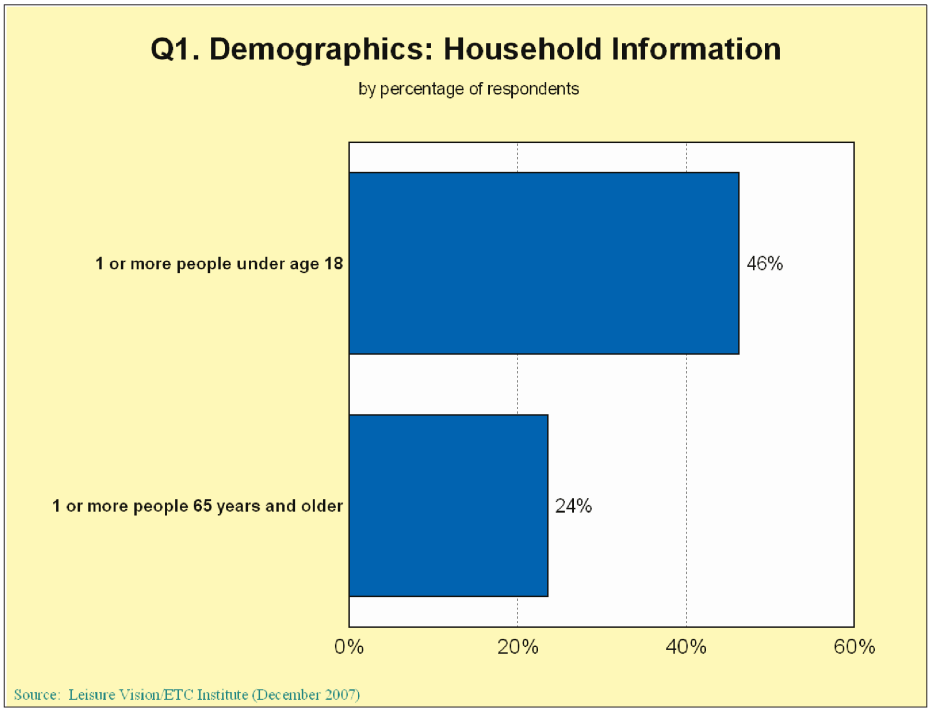
Property Tax Increase to Help Fund a New Aquatic Center

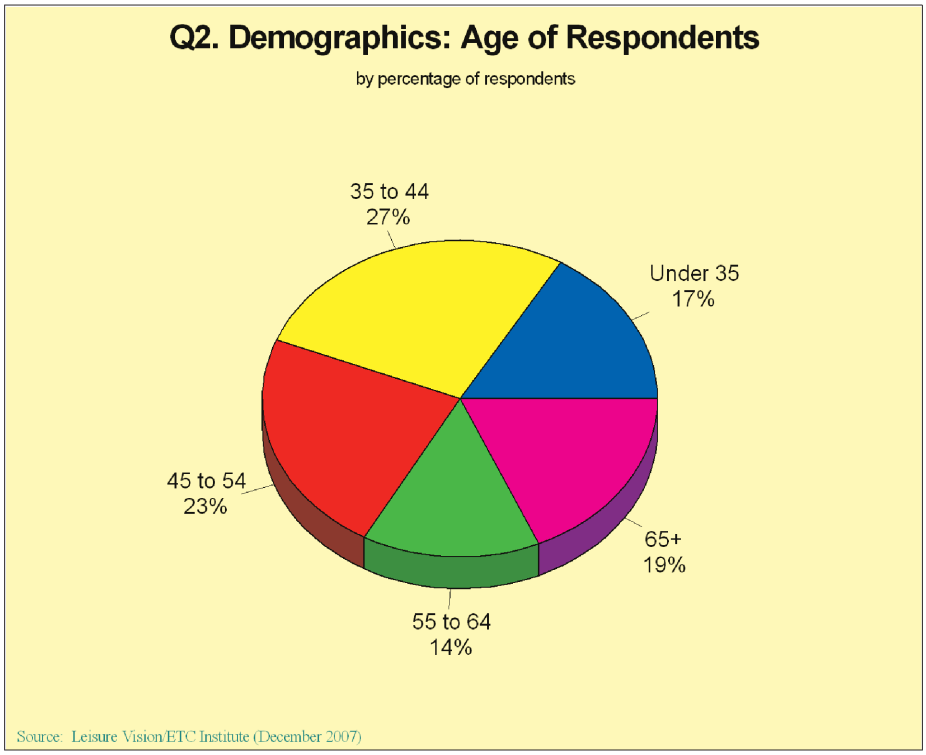
Respondents were asked to indicate the maximum property tax increase they would support to help fund a new aquatic center that meets the needs of their household. The following summarizes key findings:

- **Fifty-three percent (53%) of respondents would support a property tax increase of $50 or more per year to help fund a new aquatic center that meets the needs of their household.**

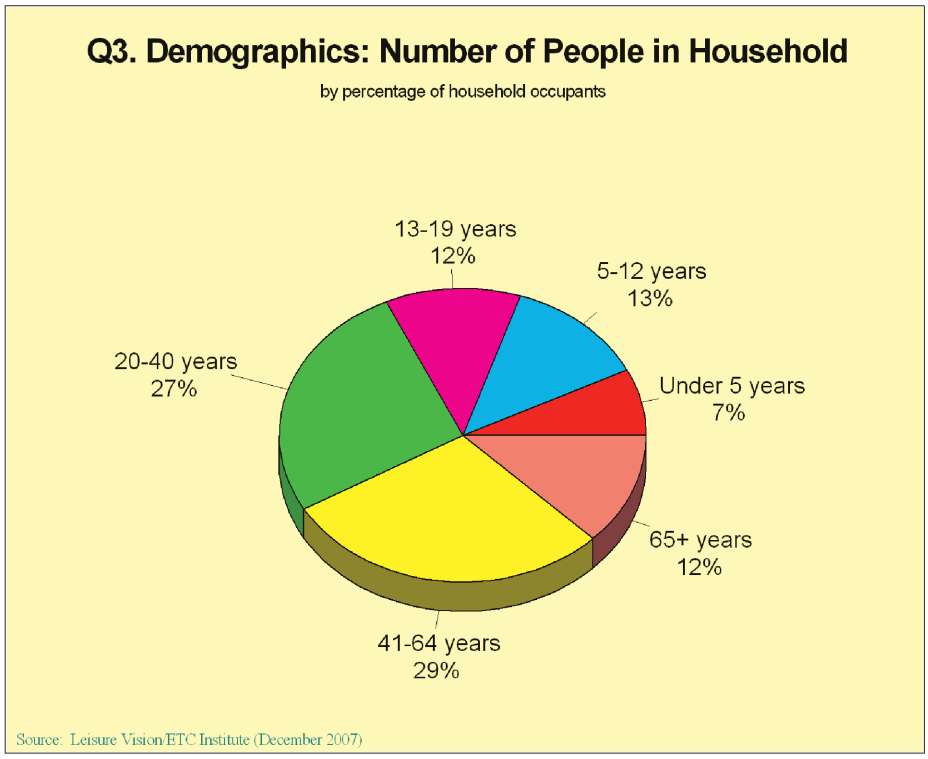


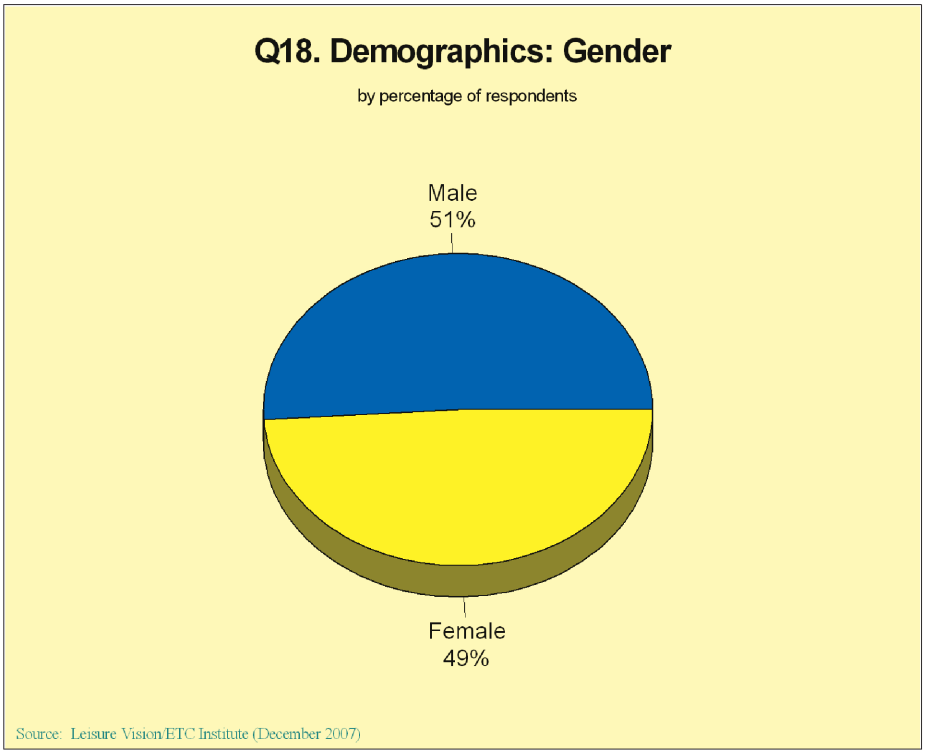
Demographics





Demographics (Continued)





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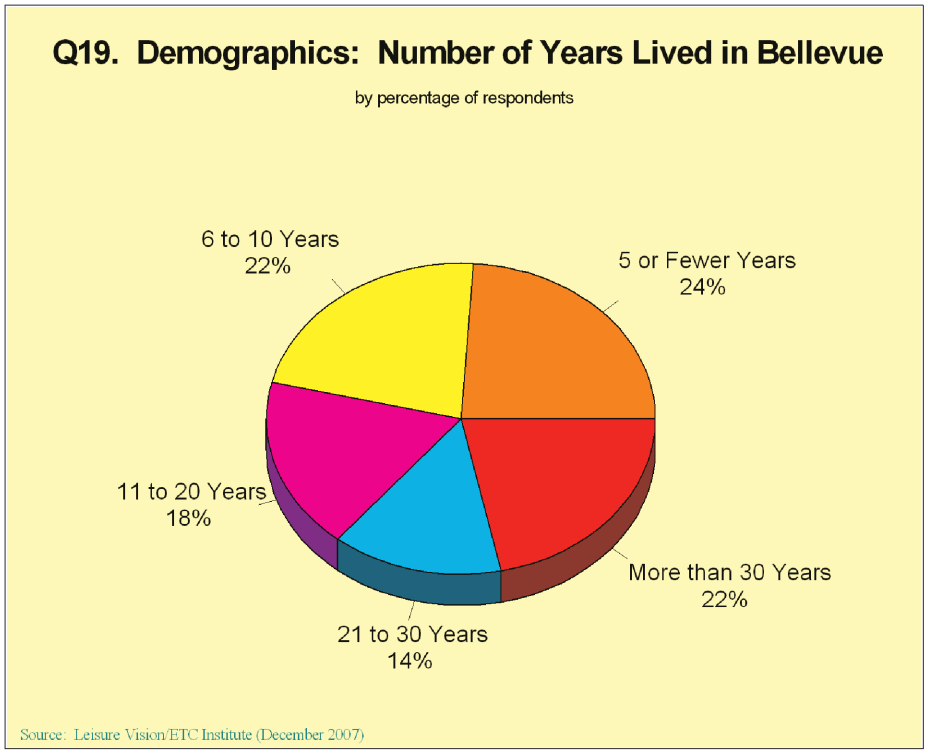
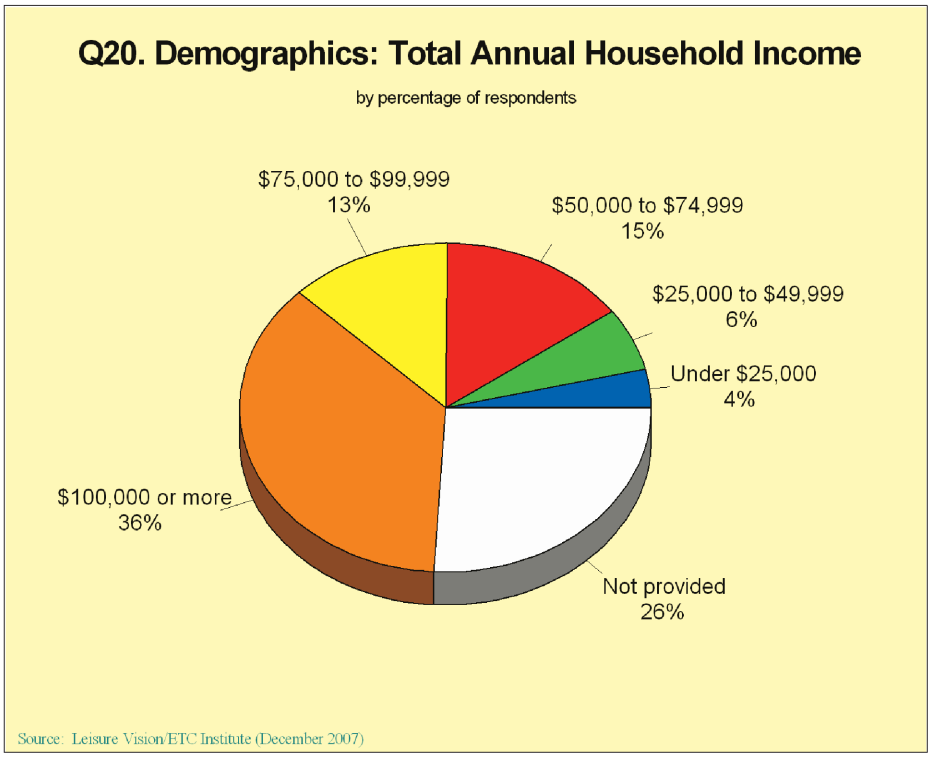
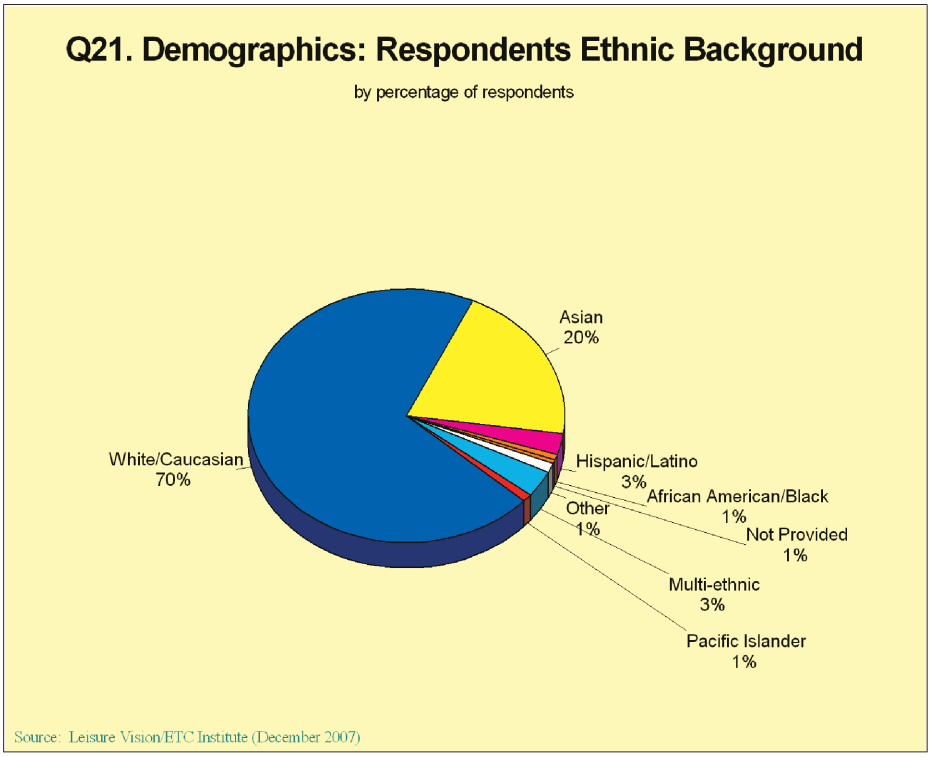




Demographics (Continued)



Bellevue Aquatic Center Feasibility Study

Facility Development Options

Option 1 – World Class Aquatic Center (SPLASH Option)

Includes:

- 50 meter pool w/3,000 seats
- 25 yard x 25 meter warm up pool
- Leisure pool w/slides. etc.
- Diving pool with platform
- Therapy pool
- Indoor support spaces (locker rooms, concessions, fitness area)

Option 2 – Regionally Focused Aquatic Center

Includes:

- 50 meter pool w/1,500 seats and diving (1 mtr/3 mtr)
- 25 yard x 25 meter warm up pool
- Leisure pool w/slides
- Therapy pool
- Indoor support spaces (locker rooms, concessions, fitness area)

Not Included:

- Diving pool with platform
- Reduced seating

Option 3 – Eastside Focused Aquatic Center

Includes:

- 50 meter pool w/1,000 seats and diving (1 mtr/3 mtr)
- Leisure pool w/slides
- Therapy pool
- Indoor support spaces (locker rooms, concessions, fitness area)

Not Included:

- Diving pool with platform
- Reduced seating
- 25 yard x 25 meter warm up pool

Option 4 – Bellevue Focused Aquatic Center

Includes:

- 25 yard x 25 meter pool w/500 seats and diving (1 mtr/3 mtr)
- Leisure pool w/slides
- Indoor support spaces (locker rooms, concessions, fitness area)

Not Included:

- Diving pool with platform
- Reduced seating
- 25 yard x 25 meter warm up pool
- Therapy pool
- 50 meter pool

Option 5 – Indoor/Outdoor Aquatic Center

Includes:

- 25 yard x 25 meter pool w/500 seats and diving (1 mtr/3 mtr)
- Small indoor leisure pool w/slides
- Large outdoor leisure pool
- Indoor support spaces (locker rooms, concessions, fitness area)

Not Included:

- Diving pool with platform
- Reduced seating
- 25 yard x 25 meter warm up pool
- Therapy pool
- 50 meter pool
- Reduced indoor leisure pool