3 MARKET ANALYSIS

Ballard*King & Associates (B*K) has completed a market analysis for a possible new aquatic center for the Si View Metropolitan Park District.

3.1 DEMOGRAPHICS

3.1.1 INTRODUCTION

The following is a summary of the demographic characteristics within the Si View Metropolitan Park District and an area identified as the Secondary Service Area. The Secondary Service Area extends beyond Si View Metropolitan Park District to include Snoqualmie, Fall City and Preston.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2018-2023 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

3.1.2 SERVICE AREAS

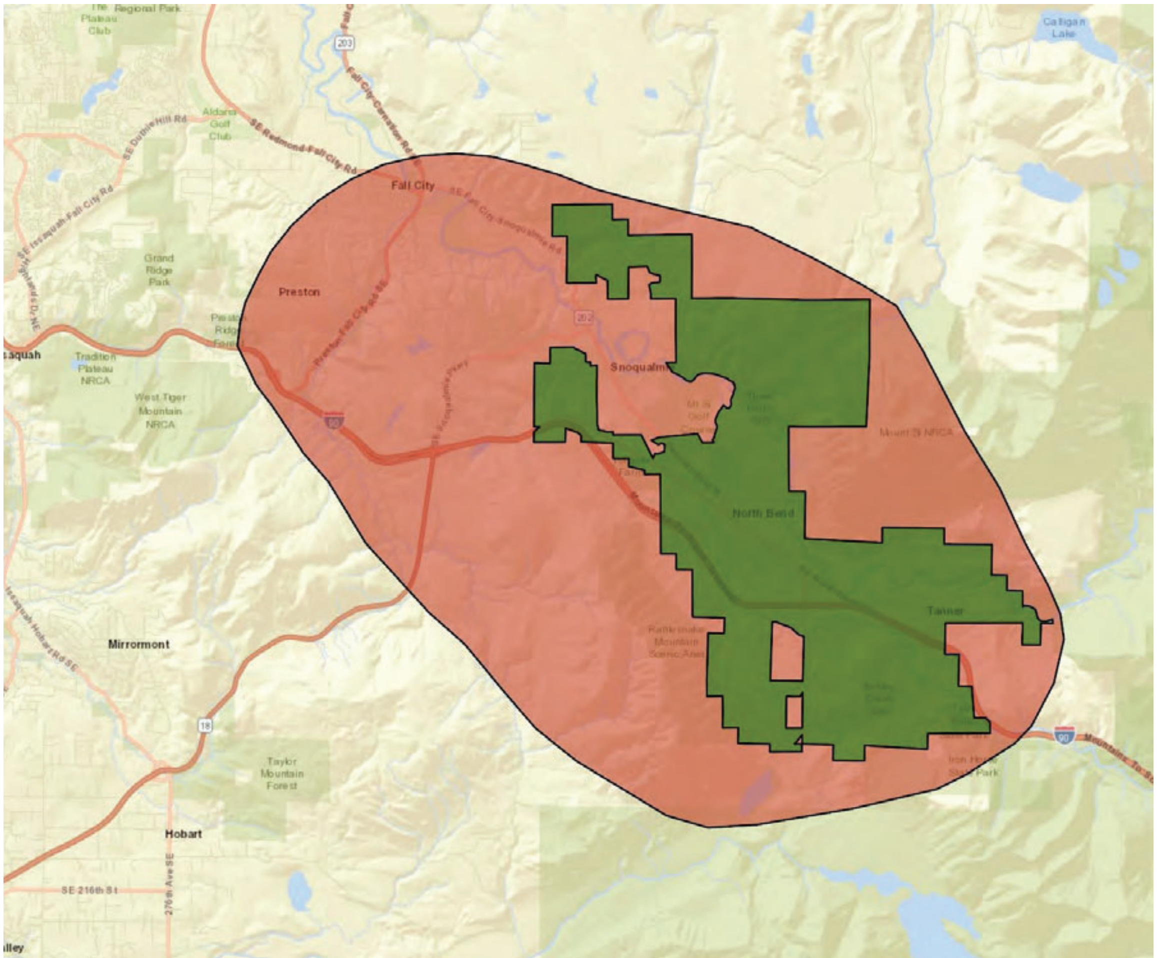
The information provided includes the basic demographics and data for Si View Metropolitan Park District with comparison data for the Secondary Service Area as well as the State of Washington and the United States.

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

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

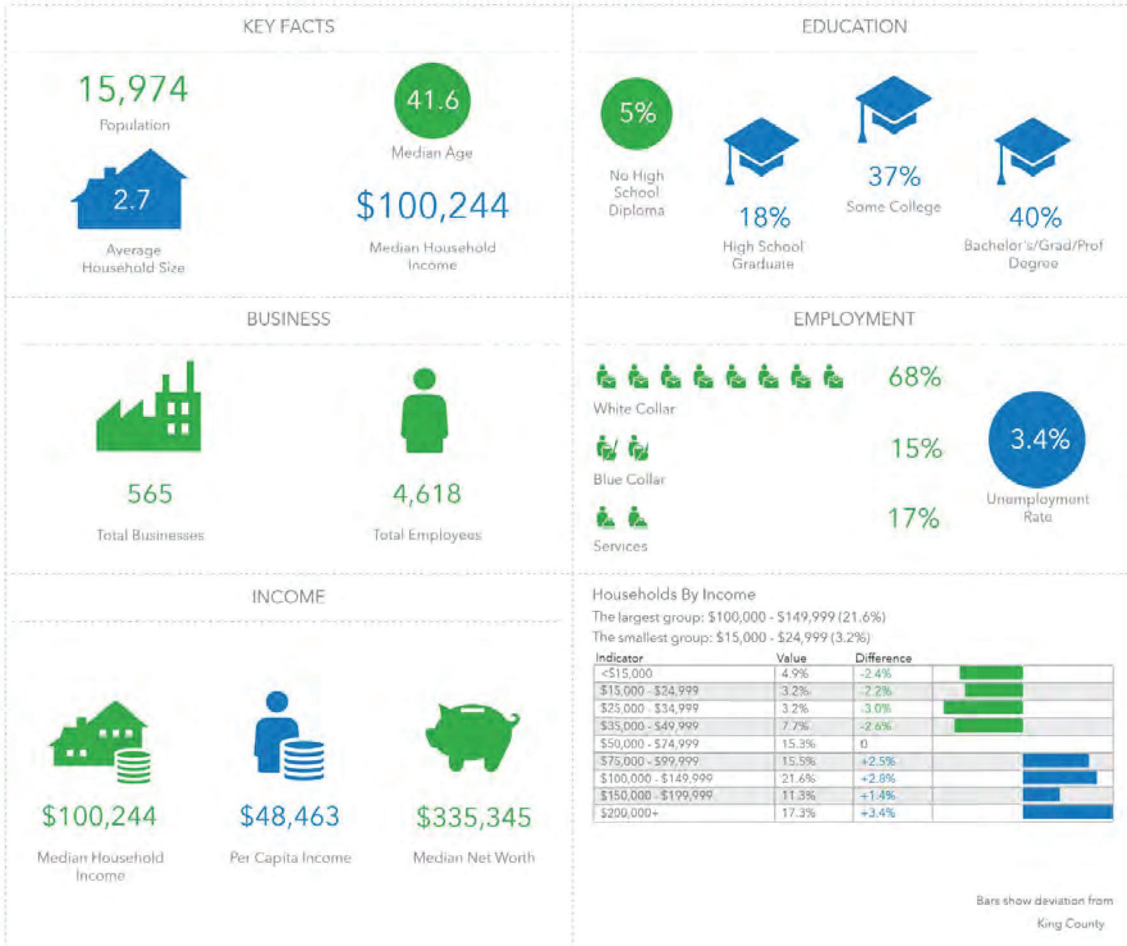
Service areas can vary in size with the types of components in the facility.

MAP A: SERVICE AREA MAP



- Green Boundary – Primary Service Area (Si View Metro Park District)
- Red Boundary – Secondary Service Area

INFOGRAPHIC OF THE PRIMARY SERVICE AREA



Indicator	Value	Difference
<$15,000	4.9%	-2.4%
$15,000 - $24,999	3.2%	-2.2%
$25,000 - $34,999	3.2%	-3.0%
$35,000 - $49,999	7.7%	-2.6%
$50,000 - $74,999	15.3%	0
$75,000 - $99,999	15.5%	+2.5%
$100,000 - $149,999	21.6%	+2.8%
$150,000 - $199,999	11.3%	+1.4%
$200,000+	17.3%	+3.4%

DEMOGRAPHIC SUMMARY

	Primary Service Area	Secondary Service Area
Population:		
2010 Census	14,341[1]	31,229[2]
2018 Estimate	15,974	36,346
2023 Estimate	17,042	39,422
Households:		
2010 Census	5,372	11,299
2018 Estimate	5,884	12,819
2023 Estimate	6,225	13,741
Families:		
2010 Census	3,883	8,577
2018 Estimate	4,276	9,835
2023 Estimate	4,541	10,602
Average Household Size:		
2010 Census	2.66	2.75
2018 Estimate	2.70	2.82
2023 Estimate	2.73	2.85
Ethnicity (2018 Estimate):		
Hispanic	5.6%	5.6%
White	90.5%	86.0%
Black	0.5%	0.7%
American Indian	0.9%	0.8%
Asian	1.9%	6.1%
Pacific Islander	0.2%	1.7%
Other	2.0%	4.5%
Multiple	4.0%	5.6%
Median Age:		
2010 Census	39.9	37.5
2018 Estimate	41.6	39.2
2023 Estimate	43.2	39.9
Median Income:		
2018 Estimate	$100,244	$115,313
2023 Estimate	$109,141	$127,876

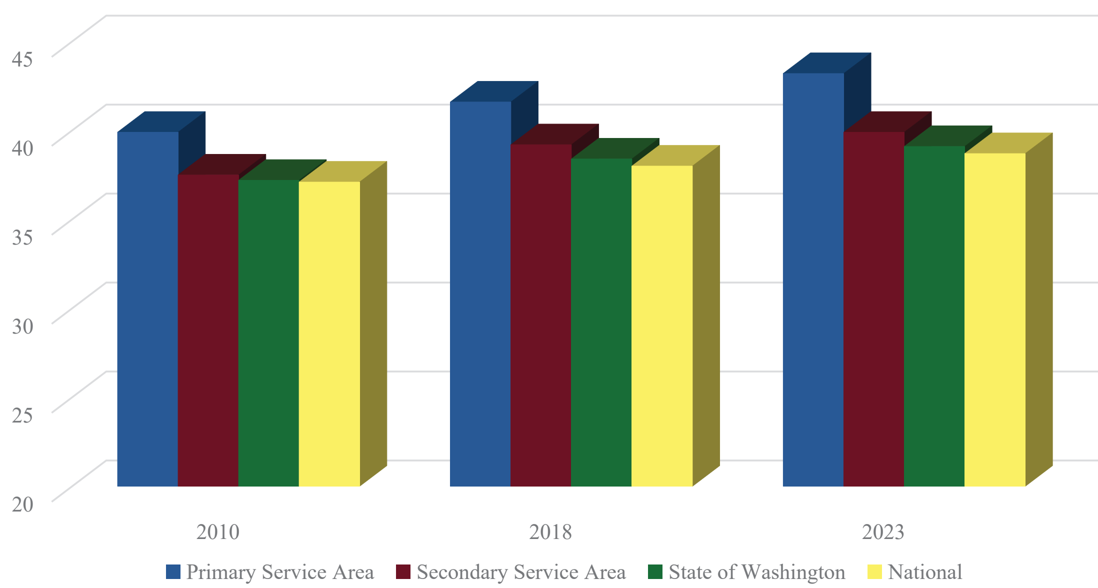
3.1.3 AGE AND INCOME

The median age and household income levels are compared with the national number as both of these factors are secondary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

TABLE A MEDIAN AGE

	2010 Census	2018 Projection	2023 Projection
Primary Service Area	39.9	41.6	43.2
Secondary Service Area	37.5	39.2	39.9
State of Washington	37.2	38.4	39.1
Nationally	37.1	38.3	39.0

CHART A: MEDIAN AGE



The median age in the Primary Service Area is slightly older than the Secondary Service Area, the State of Washington and the National number. A lower median age typically points to the presence of families with children.

3.1.4 HOUSEHOLDS WITH CHILDREN

The following chart provides the number of households and percentage of households in the Primary and Secondary Service Area with children.

TABLE B: HOUSEHOLDS WITH CHILDREN

The following chart provides the number of households and percentage of households in the Primary and Secondary Service Area with children.

	Number of Households w/ Children	Percentage of Households w/ Children
Primary Service Area	2,015	37.5%
Secondary Service Area	4,779	42.3%
State of Washington	836,791	31.9%

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

MAP B: MEDIAN AGE BY BLOCK GROUP

The median age in the Primary Service Area is slightly older than the Secondary Service Area, the State of Washington and the National number. A lower median age typically points to the presence of families with children.

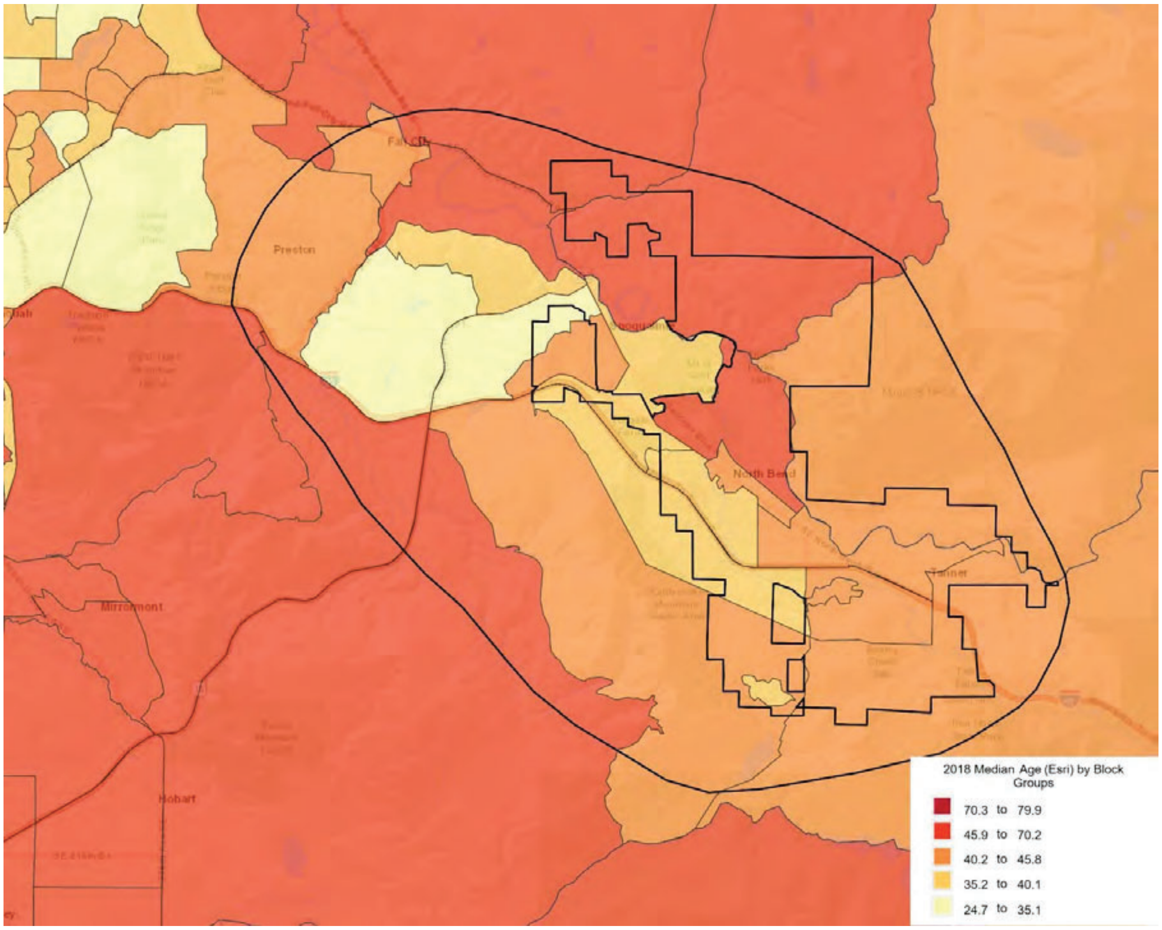
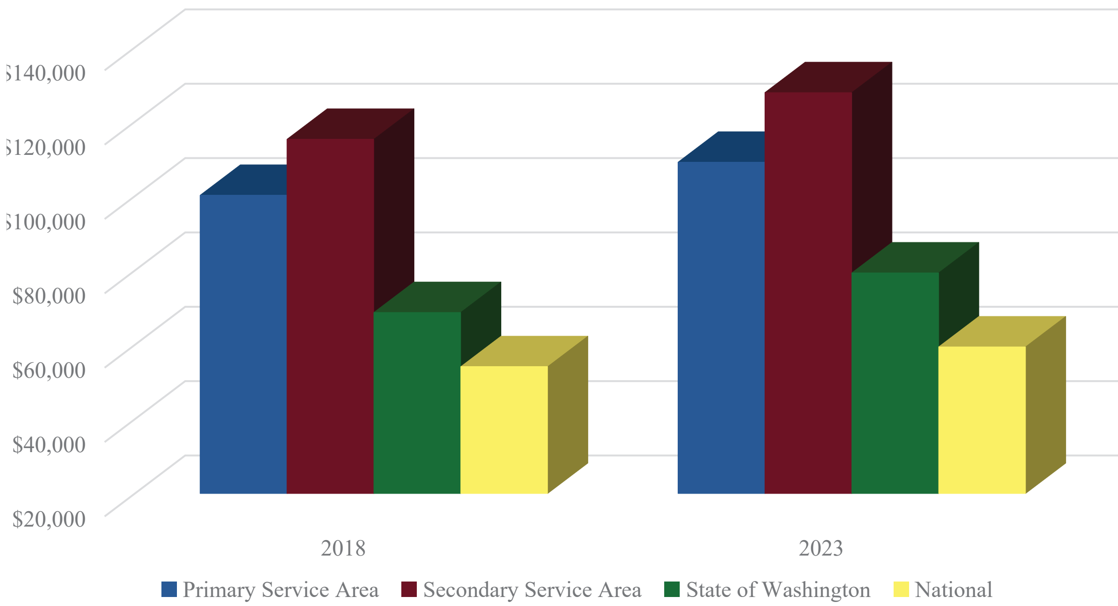


TABLE C: MEDIAN HOUSEHOLD INCOME

	2018 Projection	2023 Projection
Primary Service Area	$100,244	$109,141
Secondary Service Area	$115,313	$127,876
State of Washington	$68,734	$79,382
Nationally	$58,100	$65,727

CHART B: MEDIAN HOUSEHOLD INCOME



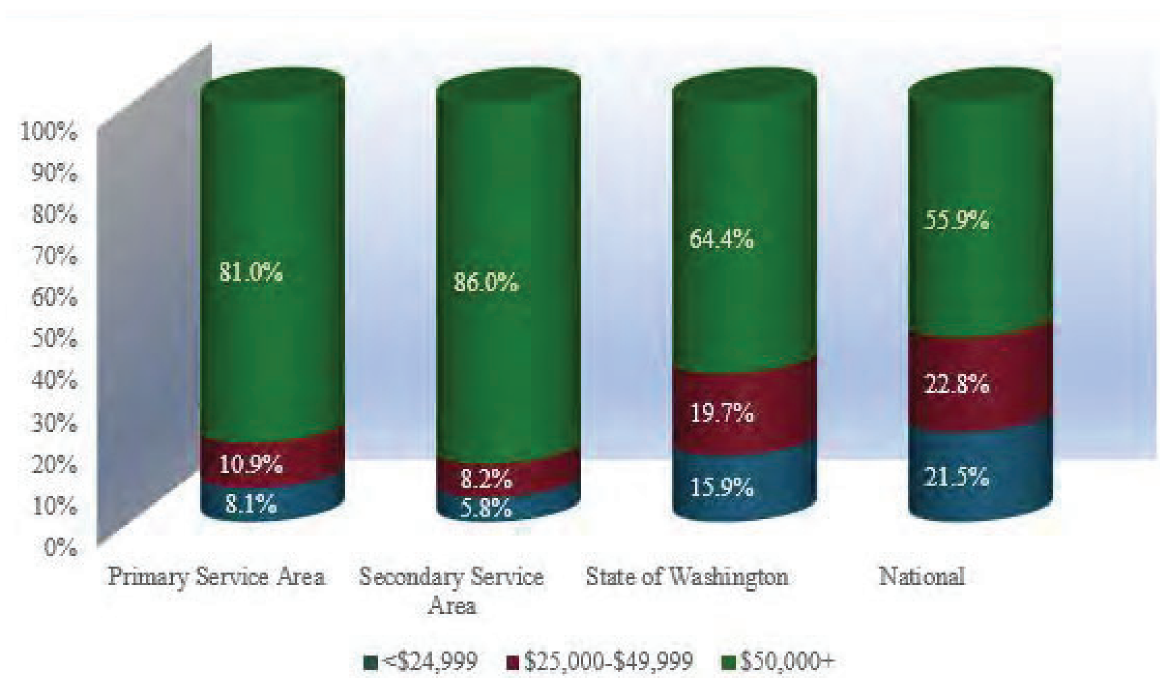
Based on 2018 projections for median household income the following narrative describes the service areas:

In the Primary Service Area, the percentage of households with median income over $50,000 per year is 81.0% compared to 55.9% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 8.1% compared to a level of 21.5% nationally.

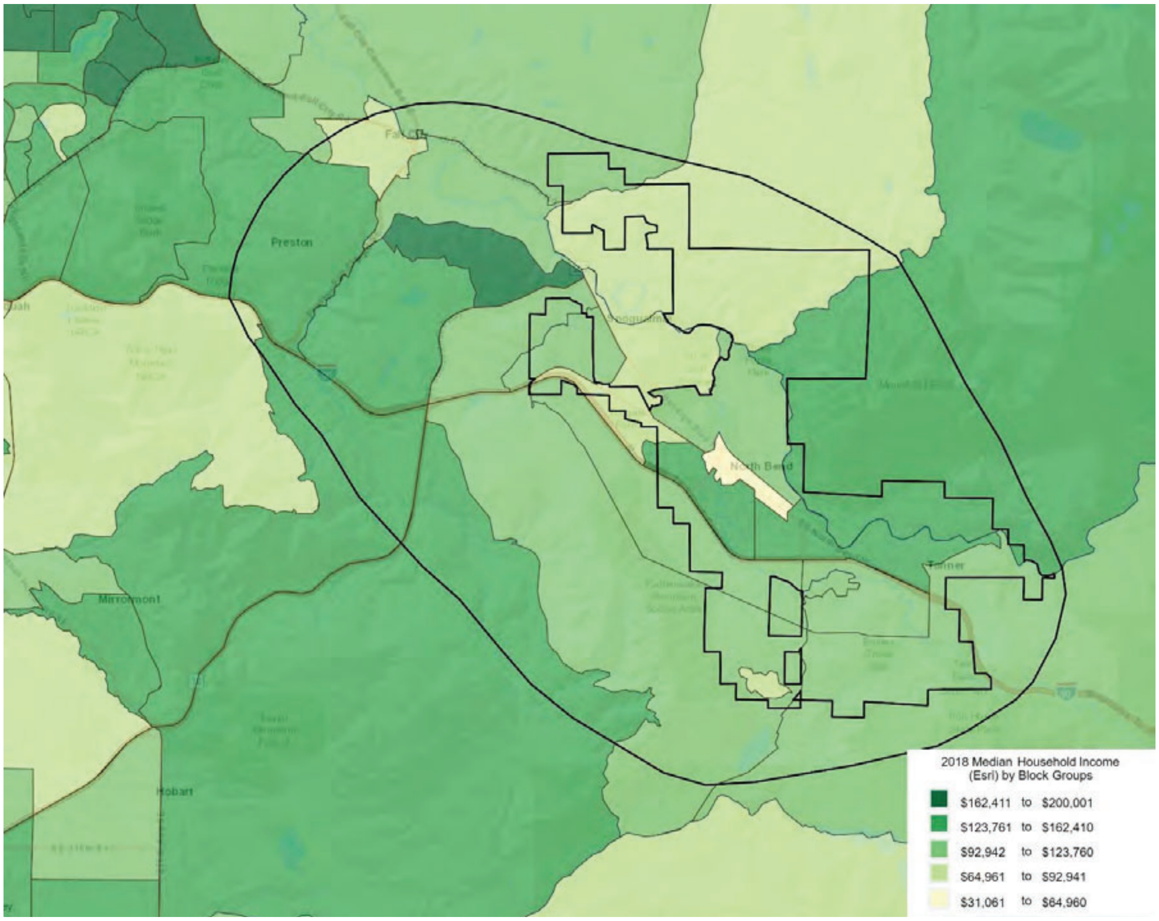
In the Secondary Service Area, the percentage of households with median income over $50,000 per year is 86.0% compared to 55.9% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 5.8% compared to a level of 21.5% nationally.

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

CHART C: MEDIAN HOUSEHOLD INCOME DISTRIBUTION



MAP C: MEDIAN AGE BY BLOCK GROUP



3.1.5 HOUSEHOLD BUDGET EXPENDITURES

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

TABLE D: HOUSEHOLD BUDGET EXPENDITURES[3]

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	170	$37,066.15	29.9%
Shelter	*173*	*$28,980.99*	*23.4%*
Utilities, Fuel, Public Service	*163*	*$8,085.16*	*6.5%*
Entertainment & Recreation	174	$5,618.92	4.5%

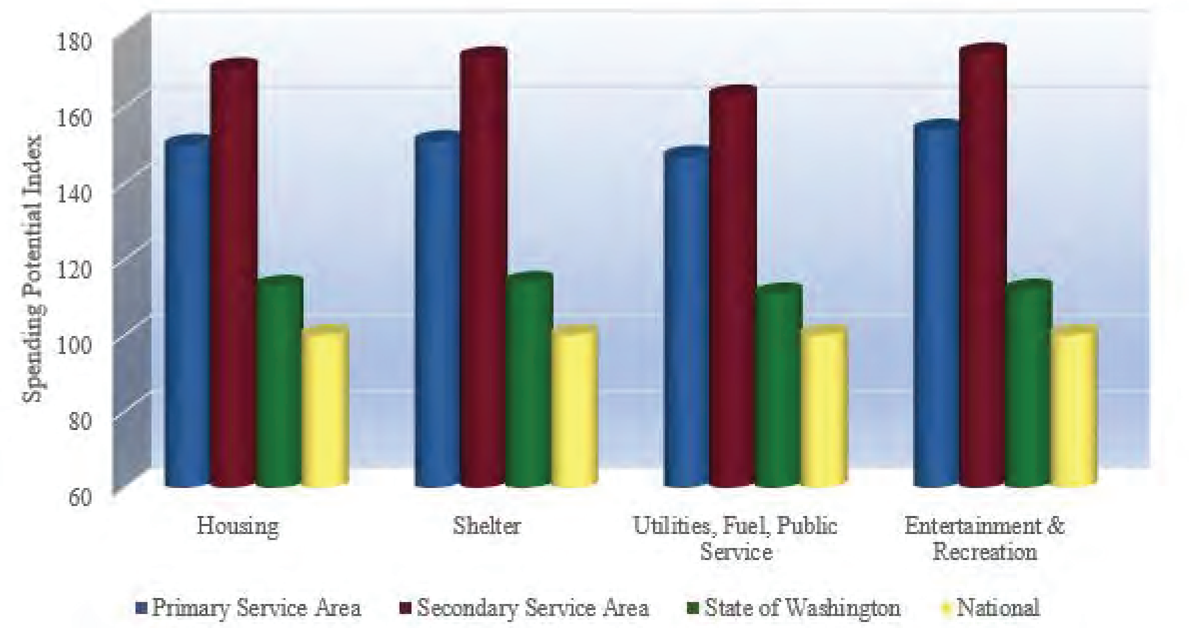
State of Washington	SPI	Average Amount Spent	Percent
Housing	113	$24,571.38	30.6%
Shelter	*114*	*$19,060.98*	*23.8%*
Utilities, Fuel, Public Service	*111*	*$5,510.41*	*6.9%*
Entertainment & Recreation	112	$3,614.61	4.5%

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

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

[3] Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2018 and 2023.

CHART D: HOUSEHOLD BUDGET EXPENDITURES SPENDING POTENTIAL INDEX



The total number of housing units in the Primary Service Area is 5,845 and 91.9% are occupied, or 5,372 housing units. The total vacancy rate for the service area is 6.2%. Of the available units:

- For Rent 1.4%
- Rented, not Occupied 0.1%
- For Sale 1.3%
- Sold, not Occupied 0.3%
- For Seasonal Use 3.4%
- Other Vacant 1.5%

The total number of housing units in the Secondary Service Area is 12,171 and 92.8% are occupied, or 11,299 housing units. The total vacancy rate for the service area is 6.3%. Of the available units:

- For Rent 1.1%
- Rented, not Occupied 0.1%
- For Sale 1.7%
- Sold, not Occupied 0.5%
- For Seasonal Use 2.2%
- Other Vacant 1.6%

3.1.6 RECREATION EXPENDITURES SPENDING POTENTIAL INDEX

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

TABLE E: RECREATION EXPENDITURES SPENDING POTENTIAL INDEX4

Primary Service Area	SPI	Average Spent
Fees for Participant Sports	166	$188.06
Fees for Recreational Lessons	176	$243.12
Social, Recreation, Club Membership	168	$380.48
Exercise Equipment/Game Tables	171	$98.54
Other Sports Equipment	157	$12.09

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	193	$217.79
Fees for Recreational Lessons	215	$297.02
Social, Recreation, Club Membership	195	$440.75
Exercise Equipment/Game Tables	197	$113.38
Other Sports Equipment	182	$13.98

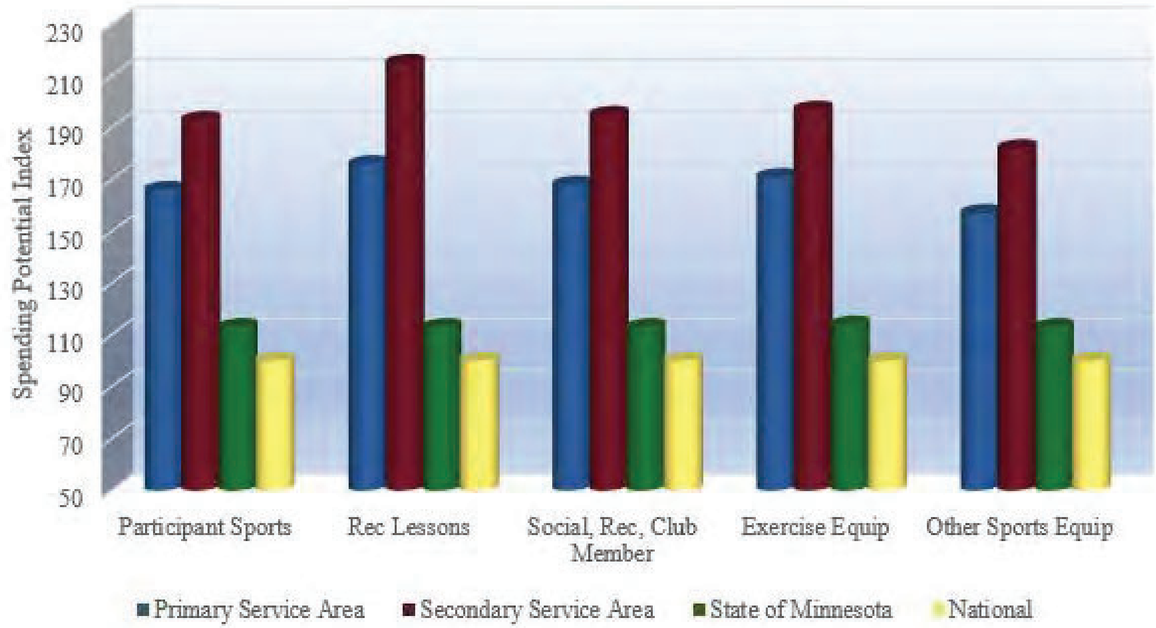
State of Washington	SPI	Average Spent
Fees for Participant Sports	113	$127.54
Fees for Recreational Lessons	113	$156.30
Social, Recreation, Club Membership	113	$255.90
Exercise Equipment/Game Tables	114	$65.35
Other Sports Equipment	113	$8.69

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

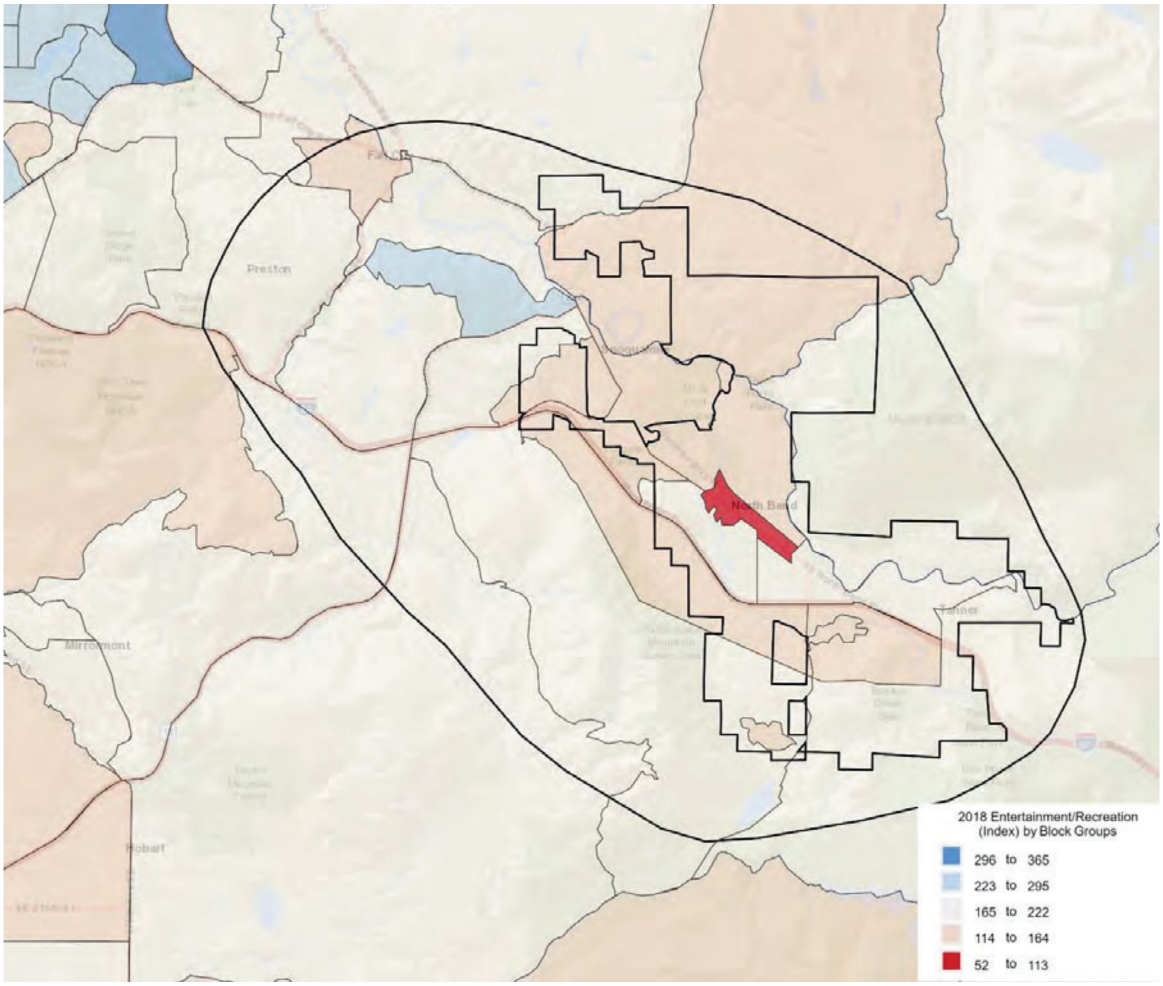
SPI: Spending potential index as compared to the national number of 100.

[4] Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics.

CHART E: RECREATION SPENDING POTENTIAL INDEX



MAP D: ENTERTAINMENT AND RECREATION SPENDING BY BLOCK GROUP



3.1.7 POPULATION DISTRIBUTION BY AGE

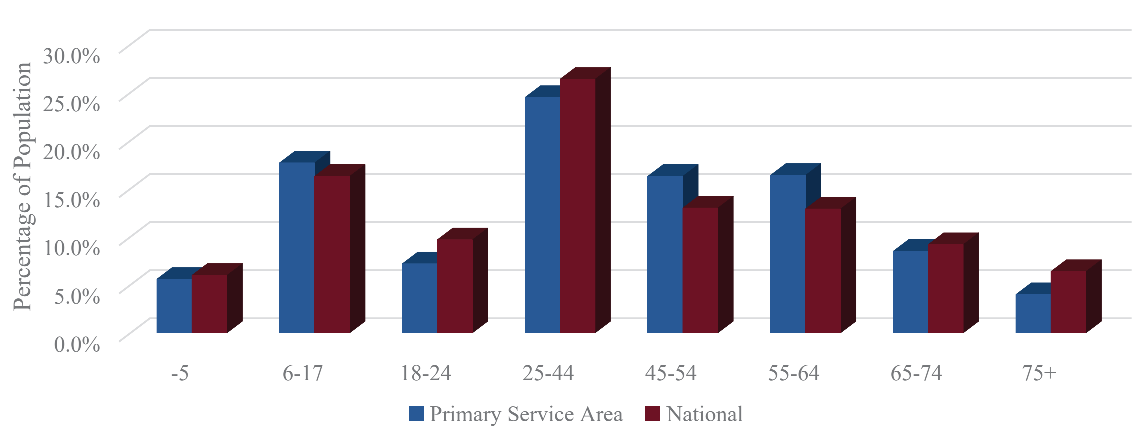
Utilizing census information for the Primary Service Area and Secondary Service Area, the following comparisons are possible.

TABLE F: 2018 PRIMARY SERVICE AREA AGE DISTRIBUTION *(ESRI ESTIMATES)*

Ages	Population	% of Total	Nat. Population	Difference
0-5	886	5.6%	6.0%	-0.4%
5-17	2,814	17.7%	16.3%	+1.4%
18-24	1,150	7.2%	9.7%	-2.5%
25-44	3,892	24.5%	26.4%	-1.9%
45-54	2,612	16.3%	13.0%	+3.3%
55-64	2,627	16.4%	12.9%	+3.5%
65-74	1,363	8.5%	9.2%	-0.7%
75+	633	4.0%	6.4%	-2.4%

Population: *2018 census estimates in the different age groups in Primary Service Area.*
% of Total: *Percentage of the Primary Service Area population in the age group.*
National Population: *Percentage of the national population in the age group.*
Difference: *Percentage difference between Primary Service Area population and the national population*

CHART F: 2018 PRIMARY SERVICE AREA AGE DISTRIBUTION



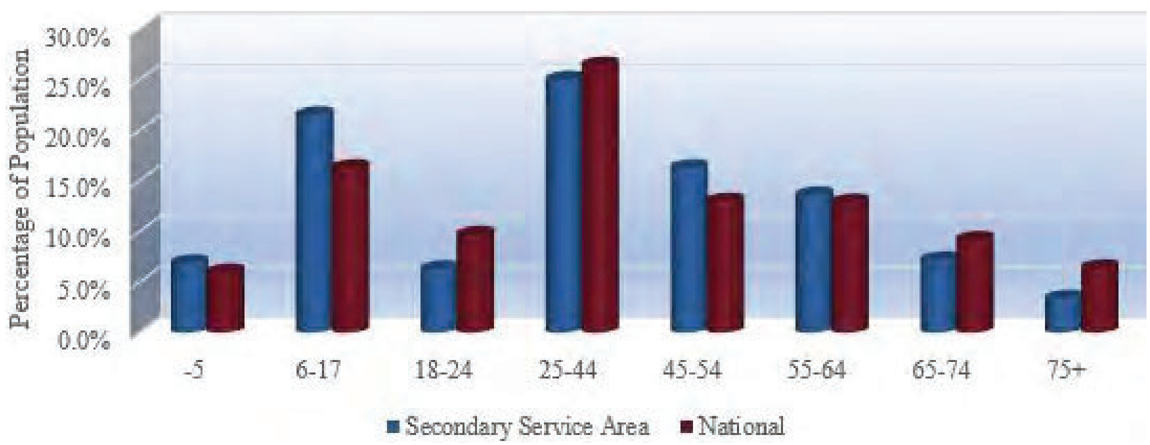
The demographic makeup of Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the age groups, 5-17, 45-54 and 55-64 A smaller population in the age groups under 5, 18-24, 25-44, 65-74 and 75+. The greatest positive variance is in the 55-64 age group with +3.5%, while the greatest negative variance is in the 18-24 age group with -2.5%.

TABLE G: 2018 SECONDARY SERVICE AREA AGE DISTRIBUTION *(ESRI ESTIMATES)*

Ages	Population	% of Total	Nat. Population	Difference
0-5	2,488	6.9%	6.0%	+0.9%
5-17	7,797	21.5%	16.3%	+5.2%
18-24	2,297	6.3%	9.7%	-3.4%
25-44	9,094	25.0%	26.4%	-1.4%
45-54	5,913	16.3%	13.0%	+3.3%
55-64	4,918	13.6%	12.9%	+0.7%
65-74	2,643	7.2%	9.2%	-2.0%
75+	1,194	3.4%	6.4%	-3.0%

Population:	*2018 census estimates in the different age groups in the Secondary Service Area.*
% of Total:	*Percentage of the Secondary Service Area population in the age group.*
National Population:	*Percentage of the national population in the age group.*
Difference:	*Percentage difference between Secondary Service Area population and the national population*

CHART G: 2018 SECONDARY SERVICE AREA AGE GROUP DISTRIBUTION



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the age groups Under 5, 5-17, 45-54, and 55-64+. There is a smaller population in the 18-24, 25-44, 65-74 and 75+ age groups. The greatest positive variance is in the 5-17 age group with +5.2%, while the greatest negative variance is in the 18-24 age group with-3.4%.

3.1.8 POPULATION DISTRIBUTION COMPARISON BY AGE

Utilizing census information from the Primary Service Area and Secondary Service Area, the following comparisons are possible.

TABLE H: 2018 PRIMARY SERVICE AREA POPULATION ESTIMATES
(US CENSUS INFORMATION AND ESRI)

Ages	2010 Census	2018 Projection	2023 Projection	Percent Change	Percent Change Nat'l
-5	896	886	899	+0.3%	+2.5%
5-17	2,778	2,814	2,828	+1.8%	+0.9%
18-24	939	1,150	1,087	+15.8%	+0.7%
25-44	3,851	3,892	4,126	+7.1%	+12.5%
45-54	2,839	2,612	2,461	-13.3%	-9.5%
55-64	1,866	2,627	2,759	+47.9%	+17.2%
65-74	685	1,363	1,958	+185.8%	+65.8%
75+	489	633	920	+88.1%	+40.2%

CHART H: PRIMARY SERVICE AREA POPULATION GROWTH

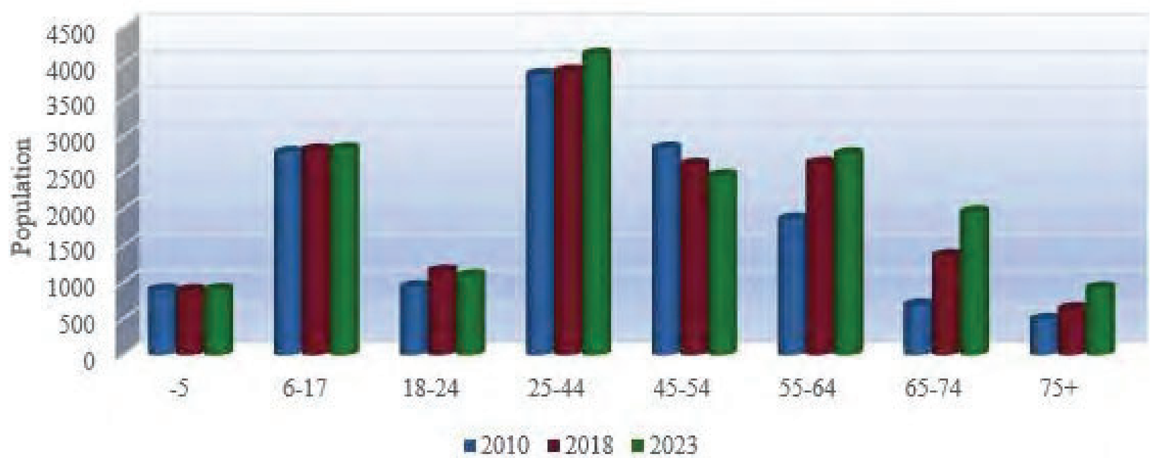


Table-H illustrates the growth or decline in age group numbers from the 2010 census until the year 2023. It is projected all age categories, except 45-54, will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers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

TABLE I : 2018 SECONDARY SERVICE AREA POPULATION ESTIMATES
(US CENSUS INFORMATION AND ESRI)

Ages	2010 Census	2018 Projection	2023 Projection	Percent Change	Percent Change Nat'l
-5	2,527	2,488	2,645	+4.7%	+2.5%
5-17	6,392	7,797	8,219	+28.6%	+0.9%
18-24	1,626	2,297	2,331	+43.4%	+0.7%
25-44	9,440	9,094	9,841	+4.2%	+12.5%
45-54	5,444	5,913	5,883	+8.1%	-9.5%
55-64	3,525	4,918	5,203	+47.6%	+17.2%
65-74	1,411	2,643	3,608	+155.7%	+65.8%
75+	866	1,194	1,692	+95.4%	+40.2%

CHART I: SECONDARY SERVICE AREA POPULATION GROWTH

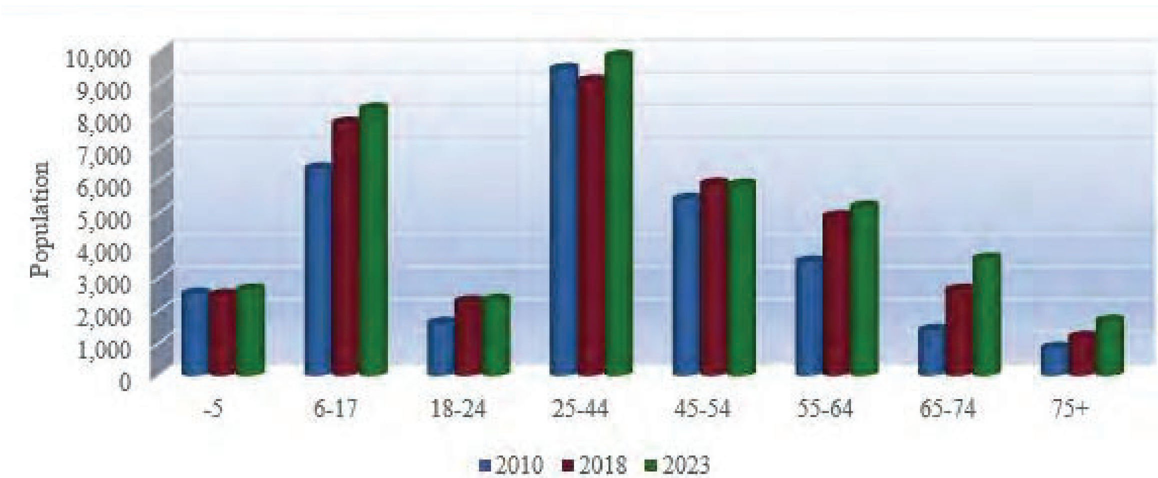


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2023. It is projected that all age categories will see an increase. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups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

3.1.9 ETHNICITY AND RACE

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

TABLE J: PRIMARY SERVICE AREA ETHNIC POPULATION AND MEDIAN AGE 2018
(SOURCE - US BUREAU AND ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of WA Population
Hispanic	900	27.0	5.6%	12.9%

TABLE K: PRIMARY SERVICE AREA BY RACE AND MEDIAN AGE 2018
(SOURCE - US BUREAU AND ESRI)

Race	Total Population	Median Age	% of Population	% of WA Population
White	14,462	42.7	90.5%	73.6%
Black	71	44.5	0.5%	4.1%
American Indian	151	40.6	0.9%	1.5%
Asian	300	43.6	1.9%	8.8%
Pacific Islander	33	43.1	0.2%	0.7%
Other	320	28.2	2.0%	5.9%
Multiple	635	21.0	4.0%	5.4%

2018 Primary Service Area Total Population: 15,974 Residents

CHART J: 2018 PRIMARY SERVICE AREA POPULATION BY NON-WHITE RACE

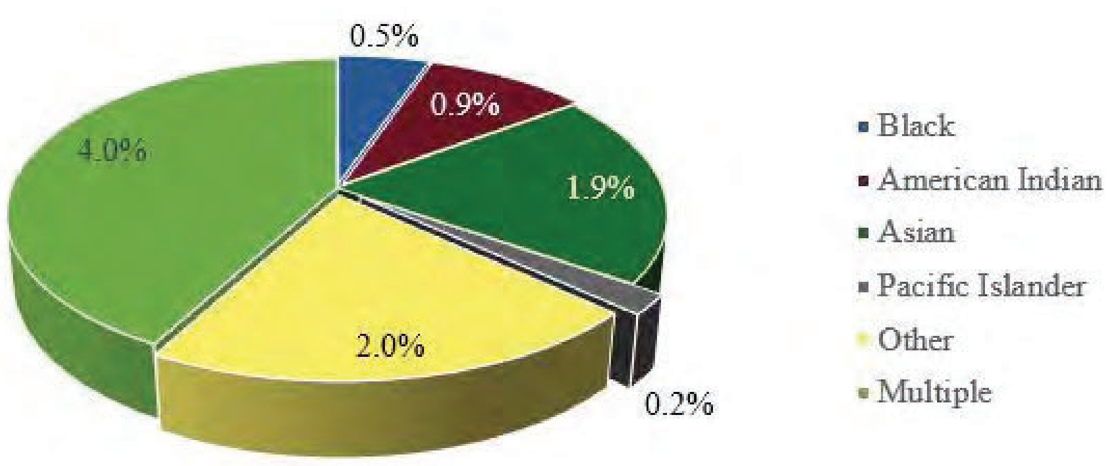


TABLE L: SECONDARY SERVICE AREA ETHNIC POPULATION AND MEDIAN AGE 2018
(SOURCE - US BUREAU AND ESRI)

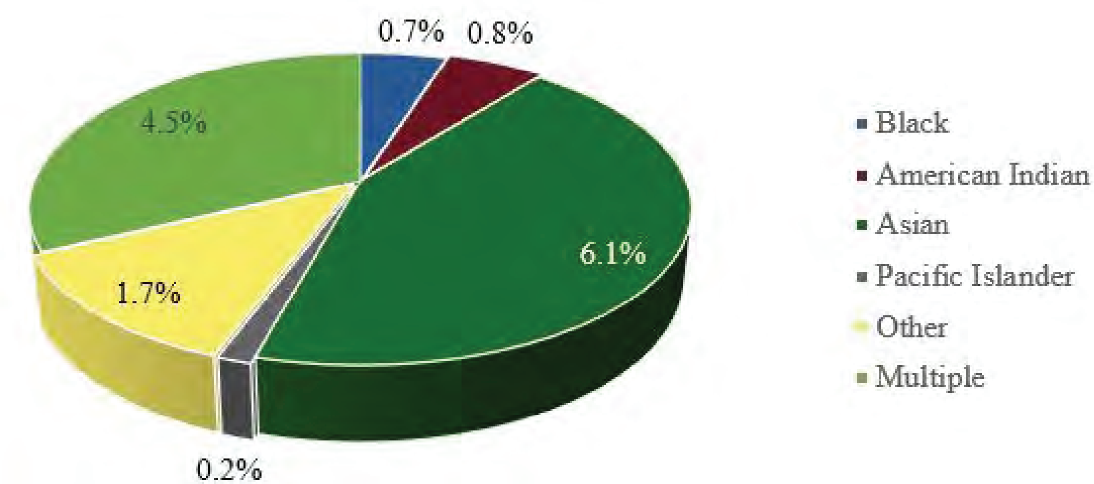
Ethnicity	Total Population	Median Age	% of Population	% of WA Population
Hispanic	2,037	23.7	5.6%	12.9%

TABLE M: SECONDARY SERVICE AREA BY RACE AND MEDIAN AGE 2018
(SOURCE - US BUREAU AND ESRI)

Race	Total Population	Median Age	% of Population	% of WA Population
White	31,252	40.7	86.0%	73.6%
Black	268	37.7	0.7%	4.1%
American Indian	304	35.8	0.8%	1.5%
Asian	2,216	36.4	6.1%	8.8%
Pacific Islander	55	40.5	0.2%	0.7%
Other	634	27.1	1.7%	5.9%
Multiple	1,622	15.6	4.5%	5.4%

2018 Primary Service Area Total Population: 36,346 Residents

CHART K: 2018 SECONDARY SERVICE AREA POPULATION BY NON-WHITE RACE



3.1.10 TAPESTRY SEGMENTATION

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

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

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provide a brief description of each.

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

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

TABLE N: PRIMARY SERVICE AREA TAPESTRY SEGMENT COMPARISION
(ESRI ESTIMATE)

	Primary Service Area		*Demographics*	
	Percent	Cumulative Percent	Median Age	Median HH Income
Soccer Moms (4A)	24.0%	24.0%	36.6	$84,000
Savvy Suburbanites (1D)	22.8%	46.8%	44.1	$104,000
Green Acres (6A)	13.9%	60.7%	43.0	$72,000
Old and Newcomers (8F)	12.0%	72.7%	38.5	$39,000
Professional Pride (1B)	11.1%	83.8%	40.5	$127,000

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

SAVY SUBURBANITES (1D)
Families include empty nesters and those with adult children still at home. Well-educated that enjoy cultural and sporting events and being physically active.

GREEN ACRES (6A)
Lifestyle that features self-reliance. Enjoy maintaining home/yard, being outside and playing sports. Most households no longer have children. Conservative and cautious.

OLD AND NEWCOMERS (8F)
Singles living on a budget. Just beginning careers or taking college/adult education classes. Strong supporters of environmental organizations.

PROFESSIONAL PRIDE (1B)
Goal oriented couples working long hours. They are well-organized and scheduled with commitments to their children's activities. Exercise often at health clubs.

CHART L: PRIMARY SERIVICE AREA TAPESTRY SEGMENT REPRESENTATION PERCENTAGE

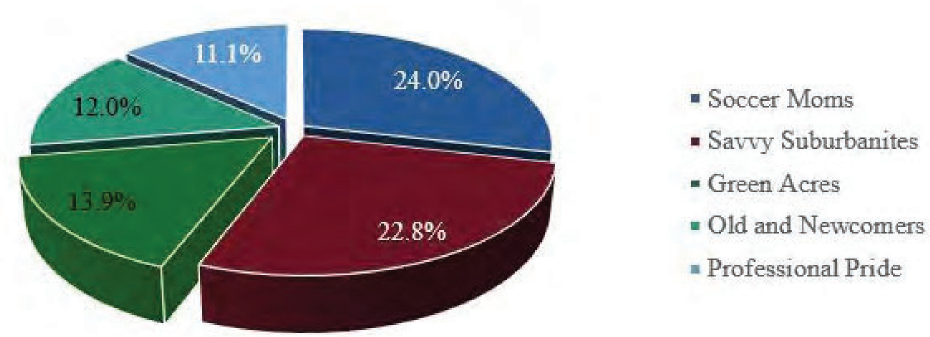


CHART M: PRIMARY SERVICE AREA TAPESTRY SEGMENT ENTERTAINMENT SPENDING

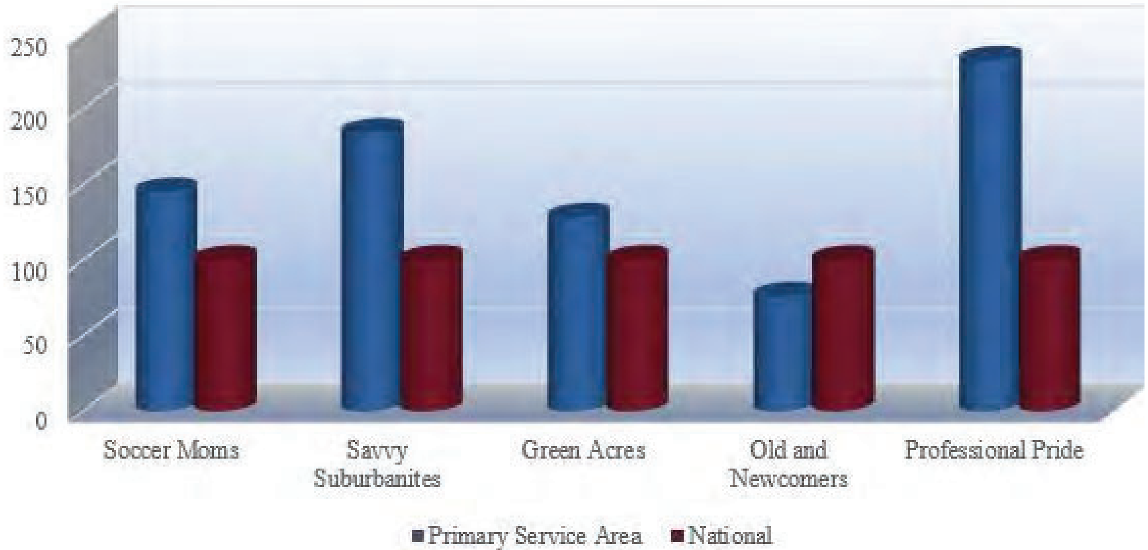


TABLE O: SECONDARY SERVICE AREA TAPESTRY SEGMENT COMPARSION
(ESRI ESTIMATE)

	Secondary Service Area		*Demographics*	
	Percent	Cumulative Percent	Median Age	Median HH Income
Boomburbs (1C)	32.6%	32.6%	33.6	$105,000
Savvy Suburbanites (1D)	13.9%	46.5%	44.1	$104,000
Pleasantville (2B)	12.1%	58.6%	41.9	$85,000
Soccer Moms (4A)	11.3%	69.9%	36.6	$84,000
Professional Pride (1B)	7.9%	77.8%	40.5	$127,000

BOOMBURBS 91C)
A new growth market with many young professionals with families. Fitness is a priority, including club memberships. Enjoy all sports and generous supporters of the arts.

SAVVY SUBURBANITES (1D)
Families include empty nesters and those with adult children still at home. Well-educated that enjoy cultural and sporting events and being physically active.

PLEASANTVILLE (2B)
Transitioning into empty nests, residents spend their spare time with sports and home improvement. Willing to spend money on quality and brands.

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

PROFESSIONAL PRIDE (1B)
Professional Pride (1B) – Goal oriented couples working long hours. They are well-organized and scheduled with commitments to their children's activities. Exercise often at health clubs.

CHART N: SECONDARY SERVICE AREA TAPESTRY SEGMENT REPRESENTATION BY PERCENTAGE

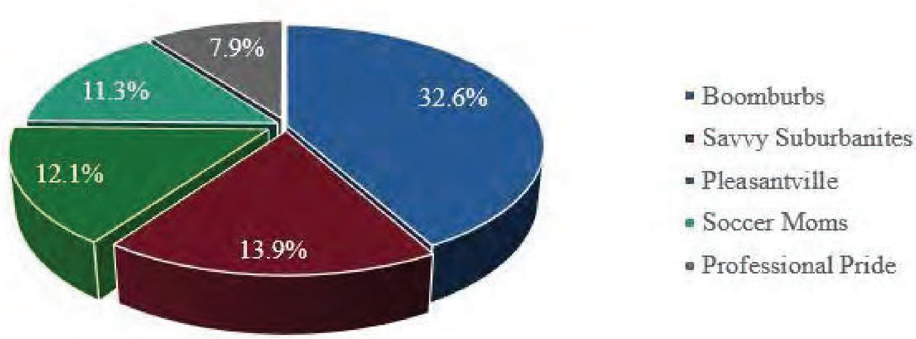


CHART O: SECONDARY SERVICE AREA TAPESTRY SEGMENT ENTERTAINMENT SPENDING

3.1.11 DEMOGRAPHIC SUMMARY

The following summarizes the demographic characteristics of the service areas.

- The Primary Service Area (Si View Metropolitan Park District) at approximately 16,000 in population is too small to support a significant aquatic/recreation center without drawing users from the Secondary Service Area.
- The Secondary Service Area at nearly 36,500, is large enough to support an aquatic/recreation center with a number of amenities.
- Both service areas have a relatively large household size, indicating homes with a number of children.
- The population in both service areas is slightly older than the state and national numbers and in the coming years there is expected to be an increase in the youth age groups but more significant growth in the senior age categories.
- Both service areas have a much higher median household income level when compared to state and national numbers.
- Expenditures for recreation activities is significantly higher than the state and na tional numbers but the cost of living in the area is also higher.
- There is very little ethnic diversity in the area.

3.2 MARKET ANALYSIS - RECREATION PARTICIPATION, TRENDS & PROVIDERS

3.2.1 INTRODUCTION

In addition to analyzing the demographic realities of the service areas, it is possible to project participation in recreation and sport activities.

3.2.2 PARTICIPATION NUMBERS

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

B*K takes the national average and combines that with participation percentages of Si View Metropolitan Park District and the Secondary Service Area based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage when applied to the population of Si View Metropolitan Park District and the Secondary Service Area then provides an idea of the market potential for various activities.

TABLE A: SWIMMING POOL PARTICIPATION RATES

	Age	Income	Region	Nation	Average
Swimming	16.6%	21.4%	15.2%	16.2%	17.3%
Did Not Participate	23.0%	18.1%	20.8%	22.8%	21.2%

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

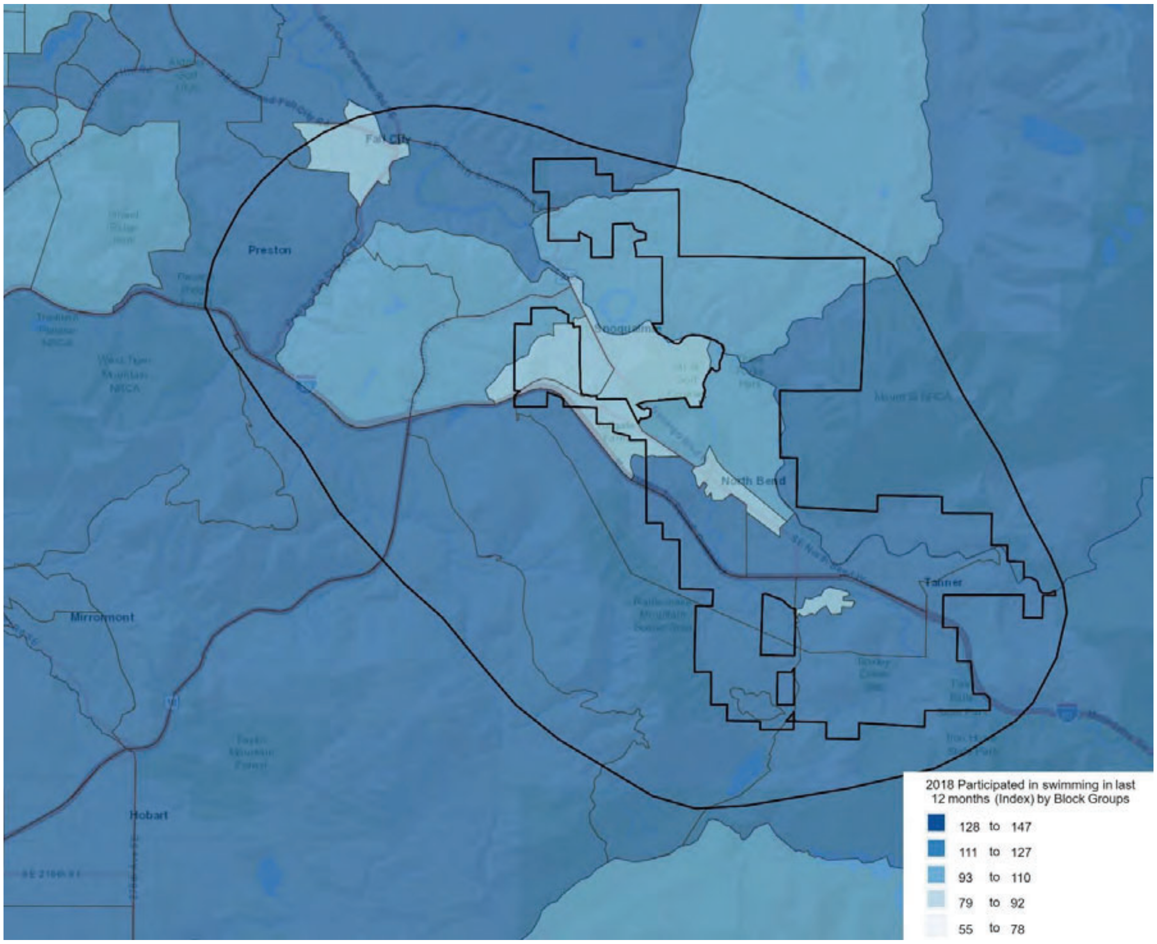
TABLE B: SWIMMING PARTICIPATION RATES FOR SECONDARY SERVICE AREA

	Age	Income	Region	Nation	Average
Swimming	17.2%	21.4%	15.2%	16.2%	17.5%
Did Not Participate	23.0%	18.1%	20.8%	22.8%	21.2%

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

Note: "Did Not Participate" refers to all 55 activities tracked by the NSGA.

MAP A: SWIMMING PARTICIPATION



3.2.3 ANTICIPATED SWIMMING PARTICIPATION NUMBER

Utilizing the average percentage from Table-A above plus the 2010 census information and census estimates for 2018 and 2023 (over age 7) the following comparisons are available.

TABLE C: SWIMMING PARTICIPATION GROWTH OR DECLINE IN SI VIEW METROPOLITAN PARK DISTRICT

	Average	2010 Population	2018 Population	2023 Population	Difference
Swimming	17.3%	2,271	2,551	2,734	463
Did Not Participate	21.2%	2,773	3,115	3,339	566

SWIMMING PARTICIPATION GROWH OR DECLINE IN THE SECONDARY SERVICE AREA

	Average	2010 Population	2018 Population	2023 Population	Difference
Swimming	17.5%	4,840	5,717	6,221	1,382
Did Not Participate	21.2%	5,855	6,917	7,527	1,671

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The "Did Not Participate" statistics refers to all 55 activities outlined in the NSGA 2017 Survey Instrument.

3.2.4 ANTICIPATED ANNUAL SWIMMER DAYS

Utilizing NSGA survey information B*K can determine the average number of times each of the groups listed below participated in swimming. Once that average has been determined it can be applied the participation numbers from Table C and D to provide an anticipated number of swimmer days within the service area. Anticipated number of swimmer days can be defined as the number of times all of the individuals within the service area will swim during a year, regardless of duration.

TABLE E: ANTICIPATED ANNUAL SWIMMER DAYS IN THE PRIMARY SERVICE AREA

National	Male	Female	Region	Income	Average
39.95	39.77	40.12	41.13	38.62	**39.92**

Average	2010 Part.	2018 Part.	2023 Part.
39.92	90,658	101,836	109,141

TABLE F: ANTICIPATED ANNUAL SWIMMER DAYS IN THE SECONDARY SERVICE AREA

National	Male	Female	Region	Income	Average
39.95	39.77	40.12	41.13	38.62	**39.92**

Average	2010 Part.	2018 Part.	2023 Part.
39.92	193,213	228,223	248,342

It is important to note that these days are currently being spent at existing facilities in the area which may extend beyond the Secondary Service Area.

In addition to developing a unique participation percentage, B*K also examines the frequency of participation in swimming.

TABLE G: PARTICIPATION FREQUENCY

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

In the chart above one can look at swimming and how it is defined with respect to visits being Frequent, Occasional or Infrequent.

TABLE H: PARTICIPATION NUMBERS IN THE PRIMARY SERVICE AREA

	Frequent	Occasional	Infrequent	Total
Swimming	112	67	15	
Population	173	1,033	1,344	
Visits	**19,431**	**69,231**	**20,168**	**108,830**

TABLE I: PARTICIPATION NUMBERS IN THE SECONDARY SERVICE AREA

	Frequent	Occasional	Infrequent	Total
Swimming	112	67	15	
Population	389	2,315	3,013	
Visits	**43,542**	**155,136**	**45,194**	**243,872**

Note: The rate for calculation of visits is different than for the determination of the number of swimmer days which results in a difference in the total for swimmer days and projected visits.

3.2.5 PARTICIPATION BY ETHNICITY AND RACE

The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2017 survey, the following comparisons are possible.

TABLE J: COMPARISON OF NATIONAL, AFRICAN AMERICAN AND HISPANIC PARTICIPATION RATES

Indoor Activity	Si View Metropolitan Park District	National Participation	African American Participation	Hispanic Participation
Swimming	17.3%	16.2%	10.2%	12.9%
Did Not Participate	21.2%	22.8%	26.6%	26.6%

Si View Park District Part:	*The unique participation percentage developed for Si View Metropolitan Park District.*
National Rate:	*The national percentage of individuals who participate in the given activity.*
African American Rate:	*The percentage of African-Americans who participate in the given activity.*
Hispanic Rate:	*The percentage of Hispanics who participate in the given activity.*

There is an African American population of 0.5% and Hispanic population of 5.6% in Si View Metropolitan Park District. As such these numbers don't play much of a factor with regards to overall participation.

TABLE K: COMPARISON OF NATIONAL, AFRICAN AMERICAN AND HISPANIC PARTICIPATION RATES

Indoor Activity	Secondary Service Area	National Participation	African American Participation	Hispanic Participation
Swimming	17.5%	16.2%	10.2%	12.9%
Did Not Participate	21.2%	22.8%	26.6%	26.6%

Secondary Service Part:	*The unique participation percentage developed for the Secondary Service Area.*
National Rate:	*The national percentage of individuals who participate in the given activity.*
African American Rate:	*The percentage of African-Americans who participate in the given activity.*
Hispanic Rate:	*The percentage of Hispanics who participate in the given activity.*

There is an African American population of 0.7% and Hispanic population of 5.6% in the Secondary Service Area. As such these numbers don't play much of a factor with regards to overall participation

3.2.6 SUMMARY OF SPORTS PARTICIPATION

The following chart summarizes participation for activities utilizing information from the 2017 National Sporting Goods Association survey.

TABLE L: SPORTS PARTICIPATION SUMMARY

Sport	Nat'l Rank[5]	Nat'l Participation (in millions)
Exercise Walking	1	105.7
Exercising w/ Equipment	2	57.1
Swimming	**3**	**45.6**
Aerobic Exercising	4	45.6
Running/Jogging	5	44.9
Hiking	6	42.9
Camping	7	40.4
Workout @ Club	8	37.8
Bicycle Riding	9	36.2
Weight Lifting	10	35.6
Bowling	11	34.0
Fishing (fresh water)	12	29.7
Yoga	13	29.6
Basketball	14	24.6
Billiards/Pool	15	21.0
Target Shooting (live ammunition)	16	20.1
Golf	17	17.9
Hunting w/ Firearms	18	17.7
Boating (motor/power)	19	14.9
Soccer	20	14.3
Backpack/Wilderness Camping	21	12.4
Tennis	22	12.3
Baseball	23	12.1
Volleyball	24	10.5
Table Tennis/Ping Pong	25	10.2
Kayaking	26	10.0
Softball	27	9.8
Football (touch)	28	9.5
Fishing (salt water)	29	9.2
Dart Throwing	30	9.0

Nat'l Rank: Popularity of sport based on national survey.
Nat'l Participation: Population that participate in this sport on national survey.

[5] This rank is based upon the 55 activities reported on by NSGA in their 2017 survey instrument.

3.2.7 PARTICIPATION BY AGE GROUP

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

TABLE M: PARTICIPATION BY AGE GROUP

Activity	Largest	Second Largest	Third Largest
Exercise Walking	55-64	45-54	65-74
Exercising w/ Equipment	45-54	35-44	25-34/55-64
Swimming	**35-44**	**45-54**	**12-17**
Aerobic Exercise	35-44	25-34	45-54
Running/Jogging	25-34	35-44	18-24
Workout @ Club	25-34	35-44	45-54
Weight Lifting	25-34	35-44	45-54
Bicycle Riding	7-11	45-54	55-64/35-44
Soccer	7-11	12-17	25-34
Baseball	12-17	7-11	25-34
Yoga	25-34	35-44	45-54
Basketball	12-17	25-34	18-24
Volleyball	12-17	25-34	18-24
Softball	12-17	25-34	7-11
Football (tackle)	12-17	25-34	18-24
Football (flag)	7-11	12-17	25-34
Martial Arts/MMA	7-11	25-34	18-24/35-44
Pilates	25-34	35-44	45-54
Lacrosse	12-17	7-11	25-34

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

3.2.8 MARKET POTENTIAL INDEX FOR ADULT PARTICIPATION

In addition to examining the participation numbers for various indoor activities through the NSGA 2017 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in swimming activities.

TABLE N: MARKET POTENTIAL INDEX FOR ADULT PARTICIPATION IN ACTIVITIES IN PRIMARY SERVICE AREA

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Swimming	2,578	21.0%	130

TABLE O: MARKET POTENTIAL INDEX FOR ADULT PARTICIPATION IN ACTIVITIES IN SECONDARY SERVICE AREA

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Swimming	5,320	20.4%	126

Expected # of Adults:	Number of adults, 18 years of age and older, participating in the activity.
Percent of Population:	Percent of the service area that participates in the activity.
MPI:	Market potential index as compared to the national number of 100.

These table indicates that the overall propensity for adults to participate in swimming is greater than the national number of 100.

3.2.9 SPORTS PARTICIPATION TRENDS

Below are listed several sports activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2008-2017).

TABLE P: NATIONAL ACTIVITY TRENT (IN MILLIONS)

Increasing in Popularity

	2008 Participation	2017 Participation	Percent Change
Yoga	13.0	29.6	127.7%
Kayaking	4.9	10.0	104.1%
Hockey (ice)	1.9	3.3	73.7%
Gymnastics	3.9	6.0	53.8%
Skiing (cross country)	1.6	2.3	43.8%
Running/Jogging	30.9	43.8	41.7%
Aerobic Exercising	32.2	44.9	39.4%
Hiking	33.1	43.9	32.6%
Cheerleading	2.9	3.5	20.7%
Archery (Target)	7.1	8.0	12.7%
Lacrosse	2.6	2.9	11.5%
Exercise Walking	96.6	104.5	8.2%
Weight Lifting	33.9	36.5	7.7%
Ice/Figure Skating	8.2	8.8	7.3%
Wrestling	3.0	3.2	6.7%
Soccer	13.5	14.3	5.9%
Pilates	5.5	5.7	3.6%
Football (touch)	9.3	9.5	2.2%
Exercising w/ Equipment	55.0	55.5	0.9%
Scuba Diving (open water)	2.5	2.5	0.0%

2017 Participation: *The number of participants per year in the activity (in millions) in the United States.*

2008 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 2008 to 2017.*

Decreasing in Popularity

	2008 Participation	2017 Participation	Percent Change
Target Shooting (live ammunition)	20.3	20.1	-1.0%
Fishing (salt water)	9.4	9.2	-2.1%
Tennis	12.6	12.3	-2.4%
Boxing	3.8	3.7	-2.6%
Football (flag)	6.7	6.5	-3.0%
Target Shooting (air gun)	5.0	4.8	-4.0%
Basketball	25.7	24.6	-4.3%
Backpack/Wilderness Camping	13.0	12.4	-4.6%
Workout @ Club	39.3	37.4	-4.8%
Hunting w/ Bow & Arrow	6.2	5.9	-4.8%
Hunting w/ Firearms	18.8	17.7	-5.9%
Bicycle Riding	38.7	36.4	-5.9%
Martial Arts / MMA	6.4	6.0	-6.3%
Baseball	13.3	12.1	-9.0%
Skiing (alpine)	6.5	5.9	-9.2%
Swimming	53.5	47.9	-10.5%
Volleyball	12.2	10.5	-13.9%
Camping (Vacation/Overnight)	49.4	42.1	-14.8%
Muzzleloading	3.4	2.7	-20.6%
Paintball Games	6.7	5.3	-20.9%
Football (tackle)	9.5	7.5	-21.1%
Fishing (fresh water)	37.8	29.7	-21.4%
Golf	23.2	17.9	-22.8%
Canoeing	10.3	7.9	-23.3%
Table Tennis/Ping Pong	13.3	10.2	-23.3%
Softball	12.8	9.8	-23.4%
Bowling	44.7	34.0	-23.9%
Dart Throwing	12.2	9.0	-26.2%
Snowboarding	5.9	4.1	-30.5%
Water Skiing	5.6	3.8	-32.1%
Billiards/Pool	31.7	21.0	-33.8%
Skateboarding	9.8	5.5	-43.9%
Mountain Biking (off road)	10.2	5.6	-45.1%
Boating (motor/power)	27.8	14.9	-46.4%
In-Line Roller Skating	9.3	4.5	-51.6%

2017 Participation: *The number of participants per year in the activity (in millions) in the United States.*

2008 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 2008 to 2017.*

3.2.10 AQUATIC PARTICIPATION TRENDS

Swimming is one of the most popular sports and leisure activities, meaning that there is a significant market for aquatic pursuits. Approximately 15.2% of the population in the Pacific region of the country participates in aquatic activities. This is a significant segment of the population.

Despite the recent emphasis on recreational swimming the more traditional aspects of Aquatics (including swim teams, water polo, instruction and aqua fitness) remain as an important 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 swim team programs through USA Swimming, high schools, masters, and other community based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.

A 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 possibly long course). In communities where there are a number of competitive swim programs, utilizing a pool with 8 lanes or more is usually important. A competitive 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. Thus, 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 divers drops even more while the cost of construction with deeper pool depths and higher dive towers becomes significantly larger. 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 competitive aquatic centers. However, their competition base and number of participants is somewhat smaller. Water polo is a sport that continues to be very 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 of 6 foot is required which is often difficult to find 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.

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 has greatly diminished. 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 that is in a park like setting than a conventional aquatic facility.

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 has enhanced this type of amenity and created a pleasant atmosphere for adult socialization.

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.

3.2.11 AQUATIC 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 any aquatic facility. These include:

1. Leisure/recreation aqu tic activitie 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 p ogramming - The primary emphasis is on teaching swimming and lifesaving 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. Competi e 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 at the turn end and 6 feet for starts (7 is preferred). Spectator seating and deck space for staging meets is necessary. This market usually has strong demands for competitive pool space and time during prime times of center use.

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.

7. Social/relaxation - The appeal of using an aquatic 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 kid's 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 most pools is 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 many pools is 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. **Adults** – This age group has a variety of needs from aquatic exercise classes to lap swimming, triathlon training and competitive swimming through the master's program.

6. **Seniors**- As the population of the United States and the service areas continues to age, meeting the needs of an older senior population will be essential. 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.

7. **Special needs population** - This is a secondary market, but with the A.D.A. requirements and the 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.

8. **Special interest groups** - These 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 aquatic 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 pools, the ability for different water temperatures, and strong utilization of the aquatic area, it is possible to meet most of the varied market orientations as outlined above

3.2.12 INDOOR AQUATIC FACILITIES INVENTORY

There are a number of indoor aquatic facilities that currently serve the greater Si View market area. These vary from municipal pools to school facilities, to YMCA's and other non-profit providers.

PUBLIC CENTERS

There are a variety of public indoor aquatic and recreation amenities in the area. This includes:

Si View Pool – The Si View pool is a very small (50 x 30) indoor pool that has limited capacity and uses. It is primarily a warm water pool for lessons and water exercise classes but there is a limited amount of time available for lap swimming and the pool is utilized by a swim team.

Julius Boehm Pool – Located in Issaquah, this is one of the old King County Forward Thrust pools with a conventional stretch 40-yard pool with a shallow area and a 25-yard six lane lap/competition area. The facility has been totally renovated within the last five years.

Covington Aquatic Center – Another of the Forward Thrust pools this is also a stretch 40-yard pool with a shallow area and a 6 lane by 25-yard lap/competition pool.

Bellevue Aquatic Center – This conventional 6 lane x 25-yard pool has a diving 'L' attached as well as a separate therapy pool. It is an older facility that has been renovated but still does not meet the requirements for competitive swimming.

NON-PROFIT

There are a limited number of non-profit aquatic facilities in the greater Si View area. This includes:

Bellevue Family YMCA – This is a full-service YMCA that is in a small building that suffers from a lack of parking. The Y has a 4-lane x 25-yard lap pool, gym, fitness area, indoor track, racquetball courts, youth, teen and senior areas.

Sammamish Family YMCA – This is a full-service YMCA that has a warm water recreational pool and a 6 lane by 25-yard pool. The center is owned by the City of Sammamish.

Coal Creek Family YMCA – Located in Newcastle, this full-service YMCA has a 4-lane lap pool as well as a small recreation/teaching pool.

Samena Swim & Recreation Club – Located in Bellevue, this club has an indoor 6 lane x 25-meter pool and a 6-lane x 25-yard outdoor pool (that is bubbled in the winter), a fitness area, classroom space, youth space, preschool room, and a multipurpose room. This facility is a considerable distance from Si View.

Stroum Jewish Community Center - Located in Mercer Island, the facility has an indoor 4 lane by 25-yard pool that not only serves its members but is utilized by local swim teams as a practice site.

Mary Wayte Pool – The pool is owned by the Mercer Island School District but operated by Olympic Cascade Aquatics. This is another Forward Thrust pool

PRIVATE

Klahanie Pools – The Klahanie development has two small outdoor 4 lane x 25-yard lap pools, one is the Mountainview Pool which is seasonal and the other is Lakeside which has an inflatable bubble during the non-summer season. This pool is used by competitive swim teams during the winter months and is open to the general public as well.

The Club at Snoqualmie Ridge – The club features an outdoor 6 lane by 25-yard pool with a small wading pool as well. This is one of the few facilities that is actually located in Snoqualmie.

SwimLabs Swim School – This indoor facility has a relatively small warm water pool that is primarily utilized to teach youth how to swim. It is in Issaquah.

Tiger Mountain Aquatics – This is another small indoor aquatic facility that focuses on youth swim lessons.

Beyond these private facilities, there are also a number of private health clubs than have indoor pools, including:

Pro Sports Club – Located in Bellevue, this club has two 6-lane by 25-yard indoor pools that are used for lap swimming, lessons, aquatic exercise as well as swim team practices.

Columbia Athletic Club-Pine Lake – The club has a 4-lane x 25-yard lap pool, therapy pool, and children's pool. The club is located in Sammamish.

The Plateau Club – The club is primarily a golf-oriented facility, but it does have a small fitness center and an outdoor 6 lane x 25-yard pool with kid's pool that is located in a separate building from the clubhouse.

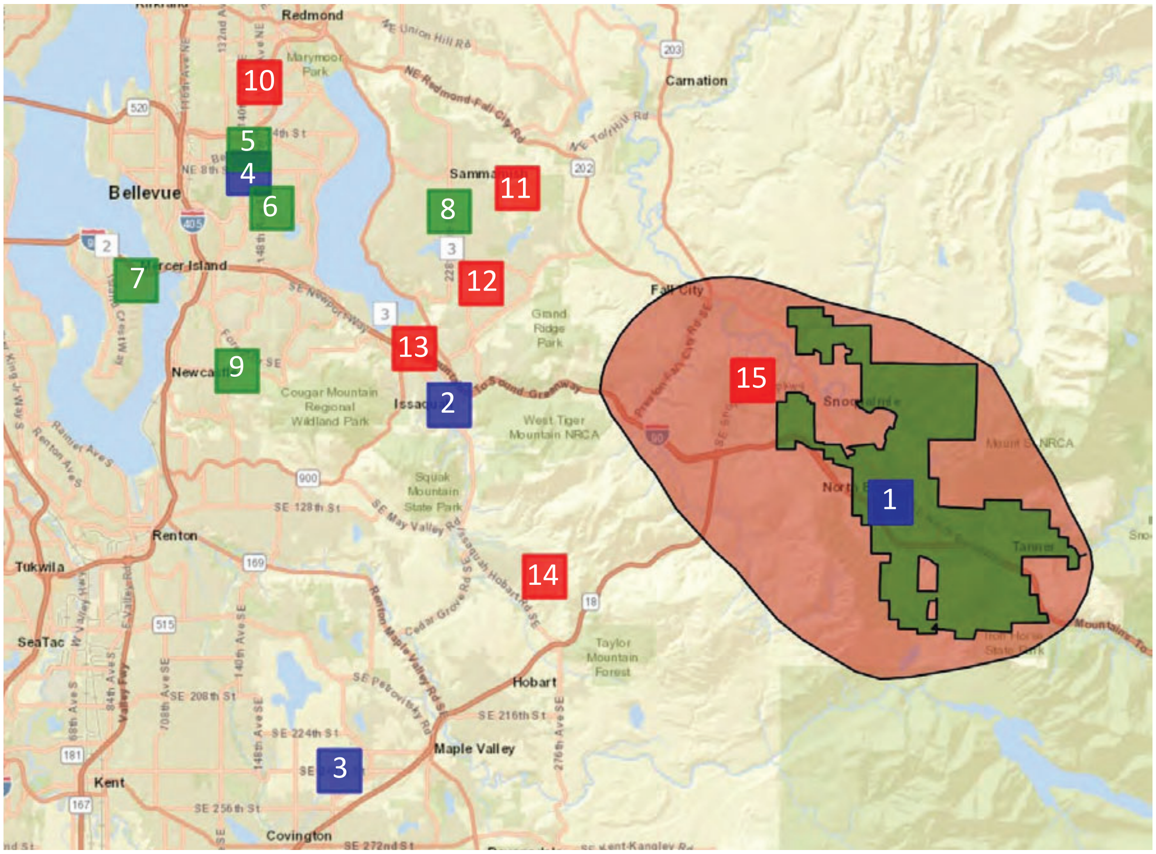
24 Hour Fitness – The club has a small three lane lap pool.

Issaquah Fitness Club – Located in Issaquah, the club has a 4-lane x 25-yard lap pool.

Gold's Gym Issaquah – The Club has an indoor 5 lane x 25-yard lap pool.

This is a representative listing of alternative aquatic facilities in the area and is not meant to be a total accounting of all service providers. There may be other facilities located in the greater Si View area that have an impact on the market as well.

MAP: ALTERNATE PROVIDERS



Blue – Public Providers
1. Si View Pool
2. Julius Boehm Pool
3. Covington Aquatic Center
4. Bellevue Aquatic Center

Green – Non Profit P oviders
5. Bellevue Family YMCA
6. Samena Swim & Rec Center
7. Mary Wayte Pool
   Stroum Jewish Community Center
8. Sammamish Family YMCA
9. Coal Creek Family YMCA

Red – Private Providers
10. Pro Sports Club
11. The Plateau Club
12. Columbia Athletic Club
    Klahanie Mountainview Club
    Klahanie Lakeside Pool
13. Issasquah Fitness Club
    Gold's Gym Issaquah
    24 Hr Fitness
    Swim Lab Swim School
14. Tiger Mountain Aquatics
15. The Club at Snoqulmie Ridge

3.2.13 OTHER PROVIDER SUMMARY

After analyzing the existing indoor aquatic providers in the greater Si View area, there is a definite market for an additional public facility. With a population base of approximately 36,500 in the Secondary Service Area there is a satisfactory base for new public indoor aquatic amenities. Most of the other providers are located well to the west of the Si View market area. The most viable facilities are the Julius Boehm Pool in Issaquah and the aquatic facilities at the Sammamish Family YMCA. Despite the fact that many of the health clubs in the area have some form of an indoor pool, they are generally small lap/instructional pools that serve their members. It has been known for at least the last 15 years that there is a strong market demand for more indoor water on the east side of the Seattle area.

3.2.14 DEMOGRAPHIC AND MARKET CONCLUSIONS

A new Si View Aquatic/Recreation Center will need to serve a variety of aquatic needs from competitive swimming to aquatic programs and recreational swimming to ensure a strong financial base for the facility.

Below are listed some of the market opportunities and challenges that exist with this project.

Opportunities

- The Secondary Service Area at nearly 36,500, is large enough to support an aquatic/recreation center.

- There are no comprehensive, public, indoor aquatic/recreation facilities in the Si View Metropolitan Park District or the Secondary Service Area.

- Many of the current public indoor aquatic facilities in the area are all older, conventional pools, with none of the appeal of a true leisure pool.

- Despite the presence of a number of other aquatic/recreation providers the greater market, the population base is large enough to support another indoor aquatic center.

- The demographic characteristics indicate households with children and higher income levels.

- There has been a distinct shortage of indoor aquatic facilities on the east side of the Seattle area for the last 15 years.

- An indoor aquatic/recreation center improves the quality of life in a community.

Challenges

- The Si View Metropolitan Park District at approximately 16,000 in population is too small to support a significant aquatic/recreation center without drawing users from the Secondary Service Area.

- The population in both service areas is slightly older than the state and national numbers and in the coming years there is expected to be an increase in the youth age groups but more significant growth in the senior age categories.

- There are a number of existing aquatic facilities in the greater Si View area with the Sammamish Family YMCA and Julius Boehm Pool being the most prominent.

- New public aquatic centers are possible in the coming years in Redmond and Bellevue.

- Funding not only the development but the operation of an indoor aquatic center will have to be clearly defined.

Project Direction

Based on the information gathered from the demographic and market analysis, the following is the recommended direction for the project.

- The facility will need to emphasize its ability to serve all age groups including youth, seniors and most importantly families.

- The center must be seen as a facility that features a variety of aquatic uses.

- The facility has to be perceived as being affordable for the amenities and services that are going to be provided.

- The site has to be visualized as being easily accessible for the entire Secondary Service Area.