

RECREATION DEMAND AND PROGRAM PLAN
SKYWAY - WESTHILL COMMUNITY CENTER
KING COUNTY PARKS AND RECREATION DIVISION
May, 2024

DRAFT



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& ASSOCIATES LTD

a|r|c
architecture resource collaborative

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Introduction – Market Analysis to Facility Program

Development of a new facility program requires a series of steps, from determining the primary service area to understanding community input. Some of these steps are data driven and consider the local markets, while others are based on experience and broader based national trends.

B*K uses the demographic analysis of the primary and secondary service areas as the baseline piece of information. The population characteristics help describe the community, who lives there and the resources that they have available to them. This begins to point to the ability to support and sustain a community facility, as well as potential programming interest levels. The demographics are then used to develop participation data from the National Sporting Goods Association. This data outlines the market for programs that could take place in a facility, and in some cases highlights the need for a specialized space, or additional space in the community. B*K also uses data from the National Endowment for the Arts to understand what types of enrichment programming and facilities could be supported. The other data point in this stage is understanding who the other providers are in the service area, and the gaps that exist.

With an understanding of the demographics, participation potential, and alternative providers the next piece of data that enters the equation is public input. The data received in the public input process can either further validate the demographics and participation figures, or it can influence a new direction. For this project, the public input from previous studies and surveys is the starting point for this programming. Future public meetings will continue to influence the building's program and design.

A final data point for the program development is an understanding of the potential site, as well as construction and project budgets. This information begins to outline the size of the facility, potential program opportunities, and is often coupled with the operational goals of the facility. For example, a pay-to-play facility with a focus on revenue generation, likely has a much different facility program in contrast to one that is focused on free access and creating a community gathering place.

With this information in hand, B*K then develops a facility program. That program takes all these data points into account, along with the facility operating experience of the B*K staff. The program that B*K develops focuses on the spaces that should be included in the facility. ARC Architects then validates the square footage allocation recommendations from B*K and uses that information to develop a construction and project budget.

As part of the feasibility study a facility program has been developed. This facility program was recommended by Ballard*King & Associates and the square footage recommendations were verified by ARC Architects.

It is important to note that this facility program was developed using multiple data points. Those include:

- Completion of a market assessment that examined demographics, participation data, and alternative providers.
- Initial public input from previous studies and surveys which assessed areas of interest from the surrounding community.
- On-going discussion with the client on the need to have a financially efficient operation.

Section I – Demographics

Ballard*King & Associates (B*K), as a sub-consultant to ARC Architects, has been hired to complete a feasibility study for an indoor community center.

The following is a summary of the demographic characteristics within areas identified as the Primary and Secondary Service Areas. The Primary Service Area encompasses Bryn Mawr – Skyway CDP, and the Secondary Service Area encompasses a larger geographic area.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2020 Census data and their demographers for 2023-2028 projections. In addition to demographics, ESRI also provides data on housing, 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.

Service Areas:

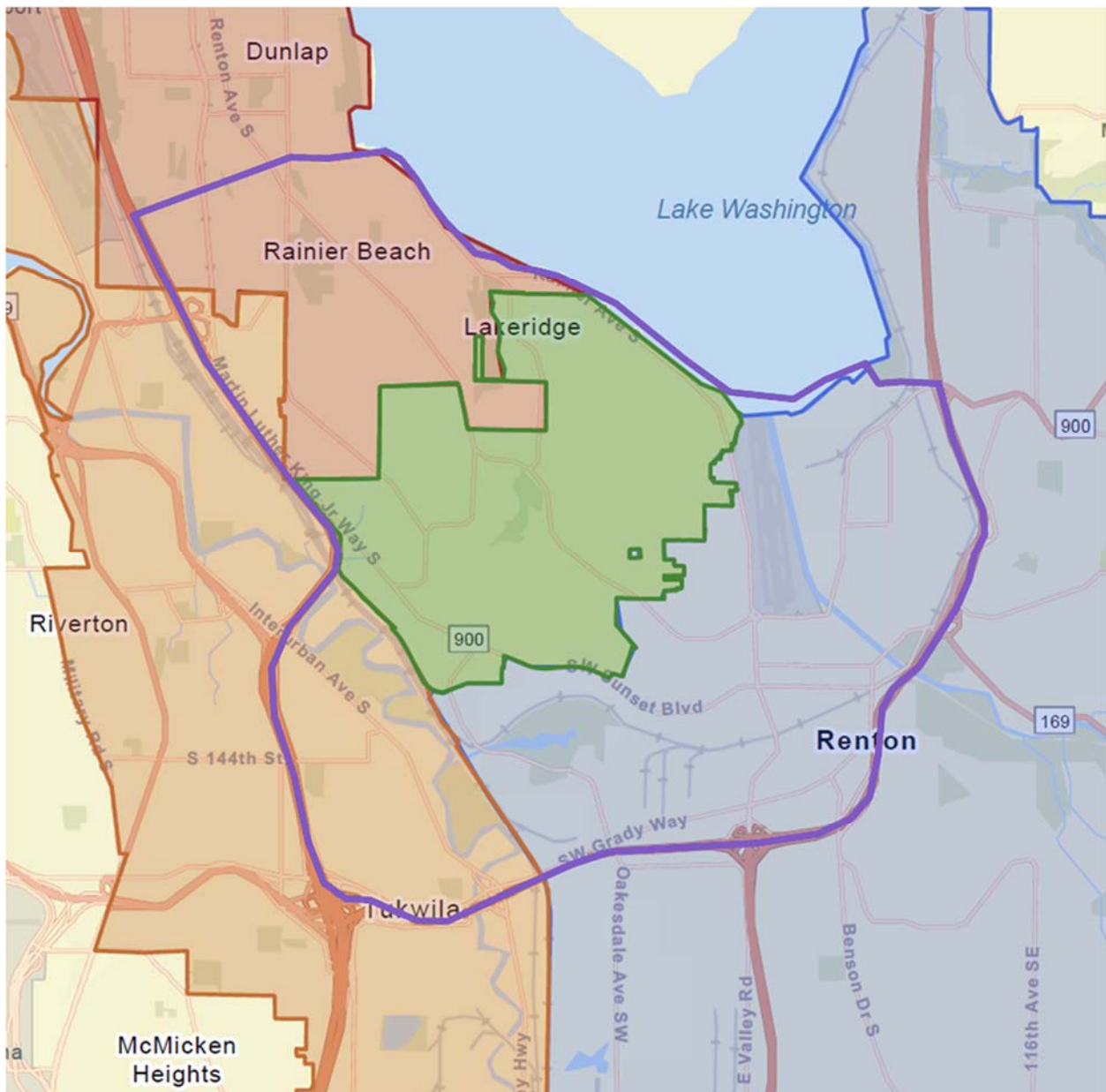
The information provided includes the basic demographics and data for the Primary and Secondary Service Area with comparison data for the State of Washington and the United States.

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

Service areas can flex or contract based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can influence participation, 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.

Service Area Map



- Green Boundary – Primary Service Area (Bryn Mawr – Skyway CDP)
- Purple Boundary – Secondary Service Area (as defined by B*K and Staff)

Demographic Summary

	Primary Service Area	Secondary Service Area
Population:		
2020 Census	17,397 ¹	48,011 ²
2023 Estimate	17,352	48,293
2028 Estimate	17,212	48,262
Households:		
2020 Census	6,335	19,165
2023 Estimate	6,430	19,456
2028 Estimate	6,365	19,400
Families:		
2020 Census	4,209	10,525
2023 Estimate	4,322	11,070
2028 Estimate	4,332	11,193
Average Household Size:		
2020 Census	2.68	2.47
2023 Estimate	2.68	2.47
2028 Estimate	2.69	2.47
Ethnicity (2023 Estimate):		
Hispanic	10.7%	12.9%
White	25.7%	29.2%
Black	26.4%	22.8%
American Indian	1.2%	1.1%
Asian	30.3%	27.9%
Pacific Islander	0.8%	1.1%
Other	5.7%	7.1%
Multiple	10.0%	10.8%
Median Age:		
2020 Census	37.4	37.1
2023 Estimate	38.9	39.1
2028 Estimate	39.5	40.0
Median Income:		
2023 Estimate	\$83,040	\$81,200
2028 Estimate	\$104,149	\$104,463

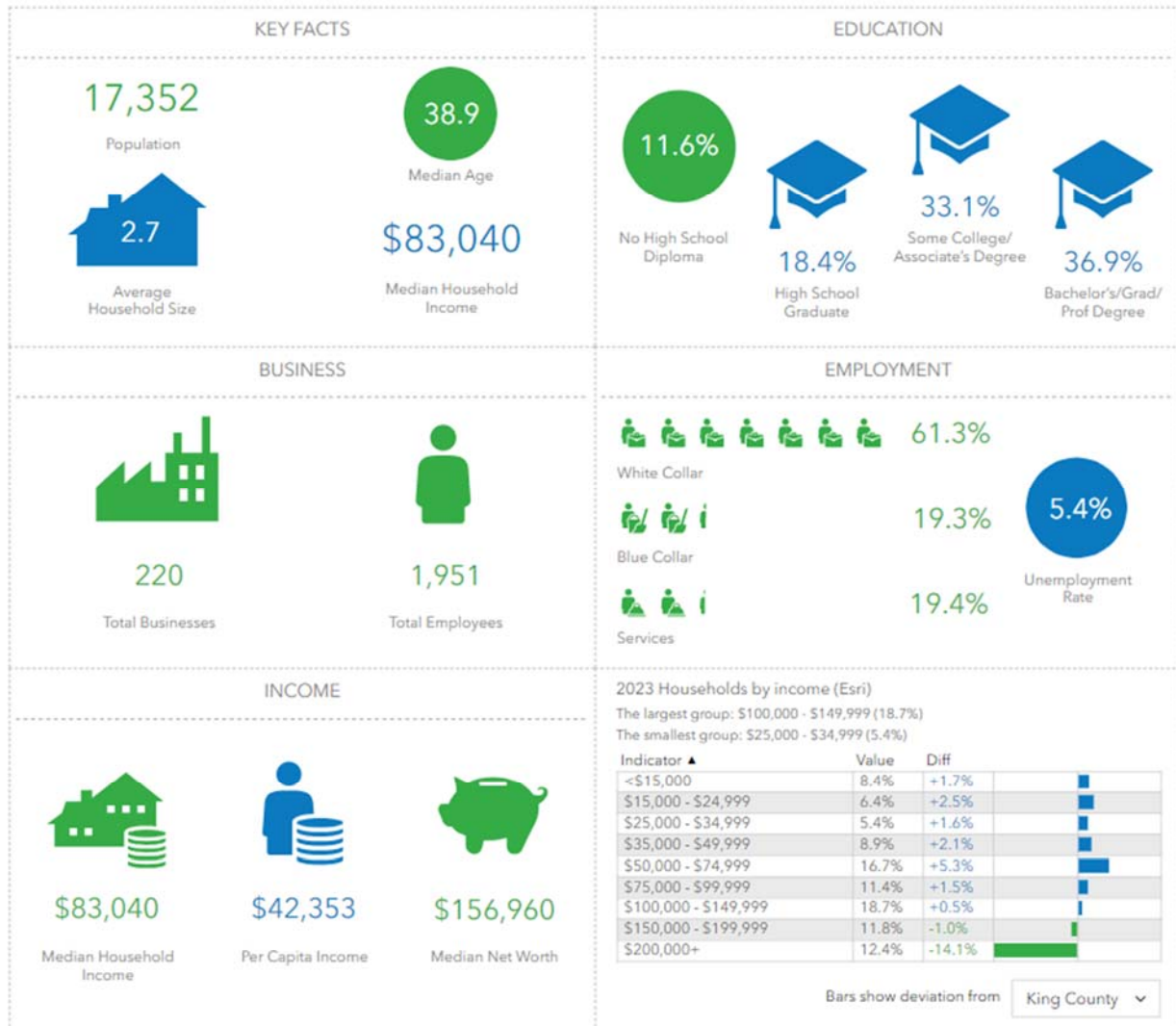
¹ From the 2010-2020 Census, the Immediate Service Area experienced a 10.5% increase in population.

² From the 2010-2020 Census, the Secondary Service Area experienced a 13.5% increase in population.

Key Fact Infographic for Primary Service Area:

Key Facts

Bryn Mawr-Skyway CDP, WA
Geography: Place



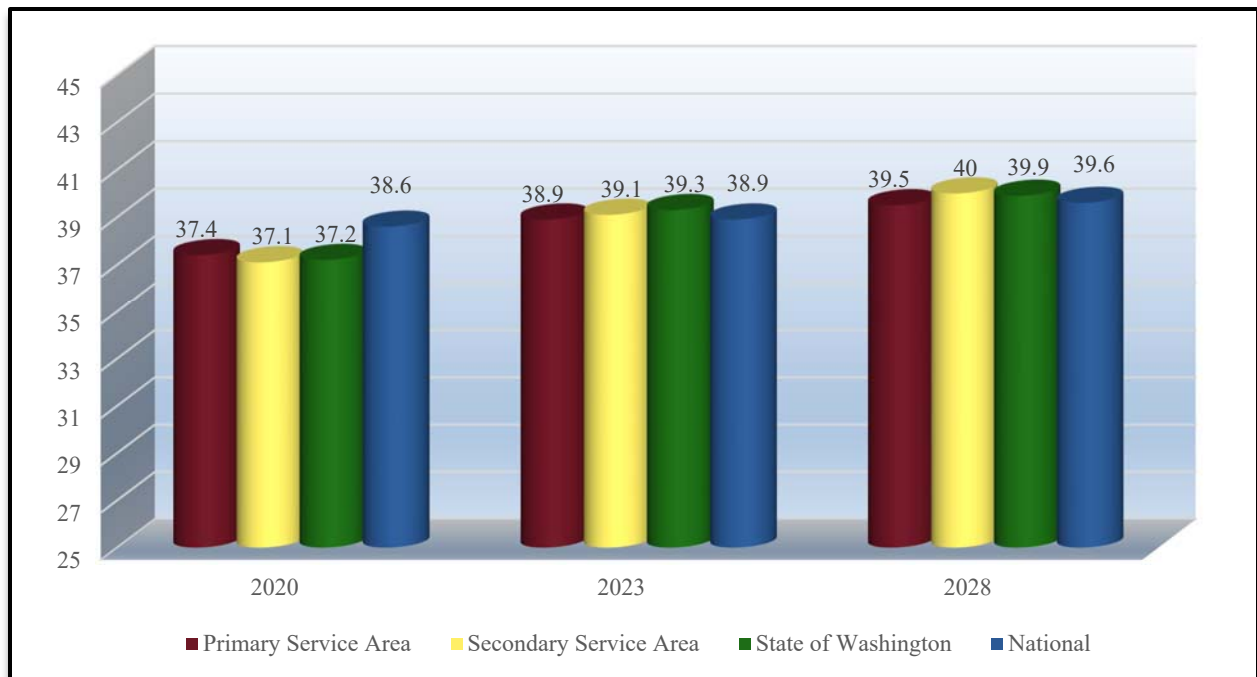
Source: This infographic contains data provided by Esri (2023, 2028), Esri-Data Axle (2023). © 2024 Esri

Age and Income: The median age and household income levels are compared with the national number as both 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:

	2020 Census	2023 Projection	2028 Projection
Primary Service Area	37.4	38.9	39.5
Secondary Service Area	37.1	39.1	40.0
State of Washington	37.2	39.3	39.9
Nationally	38.6	38.9	39.6

Chart A – Median Age:



The median age in the Primary & Secondary Service Areas are comparable to that of the State of Washington and the National number. Parks and recreation activities, programs and events draw a large demographic but tend to be most popular with youth and their parents. Grandparents are becoming an increasing part of the household though, as they care for and are involved with their grandchildren.

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

Table B – Households w/ Children

	Number of Households w/ Children	Percentage of Households w/ Children
Primary Service Area	2,286	34.6%
Secondary Service Area	5,298	28.0%
State of Washington	-	30.4%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2020 Census, 30.7% of households nationally had children present.

Map of Median Age by Census Block Group:

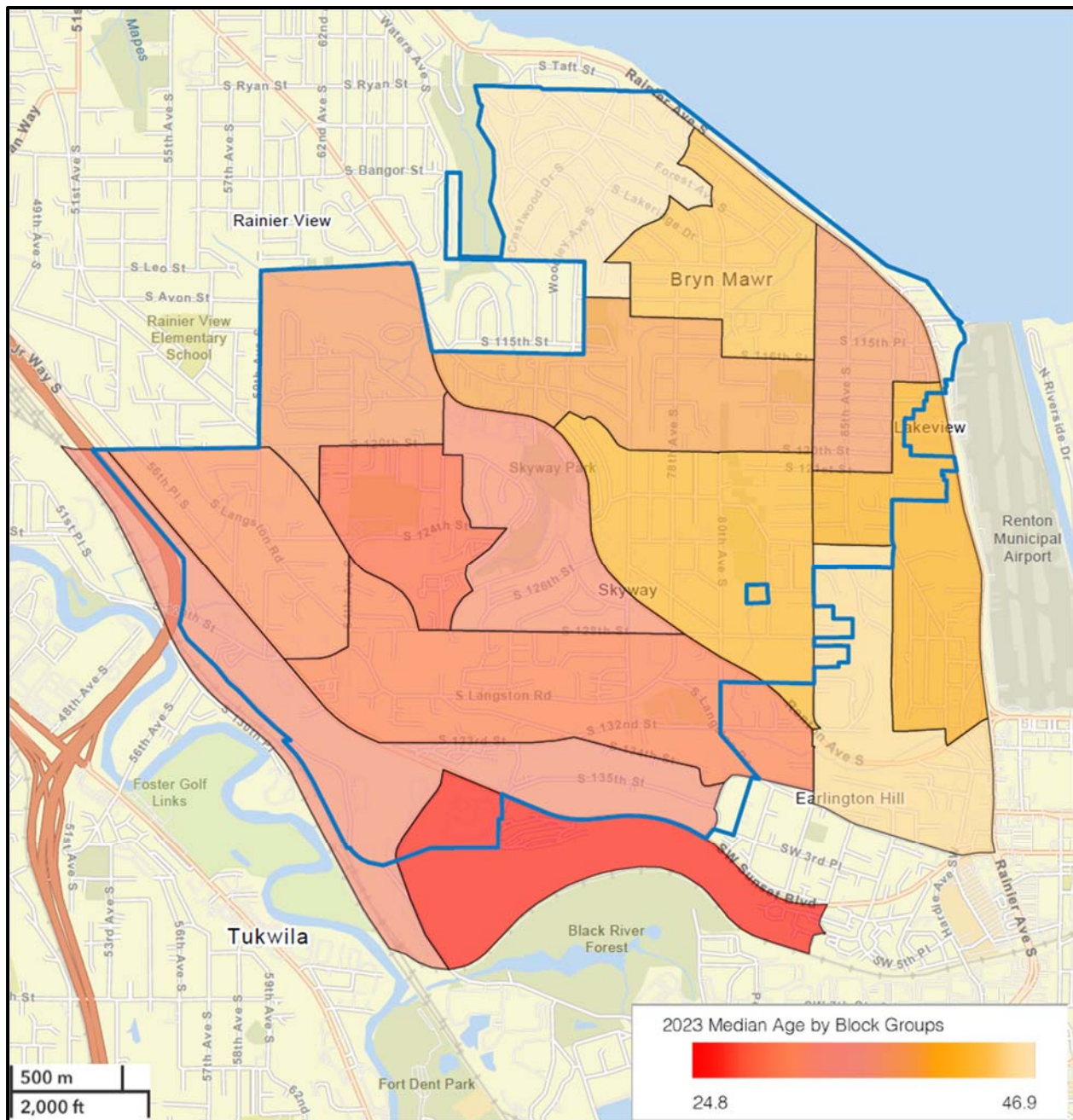
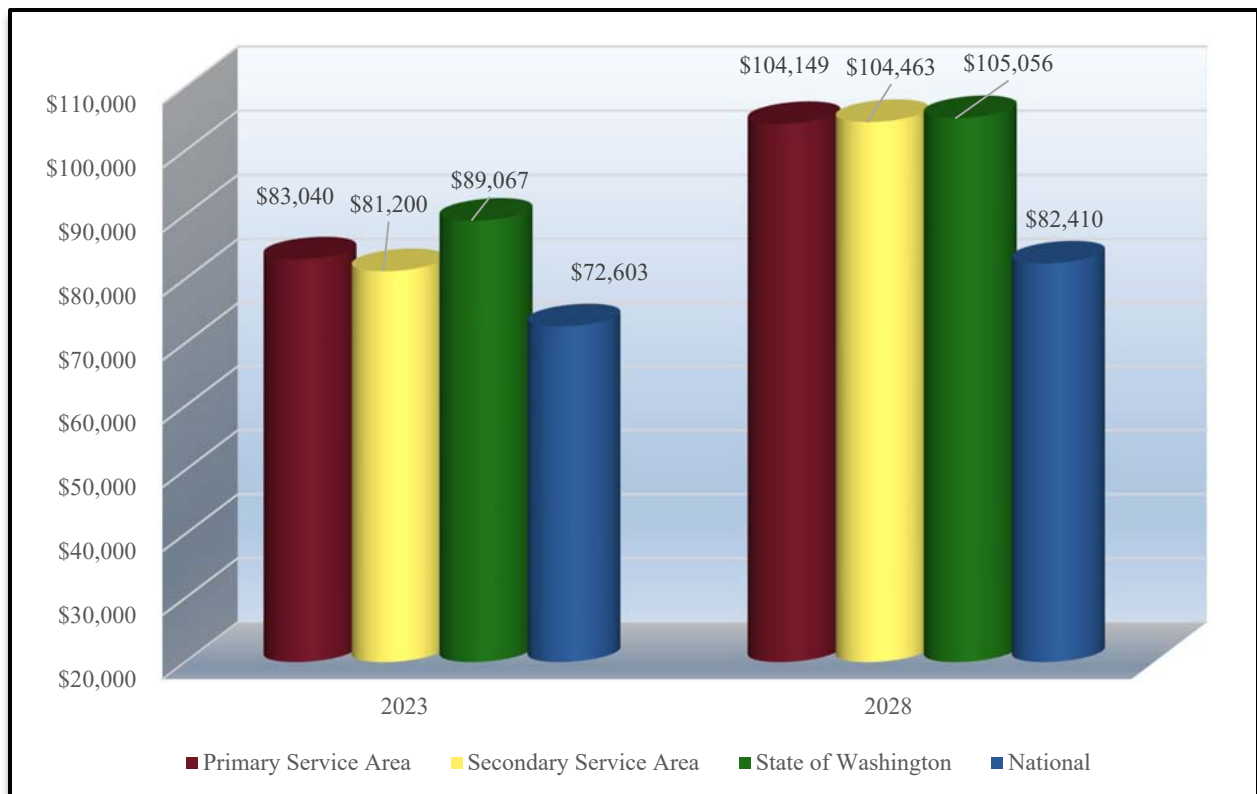


Table C – Median Household Income:

	2023 Projection	2028 Projection
Primary Service Area	\$83,040	\$104,149
Secondary Service Area	\$81,200	\$104,463
State of Washington	\$89,067	\$105,056
Nationally	\$72,603	\$82,410

Chart C (1) – Median Household Income:



There are significant increases projected in both the Primary and Secondary Service Areas. This is not uncommon in the Seattle market.

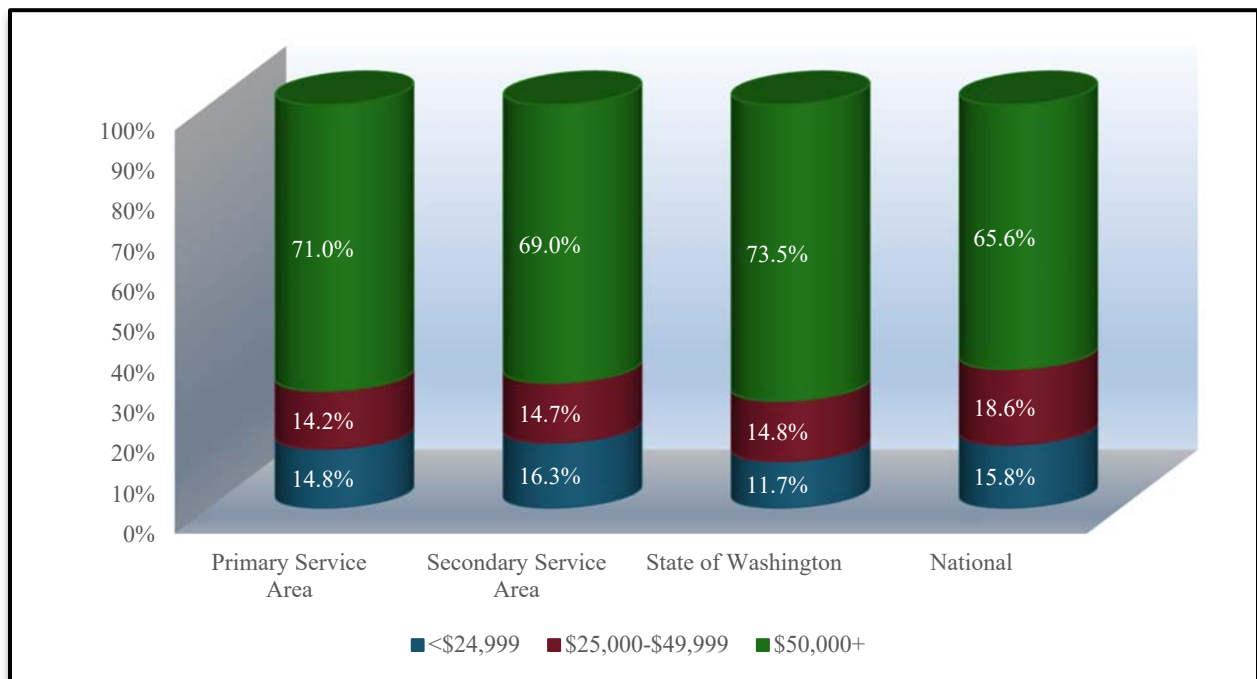
Based on 2023 projections for median household income the following narrative describes the service areas:

In the Primary Service Area, the percentage of households with a median income over \$50,000 per year is 71.0% compared to 61.6% on a national level. Furthermore, the percentage of households in the service area with median income less than \$25,000 per year is 14.8% compared to a level of 18.0% nationally.

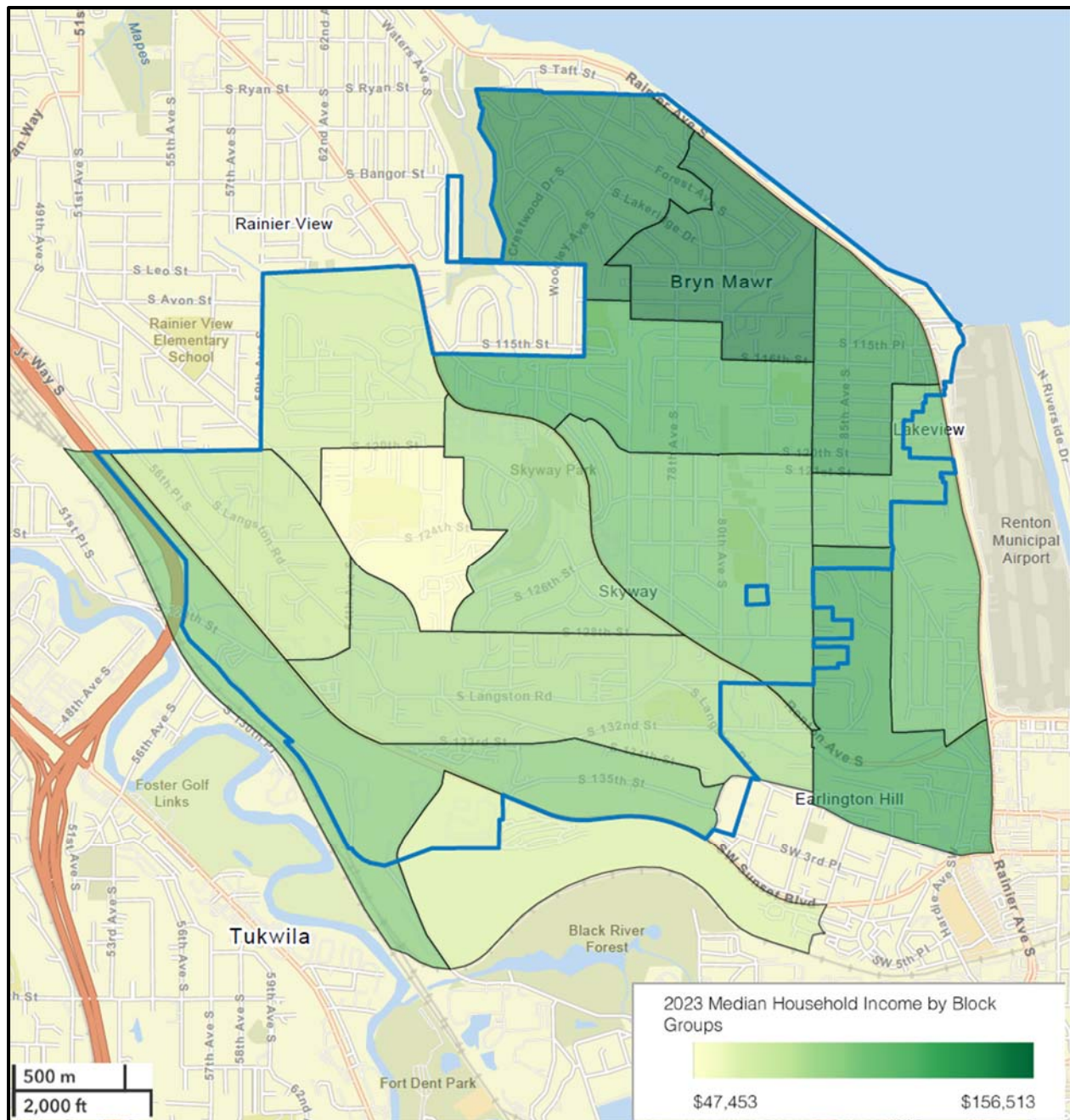
In the Secondary Service Area, the percentage of households with a median income over \$50,000 per year is 69.0% compared to 61.6% on a national level. Furthermore, the percentage of households in the service area with median income less than \$25,000 per year is 16.3% compared to a level of 18.0% nationally. 14.7

While there is no perfect indicator of use of an aquatic 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 (2) – Median Household Income Distribution



Map of Median Household Income by Census Block Group



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

Table D – Household Budget Expenditures³:

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	109	\$33,443.33	34.5%
<i>Shelter</i>	112	\$27,639.93	28.5%
<i>Utilities, Fuel, Public Service</i>	100	\$5,803.39	6.0%
Entertainment & Recreation	102	\$3,874.50	4.0%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	110	\$33,753.39	34.3%
<i>Shelter</i>	112	\$27,745.04	28.2%
<i>Utilities, Fuel, Public Service</i>	104	\$6,008.35	6.1%
Entertainment & Recreation	104	\$3,916.90	4.0%

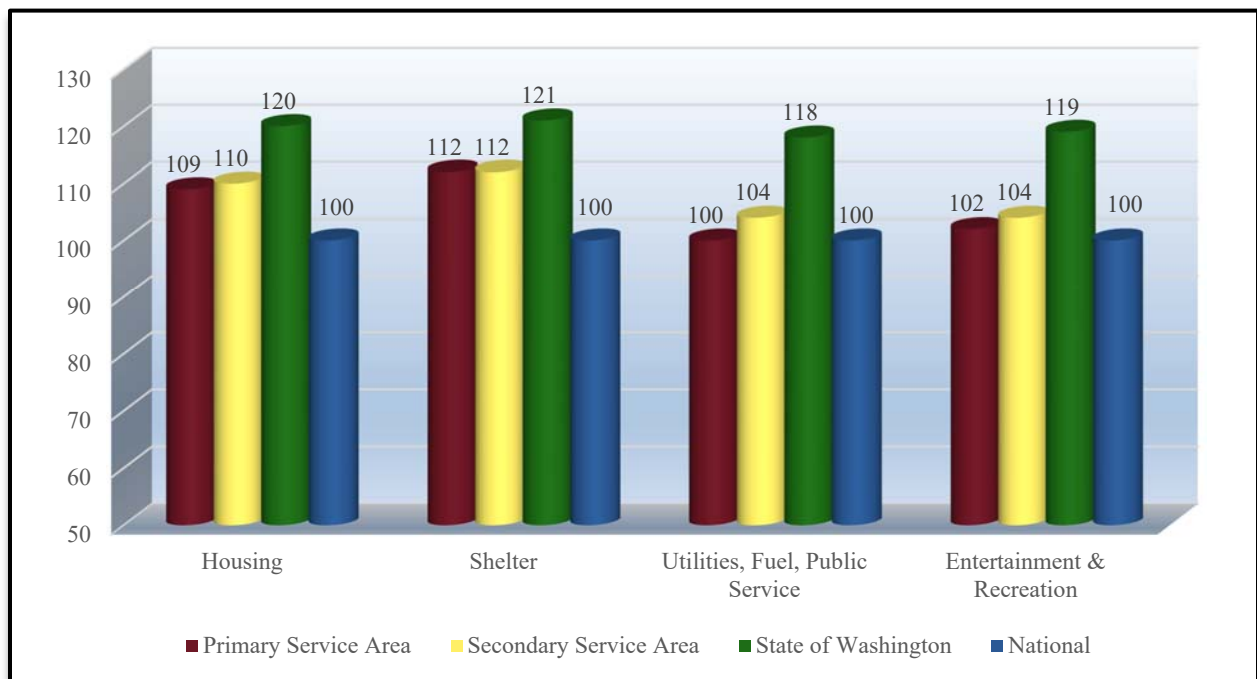
State of Washington	SPI	Average Amount Spent	Percent
Housing	120	\$36,781.63	33.4%
<i>Shelter</i>	121	\$29,945.29	27.2%
<i>Utilities, Fuel, Public Service</i>	118	\$6,836.34	6.2%
Entertainment & Recreation	119	\$4,509.82	4.1%

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 2018 and 2019 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2023 and 2028.

Chart D – Household Budget Expenditures Spending Potential Index:



The consistency between the median household income and the household budget expenditures is important. It also points to the fact that compared to a National level the dollars available, the money being spent in the Primary & Secondary Service Areas is greater than the State and National figures. This could point to the ability to pay for programs and services offered at a recreation facility of any variety.

The total number of housing units in the Primary Service Area is 6,638 and 96.6% are occupied, or 6,335 housing units. The total vacancy rate for the service area is 4.6%. As a comparison, the vacancy rate nationally was 11.6%.

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	107	\$128.42
Fees for Recreational Lessons	127	\$183.92
Social, Recreation, Club Membership	107	\$296.78
Exercise Equipment/Game Tables	98	\$95.54
Other Sports Equipment	91	\$10.09

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	104	\$124.79
Fees for Recreational Lessons	115	\$166.95
Social, Recreation, Club Membership	104	\$290.11
Exercise Equipment/Game Tables	100	\$97.91
Other Sports Equipment	92	\$10.24

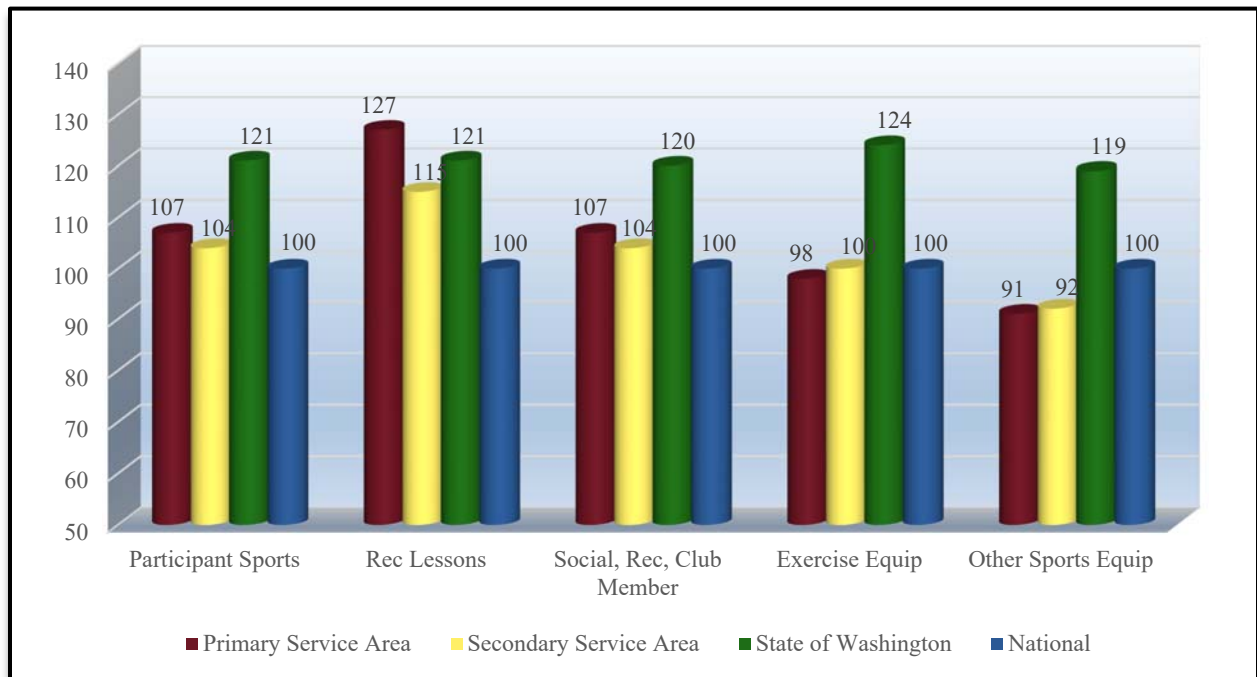
State of Washington	SPI	Average Spent
Fees for Participant Sports	121	\$145.30
Fees for Recreational Lessons	121	\$175.71
Social, Recreation, Club Membership	120	\$333.51
Exercise Equipment/Game Tables	124	\$120.96
Other Sports Equipment	119	\$13.28

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 2018 and 2019 Consumer Expenditure Surveys, Bureau of Labor Statistics.

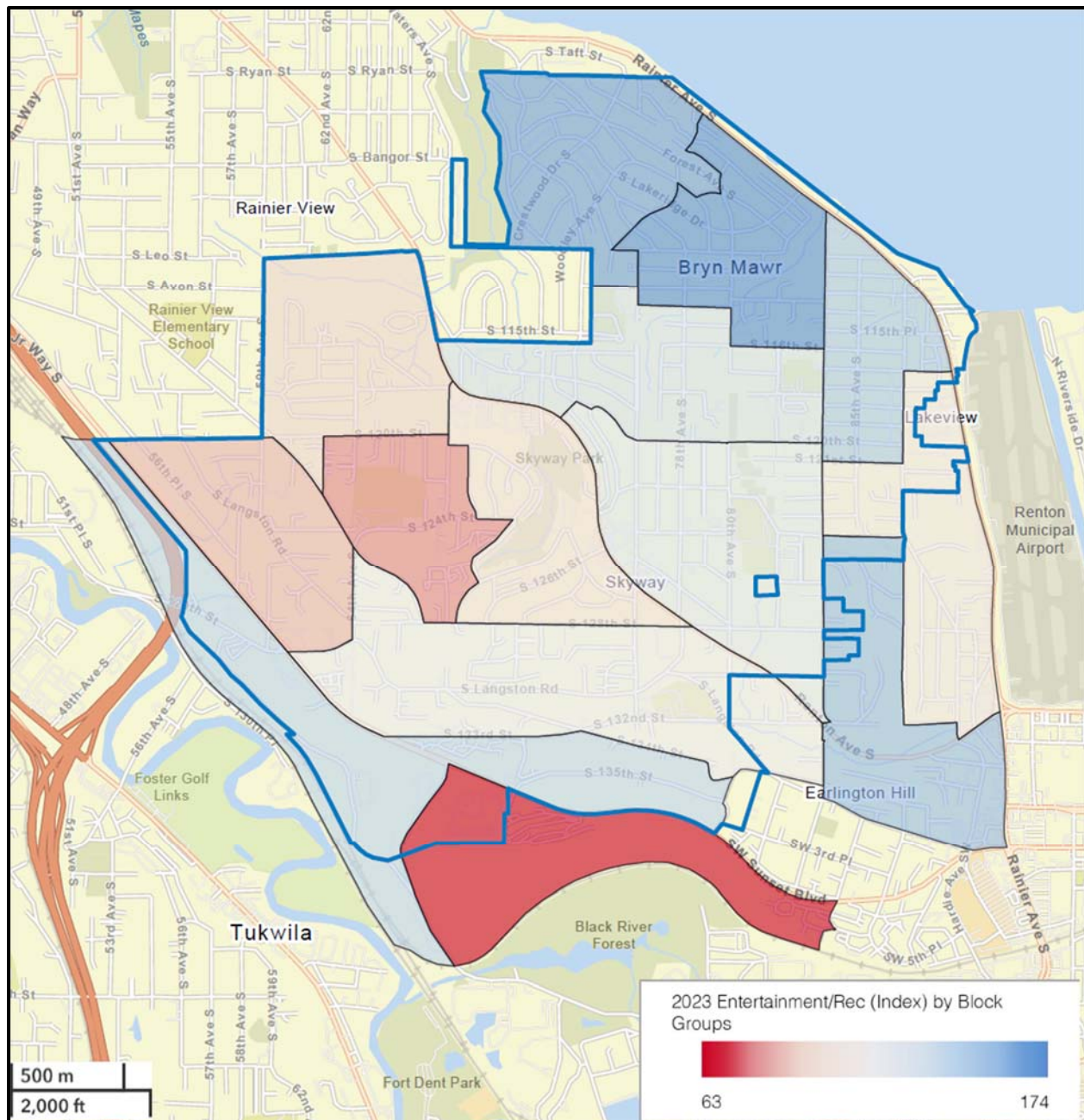
Chart E – Recreation Spending Potential Index:



Again, there is a great deal of consistency between median household income, household budget expenditures and now recreation and spending potential.

The map of Recreation Spending Index by census block group shows that the Skyway-Westhill region displays lower recreation spending in most areas (red and pink areas) when compared to the national numbers for participant sports, recreation lessons, and social club activities.

Map of Entertainment & Recreation Spending Potential Index by Census Block Group:



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

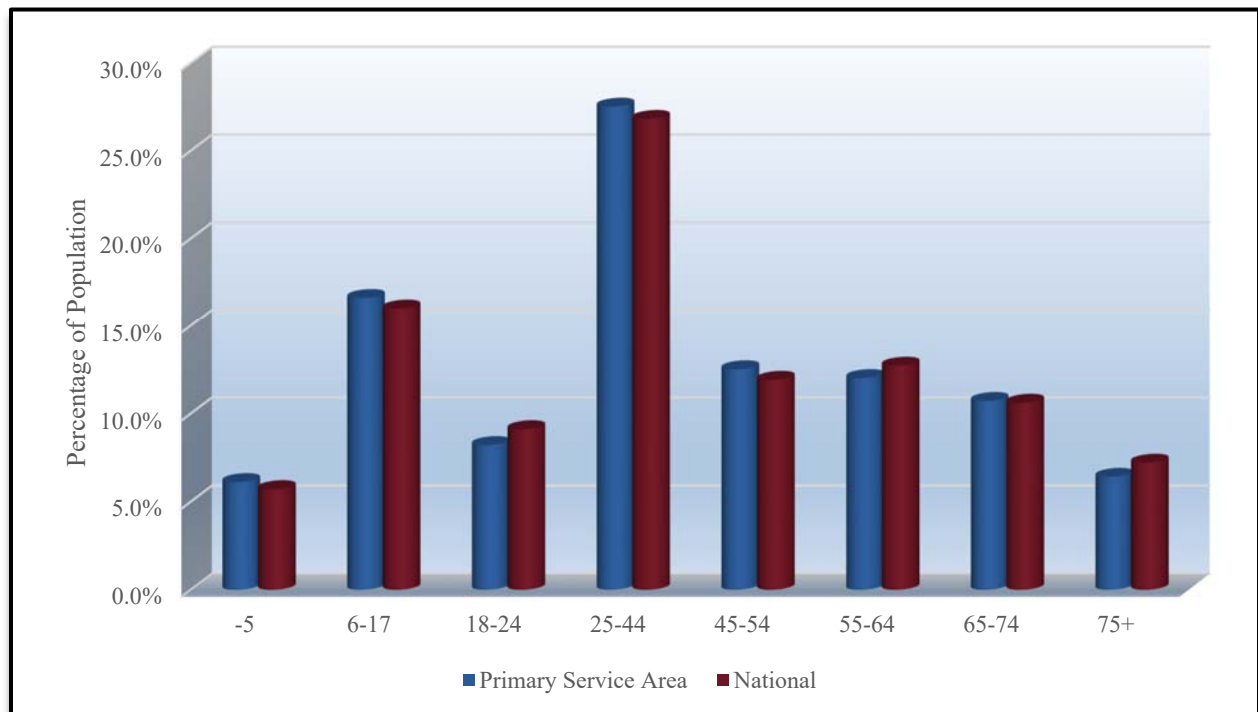
Table F – 2023 Primary Service Area Age Distribution

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	1,059	6.1%	5.7%	+0.4
5-17	2,885	16.6%	16.0%	+0.6
18-24	1,421	8.2%	9.1%	-0.9
25-44	4,768	27.5%	26.8%	+0.7
45-54	2,177	12.5%	11.9%	+0.6
55-64	2,087	12.0%	12.7%	-0.7
65-74	1,850	10.7%	10.6%	+0.1
75+	1,105	6.4%	7.2%	-0.8

Population: 2023 census estimates in the different age groups in the Primary Service Area.
% of Total: Percentage of the Primary Service Area population in the age group.
National Population: Percentage of the national population in the age group.
Difference: Percentage difference between the Primary Service Area population and the national population.

Chart F – 2023 Primary Service Area Age Group Distribution



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the

age groups 18-24, 5-64 and 75+. The greatest positive variance is in the 25-44 age group with +0.7%, while the greatest negative variance is in the 18-24 age group with -0.9%.

Population Distribution Comparison by Age: Utilizing census information from the Primary and Secondary Service Areas, the following comparisons are possible.

Table H – 2023 Primary Service Area Population Estimates

(U.S. Census Information and ESRI)

Ages	2020 Census	2023 Projection	2028 Projection	Percent Change	Percent Change Nat'l
-5	1,259	1,059	1,077	-14.5%	-8.3%
5-17	2,796	2,885	2,696	-3.6%	-8.5%
18-24	1,564	1,421	1,472	-5.9%	-8.9%
25-44	4,937	4,768	4,731	-4.2%	+3.3%
45-54	2,488	2,177	2,135	-14.2%	-17.8%
55-64	2,236	2,087	1,933	-13.6%	+2.5%
65-74	1,043	1,850	1,829	+75.4%	+58.2%
75+	1,072	1,105	1,339	+24.9%	+46.3%

Chart H – Primary Service Area Population Growth

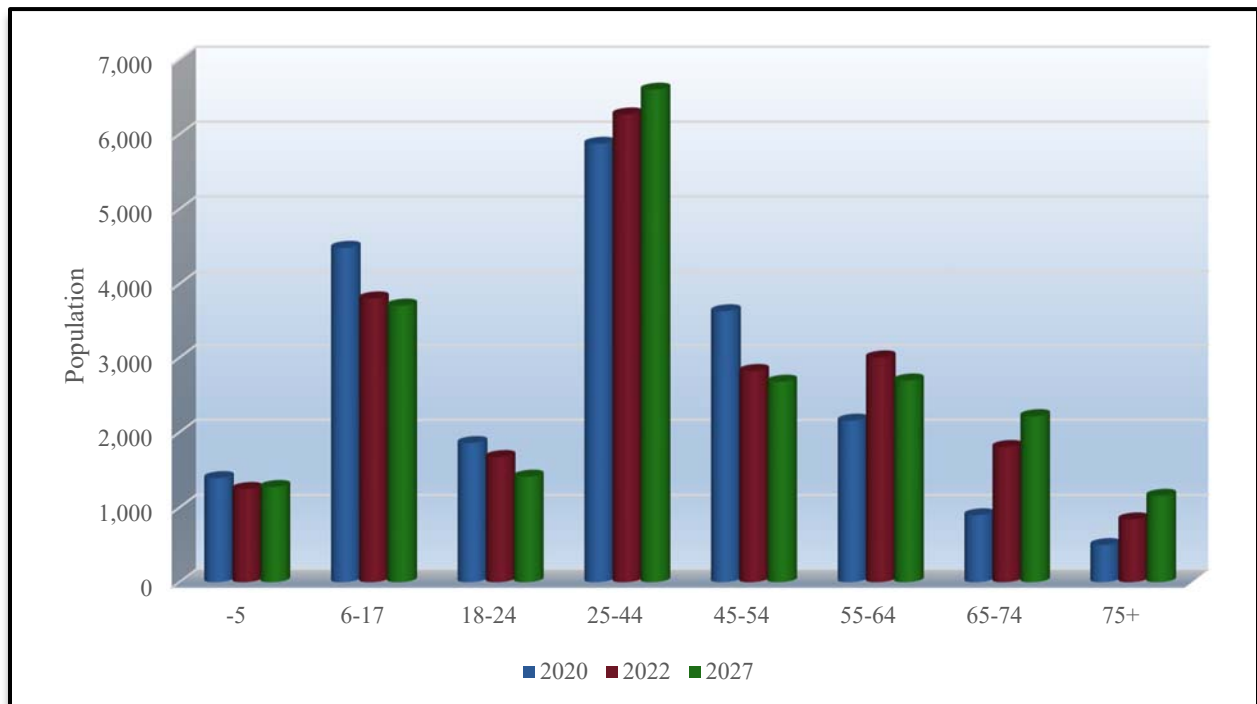


Table-H illustrates the growth or decline in age group numbers from the 2020 census until the year 2028. It is projected that age categories of 65-74 and 75+ will see an increase in population.

The population of the United States is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the Primary and Secondary Service Area for 2023 population projections. Those numbers were developed from 2020 Census Data.

Table J – Primary Service Area Ethnic Population and Median Age 2023

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

Ethnicity	Total Population	Median Age	% of Population	% of WA Population
Hispanic	1,860	27.4	10.7%	14.4%

Table K – Primary Service Area by Race and Median Age 2023

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

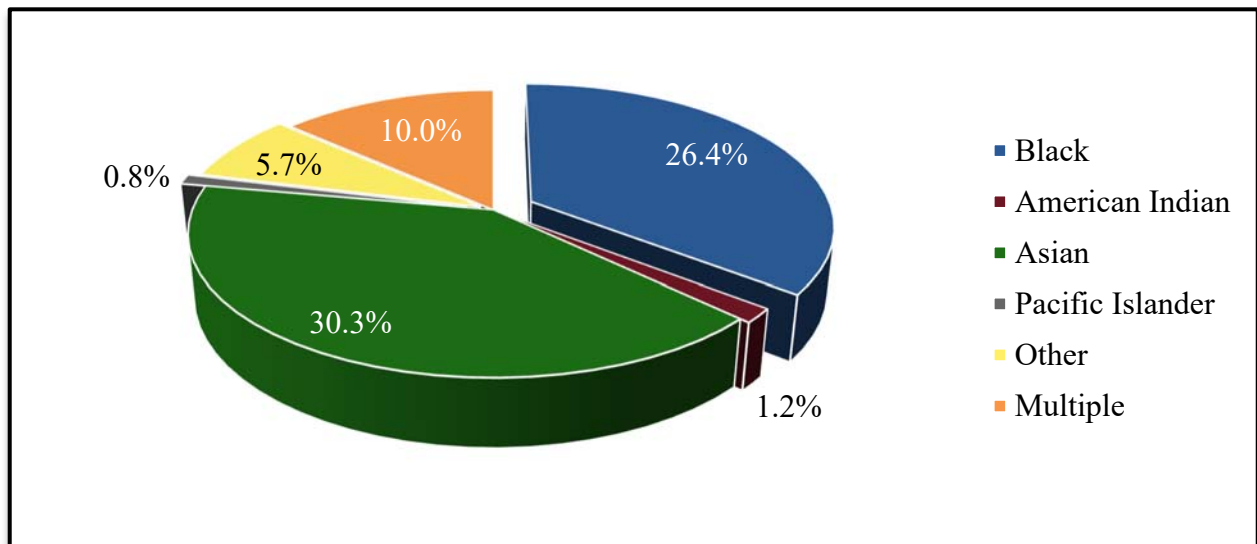
Race	Total Population	Median Age	% of Population	% of WA Population
White	4,451	52.9	25.7%	65.0%
Black	4,575	34.6	26.4%	4.1%
American Indian	207	45.2	1.2%	1.6%
Asian	5,252	39.7	30.3%	10.2%
Pacific Islander	137	36.0	0.8%	0.9%
Other	992	29.4	5.7%	7.0%
Multiple	1,738	19.3	10.0%	11.3%

2023 Primary Service Area Total Population:

17,352 Residents

Chart K illustrates the non-white population on the following page. B*K typically identifies a race or ethnicity as “significant” if it is greater than 10% of the population. Using this marker, the Hispanic, Black, Asian, and Multiple categories are significant. Participation by the Hispanic population and Black population is tracked by the National Sporting Goods Association and can impact the rate of participation in activities.

Chart K – 2023 Primary Service Area Population by Non-White Race



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.

There is value including this information for Skyway, WA. The data assists the organization in understanding the consumers/constituents in their service area and supply them with the right products and services.

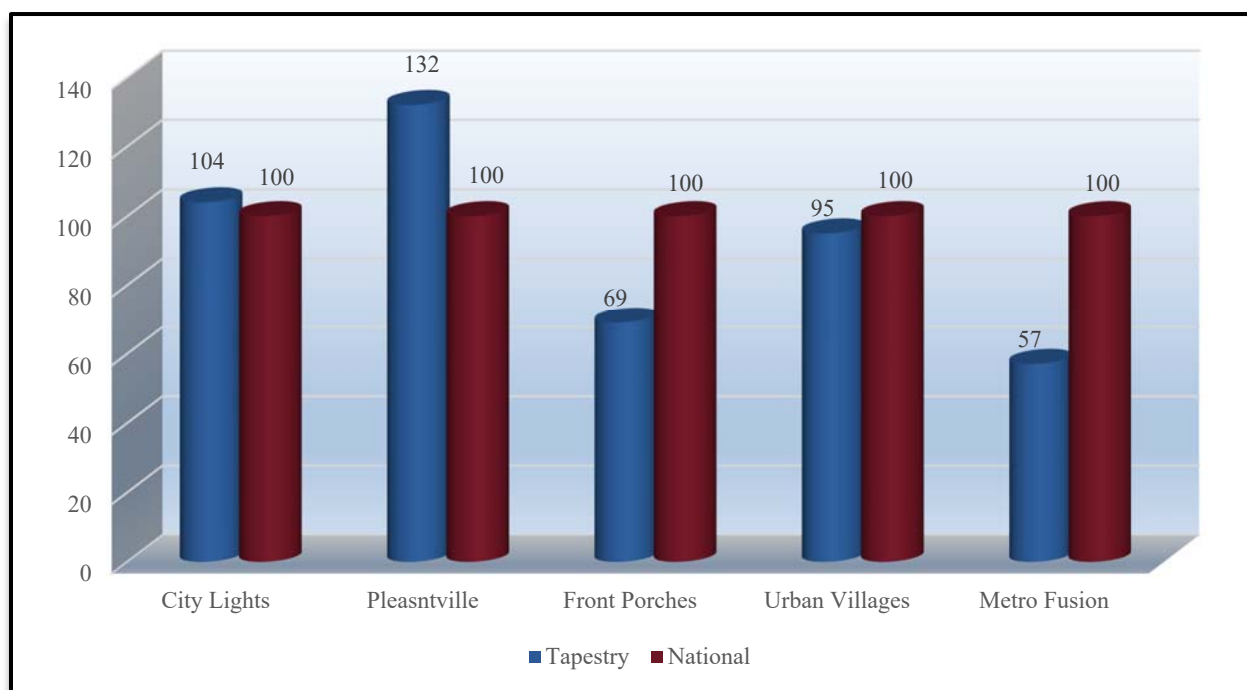
The Tapestry segmentation system classifies U.S. neighborhoods into 65 unique market segments. Neighborhoods are sorted by more than 60 attributes including; income, employment, home value, housing types, education, household composition, age and other key determinates of consumer behavior.

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

Table N – Primary Service Area Tapestry Segment Comparison
 (ESRI estimates)

	Primary Service Area	Demographics	
	Percent	Median Age	Median HH Income
City Lights (8A)	34.7%	39.3	\$69,200
Pleasantville (2B)	28.1%	42.6	\$92,900
Front Porches (8E)	15.7%	34.9	\$43,700
Urban Villages (7B)	8.6%	34.0	\$62,300
Metro Fusion (11C)	7.4%	29.3	\$35,700

Chart N – Primary Service Area Tapestry Segment Entertainment Spending:



City Lights – This is a densely populated urban market. The wide-ranging demographic characteristics of residents mirror their passion for social welfare and equal opportunity. Household types range from single person to married-couple families, with and without children. Willing to commute to their jobs, they work hard and budget well to support their urban lifestyles. These consumers are health-conscious spending more than 7 hours exercising per week.

Pleasantville – Situated principally in older housing in suburban areas in the Northeast and secondarily in the west, these slightly older couples move less than any other market. Many couples have already transitioned to empty nesters; many are home to adult children. They enjoy outdoor gardening, going to the beach, visiting theme parks, frequenting museums, and attending rock concerts.

Front Porches – These residents are a blend of household types, with more young families with children and more single households than average. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to these residents and help to influence purchases. Participate in leisure activities including sports, playing board games and video games.

Urban Villages – These residents are multigenerational and multilingual. Trendy and fashion conscious, they are risk takers. However, these consumers focus on their children and maintain gardens. They are well connected with their smartphones, but more likely to shop in person. Leisure includes family activities like going to water parks, theme parks, watching movies, and gardening, plus sports like soccer and basketball.

Metro Fusion – This is a young market. Many residents do not speak English fluently and have moved into their homes recently. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children, and a quarter are single-parent families. Football and weightlifting are popular activities.

Demographic Summary

The following summarizes the demographic characteristics of the service areas.

- The population within the Primary Service Area is such that it would support an indoor community center with a focus on programs and drop-in participation.
- The median age in the Primary and Secondary Service Areas are like the State and National numbers. A lower median age points to young families with children, which are significant participants in recreation programs. As such, the median age is a benefit to the project. It is also important to note that community centers are multi-generational, attracting the full age spectrum of participants.
- Both the Primary and Secondary Service Areas have a significant percentage of households with children. Again, this is a target market for drop-in participation and programs.
- Both the Primary and the Secondary Service Areas have a lower median household income in comparison to the state. Income level is important when it comes to price point for programs and services, subsequently the cost recovery level of a facility. The income level suggests that the service areas will be able to support a facility, but the facility will likely not recover 100% of its operating expenses.
- The average Household Budget Expenditures and the Recreation Spending Potential are consistent with the median household income. Recreation Spending Index by census block group shows that the Skyway-Westhill region displays lower recreation spending in most areas (red and pink areas) when compared to the national numbers for participant sports, recreation lessons, and social club activities.
- The age distribution in Skyway is such that 21.7% are under the age of 18 and 30.5% are over the age of 55 in the Primary Service Area. These are two age groups that will be significant users of the community center and its programs/services. Additionally, it is projected that the 55+ age categories are projected to remain relatively stable through 2028.

The demographic data points for the project can be classified as positive.

Section II – Participation Statistics

Market Potential Index for Adult Participation:

Table A – Market Potential Index (MPI) for the Primary Service Area

Adult Participation	Expected Number of Adults	Percent of Population	MPI
Aerobic Exercise	1,223	9.1%	109
Basketball	880	6.6%	115
Bicycle Riding (road)	1,839	13.7%	114
Jogging/Running	1,704	12.7%	113
Pilates	486	3.6%	129
Ping Pong	527	3.9%	114
Soccer	548	4.1%	130
Tennis	560	4.2%	109
Volleyball	378	2.8%	120
Walking for Exercise	4,652	34.7%	102
Weightlifting	2,027	15.1%	107
Yoga	1,717	12.8%	117
Zumba	560	4.2%	135

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

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

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

The rate of participation for adults in the above-listed activities is greater than the national figure of 100. Active adults point to activities for families and active children. These figures suggest that adults are using some type of recreation or community center facility in the area.

On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. The data is collected in one year and the report is issued in June of the following year. This information provides the data necessary to overlay the rate of participation onto the Primary Service Area to determine market potential.

B*K takes the national average and combines that with participation percentages of the Primary Service Area based upon age distribution, median income, region, and National number. Those four percentages are averaged together to create a unique participation percentage for the service area. This participation percentage when applied to the population of the Primary Service Area then provides an idea of the market potential for swimming or aquatic services.

Table B –Participation Rates for Indoor Activities in the Primary Service Areas

	Age Distribute	Median Income	Region	National Average	Average
Aerobic Exercise	15.7%	16.5%	18.5%	15.8%	16.6%
Basketball	7.6%	7.8%	8.3%	7.6%	7.8%
Bicycle Riding	14.6%	15.5%	17.1%	14.6%	15.4%
Billiards/Pool	7.3%	9.2%	8.2%	7.3%	8.0%
Boxing	1.5%	1.4%	1.6%	1.5%	1.5%
Cheerleading	2.4%	1.5%	0.8%	1.0%	1.4%
Dart Throwing	3.7%	4.0%	3.0%	3.7%	3.6%
Exercise Walking	37.3%	40.4%	42.6%	37.3%	39.4%
Exercise w/ Equipment	19.0%	20.8%	19.7%	19.1%	19.7%
Gymnastics	1.8%	2.3%	1.8%	1.8%	1.9%
Martial Arts/MMA	1.7%	2.0%	2.2%	1.7%	1.9%
Pickleball	2.1%	2.7%	2.7%	2.1%	2.4%
Pilates	2.0%	2.3%	2.0%	2.0%	2.1%
Running/Jogging	14.7%	17.6%	18.6%	14.8%	16.4%
Table Tennis/Ping Pong	4.1%	5.1%	4.4%	4.1%	4.4%
Volleyball	3.8%	4.7%	3.0%	3.8%	3.8%
Weightlifting	12.6%	12.8%	13.9%	12.7%	13.0%
Workout @ Clubs	9.7%	10.2%	10.0%	9.7%	9.9%
Wrestling	1.0%	0.9%	1.2%	1.0%	1.0%
Yoga	10.4%	10.8%	13.3%	10.4%	11.2%
Did Not Participate	20.7%	18.8%	19.5%	20.6%	19.9%

Age Distribution: Participation based on individuals ages 7 & Up of the Primary Service Area.
Median Income: Participation based on the 2022 estimated median household income in the Primary Service Area.
Region: Participation based on regional statistics Pacific.
National Average: Participation based on national statistics.
Unique Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-B above plus the 2020 census information and census estimates for 2023 and 2028 (over age 7) the following comparisons are available.

Table C –Participation Growth/Decline for Indoor Activities in the Primary Service Area

	Average	2020 Population	2023 Population	2028 Population	Difference
Aerobic Exercise	16.6%	2,481	2,505	2,485	+4
Basketball	7.8%	1,193	1,205	1,195	+2
Bicycle Riding	15.4%	2,292	2,315	2,296	+4
Billiards/Pool	8.0%	1,146	1,158	1,148	+2
Boxing	1.5%	236	238	236	0
Cheerleading	1.4%	157	159	157	0
Dart Throwing	3.6%	581	587	582	+1
Exercise Walking	39.4%	5,856	5,915	5,865	+9
Exercise w/ Equipment	19.7%	2,999	3,029	3,003	+5
Gymnastics	1.9%	283	285	283	0
Martial Arts/MMA	1.9%	267	270	267	0
Pickleball	2.4%	330	333	330	+1
Pilates	2.1%	314	317	315	+1
Running/Jogging	16.4%	2,324	2,347	2,327	+4
Table Tennis/Ping Pong	4.4%	644	650	645	+1
Volleyball	3.8%	597	603	598	+1
Weightlifting	13.0%	1,994	2,014	1,997	+3
Workout @ Clubs	9.9%	1,523	1,538	1,525	+2
Wrestling	1.0%	157	159	157	0
Yoga	11.2%	1,633	1,649	1,635	+3
Did Not Participate	19.9%	3,234	3,267	3,239	+5

Note: These figures do not necessarily translate into attendance figures for various activities or programs. An increase or decrease in participation can be attributed to future population figures.

Ethnicity & Race Participation Comparison: The following chart compares the unique rate of participation for the Primary Service Area with the National Figure, Black participation, and Hispanic participation.

Table D – Participation by Race & Ethnicity

	Primary Service Rate	National Rate of Part.	Black Rate of Part.	Hispanic Rate of Part.
Aerobic Exercise	16.6%	15.8%	13.1%	17.8%
Basketball	7.8%	7.6%	12.0%	9.4%
Bicycle Riding	15.4%	14.6%	11.8%	13.3%
Billiards/Pool	8.0%	7.3%	4.7%	8.2%
Boxing	1.5%	1.5%	3.7%	2.3%
Cheerleading	1.4%	1.0%	1.5%	1.1%
Dart Throwing	3.6%	3.7%	2.1%	4.2%
Exercise Walking	39.4%	37.3%	24.4%	32.1%
Exercise w/ Equipment	19.7%	19.1%	13.6%	17.2%
Gymnastics	1.9%	1.8%	1.8%	2.3%
Martial Arts/MMA	1.9%	1.7%	2.6%	2.1%
Pickleball	2.4%	2.1%	1.0%	1.7%
Pilates	2.1%	2.0%	1.7%	2.3%
Running/Jogging	16.4%	14.8%	12.9%	16.8%
Table Tennis/Ping Pong	4.4%	4.1%	2.5%	3.6%
Volleyball	3.8%	3.8%	3.7%	4.6%
Weightlifting	13.0%	12.7%	10.7%	13.2%
Workout @ Clubs	9.9%	9.7%	7.0%	9.9%
Wrestling	1.0%	1.0%	1.6%	1.5%
Yoga	11.2%	10.4%	7.5%	10.3%
Did Not Participate	19.9%	20.6%	22.7%	19.8%

As previously mentioned in the demographic section there is a significant Black and Hispanic population. Because of the significant Black and Hispanic population there is a strong possibility that the rates of participation will be impacted.

National Summary of Sports Participation: The following chart summarizes participation for the top ten most participated in activities utilizing information from the 2022 National Sporting Goods Association survey.

Table E – Sports Participation Summary

Sport	Nat'l Rank ⁵	Nat'l Participation (in millions)
Exercise Walking	1	113.9
Cardio Fitness	2	92.9
Strength Training	3	73.4
Exercising w/ Equipment	4	58.2
Running/Jogging	7	45.0
Bicycle Riding	8	44.6
Weightlifting	10	38.8
Yoga	11	31.7
Workout @ Club	13	29.6
Basketball	15	23.2
Billiards/Pool	16	22.3
Table Tennis/Ping Pong	23	12.5
Volleyball	26	11.7
Dart Throwing	28	11.2
Pickleball	38	6.4
Pilates	39	6.2
Gymnastics	43	5.3
Martial Arts/MMA	44	5.3
Boxing	48	4.6
Wrestling	52	3.1
Cheerleading	53	3.1

Nat'l Rank: Popularity of sport based on national survey.

Nat'l Participation: Population that participate in this sport on national survey.

These are national figures, and there can be fluctuation.

⁵ This rank is based upon the 58 activities reported on by NSGA in their 2021 survey instrument.

National 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.

Chart F – Participation by Age Group:

	Largest	Second Largest	Third Largest
Aerobic Exercise	35-44	25-34	45-54
Basketball	12-17	25-34	18-24
Bicycle Riding	55-64	45-54	12-17
Billiards/Pool	25-34	34-44	45-54
Boxing	25-34	18-24	35-44
Cheerleading	12-17	7-11	18-24
Dart Throwing	25-34	35-44	45-54
Exercise Walking	55-64	65-74	45-54
Exercise w/ Equipment	25-34	45-54	55-64
Gymnastics	7-11	12-17	25-34
Martial Arts/MMA	7-11	25-34	12-17
Pickleball	12-17	65-74	18-24
Pilates	25-34	35-44	45-54
Running/Jogging	25-34	35-44	45-54
Table Tennis/Ping Pong	25-34	18-24	12-17
Volleyball	12-17	25-34	18-24
Weightlifting	25-34	45-54	35-44
Workout @ Clubs	25-34	35-44	45-54
Wrestling	12-17	25-34	7-11
Yoga	25-34	35-44	45-54
Did Not Participate	45-54	55-64	65-74

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.

National Participation History: The following provides a historical perspective on national rates of participation.

Chart F – 10-Year Data Points National Participation

	Percentage Increase
Pickleball	+276%
Table Tennis/Ping Pong	+27.6%
Bicycle Riding	+25.3%
Weightlifting	+24.0%
Yoga	+22.4%
Boxing	+21.1%
Exercise Walking	+18.3%
Volleyball	+15.8%
Billiards/Pool	+14.4%
Dart Throwing	+14.3%
Pilates	+12.7%
Exercising w/ Equipment	+9.6%
Running/Jogging	+7.1%
Gymnastics	+3.9%
Wrestling	+0.0%

	Percentage Decrease
Basketball	-9.0%
Cheerleading	-11.4%
Workout @ Club	-13.2%
Martial Arts/MMA	-17.2%

The chart illustrates the growth, or decline, in **national** participation in the past 10 years. It is possible that on a regional level the trend could be slightly different.

Non-Sport Participation Statistics: It is important to note that participation rates in non-sport activities. While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States. It tracks various arts activities that Americans (aged 18 and over) report having done in a year. It also asks questions about adults' preferences for different kinds of music, and it seeks to understand participation in non-arts leisure events such as sports and exercise, outdoor activities, and civic and social affairs.

The participation numbers for these activities are national numbers and the information falls into the following categories:

- Attending Arts Activities
- Reading Books and Literature
- Consuming Art through Electronic Media
- Making and Sharing Art
- Participating in Arts Learning
- Perceptions of Arts Availability

The information in this section is significant in that many community centers, or government agencies, are providers of these types of services. Specifically with community centers these types of activities are many time categorized as core services.

Attending Arts Activities

Table G – Percentage of U.S. Adult Attending a Performing Arts Activity at Least Once in the Past 12-Months

Music	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Jazz	7.8%	8.1%	8.6%	+0.3%	+0.5%
Classical Music	9.3%	8.8%	8.6%	-0.5%	-0.2%
Opera	2.1%	2.1%	2.2%	+0.0%	+0.1%
Latin Music	4.9%	5.1%	5.9%	+0.2%	+0.8%
Outdoor Performing Arts Festival	20.8%	20.8%	24.2%	+0.0%	+3.4%

Plays	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Musical Plays	16.7%	15.2%	16.5%	-1.5%	+1.3%
Non-Musical Plays	9.4%	8.3%	9.4%	-1.1%	+1.1%

Dance	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Ballet	2.9%	2.7%	3.1%	-0.2%	+0.4%
Other Dance	5.2%	5.6%	6.3%	+0.4%	+0.7%

- Following a sharp decline in overall arts attendance that occurred from 2002-2008, participation rates held steady from 2008-2012, and have increased into 2017.
- Changes in the U.S. demographic composition appear to have contributed to attendance in performing arts attendance. Still, various subgroups of Americans have maintained or increased attendance rates for individual art forms.

Table H – Percentage of U.S. Adults Attending Visual Arts Activities and Events

				Rate of Change	
	2008	2012	2017	2008-2012	2012-2017
Art Museums/Galleries	22.7%	21.0%	23.7%	-1.7%	+2.7%
Parks/Historical Buildings	24.5%	22.4%	28.3%	-2.1%	+5.9%
Craft/Visual Arts Festivals	24.9%	23.9%	23.8%	-1.0%	-0.1%

- Visual arts attendance has declined significantly from 2002 to 2012 although has rebounded in 2017.

Reading Books and Literature

Table I – Reading Activity

				Rate of Change	
	2008	2012	2017	2008-2012	2012-2017
Read any Book, non-required	54.3%	54.6%	52.7%	+0.3%	-1.9%
Literature	50.2%	47.0%	44.2%	-3.2%	-2.8%
Novels and Short Stories	47.0%	45.2%	41.8%	-1.8%	-3.4%
Plays	2.6%	2.9%	3.7%	+0.3%	+0.8%
Poetry	8.3%	6.7%	11.7%	-1.6%	+5.0%

Consuming Art Through Electronic Media

Table J – Percentage of U.S. Adults Who Used Electronic Media to Consume Books or other Artistic, Arts-Related, and Literary Content Arts: 2017

	Percentage
Used Electronic Media to Consume Artistic or Arts Related Content	74%
Read Any Books Using Electronic Media	23%
Listen to Any Audiobooks	16%

Table K – Percentage of Adults Who Used Electronic Media to Consume Art in the past 12 Months

	Percentage
Other Music ⁶	65%
Classical Music or Opera	21%
Jazz	20%
Programs Info. About Book Writers	19%
Latin, Spanish, or Salsa	19%
Theater Productions (musical or stage play) ⁷	16%
Paintings, Sculpture, Pottery or Other Visual Art	16%
Dance Performances or programs	14%
Programs and Info. About Visual Arts	14%

Making and Sharing Art

Table L – Percentage of American Adults Who Made Art in the Last 12 Months: 2017

	Percentage
Any Art	54%
Performing Arts	40%
Visual Arts	33%
Creative Writing	7%

Performing Arts include singing, playing any musical instrument, dancing, or acting.

Visual Arts include painting, drawing, sculpting, or making prints, taking photographs, creating films, creating animations, digital arts, making pottery, ceramics, or jewelry, doing leatherwork, metalwork or woodwork, weaving, crocheting, quilting, knitting, or sewing, scrapbooking, etc.

Creative Writing includes fiction, nonfiction, poetry or plays.

Table M – Percentage of American Adults Who Did Performing Arts

	Percentage
Singing	25%
Dancing	24%
Playing Musical Instrument	11%
Creating or Performing Music in Other Ways	3%
Acting	2%
Using Electronic Media to Edit or Remix Music	2%

⁶ Rock, pop, country, folk, rap or hip-hop

⁷ Musicals, plays or information about theatre.

Table N – Percentage of American Adults Who Did Visual Arts

	Percentage
Taking Photographs	14%
Painting, Drawing, Sculpting, or Making Prints	13%
Weaving, Crocheting, Quilting, Needleworking, Knitting or Sewing	12%
Editing Photographs	10%
Doing Scrapbooking, Origami, or Other Paper-Based Art	7%
Doing Leatherwork, Metalwork, or Woodwork	7%
Creating Films or Videos	5%
Making Pottery, Ceramics, or Jewelry	4%
Designing or Creating Animations, Digital Art, Computer Graphics or Video Games	3%

Table O – Among Adults Who Made Art, Percentage Who Did So At Least Once a Week

	Percentage
Sing	70.2%
Use Electronic Media to Edit or Remix Music	48.5%
Play Any Musical Instrument	46.6%
Take Photographs	45.2%
Edit Photographs	38.5%
Create or Perform Any Music In Other Ways	37.5%
Creating Writing	34.3%
Design or Create Animations, Digital Art, Computer Graphics or Video Games	32.2%
Weave, Crochet, Quilt, Needlework, Knot or Sew	26.2%
Create Films or Videos	22.9%
Dance	22.6%
Paint, Draw, Sculpt, or Make Prints	22.5%
Act	20.8%
Do Leatherwork, Metalwork, or Woodwork	20.6%
Do Scrapbooking, Origami, or Other Paper-Based Art	14.0%
Make Pottery, Ceramics or Jewelry	9.8%

Participating in Arts Learning

Table P – Percentage of Adults Who Took Formal Art Lessons or Classes in Past 12 Months

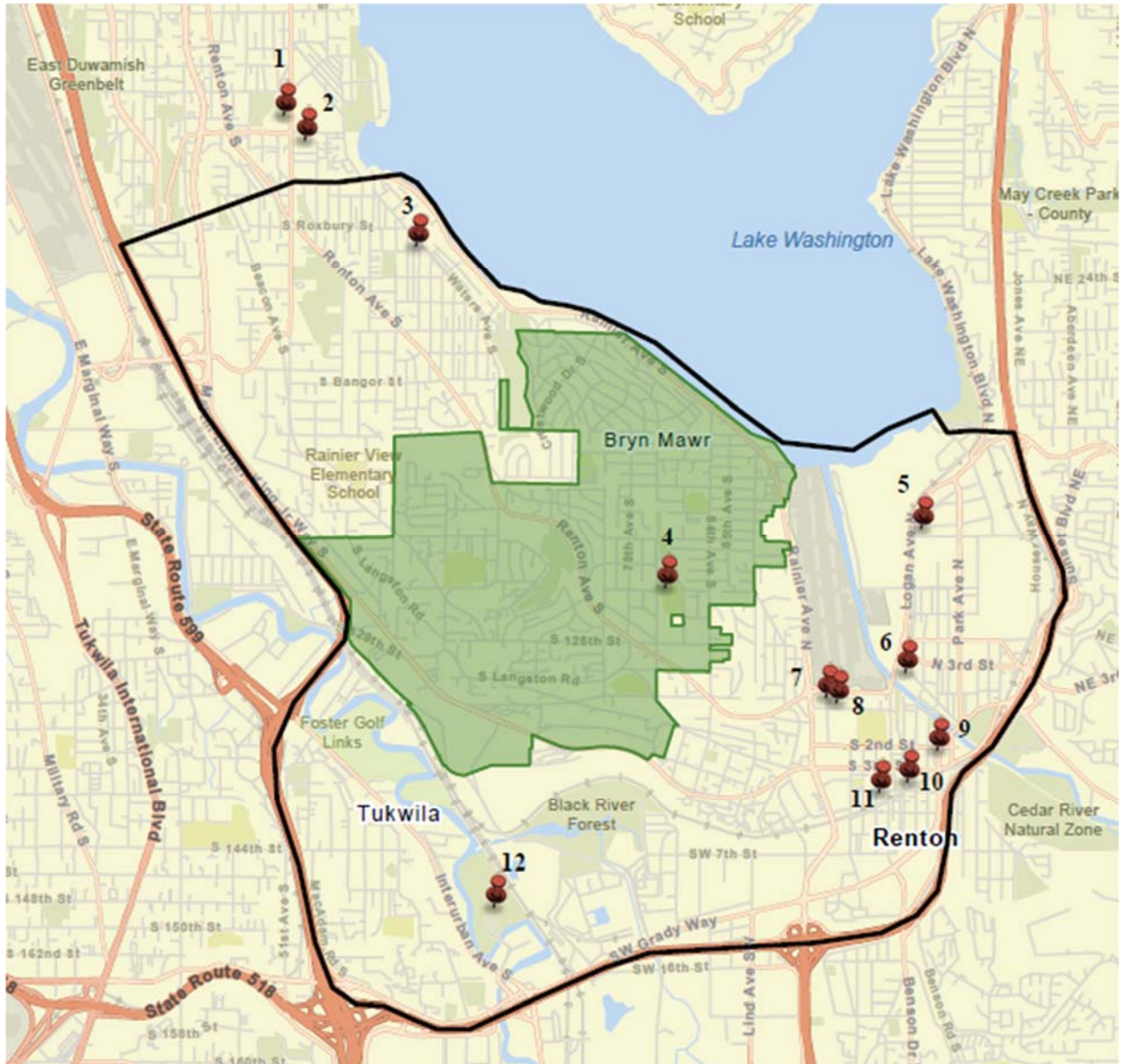
	Percentage
Any Type of Art	9.5%
Visual Arts ⁸	3.6%
Music	2.7%
Art History or Appreciation	2.1%
Dance	1.9%
Creative Writing	1.7%
Computer Animation or Digital Art	1.8%
Photography or Filmmaking	1.6%
Acting or Theatre	0.6%

Table Q – Percentage of Adults Who Took Informal Art Lessons or Classes in Past 12 Months

	Percentage
Any Type of Art	17.2%
Music	10.3%
Visual Arts	6.3%
Photography or Filmmaking	5.3%
Art History or Appreciation	4.9%
Dance	3.5%
Creative Writing	3.1%
Acting or Theatre	1.8%
Computer Animation or Digital Art	N/A

⁸ Drawing, Painting, Pottery, Weaving or Graphic Design

Section III – Existing Recreation-Related Providers



1. Rainier Beach Community Center
 - Municipal Operator
 - 48,000 Square Feet
 - New Building in 2013
 - Program Categories: Late night, special populations, drop-in, childcare, after school, before school, indoor toddler playtime, teen, lifelong recreation.
2. Planet Fitness
 - Private Operator
 - 25,000 Square Feet
 - Program Categories: Fitness (individual and group), personal training, massage.
3. Rainier Beach Community Club
 - Non-Profit Operator
 - Constructed in 1923
 - Program Categories: Monthly meetings and special event venue.
4. Renton/Skyway Boys & Girls Club
 - Non-Profit Operator
 - Program Categories: Academic support, STEM, healthy lifestyles, arts, leadership and character, college and workforce readiness, athletics, summer specific.
5. LA Fitness
 - Private Operator
 - Program Categories: Group fitness classes, functional training, personal training, kids klub, swim school.
6. Renton Senior Activity Center
 - Municipal Operator
 - Program Categories: Senior day trips, senior events, senior arts, senior dance, senior fitness, senior wellness, senior general interest, senior technology.
7. Anytime Fitness
 - Private Operator
 - 4,000-6,000 Square Feet
 - Program Categories: Small group training, virtual studio classes, personal training.

8. The Public House Barbell Club
 - Private Operator
 - 5,300 Square Feet
 - Program Categories: Personal training.
9. Fortified Fitness
 - Private Operator
 - Program Categories: Boot camp classes and personal training.
10. Vigor Ground Fitness and Performance
 - Private Operator
 - 8,500 Square Feet
 - Program Categories: Team training, small group, strength camp, semi-private personal training.
11. St Anthony Hall
 - Non-Profit Operator
 - 1954 Construction
 - Program Categories: Not available.
12. Starfire Sports
 - Non-Profit Operator
 - 2013 Construction
 - Program Categories: Soccer programs, STEAM programs, tournaments, team practices and training, amateur and professional games.

Section IV – Program

The facility program recommendations are broken into five areas: recreation, community, education, administration, and circulation.

	Total Square Feet
Gymnasiums (1)	7,600
Gymnasium Storage (1)	400
Fitness/Dance Studio (1)	1,500
Fitness/Dance Storage (1)	100
Childcare / Child Watch (1)	1,000
Childcare Child Watch Front Desk (1)	100
Childcare Child Watch Restrooms (2)	100
Indoor Play	500
<i>Recreation Sub-Total</i>	<i>11,300</i>
Community Room (1)	2,500
Community Room Storage (1)	250
Kitchen (1)	750
Kitchen Storage (1)	150
Stage/Studio/Meeting Room (1)	1,000
<i>Community Sub-Total</i>	<i>4,650</i>
Incubator Space / Tech Lab (1)	1,000
Storage (1)	250
Classroom (1)	500
Focus Rooms / 1 v. 1 Instruction (4)	400
Lounge (1)	750
Gender Neutral Restrooms (2)	160
<i>Education Sub-Total</i>	<i>3,060</i>
Offices & Open Cubicles (1)	750
Conference Room (1)	250
Staff Workspace (1)	250
Front Desk (1)	250
Lobby (1)	750
Restrooms (2)	500
Gender Neutral Restrooms (1)	80
<i>Administrative Sub-Total</i>	<i>2,830</i>
<i>Circulation & Mechanical Sub-Total</i>	<i>3,276</i>
Total	25,116

Recreation Components & Number	Total Square Feet
Gymnasiums (1)	7,600
Gymnasium Storage (1)	400
Fitness/Dance Studio (1)	1,500
Fitness/Dance Storage (1)	100
Childcare / Child Watch (1)	1,000
Childcare Child Watch Front Desk (1)	100
Childcare Child Watch Restrooms (2)	100
Indoor Play	500
Sub-Total	11,300

- **Gymnasium**
 - A large gymnasium is recommended to support a wide variety of sports and community activities, is rated high from past public input, and can create some revenue for the facility. The area can also serve as a large community gathering space.
 - Characteristics. A large space that can have a full-sized high school basketball court (84 x 50) running the width of the space, with two smaller cross courts with a drop-down curtain, and that could accommodate a full-sized volleyball court, or 2-3 pickleball courts. It is recommended that the space have a traditional hardwood floor. This would be similar in size to the Rainier Beach CC gymnasium.
- **Fitness/Dance Studio**
 - Fitness/Dance studio is recommended to support a variety of activities that will address the needs of multiple age groups. These studios can function as a group exercise space for adults, a dance studio for youth and adults, and a gentle motion exercise classroom for the aging population. Zumba, yoga, and aerobic exercise have a high MPI for the primary service area. Health/fitness spaces were also identified as a need through the public engagement process.
 - Characteristics. A single large fitness/dance studio is recommended with storage that can be accessed from the hallway or within the studio. This space would have a hardwood floating floor, mirrors would be on at least 2 walls, along with ballet bars. The room would have a standalone AV system with sound, screen, and projector. The space could be used for a wide variety of group exercise classes, dance classes for all ages, and function as a meeting room on a very limited basis.
- **Childcare/Child Watch**
 - Childcare/ Child Watch is often included in this type of facility. It allows for socialization opportunities with young children. It also provides an opportunity for parents/caregivers to participate in programs at the facility, while their child is being supervised. The opportunities for play and socialization have been ranked

highly in the public input processes. Both the Primary and Secondary Service Areas have a significant percentage of households with children, 35% and 28% respectively.

- Characteristics. This space should be adequate so that it could offered licensed or drop-in childcare or child watch. Within the room there should be a front desk/control point for check-in and check-out of participants. It should also have self-contained restrooms. If this amenity were located on the first-floor direct access to a dedicated outdoor play space should also be a consideration.

Community Components & Number	Total Square Feet
Community Room (1)	2,500
Community Room Storage (1)	250
Warming Kitchen (1)	750
Kitchen Storage (1)	150
Stage/Studio/Meeting Room (1)	1,000
Sub-Total	4,650

- Community Room
 - Community Rooms were recommended for the facility because of the wide variety of programs that they can accommodate. Often these areas are designed in a way to accommodate both programs and meetings, such as larger fitness classes, education classes, and meetings. Expansion of program opportunities of all kinds, along with meeting spaces were identified in the public input processes.
 - Characteristics. This space would function as one large area or two separate meeting rooms with a retractable dividing wall. When used as one large space it should be able to seat at least 130 people at 8' round tables. The room should have appropriate AV so that the system can function as one combined or two independent systems. Finishes are to be determined by the client.
 - Storage Characteristics. This space should have adequate storage of tables and chairs to host a variety of events.
- Warming Kitchen
 - A warming or catering kitchen is often associated with meeting rooms. These support community gathering spaces, provide opportunities to deliver meal programs, and create opportunities for healthy cooking instruction. Increasing social opportunities, education, and health were focuses of public input.
 - Characteristics. This should be located at one end of the community room. B*K is not recommending a commercial kitchen, but it should not only function as a warming kitchen. The space should be able to accommodate a meal program if the client were to choose to operate one from this location.
 - Kitchen Storage Characteristics. This space should be adjacent to the kitchen and accessible from the kitchen.

- Stage/Studio/Meeting Room
 - This space is truly a flexible space as it can address program needs, serve as a meeting room, or a stage for gatherings. The flexibility of this space makes it attractive, and it touches on the community building and learning opportunities that were identified in public input.
 - Characteristics. This should be on the opposite wall to the kitchen and should be accessible via ramp/steps from the community room. It should also be accessible from the hallways outside of the community room. This space should have a retractable dividing wall that separates it from the community room. In designing the space in this way, it can function as a stage if required for the community room, or as an additional program space for smaller group exercise classes, programs, or meetings.

Education Components & Number	Total Square Feet
Incubator Space / Tech Lab (1)	1,000
Storage (1)	250
Classroom (1)	500
Focus Rooms / 1 v. 1 Instruction (4)	400
Lounge (1)	750
Gender Neutral Restrooms (2)	160
Sub-Total	3,060

- Incubator Space / Tech Lab
 - These types of spaces are being included in community facilities on a more frequent basis and is recommended for this facility based on community input for increased access to internet, computers, as well as national trend for increased art and crafts opportunities. Many times, these spaces are coupled with STEM initiatives. This is a positive trend taking place across the country and focuses on the learning input focus.
 - Characteristics. This space should be welcoming to all age groups and have computer stations, 3D printers, adequate sound barriers, and function as a space that promotes STEM. It is possible that within the 1,000 square feet consideration may be given for 1-2 small (8'x 8') breakout rooms.
 - Storage Characteristics. This should be split between the Incubator/Tech Lab and the Classroom, with access to the space from both rooms.
- Classroom Characteristics.
 - Again, the classroom identified factors into leaning and community building that were focuses of public input. Additionally, these spaces can host a variety of programs/seminars that serve as a connection to resources opportunity for the community. From senior activities during the day, to evening parenting classes, and youth group meet-ups, this room could be scheduled by a variety of community groups.

- This space should be equipped to handle a wide variety of meetings and programs for the public. Consideration should be given to equipping the space with built-in cabinets for storage, and potentially a sink.
- Focus Rooms / Small Instruction
 - These spaces provide breakout opportunities for large groups, or small group instruction. These spaces touch on the connection to resources and learning objectives that were identified in public input. Additionally, these spaces are trending positively across the country.
 - Characteristics. These are small 10' x 10' spaces that provide an opportunity for individual use, 1 v. 1 instruction or small groups. Having a table and chairs in this space would be appropriate along with a screen with appropriate components to plug in a laptop.
- Lounge
 - Characteristics. The lounge should function as a social area of the facility for organized or unorganized gatherings.

Administrative Components & Number	Total Square Feet
Offices & Open Cubicles (1)	750
Conference Room (1)	250
Staff Workspace (1)	250
Front Desk (1)	250
Lobby (1)	750
Restrooms (2)	500
Gender Neutral Restrooms (1)	80
Sub-Total	2,830