

Poulsbo Events and Recreation Center Market Analysis

Final DRAFT REPORT | July 19, 2021

Contents

- Introduction and Context..... 2**
- Demand Analysis..... 3**
 - Summary Profile..... 3
 - Historical Recreation Programming 7
 - Recreation Trends 7
 - Community Survey 11
 - Arts and Recreation Demand..... 11
 - Business Users..... 13
- Competitive and Complementary Facility Analysis 14**
 - Aquatic Centers..... 16
 - Sports Fields..... 18
 - Event Spaces..... 19
- Net Anticipated PERC Usage 21**
 - Summary of Anticipated Market Demand 21
 - Key Opportunity and Risk Factors..... 25
- Conclusion..... 25**
 - Summary of Marketing Guidance 27
- Appendix A. Interview Summary from Comparable Facilities..... 29**
- Appendix B. Interview Summary from Arts and Recreation Users Groups..... 32**
- Appendix C. Interview Summary from Steering Committee Members 38**

Introduction and Context

The Poulsbo Events and Recreation Center (PERC) is a concept for a multi-use recreational, educational, and events center. The PERC is a collaboration between the City of Poulsbo, the Kitsap Public Facilities District, and the community. As part of a feasibility study, BERK worked with the City of Poulsbo on a market analysis to understand the local and regional demand for potential PERC components. This market analysis combines City-provided information, market research, and information from representatives of similar facilities to estimate the potential demand for venues and spaces to accommodate indoor and outdoor recreation, meetings, and events.

Methodology

This market analysis started with a review of community preference survey conducted by the City and a demographic assessment of potential users based on drive-time catchment areas. We conducted preliminary demand research on potential facility components, including comparisons to similar facilities in the region, considering location, amenities, and access.

We interviewed peer comparable facilities to understand trends and lessons learned that could be useful for Poulsbo. We also talked with local arts and recreation user groups, Poulsbo Chamber of Commerce members, and Steering Committee members with expertise in various fields relevant to facilities, parks, and recreation planning. These conversations provided insight on the market position of the PERC, potential usage, important facility components, and potential regional draw and use of the planned hotel that will be located near the PERC.

We mapped potential market areas and estimated market demand based on drive times for three potential components: aquatic centers, tournament sports fields, and event spaces. Based on the community survey, interviews, and drive-time analysis, we summarized the anticipated demand for key PERC facility components.

This market analysis provides baseline information for the City of Poulsbo as it moves forward with assessing the feasibility and operational structure of the PERC. This market analysis will be integrated into the Draft Management Plan and be used to inform the Economic Uplift and Fiscal Impact Analysis.

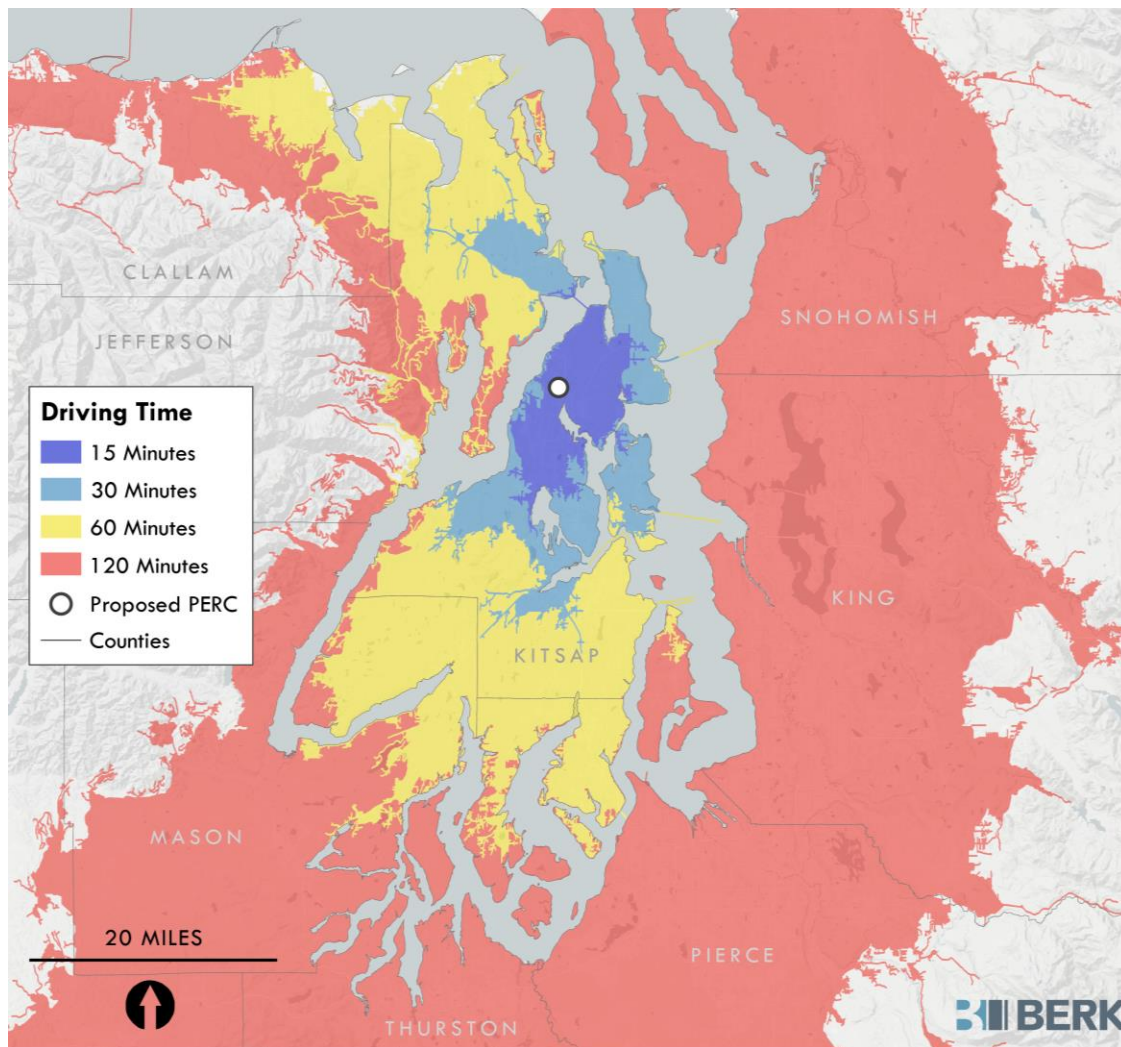
Demand Analysis

The mission of the proposed PERC is to serve local residents and draw visitors from around the region. We conducted a demand analysis to understand current recreation trends, community priorities, and the landscape of comparative facilities. Demand can be informed by historical participant registration, national and regional recreation trends, community survey results, and input from community user groups.

SUMMARY PROFILE

Exhibit 1 maps preliminary catchment areas of 15-, 30-, 60-, and 120-minute drive times from the PERC facility site. Using the current road system, GIS creates areas based on how far an individual could be expected to drive from a starting point during typical traffic conditions. This provides an estimate of the market based on the number of people who could drive to the PERC.

Exhibit 1. 15-, 30-, 60-, and 120-minute Drive Time Catchment Areas



Note: The 60-minute drive time area was adjusted to remove two areas that are within saturated markets: the area across from the Tacoma Narrows Bridge, and the Edmonds area.

Sources: ESRI, 2021; BERK, 2021.

Exhibit 2 summarizes the demographic profile of these drive-time catchment areas in 2020 and 2025.

- The estimated 2020 population is around 60,000 in a 15-minute drive time area, around 200,000 in a 30-minute drive time area, around 400,000 in a 60-minute drive time area, and around 5 million in a 120-minute drive time area.
- From 2020 through 2025, population, number of households, and number of families are all projected to grow at an annual rate of around 1%.
- The median household income in a 15-minute drive time area is \$81,000; this decreases as the catchment area expands to \$78,000 in a 30-minute drive time area, \$78,000 in a 60-minute drive time area, and \$86,000 in a 120-minute drive time area.

Exhibit 2. Demographic Summary of 15-, 30-, 60-, 120-minute Drive Time Catchment Areas

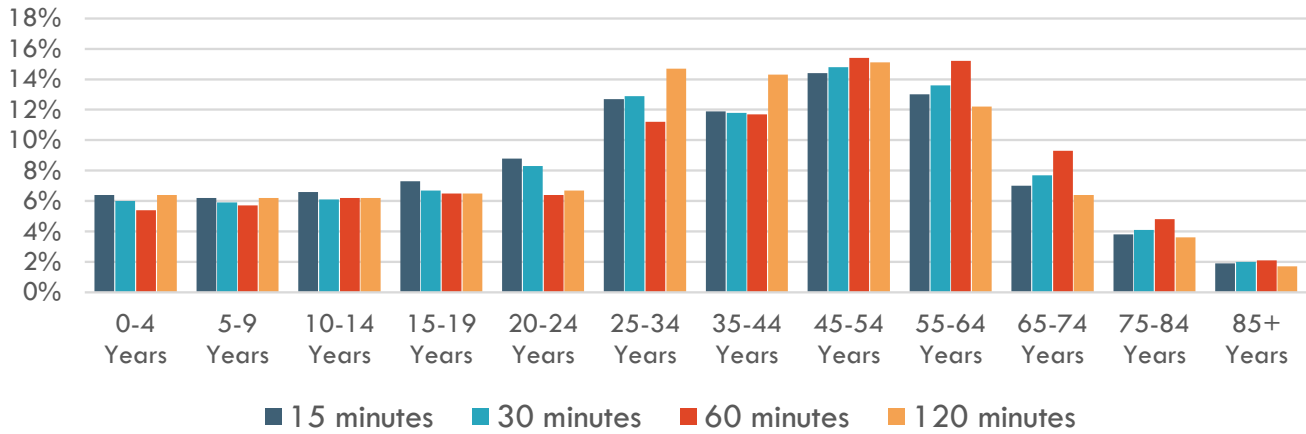
	15-minute Drive Time	30-minute Drive Time	60-minute Drive Time	120-minute Drive Time
2020 Summary				
Population	59,948	201,867	406,550	4,888,182
Households	23,465	79,074	162,708	1,924,676
Families	15,957	51,780	109,109	1,204,504
Average Household Size	2.48	2.44	2.43	2.49
Owner Occupied Housing Units	16,079	54,518	120,558	1,198,341
Renter Occupied Housing Units	7,386	24,556	42,150	726,335
Median Age	38.7	39.8	44.6	38.8
Median Household Income	\$81,033	\$78,162	\$77,669	\$86,501
Average Household Income	\$103,081	\$103,166	\$104,419	\$116,897
2025 Summary				
Population	62,516	212,150	428,003	5,230,781
Households	24,538	83,416	171,706	2,059,110
Families	16,676	54,527	115,004	1,286,163
Average Household Size	2.47	2.43	2.42	2.50
Owner Occupied Housing Units	16,930	57,503	127,679	1,278,580
Renter Occupied Housing Units	7,608	25,913	44,028	780,530
Median Age	40.1	41.2	45.6	39.4
Median Household Income	\$88,689	\$84,310	\$84,435	\$96,112
Average Household Income	\$115,770	\$115,151	\$117,045	\$130,600
Trends: 2020-2025 Annual Rate				
Population	0.8%	1.0%	1.0%	1.4%
Households	0.9%	1.1%	1.1%	1.4%
Families	0.9%	1.0%	1.1%	1.3%
Owner Households	1.0%	1.1%	1.2%	1.3%
Median Household Income	1.8%	1.5%	1.7%	2.1%

Sources: ESRI, 2021; BERK, 2021.

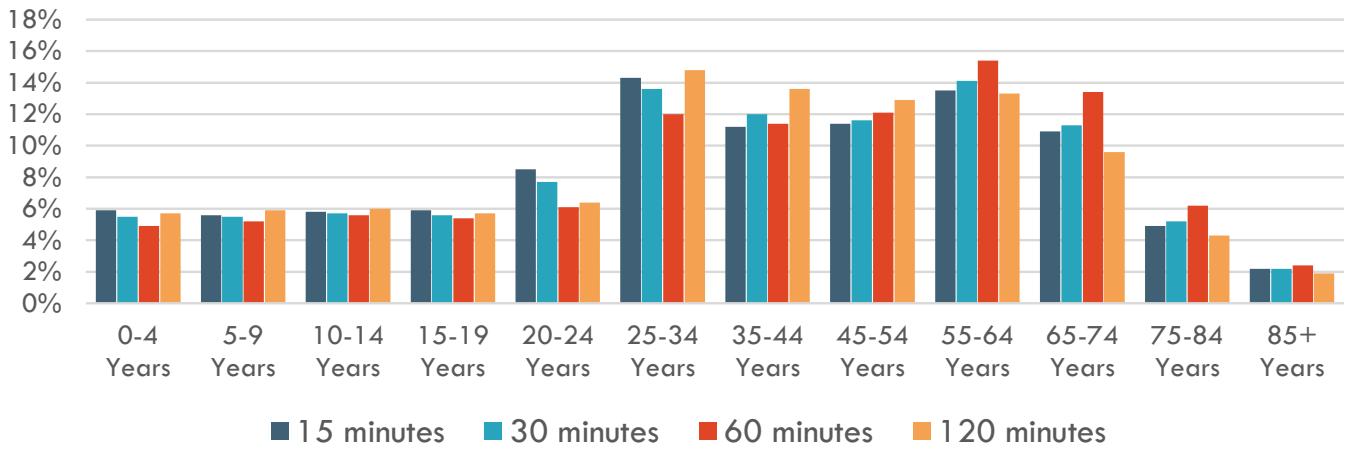
To understand how the age distribution is changing, Exhibit 3 compares the 2010, 2020, and 2025 age distributions. Poulsbo has seen an increase in the share of population that is between ages 25-34, which could correspond to more young families moving in, as well as between 65-74, which could reflect an active older adult and senior population.

Exhibit 3. Age distribution in 15-, 30-, 60-, and 120-minute Drive Time Catchment Areas

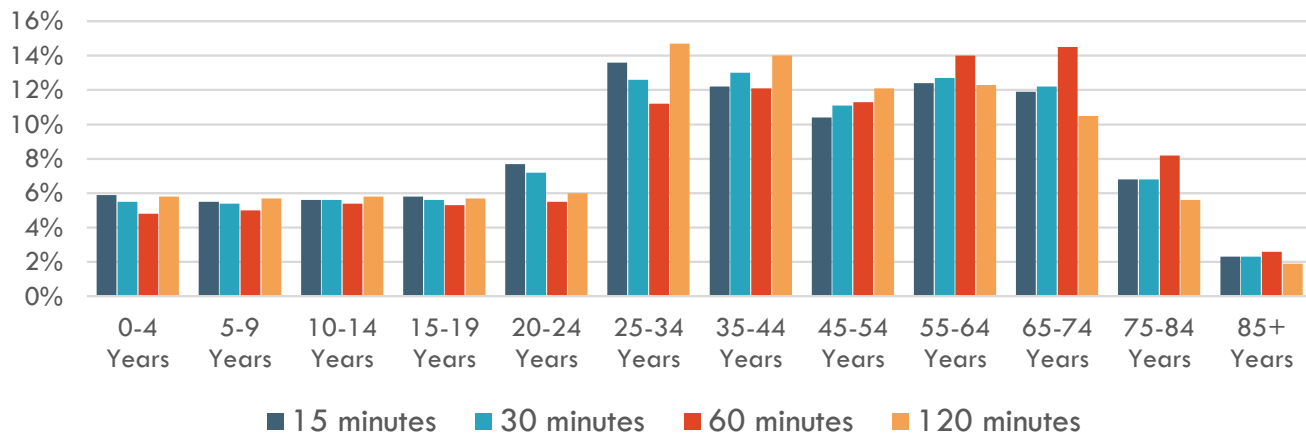
2010 Driving Time Areas Est. Age Distribution



2020 Driving Time Areas Est. Age Distribution



2025 Driving Time Areas Est. Age Distribution

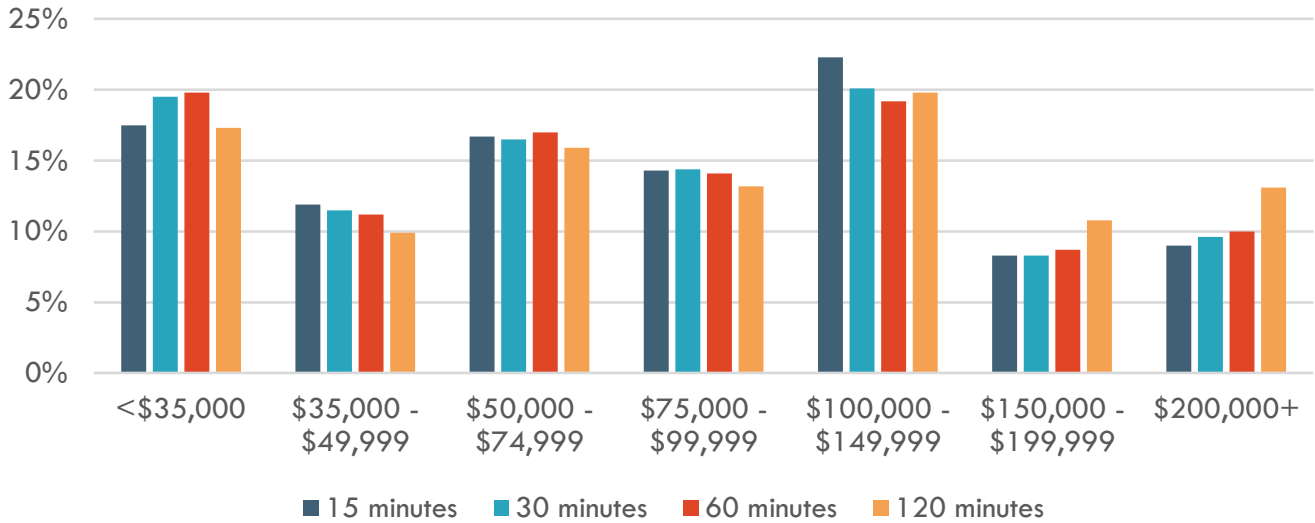


Sources: ESRI, 2021; BERK, 2021.

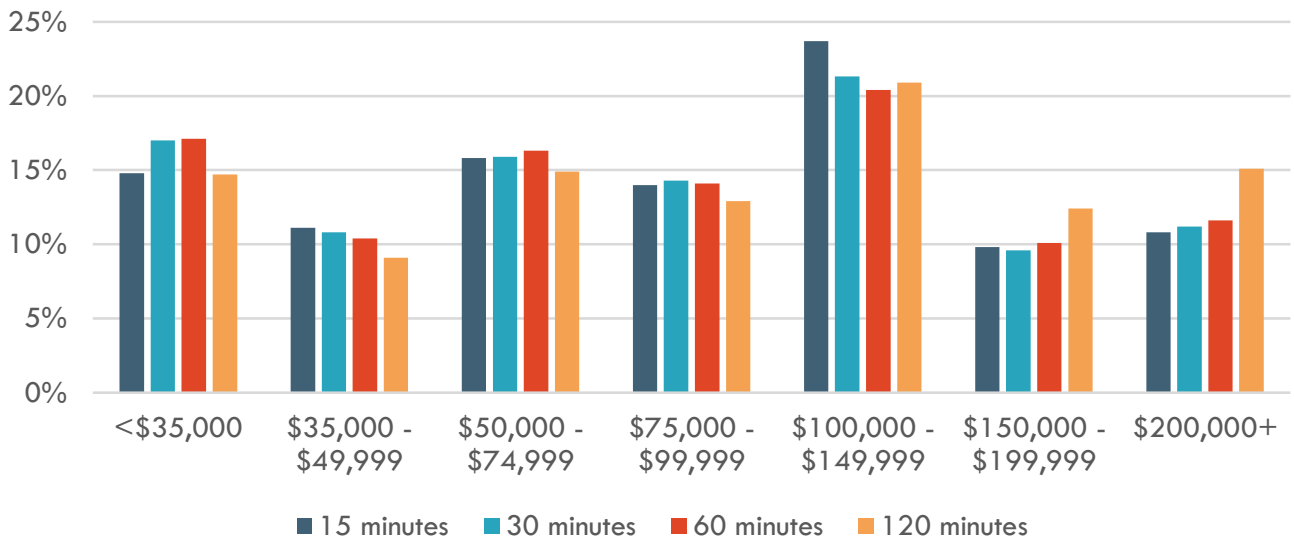
To understand how the household incomes are changing, Exhibit 4 compares the 2020 and 2025 age distributions. The highest median household incomes are in a 15-minute drive time area, and there is a growing share of the population with household incomes between \$100,000-\$149,999.

Exhibit 4. Households by Income in 15-, 30-, 60-, and 120-minute Drive Time Catchment Areas

2020 Households by Income



2025 Households by Income



Sources: ESRI, 2021; BERK, 2021.

HISTORICAL RECREATION PROGRAMMING

The City offers a variety of recreational programming through its Parks and Recreation programs. Gymnastics, gardening, senior programs, piano lessons, watercolor, and camps tend to be full. Classes added in 2019 were gymnastics, preschool camps, gardening, watercolor, and Smart Phone 101. Exhibit 5 summarizes ongoing programs from the City’s recreation programming in 2019 by age group, and Exhibit 6 summarizes a selection of ongoing programs by type. The City’s recreation programming would be moved to the PERC if the facility is constructed.

Exhibit 5. City of Poulsbo Recreation Programming by Age Group, 2019

By Age Group	# Classes Offered	Total Registrations	% of Classes Run
Preschool	144	883	74%
Youth	321	2,457	83%
Adults	223	1,489	71%
Seniors	40	465	85%
Totals	728	5,294	78%

Source: City of Poulsbo, 2021.

Exhibit 6. City of Poulsbo Recreation Programming by Type, 2019

By Type	# Classes Offered	Total Registrations	% of Classes Run
Camps	129	1,238	88%
Gymnastics	126	714	84%
Senior Trips	32	414	81%
Totals	287	2,366	85%

Source: City of Poulsbo, 2021.

RECREATION TRENDS

National Trends

Recreation Management publishes an annual *State of the Industry Report* with trends in recreation, sports, and fitness facilities. The 2020 annual survey was completed between January and February 2020, prior to the COVID-19 pandemic, and includes respondents from parks and recreation districts and departments, colleges, recreation centers, schools, health clubs, YMCAs, and camps.¹

Partnerships. According to Recreation Management’s *2020 State of the Industry Report*, many recreation, sports, and fitness facilities partner with other organizations such as local schools, nonprofit organizations, or state or local government; 87% of recreation center respondents partner with organizations to broaden capabilities related to funding, programming, or outreach.

¹ <https://recmanagement.com/feature/202006FE01>

Use of facilities. Around 60% of recreation center respondents reported that the number of people using their facilities increased from 2018 to 2019. This was the highest compared with other types of facilities. Looking ahead, 61% of recreation centers responded to the pre-pandemic survey that they expected an increase in users in 2020 and 2021.

Staffing. Recreation centers employed an average of 129.8 workers in 2019.

Future program offerings. Around 35% of respondents said they were planning to add program offerings in their facilities over the next three years. Almost half (48.2%) of recreation center respondents said they would be adding programs at their facilities over the next three years.

Across all types of facilities, the top 10 planned features for all facility types were:

1. Splash play areas (25.4% of those with plans to add features were planning to add splash play)
2. Playgrounds (20.3%)
3. Park shelters (17.3%)
4. Dog parks (17.1%)
5. Park restrooms (16.1%)
6. Synthetic turf sports fields (14.8%)
7. Walking and hiking trails (14.8%)
8. Fitness trails and outdoor fitness equipment (14.8%)
9. Disc golf courses (12.9%)
10. Outdoor sports courts (11.3%)

Source: Recreation Management 2020 State of the Industry Report.

Programming. The top 10 most commonly offered programs are:

1. Holiday events and other special events (65.3%)
2. Educational programs (59%)
3. Group exercise programs (58.8%)
4. Fitness programs (57.6%)
5. Day camps and summer camps (57.3%)
6. Youth sports teams (55.2%)
7. Mind-body balance programs (51.2%)
8. Adult sports teams (46%)
9. Arts and crafts (45.8%)
10. Active older adult programs (45.4%)

Source: Recreation Management 2020 State of the Industry Report.

According to the National Recreation and Park Association (NRPA), emerging trends for 2021 include:

- **Focus on health and health equity.** COVID-19 magnified the focus on health and well-being, and beyond the pandemic NRPA expects a focus on social needs of communities.² NRPA predicts that “At least 10 agencies will publicly acknowledge the impacts of how disparities in the provision of park and recreation services have been affected by systemic social inequities, racial injustice and environmental inequalities. Demonstrated positive actions to correct these historic inequities will be part of the measure of reversing these trends.”
- **Environmentally sustainable design.** Parks will be designed with resilience in mind, considering the accelerating impacts of climate change.

GameTime, a playground equipment company, shared these top five park and playground trends for 2021:³

- Inclusion and social equity
- Embracing the natural landscape
- Community health and wellness
- Using outdoor spaces for learning
- Environmentally responsible play and activity

Regional and Local Trends

According to the Washington Trails Association, Washington residents spend an average of 56 days per year engaged in outdoor activities.⁴ People are drawn to a more active lifestyle compared with ten years ago. Older adults are more active than the same age group populations have been in the past.

According to the Washington State Recreation and Conservation Office (RCO), the top activities for people 65 and older are walking, sightseeing, and nature-based activities.⁵

According to interviews with peer facilities and local arts and recreation users, trends reflect interest in the following activities:

- **Events:**
 - Conventions, business trade shows, conferences
 - Birthday and retirement parties, weddings, memorials
- **Indoor recreation:**
 - Performing arts
 - Cardio, indoor track, personal training
 - Family programs and health education classes

² <https://www.nrpa.org/parks-recreation-magazine/2021/january/top-trends-in-parks-and-recreation-2021/>

³ <https://www.gametime.com/news/gametime-announces-top-five-park-and-playground-trends-for-2021>

⁴ <https://www.wta.org/news/magazine/features/big-money-how-recreation-is-driving-washingtons-economic-landscape>

⁵ Washington State Recreation and Conservation Office. <https://www.rco.wa.gov/StateRecPlans/scorp/address-changing-demographics/>

- Basketball, volleyball, pickleball
- Swimming
- **Outdoor recreation:**
 - Continued interest in outdoor spaces after COVID-19
 - Turf fields
 - Tournaments: soccer, lacrosse, Little League
 - Splash pads

How Trends May Affect PERC Demand

- Considering the trend toward **community health and wellness**, PERC programming should include a focus on health. Classes could include chronic illness prevention education, for example. Facility users will approach recreation with a mindset of investing in health.
- The focus on **health equity** means that community members will treat gathering spaces as public amenities that can serve social needs of communities and help address systemic inequities. The PERC should consider ways to keep the space as accessible and affordable as possible.
- Post COVID-19, there will be a continued **interest in outdoor activities**, which may support outdoor fields, a splash pad, and outdoor spaces. There will also be some interest in virtual programming, so events and activities might use a combination of in-person, virtual, and hybrid approaches.
- Interest on **inclusive design and accessibility** mean the PERC should be include activities for all ages and abilities. Older adults and seniors are interested in continuing to be active and engage in activities.

COMMUNITY SURVEY

To gauge community interest in the proposed PERC facility, the City of Poulsbo conducted a community survey from October 26 – November 16, 2020 and received 1,286 survey responses. The survey asked for community input on use preferences, funding support, and interest in continuing to provide input on this process. Below are key findings in several proposed areas:

- For **indoor recreation**, there is strong interest in aquatics/pool, followed by classes, yoga, weight training.
- For **outdoor recreation**, there is high interest in walking and running trails, followed by field sports. There is strong interest in multi-use or shared spaces/fields.
- For **recreational programs**, survey respondents were most interested in adult classes/programs, fitness, aquatic classes, cooking classes, and art/music.
- For **events**, the strongest interest was in performing arts, followed by weddings, banquets, company holiday parties, and award ceremonies.
- Overall, there is more interest in recreation and programs than events.
- 74% of survey respondents indicated that they would be supportive or likely to support a ballot measure to fund the construction costs.

ARTS AND RECREATION DEMAND

To learn more about community interest in potential PERC facility components, BERK interviewed 11 local arts and recreation user groups. Community members are excited for the new opportunities that the facility may bring, providing spaces for local arts, recreation, and events, as well as in attracting visitors to the Poulsbo community. Local user groups were supportive of the City's effort and happy to share how the PERC could best support them.

All user groups we interviewed stated they would use the PERC, depending on the following factors:

- Cost
- Availability
- Appropriate size and facility components

Sports tournaments and performing arts could bring visitors who would use the planned hotel that will be located next to the PERC to stay overnight.

A detailed summary of interviews is in [Appendix B.](#)

Field Sports

Local soccer and lacrosse teams currently use the North

INTERVIEWS WITH LOCAL ARTS AND RECREATION USER GROUPS

- North Kitsap Lacrosse
- North Kitsap Soccer Club
- North Kitsap Little League
- Under the Lights (flag football)
- Community youth girls basketball team
- Kitsap Children's Musical Theatre
- InMotion Performing Arts Studio
- Poulsbo Community Orchestra
- North Kitsap Community Pool
- Poulsbo Piranha Swim Team
- Splash Pad Citizen Committee

Kitsap High School Field and Strawberry Field. The Little League team uses school district fields, Strawberry Field, North Kitsap High School softball fields, and North Kitsap High School baseball fields. The flag football team uses the North Kitsap High School stadium. While these sports teams do currently use local facilities, they anticipate using the PERC if it included enough fields. They all expect that **more fields would allow them to host tournaments in Poulsbo and bring visitors to the community.**

- North Kitsap Soccer Club is affiliated with US Club Soccer, and with enough fields, the team would use the PERC year-round and soccer tournaments would attract up to 100 visiting teams.
- North Kitsap Lacrosse, affiliated with US Lacrosse, would host three tournaments and use the PERC fields for camps as well.
- North Kitsap Little League, affiliated with Little League International, would use the PERC for tournaments and practices five times a week.
- Under the Lights, a flag football team, would use the PERC for games once a week.

For soccer and lacrosse, the ideal layout is four outdoor fields: two synthetic turf and two grass. Flag football needs at least two fields (turf is preferred and does not need to be lined/marked). For little league baseball, three baseball fields would be ideal (turf is preferred and needs to be marked).

Important facility components: outdoor fields, parking, turf fields, lights, restrooms, covered seating, fencing, storage, concession stand.

Indoor Recreation

The youth girls basketball team (3rd grade through middle school) is organized by the City of Poulsbo Parks and Recreation department and currently uses school gyms as well as the Haselwood Family YMCA in Silverdale and Marvin Williams Recreation Center in Bremerton.

The basketball team would likely use the PERC if it included basketball courts with multiple hoops. They would use the PERC three or four days a week, for two to three hours each time. They would be able to host tournaments, and visitors would travel from as far as Idaho and stay in the local planned hotel.

Important facility components: multiple hoops, locker rooms, seating, floors for basketball use.

Aquatics

If the PERC includes a 50-meter swimming pool, it would become a destination facility. If not a 50-meter pool, the PERC should include two 25-yard pools: one for classes and one for competitive use. The aquatics facility should also include deck space, starting blocks, and a spa.

There is high interest in bringing a **splash pad** to Poulsbo. This should be free to enjoy, as with other splash pads in the state.

Performing Arts

We heard from local arts groups that it is extremely difficult to find venues for performing arts. The North Kitsap Auditorium at the high school is the only space that meets needs in regard to capacity, flooring type, and stage size. However, there are several challenges:

- It is difficult to reserve space because the school district has priority. The space is continuously overbooked. The children's musical theater, dance studio, and community orchestra all have to book at least a year in advance. Still, if the school district need the space, outside renters can get bumped.
- At the same time, the facility is deteriorating. The auditorium has inadequate sound, lighting, backstage areas, green room areas, parking, heating, and air conditioning. Some seats are broken and torn. The school district has not been able to invest in refurbishing the auditorium. It is not optimal for joint events, such as a performance of The Nutcracker ballet with a live orchestra.

Arts users stated they would use the PERC and expect performing arts events to draw visitors to Poulsbo.

- The dance studio would use the PERC up to five times a year, for a week each time.
- The community orchestra would use the PERC three times a week for rehearsals throughout the year and three times a year for performances.
- The children's musical theater would use the PERC five to nine hours daily, 15 weeks a year.

Important facility components: parking, orchestra pit, single occupancy private bathroom, audio/tech/lighting, 48' x 48' stage size, prop room, dressing rooms, curtains.

BUSINESS USERS

To gauge interest and potential PERC usage from Poulsbo's business community, BERK conducted a quick poll at the Poulsbo Chamber of Commerce's meeting on April 7, 2021. This survey was not meant to be representative but rather to quickly gauge interest in different types of potential PERC uses. 12 respondents participated in the quick poll.

When asked whether they would use the PERC for business events or events related to their business, five said they would use the PERC, four said maybe, and three said no. The primary reason why businesses would not use the PERC is that they already have their own facility.

Types of spaces

We asked what types of spaces they would use, and survey respondents indicated all spaces they would use from a list of options provided. In order of frequency:

- Lounge area/reception area – there is interest in a quiet place with good wifi, coffee, a place to work or meet with friends
- Dining room – interest in catering kitchen, commercial kitchen, kitchen for community use
- Small meeting rooms to seat up to 60 theater style / 40 classroom style or round tables (approx. 650–850 sq. ft.)
- Patio/courtyard

- Executive conference room with board room table to seat up to 14 (approx. 600–800 sq. ft.)
- Large meeting rooms to seat up to 125 theater style / 100 classroom style or round tables (approx. 1,000–2,000 sq. ft.)
- Large conference room/ballroom to seat up to 300 theater style / 150 classroom style (approx. 3,000–4,000 sq. ft.)
- Large ballroom to seat up to 500 theater style / 450 round tables (approx. 6,000–8,000 sq. ft.)
- Auditorium
- Stage

Types of Events

We asked what types of events they might envision attending or hosting at the PERC. Business community members indicated high interest in business multi-day, full-day, and partial-day trainings, meetings, or conferences. They also imagine using the PERC spaces for social events, reunions, weddings, birthday parties, retirement parties, memorials, and other events.

Competitive and Complementary Facility Analysis

Exhibit 7 summarizes information about some comparable recreation and events facilities across the state, including the facility size, operational structure, access, and programming.

Exhibit 7. Comparable Events and Recreation Facilities in Washington State

Facility	Location	Year Established	Facility Size	Operational Structure	Access/Participation	Indoor Rec	Outdoor Rec	Event Space	Aquatics
Bainbridge Island Aquatic Center	Bainbridge	Originally built 1970; roof added 1977	30,000 sq ft.	Operated by Bainbridge Island Metro Park & Recreation District	Fees for rental and programming	✓	✗	✗	✓
Center Place in Spokane Valley	Spokane Valley	Opened 2005	54,000 sq ft.	Owned by City of Spokane Valley, operated by City's parks and recreation department. Originally Spokane County voted bond, conveyed to city when incorporated	Open to all; fees for space rental	✓	✓	✓	✗
Hazelwood YMCA	Silverdale	Opened 2011	85,000 sq ft.	Operated by YMCA of Pierce and Kitsap counties	Membership for programming and use; financial aid available so cost is not barrier to access	✓	✓	✓	✓
Kent YMCA	Kent	Opened 2019	50,000 sq ft.	City partnership with YMCA; City deeded the land to YMCA	Membership for programming and use; financial aid available so cost is not barrier to access	✓	✓	✓	✓
Kitsap Conference Center at Bremerton Harborside	Bremerton	Opened 2004; expansion 2014	17,000 sq ft.	Funded by Kitsap PFD, owned by the City of Bremerton, managed and operated by Columbia Hospitality	Open to all; fees for space rental	✗	✗	✓	✗
Lewis County Sports Complex	Centralia	PFD 2007, approved 2010, completed 2013	75,000 sq ft.	Partnership between City of Centralia, Lewis County PFD, and Centralia School District. Sports Hub is partnership with NW Sports Hub (private)	Open to all; fees for rental and programming	✓	✓	✗	✓
Marvin Williams Recreation Center	Bremerton	Opened in 2018	20,000 sq ft.	New Life Community Development Agency (non-profit)	Open to all	✓	✗	✓	✗
UW Tacoma Student Center YMCA	Tacoma	Built 2014	70,000 sq ft.	Partnership between UW Tacoma and YMCA of Pierce and Kitsap counties	Open to currently registered UW Tacoma students and members of YMCA of Pierce and Kitsap counties	✓	✓	✓	✗

Source: BERK, 2021.

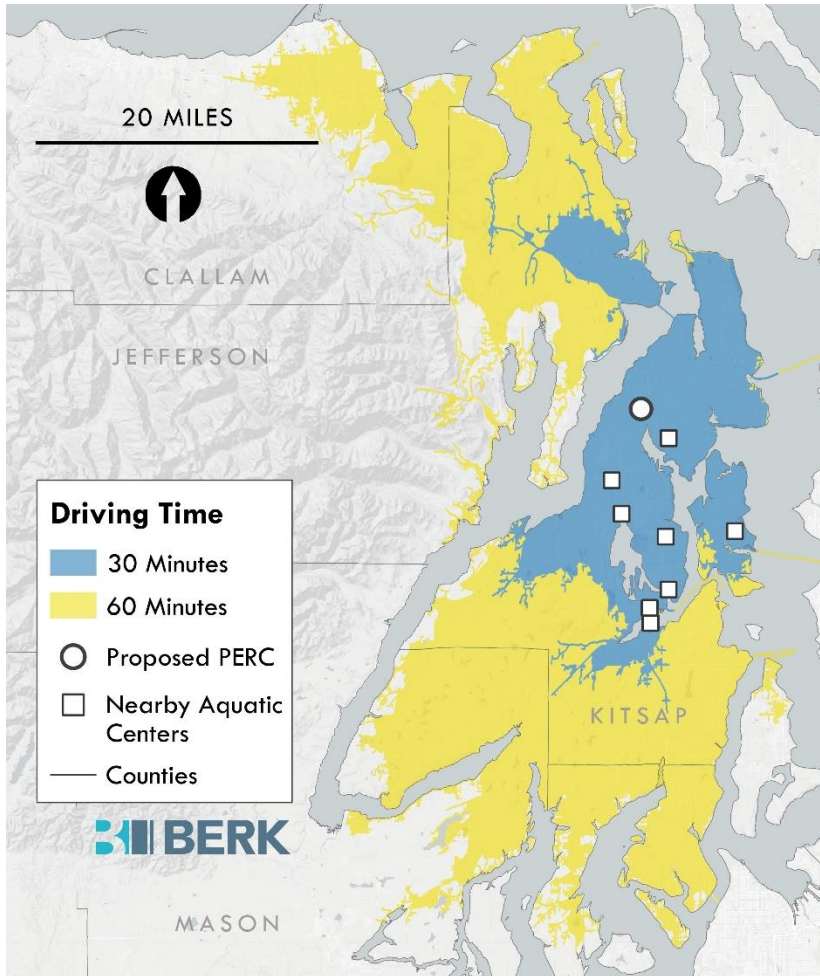
Next, we looked at comparable facilities within the drive-time area potential markets for each three components: aquatic center, tournament sports fields, and event space. We identified these facilities in collaboration with City staff and the Market Analysis Steering Committee Workgroup.

AQUATIC CENTERS

Exhibit 8 maps comparable aquatic centers within 30- and 60-minute drive time areas.

- This is a saturated market with several aquatic centers within this area. Except for **Haselwood Family YMCA**, most pools in the surrounding area are cold lap pools. This suggests that the PERC could potentially better differentiate itself as a family warmwater pool focused on recreation.
- Nearly 40% of the population is eligible to use or members of the **Bangor Aquatic Center** or **Puget Sound Naval Shipyard**, both of which provide free or subsidized services to those who have access to the pools. This suggests a more competitive landscape for a pool component at the PERC.
- The **Bainbridge Island Aquatic Center**, about 13 miles from the PERC location, offers two pools: the Ray Williamson Pool, a six lane 25-yard pool, and the Don Nakata Pool, a 360,000 gallon pool with a water slide, lazy river, sloped beach entry, tot pool, water features, toddler frog slide, one- and three-meter diving boards, and four 25-yard lap lanes. The facility also has a spa, and steam and sauna rooms. This is a destination facility, and many families in Poulsbo currently drive to use this facility. While those families would rather stay in Poulsbo, it would be difficult for the PERC to offer all the amenities that would allow it to compete with this facility.
- Community members also use school district pools. The **Olympic Swim Center** is located at Olympic High School in Bremerton, around 12 miles from the PERC location. This facility is a 25-yard pool with a separate shallow end and offers open swimming. The **South Kitsap Community Pool** is located at South Kitsap High School in Port Orchard, around 23 miles from the PERC location. This facility offers lap swimming, aerobics, and swim lessons.

Exhibit 8. Comparable Aquatic Centers in 30- and 60-minute Drive Time Area



Sources: ESRI, 2021; BERK, 2021.

The following facilities are mapped (listed in alphabetical order):

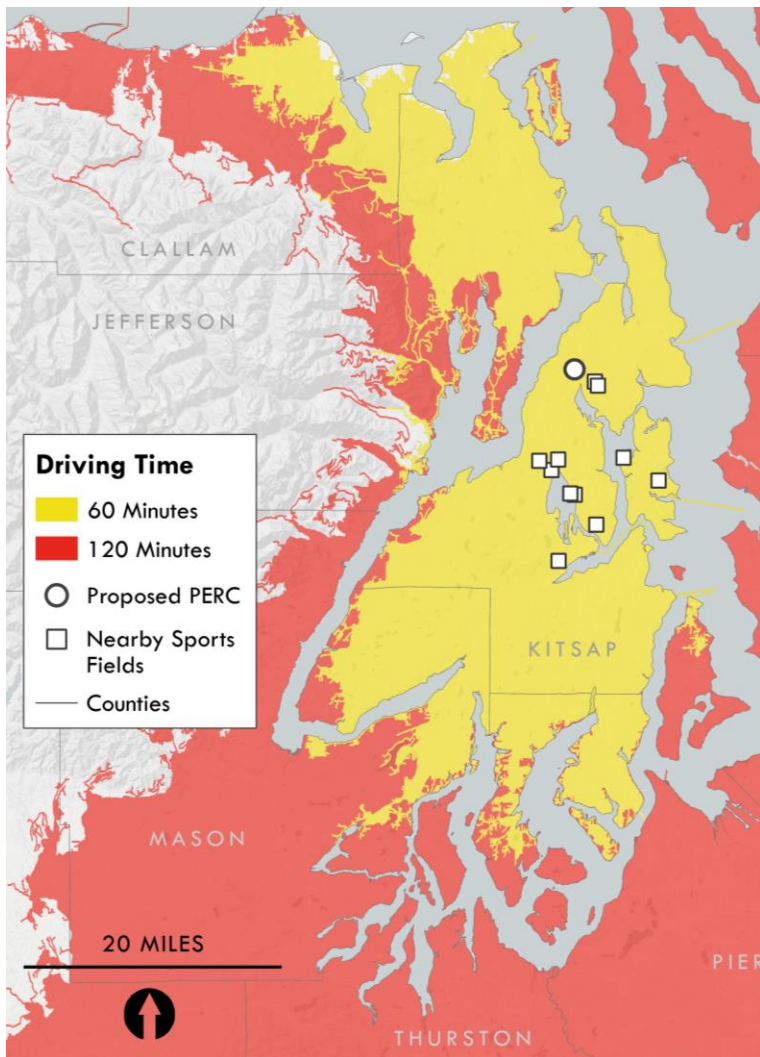
- Bainbridge Island Aquatic Center (public)
- Bangor Aquatics Center (limited by eligibility)
- Glenn Jarstad Aquatic Center (membership; fees for non-members)
- Haselwood Family YMCA (membership; fees for non-members)
- Kitsap Tennis and Athletic Center (membership)
- North Kitsap Community Pool (public)
- Puget Sound Naval Shipyard (limited by eligibility)
- South Kitsap Community Pool (public)

SPORTS FIELDS

Exhibit 9 maps comparable sports fields within 60- and 120-minute drive time areas.

- Tournament sports fields have a longer drive time area market, compared with other facility uses, because tournaments typically host visiting teams drawn from an entire region, and participating families tend to be accustomed to the travel. Poulsbo families currently drive up to several hours to attend tournaments hosted in other locations. Visitors who travel to Poulsbo for sports tournaments might stay overnight and spend money on food and other services in the community.
- Hosting a tournament requires at least four to six fields, and while the land at the proposed PERC site will not accommodate four fields, the PERC's sports fields could potentially complement fields at **North Kitsap High School** or **Strawberry Fields**. However, this split location setup could potentially make Poulsbo less competitive as a destination tournament location. There are existing large facilities throughout Western Washington that the PERC would need to compete with for regional events.

Exhibit 9. Comparable Sports Fields in 60- and 120-minute Drive Time Area



Sources: ESRI, 2021; BERK, 2021.

The following facilities are mapped in Exhibit 9 (listed in alphabetical order):

Competitive Fields

- Central Kitsap High School
- North Kitsap High School
- OlyPen Sports (Pendergast)
- Strawberry Fields (Poulsbo)

Other Sports Fields

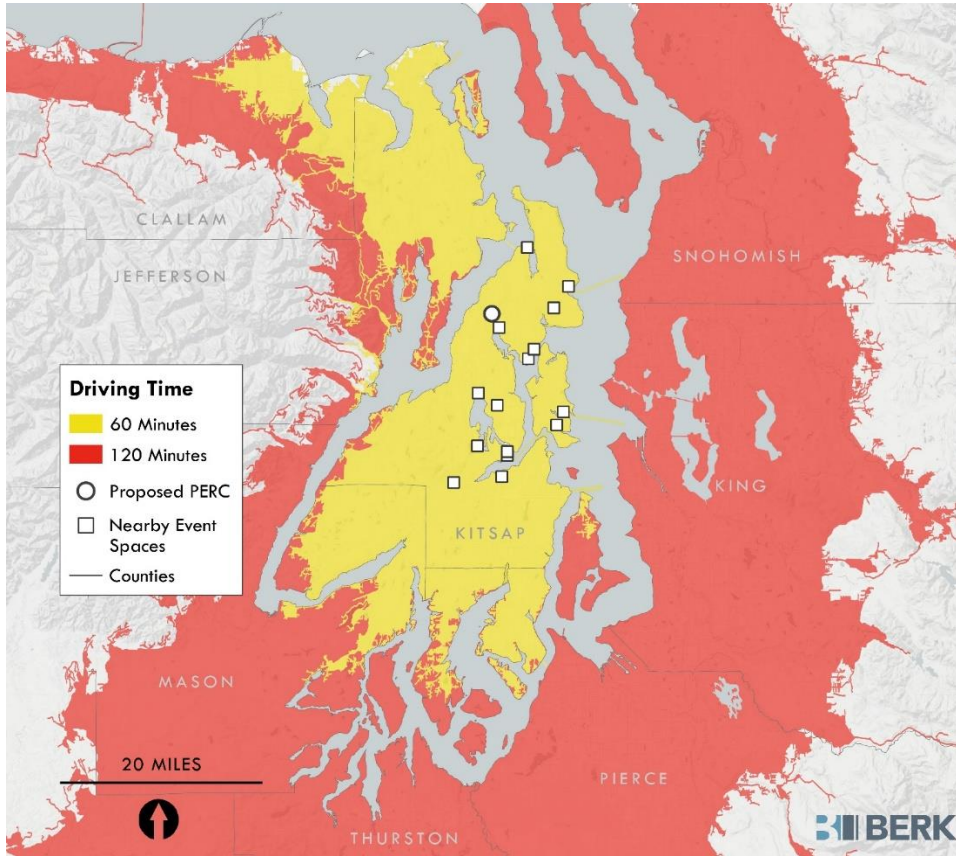
- Anderson Hill Athletic Fields
- Bainbridge High School
- Battle Point Park
- Gordon Fields
- Lobe Fields
- Ostrander Field
- Ross Field

EVENT SPACES

Exhibit 10 summarizes comparable event spaces in 60- and 120-minute drive time areas.

- There are a variety of event spaces for different types of uses – a conference center, hotel meeting space, golf course, senior center, and casino, among others.
- As an event space, the PERC would experience more use as a flexible space designed for different purposes, such as business trainings, meetings, social gatherings, weddings, and performing arts.
- The **Kitsap Conference Center in Bremerton**, around 18 miles from the PERC location, offers 17,000 sq. ft. of event space. The waterside facility is used for trade shows, conferences, weddings, social events, and reunions. The venue space holds up to 700 guests and offers easy access to Bremerton hotels (the Hampton Inn and Suites and the Fairfield Inn and Suites) The space includes breakout spaces, onsite catering, event planning, and technology services.

Exhibit 10. Comparable Event Spaces in 60- and 120-minute Drive Time Area



Sources: ESRI, 2021; BERK, 2021.

The following facilities are mapped (listed in alphabetical order):

EVENT SPACE	CAPACITY	
	MEETING	WEDDINGS
Bainbridge Island Museum of Art	-	-
Baymont Inn & Suites	558	500
Best Western Silverdale	275	200
City of Bremerton Parks & Rec	65	-
Clearwater Casino Event Center	986	100
Givens Community & Senior Center	150	-
Gold Mountain Golf Course	30	175
IslandWood	175	200
Kiana Lodge	300	350
Kitsap Conference Center	700	450
Kitsap Sun Pavilion	7,500	-
Port Gamble Weddings and Events	150	150
Sons of Norway	300	-
Village Green	200	200
White Horse Golf Course	150	175

Sources: Individual facility websites as of June 9, 2021; BERK, 2021.

Net Anticipated PERC Usage

SUMMARY OF ANTICIPATED MARKET DEMAND

Based on the community survey, interviews with local arts and recreation groups, existing facility analysis, and drive-time area market analysis, we summarize the following market demand for each potential facility component:

- **Community survey interest:** Based on the community survey, this is the percentage of respondents that said: “I would like to do this activity at the PERC.”
- **User group demand:** This is based on stakeholder interviews with local arts and recreation groups.
- **Market Potential Index:** ESRI ArcGIS is a geographic analysis software program that enables the use of proprietary data to estimate potential market demand within a specified drive time area. This is the industry standard for estimating market demand in market analysis studies. ESRI ArcGIS produces the following estimates:
 - Estimated number of participants who participated in an activity in the last 12 months
 - Estimated percentage of population who participated in this activity in the last 12 months
 - **Market Potential Index (MPI):** MPI measures the likely demand for a product or service in an area. ESRI ArcGIS uses consumer surveys and market segment data to calculate this. The MPI compares demand for specific products and services in a designated area compared to nationwide demand. A value over 100 means higher demand than national, and a value under 100 means lower demand than national.⁶

Exhibit 11, Exhibit 12, and Exhibit 13 summarize this information for each facility component.

⁶ For more information, please see the ESRI Technical Methodology:
https://downloads.esri.com/Support/downloads/other_/BA_10.8.1/2020_USA_ESRI_Market_Potential_Methodology.pdf

Exhibit 11. Aquatic Center: Summary of Demand Analysis

Community Survey Interest		
Percent who responded “I would like to do this activity at the PERC”	Aquatics 83%	
User Group Estimated Use		
Input from local groups	<ul style="list-style-type: none"> ▪ A least one high school team might use the PERC depending on interlocal agreement between school district and the City ▪ The Poulsbo Piranha Swim Team might use the PERC 6 days/week for practices, up to 5 weekends/year for swim meets ▪ If the PERC includes a free splash pad, “people would use it every day” 	
ESRI Market Demand	30-minute Driving Area	60-minute Driving Area
Population	203,000	406,000
Estimated % that swam in last 12 months	17.1%	17.4%
Estimated # of people who swam in last 12 months	27,759	57,434
MPI	112	114

Sources: ESRI, 2021; BERK, 2021.

Exhibit 12. Tournament Sports Fields: Summary of Demand Analysis

Community Survey Interest			
Percent who responded “I would like to do this activity at the PERC”	▪ Soccer 48%	▪ Baseball/softball 38%	▪ Lacrosse 20%
	▪ Ultimate Frisbee 39%	▪ Football 22%	▪ Rugby 13%
User Group Estimated Use			
Input from local groups (summarized quotes)	<ul style="list-style-type: none"> ▪ Soccer team would use the PERC year-round, bringing in up to 100 teams for tournaments ▪ Lacrosse team might use the PERC for three tournaments, use fields for camps ▪ Little League would use the PERC tournaments and practices, five times/week ▪ Flag football team would use the PERC for games once/week 		
ESRI Market Demand	60-minute Driving Area	120-minute Driving Area	
Population	406,000	4,888,000	
Estimated % that played soccer in last 12 months	4.0%	4.8%	
Estimated # of people who played soccer in the last 12 months	131,165	186,354	
MPI (soccer)	95	115	
Estimated # of people who played frisbee in last 12 months	3.7%	4.2%	
Estimated % that played frisbee in last 12 months	12,298	161,474	
MPI (frisbee)	101	113	

Sources: ESRI, 2021; BERK, 2021.

Exhibit 13. Event Space: Summary of Demand Analysis

Community Survey Interest		
Percent who responded “I would like to do this activity at the PERC”	<ul style="list-style-type: none"> ▪ Lecture series 52% ▪ Multi-day events 44% ▪ Trade shows 38% ▪ Performance venue 36% ▪ Company holiday parties 36% ▪ Business conferences 31% ▪ Award ceremonies 23% ▪ Weddings 36% 	
User Group Estimated Use		
Input from local groups	<ul style="list-style-type: none"> ▪ When asked whether they would use the PERC for business events or events related to their business, around half said they would use the PERC. Around one-third said maybe. The primary reason why businesses would not use the PERC is that they already have their own facility. ▪ Members of the Chamber indicated interest in a lounge area/reception area, dining area, auditorium, stage, and meeting spaces from all sizes. 	
ESRI Market Demand	60-minute Driving Area	120-minute Driving Area
Population	406,000	4,888,000

Sources: ESRI, 2021; BERK, 2021.

KEY OPPORTUNITY AND RISK FACTORS

Key opportunities and risks for each of these three components are summarized in Exhibit 14.

Exhibit 14. Opportunities and Risk Factors

COMPONENT	OPPORTUNITIES	RISKS
Aquatics Center	<ul style="list-style-type: none"> ▪ Strong community support ▪ Potential partnerships 	<ul style="list-style-type: none"> ▪ Saturated market ▪ Free and/or subsidized services are currently available to nearly 40% of the population ▪ Expensive to construct and operate
Tournament Sports Fields	<ul style="list-style-type: none"> ▪ Complements existing Strawberry Fields Facility ▪ Participating families tend to be accustomed to longer travel 	<ul style="list-style-type: none"> ▪ Existing large facilities throughout Western Washington would be competitive for regional events ▪ Weaker demand for soccer in the 60-minute driving time area ▪ Potential split locations could make PERC less competitive
Event Space	<ul style="list-style-type: none"> ▪ Flexible space leads to multiple use scenarios 	<ul style="list-style-type: none"> ▪ Competitive landscape ▪ Difficult to gauge niche markets

Source: BERK, 2021.

Conclusion

Community members are strongly interested in the PERC. They are excited for this new facility and its potential to meet local user group needs and also bring visitors to the community. Local arts and recreation groups expressed that they would likely use the PERC, given appropriate cost, availability, and size.

The PERC needs to serve two purposes: 1) serve local residents as a resource for the City’s parks and recreation programming, and **2) draw outside visitors** to generate economic impact and generate revenues to help sustain the facility’s operations. Legislative funding is more likely if the PERC can generate economic benefits for the region.

The community survey and interviews with local arts and recreation users provided information about local community interest in different components. ESRI ArcGIS market research analysis within drive-time areas shows the market potential for bringing people to the PERC.

The PERC will not be able to meet everyone’s interests and demands, and it is important for the PERC to focus on a few key components. In order for the PERC to be a destination facility and bring in regional visitors, the PERC needs to invest in targeted facility components, rather than spreading too thinly across all areas. Below, we summarize the market demand analysis from the community survey, interviews with local user groups, and drive-time area market analysis.

Aquatic Centers

There is **strong community interest** in an aquatic center. In an early survey, 83% of survey respondents indicated that they would like to do aquatic activities at the PERC.

Stakeholder interviews indicated that to attract outside users, the PERC needs to include a 50-meter pool or two 25-yard pools. Otherwise, the PERC may meet some community demand but will not bring in enough visitors and generate sufficient outside revenue. As a separate consideration from a pool, a 5,000 sq. ft. splash pad would draw regional visitors to Poulsbo to use the facility, though these are typically free.

Despite high demand for an aquatic center, this is a **saturated market**.

- Stakeholder input suggests that nearly 40% of the population has access to the Bangor Aquatic Center or Puget Sound Naval Shipyard, both of which provide free or subsidized services. These pools are in good condition and it would be difficult for the PERC to compete with them due to the reduced costs for members at these facilities.
- Except for Haselwood Family YMCA, most pools in the surrounding area are cold lap pools, so the PERC could better differentiate itself as a warmwater family pool.
- Bainbridge Island Aquatic Center, around 13 miles from the PERC, is a destination facility for many families in Poulsbo. The facility offers two pools: a six lane 25-yard pool and a 360,000 gallon pool with a water slide, lazy river, sloped beach entry, tot pool, water features, toddler frog slide, one and three meter diving boards, and four 25-yard lap lanes. The facility also has a spa as well as steam and sauna rooms. It would be difficult for the PERC to compete with this center, so the PERC would need to differentiate itself with **unique features that speak to the community's identity**.

Additionally, aquatic centers are very **expensive to build and maintain**. The PERC would need to ensure that it can generate enough revenue to cover costs of operations and maintenance.

Tournament Sports Fields

Tournament sports fields at the PERC can bring in people from around the region for potential sports tournaments. These types of facility components have a longer drive time area market, because participating families tend to be accustomed to longer travel. This means there could be more visitors to Poulsbo who might stay overnight and spend money on food and other services in the community.

- In the community survey, between 30-50% of respondents indicated that they would be interested in participating in soccer, ultimate frisbee, or baseball/softball at the PERC.
- Stakeholder interviews showed that in order for the PERC to draw visitors for soccer and lacrosse tournaments, the facility needs to include four fields, of which at least two are turf fields. The facility space should include enough parking, restrooms, lighting, fencing, and covered seating.

Hosting a tournament requires **at least four to six fields**. While the land at the PERC site will not accommodate four fields, tournaments could potentially combine **sports fields** at the PERC with high school fields or Strawberry Fields. Risks include:

- A split location setup **could make Poulsbo less competitive** as a destination tournament location.
- Large facilities throughout Western Washington would compete with the PERC for regional events.

- There is weaker demand for soccer, compared with other sports, in the 60-minute driving time area.

Event Spaces

Flexible event spaces can be used for many different purposes, including meetings, business trainings, social gatherings, weddings, and some performing arts uses. In the community survey, around 30-50% of community members showed interest in various types of event space uses.

- Around half of Chamber of Commerce meeting attendees indicated that they would use the PERC and showed interest in a lounge area/reception area, dining area, auditorium, stage, and meeting spaces from all sizes. The PERC's event spaces should be designed as adaptable **multi-use facilities**.
- The event space market is also a **competitive landscape**, with a variety of event spaces in the potential market – conference centers, event centers, senior centers, golf centers, wedding venues, and more. It is also difficult to gauge niche markets to determine how much unmet demand there currently is and how the PERC could meet those needs.

SUMMARY OF MARKETING GUIDANCE

Based on market research, interviews with representatives of peer facilities, and input from Steering Committee members, we summarize the following guidance for developing a strong market position, drawing regional users, and generating user fee revenue to sustain the PERC facility:

Building Awareness of Facility

- **Networking** is an important way to spread awareness about a new facility. Developing a steady crowd of users and being known in the community for what a facility offers takes time. Staff can join groups and organizations to spread the word.
- Start to **build relationships with the planned hotel** right away. The hotel and the PERC can help each other be successful. To maximize use of the PERC, its amenities should **complement** the hotel's spaces.
- Engage in **active marketing**. Hire a salesperson or a general manager who has sales experience.
- Ensure that well-trained and well-paid staff manage the building outside of regular business hours, including weekend nights.

Generating Local and Regional Use

- The facility needs to **be open seven days a week** and not sit vacant. Host morning childcare, gym use, and regular classes during the day, and host rentals (concerts, tournaments, business trainings) during the evenings. Design the facility to be multipurpose so users do not have to go downtown. Separate the routinely scheduled uses from the one-time rental uses.
- To manage **community expectations**, start with shorter hours and expand them later, rather than starting with longer hours. Publicize the quarter (during a calendar year) for the facility's opening, rather than an exact date. Both these approaches help prevent community disappointment in case the opening date needs to be pushed back.

- Be cognizant of **yield management** in booking guidelines – selling at the right time for the right price. Be aware of when to book what to maximize use of spaces.
- The PERC will need a **balance of community uses and revenue-generating commercial purposes**. Stakeholders shared a strong desire to keep the PERC a community gathering place that is affordable and accessible. The facility also needs to bring in businesses uses to generate enough revenue to sustain facility operations.
- In order to **serve as economic driver** and attract visitors from outside the community, the PERC must be large enough to host events as well as indoor sports such as basketball and volleyball, and outdoor sports such as soccer tournaments, Ultimate Frisbee, and field sports.

Meeting Community Expectations

- **PERC staff should mirror the community** and represent a diversity of race, ethnicity, gender, age, and socioeconomic backgrounds, so that people feel welcome.
- If the City intends to pursue a municipal bond funding strategy, the City needs to **communicate** to voters how it will save them money. They might pay more now, but less later as the facility generates economic impacts for the city. Explain to taxpayers how bond funding for the facility will save them money.
- The **project duration, including** community surveys, facility design, and construction, could be four to five years – a long time to sustain public interest. When people are interested in a project, they want to see it moving along. If possible, tighten up the schedule.

Appendix A. Interview Summary from Comparable Facilities

Lessons learned and tips for success:

- Developing a steady crowd of users and being known in the community for what a facility offers takes time. Networking is an important way to spread awareness about a new facility. Staff can join groups and organizations to spread the word.
- Know what type of facility you want to be and focus on that; do not try to be everything and spread out too thin.
- When opening a new facility, start with shorter hours and expand them later, rather than starting with longer hours. Reducing hours later can make community members disappointed.
- Rather than printing and advertising a specific date for the facility's grand opening, simply share the quarter. This will help prevent community disappointment in case the opening date needs to be pushed back.
- Staff working at a facility should mirror the community so that people feel welcome.
- Free parking and no food minimums (optional catering in-house services) help to draw events for rentals.
- Know your operations and maintenance costs, which can be a significant challenge.

BERK interviewed staff from the following facilities:

- **CenterPlace, Spokane Valley:** Carol Carter, CenterPlace Coordinator
 - **Haselwood Family YMCA:** Harold Shea, Executive Director
 - **Kent YMCA:** Kelly Guy, Branch Executive
 - **Lewis County Sports Complex:** Emil Pierson, Community Development Director, City of Centralia
-

Aquatics:

- Consider carefully whether to include a swimming pool. Two interviewees shared hesitations and warnings around costs of running swimming pools. The Lewis County Sports Complex has a swimming pool but it is managed by a private company, and the Parks Director recommended avoiding managing a swimming pool if possible. If building a swimming pool, they recommended a limited lap pool and more play area and splash pad. Haselwood Family YMCA's Executive Director also said that pools are very expensive and to be cautious about including a pool.
- Kent YMCA is known for its swimming pools and has a large community for swimming; because surrounding areas (e.g., Covington, Auburn, SeaTac, Renton) do not have community pools, Kent's community pool is well used.

Trends in event spaces:

- Conventions – people are always looking for meeting spaces. Hotels tend to bump conferences if other events come up, so convention planners often like event spaces.
- Businesses (trade shows and conferences) are more consistent than weddings and other one-time events.

- Birthday parties, retirement parties, and outdoor weddings are popular.
- Memorials – people are looking for reasons to celebrate together.
- Churches often need a space to start before they are large enough to open up their own space.

Trends in indoor recreation:

- Cardio equipment and free weights areas.
- Indoor track.
- Family programming and family bootcamps, intergenerational classes.
- Cooking classes, Pilates, barre, Zumba.
- Personal training classes for seniors.
- Chronic illness education classes.
- Basketball, volleyball, pickleball. Anything with courts should be adaptable to these three sports.

Trends in outdoor recreation:

- Focus on turf fields outdoors.
- People are looking for outdoor spaces to exercise during COVID-19.

Operational structure and funding:

- **CenterPlace in Spokane Valley** (54,000 sq. ft.) is owned by the City of Spokane Valley and operated by its Parks and Recreation Department. Initially, Spokane County was working with the PFD, which owns the Spokane Convention Center and arena.
 - The Convention Center wanted a voted bond for improvements, but they knew they needed to include facilities in Spokane Valley in order to gain support from voters in the valley. Spokane Valley was unincorporated at the time, but they decided to build the new facility in Spokane Valley and to include a senior center, which would help gain support from seniors.
 - When Spokane Valley became a city in 2003, the county gave them the facility, not wanting to maintain the facility and thinking it would not be able to maintain revenues. The City took over the facility right before construction.
 - Revenues are from event rentals, in-house catering, and the General Fund. Since the facility houses the City’s parks and recreation office and senior center, the City helps support revenues.
- **Haselwood Family YMCA** (86,000 sq. ft.) is part of the YMCA of Pierce and Kitsap counties association. This association includes eight locations and two campsites. A Board of Directors helps with policies, and the greater association helps to run local community centers.
 - They see themselves as a community center and partner with the fire department, police department, and school district. Bremerton High School’s swim team home pool is the YMCA.
 - They partner with many local organizations: Rotaries, service clubs, Harrison and St. Michaels Medical Center, a church next door, local businesses, cities, schools, and nonprofits.

- Membership covers 90% of revenues, and the rest comes from capital campaign donations and program fees. Membership is required, but it is affordable to all through a sliding scale.
- **Kent YMCA** (50,000 sq. ft.) is a partnership between the City of Kent and the YMCA (part of the YMCA of Greater Seattle association). The City deeded the land to YMCA through a 50-year agreement. Previous YMCA leadership made an agreement with the City on a somewhat informal friendship basis.
 - Through the Memorandum of Agreement, the City gets the following:
 - Twice a month, family swims opens up to the public.
 - Special populations (youth and young adults with disabilities) get access on Saturday mornings.
 - Two school districts without pools use the facilities for their swimming matches.
 - City summer camps use the pool.
 - The YMCA's challenge with this 50-year agreement is that there is no room for the YMCA to make revenues during the times the pools are used by the city, which are the most popular times. The YMCA failed to negotiate with the City and still needs to pay to use city spaces. They do have a good relationship with the Parks and Recreation department and Human Services department, which helps to coordinate some event planning.
 - Revenues come from corporate sponsorship, community fundraising, and membership fees. Membership is required, but it is affordable to all through a sliding scale.
 - **The Lewis County Sports Complex** (75,000 sq. ft.) is a partnership between the City of Centralia, Centralia School District, Lewis County Public Facility District (PFD), and Northwest Sports Hub (private).
 - The ballfields are owned and maintained by the City of Centralia and the Centralia School District. The stadium, track, and football fields are owned by the District, but the City helped finance turfing of the football field through a bond (borrowing against hotel motel tax dollars). The District uses and manages the facilities from September through May, and the City uses and manages the facilities from June through August.
 - The Sports Hub's land is owned by the City, which leases the land to the PFD. The PFD owns the building but leases it to the Northwest Sports Hub (private).
 - The PFD is funded by sales tax. Other revenues come from rental costs and user fees.

Appendix B. Interview Summary from Arts and Recreation Users Groups

The below represent condensed feedback from potential user group interviews. Information is as reported by the interviewed representatives.

FIELDS USERS

Current facilities:

- Soccer: North Kitsap field, Strawberry Field. Lights and turf are important. Turf is preferred.
- Lacrosse: Strawberry Field, High school field. Parking. They need the right field length and lined turfs to play lacrosse.
- Little League: School district fields (Kingston High, Kingston Middle), Strawberry Fields, North Kitsap softball fields, North Kitsap baseball fields.
- Flag football: North Kitsap High School Stadium, every Friday night from 5-9 p.m. Need a 40-yard field that they can divide into thirds and have three games going at the same time.

BERK interviewed the following fields user groups:

- Shawn Olivas and Alicia Olivas, North Kitsap Lacrosse
 - Mike Fleck, North Kitsap Soccer
 - Rick Krenzelok, North Kitsap Little League
 - Russ Shippet, Under the Lights Flag Football
-

Important facility components and amenities:

- Parking (mentioned by all): parking is a big issue on lacrosse game days.
- Turf fields (mentioned by all): turf is typically preferred by all sports, needs to be lined and safe for kids.
- Lights (mentioned by all): needed for all sports; significant cost.
- Restrooms (mentioned by all)
- Storage: storage for equipment.
- Fencing: needed for lacrosse.
- Covered seating.
- Concession stand or means to bring in food and drinks.

Potential usage of the PERC:

- North Kitsap (NK) Soccer is part of US Club Soccer. If the PERC has enough fields, soccer could use the PERC year-round and bring in teams for tournaments. They can use grass but prefer turf fields.
- NK Lacrosse is part of US Lacrosse. The PERC would help bring in teams into the community. They anticipate using the fields for camps and tournaments. There are three teams: a girls league, high school boys league, and youth league. They could hold three tournaments. During games everything is played on turf.

- Little League is part of Little League International and they play wherever they can find facilities that are available when they need them. They would use the PERC (depends on pricing). They would use the PERC for tournaments and practices. Practices are five nights per week for a couple hours per day.
- Under the Lights is national; Russ started the organization and they can use any facility they can find. They would like to have spring and fall seasons, and they would use the PERC one night per week for games (needs to be consistent time). Practices are up to players themselves (they use parks, school fields, any space – not organized by team).
- For soccer and lacrosse, the ideal layout is **4 outdoor fields: 2 turf and 2 grass**. For flag football, **at least 2 fields** (turf is preferred, does not need to be lined/marked). For little league baseball, ideally **3 baseball fields** but they will use as many as they can get (need marked baseball fields, turf is preferred).

Regional draw and hotel use:

- Soccer does not currently have enough fields for tournaments, but if they had enough fields, they could bring in up to 100 teams for tournaments. Potentially 60 of them would need a hotel space. For regular game play during the regular season, they play all over the state, and teams that travel in would use the hotel space on weekends.
- For lacrosse, many people travel several hours to get to Poulsbo, so a hotel would help.
- For little league, participants travel from Seattle and Mason County for tournaments. Some would stay overnight. Last year there was a softball game where people could not find a place to stay.
- For flag football tournaments, all participants would stay overnight at the hotel.

Other thoughts:

- Do not mix performing arts and a sports complex; decide what the PERC will be and then do that. We will not be able to make everyone happy.

BASKETBALL

Current facilities:

- The youth girls basketball team (3rd grade through middle school) is under the City’s parks and rec department. This team currently uses school gyms. The only public facility available is the YMCA in Silverdale and Marvin Williams Center in Bremerton, which is a great facility with multiple hoops. It’s difficult to book the school gyms.

BERK interviewed the following courts user group:

- Chelsea Jess, youth girls basketball team
-

Important facility components and amenities:

- **At least 2 courts, multiple hoops**, locker rooms, seating, floors.

Potential usage of the PERC:

- The basketball team would definitely use the PERC if it included basketball courts. Multiple courts

would be ideal. The YMCA has 2-3 courts but it's expensive. They would use the PERC 3-4 days a week, 2-3 hours each time.

Regional draw and hotel use:

- Visitors would definitely stay in a hotel for basketball tournaments. Players travel as far as Idaho for tournaments.

ARTS USERS

Current facilities:

- The Kitsap Children's Musical Theatre, InMotion Performing Arts Studio, and Poulsbo Community Orchestra all use the North Kitsap Auditorium, which is at the high school and managed by the school district.
- It is extremely difficult to find a location for performing arts. The North Kitsap Auditorium is the only space that meets needs in regard to space, type of flooring, and size of stage. However, there are several challenges:
 - It is difficult to reserve space because the school district has priority; if they need the space, outside renters can get bumped. The space is continuously overbooked. The orchestra books the auditorium 12-16 months in advance for its performances. They use a church down the street for rehearsals because that is available. The children's musical theater books as far in advance as they can for performances and rehearsals.
 - While the North Kitsap Auditorium is the only appropriate space available, the facility is deteriorating. The auditorium has inadequate sound, lighting, backstage areas, green room areas, parking, heating, and air-conditioning. Some seats are broken and torn. The school district has not been able to put money into refurbishing the space. Their maintenance and upkeep has at times been left to those who pay to use the facility.
 - This space is not optimal for joint events, such as a Nutcracker dance performance with a live orchestra. The orchestra pit is not in good condition and is more like a storage space.
- Cost, size, location, and availability are the key factors in deciding what facility to use. Other spaces do not work.
 - Bremerton high school theater is too far and is school district controlled. People do not want to go outside the community. School district facilities are challenging to book for community uses.
 - Bremerton Admiral Theatre is too far.
 - Bainbridge theater does not have enough space.
 - Jewel Box Theatre in Poulsbo is very small (less than 50 seats) and meant for intimate gatherings.
 - Central Kitsap School District is building a new theater that will still be school district controlled.

BERK interviewed the following arts user groups:

- Kerby Criss, Kitsap Children's Musical Theatre
 - Chris Price, InMotion Performing Arts Studio
 - Joel Wallgren, Poulsbo Community Orchestra
-

Important facility components and amenities

- Acoustically sound
- 4 dressing rooms big enough for 8 people each which can be used as meeting or practice rooms for other events
- Backstage restrooms
- Greenroom for 60 people which can be used as a meeting room for other events
- Audio monitors for dressing rooms and greenroom
- Prop room or prop area backstage
- 48' x 48' Proscenium stage with a 4' apron
- Stairs up to the stage from the audience on the edges and down the middle for weddings
- Curtains: Main, legs, traveler and cyclorama
- 12' Wings on either side of the stage
- Fly Space with at least 6 battens for drops, sets, lights and sound equipment
- Screen and Projection system for all types of events
- Complete Sound System
- Feedback monitors for stage
- Complete computerized light set up with 2 portable spotlights
- Apron lighting
- Technical Booth behind audience that holds 4 people comfortably
- Storage/building area for sets with driveway and garage door-sized opening to backstage
- Lobby with comfortable waiting area
- Concessions stand with kitchen
- Lobby restrooms
- **Single occupancy private bathroom** (at least one for each gender)
- **Parking space** to accommodate the facility space
- **Orchestra pit** with easy access into the pit. Two-thirds of the pit should extend past the stage with the back third remaining under the stage

Potential usage of the PERC:

- InMotion Performing Arts Studio would use the PERC up to 5 times a year, for a week each time.
- Poulsbo Community Orchestra would use the PERC 3 times a week for rehearsals throughout the year and 3 times a year for performances. They would request two large rehearsal spaces that could accommodate a full size orchestra.
- Kitsap Children's Musical Theatre would use the PERC 5-9 hours daily, 15 weeks a year.

Regional draw and hotel use:

- For dance, people come from around the region to watch The Nutcracker, and a few hundred people attend each show. With space, they could hold dance competitions and dance conventions, which would draw even more people who need a place to stay.

- The orchestra has a couple of musicians who already travel to participate and would definitely book a hotel. Some people traveling to watch performances would use the hotel.
- The children's theater anticipates around 150 members a year who need overnight lodging.

Other thoughts:

- All these organizations have been stopped with growth potential by the lack of sufficient and appropriate space. The North Kitsap Auditorium is booked out consistently throughout the year.
- This area has become a huge landing spot for artists. With COVID-19, people outside of the community are starting to notice events in the community. This sets up an exciting opportunity for post-COVID times when the community will be ready and excited to consume live arts. The community is at the right size with enough people to support this performing arts theater being successful.

AQUATICS USERS

Current facilities:

- The North Kitsap Swimming Pool is owned and operated by the school district. The pool opens to the public from 5:45 a.m.-8 p.m. with a one hour break for cleaning.
 - The high school swim team uses the pool from August-February from 3-5 p.m.
 - The pool is used for swim lessons, lap swim, and used by swim teams.
 - The capacity of the pool ranges throughout the day. Sometimes there are 8-10 people for a mid-day lap swim and sometimes 75-80 people for swim lessons.
- The Poulsbo Piranha Swim Team (community swim team for ages 8-18) uses the North Kitsap Swimming Pool. They have also used the Olympic Aquatic Center in Silverdale. As the pool has been shut down during COVID-19, the team has been using a public facility in Fife and the Kitsap Athletic and Tennis Center.
 - Cost is an important factor in deciding what facilities to use.
- There are no splash pads in Poulsbo right now. Tacoma has 11 splash pads.

BERK interviewed the following aquatics user groups:

- Mark Van Huis, North Kitsap Swimming Pool
 - Kurt Waeschle, Poulsbo Piranha Swim Team
 - Lindsey Kravitz, Splash Pad Citizen Committee
-

Important facility components and amenities:

- An ideal setup would be **two pools**: one warmer, shallow, smaller pool for classes (85-88 degrees) and one colder, deeper, larger pool for competitive uses and lap swim (79-81 degrees). The South Kitsap Community Pool is an example.
- If the PERC includes a **50-meter pool**, this becomes a destination facility. This is attractive but difficult to maintain.
- If not a 50-meter pool, the PERC should include **two 25-yard pools**, with a dive tank for warm-ups. The Bainbridge Island Community Pool is an example.

- Starting blocks.
- Deck space.
- Spa.
- **Splash pad:** at least 3,000 sq. ft., maybe 3,500 sq. ft. Ideally 5,000 sq. ft.

Potential usage of the PERC:

- The high school team might use the PERC depending on whether there is an interlocal agreement between the school district and the PERC.
- The Poulsbo Piranha Swim Team is affiliated with Pacific Northwest Swimming, which is part of USA Swimming, and they might use the PERC. They would likely use the PERC 6 days a week for practices and up to 5 weekends per year for swim meets.
- If the PERC includes a free splash pad (like all other splash pads in the state), people would use it every day.

Regional draw and hotel use:

- If the aquatic facility is used for competitive uses, visitors would stay at the hotel.
- If the aquatic facility is a waterpark, it would need to be a big, flashy waterpark to draw visitors staying overnight (such as the Great Wolf Lodge).
- For high school swim meets, 300-350 people would be traveling from 1-2 hours away and could stay at the hotel.
- A **5,000 sq. ft. splash pad** would mean that people come to Poulsbo to use the facility.

Other thoughts:

- If Poulsbo includes a pool in the PERC, they should consider how they will recover revenues and make sure it is functional.
- It's important to be transparent with the community about where revenues will come from and what is needed to pay for expenses.

Appendix C. Interview Summary from Steering Committee Members

Concerns:

- The length of time needed for community surveys, facility design, and construction could be 4-5 years. This is a long time to sustain public interest. When people are interested in a project, they want to see it moving along. If possible, tighten up the schedule.
- Make sure to include spaces like load-in and storage when designing the facility.
- Be sure the space is not overstaffed or oversized for the demand.
- Aquatics facilities rarely pay for themselves. Building pools is expensive.
- The PERC will need to balance community demand and commercial purposes that generate revenue for operations.
- Do not build new space where we can utilize existing spaces. The PERC should not try to compete with the Bremerton Convention Center. Check meeting spaces at the local community college. With each space, ask whether there is an existing amenity that is over or underutilized.
- The PERC will not be able to be everything for everyone. Often arts are cut for sports, so hope that the PERC will include arts.

BERK interviewed the following Steering Committee members:

- Tim Morgan, sports marketing / economic development manager
 - Don Williams, formerly at Tukwila Parks and Recreation
 - Lenny Zilz, Columbia Hospitality
 - Patricia Graf-Hoke, Visit Kitsap Peninsula
 - Kathi Forsee and Irene Moyer, Poulsbo Chamber of Commerce
-

Guidance on market position:

- The space needs to have **good aesthetics and quality of service**. Invest in cleaning facilities and present a clean facility to the community. This can be contracted.
- At the same time, demand will not simply come from being a pretty facility. The facility needs to be functional and **multidimensional**. Keep the spaces multi-use so they can be used for multiple purposes, year-round.
 - Indoor space: 4-6 basketball courts that can be converted into volleyball and large enough to host tournaments.
 - Outdoor space: Flat grass for soccer, rugby, etc.
- Event spaces need appropriate **technology**, presentation capabilities, the ability to host both in-person and remote participation.
- The market is experiencing a focus on sustainability and spending time outside.
- There are a lot of young kids and young families moving into the community, and with a Poulsbo

facility they would not need to use the Bainbridge Island Aquatic Center or the Haselwood Family YMCA in Silverdale. People want to stay in Poulsbo and maintain a lifestyle in Poulsbo.

- The center needs to be all-encompassing. People are asking for sports, arts, pool, and conferences. There's interest in using the space for weddings. People always come to musical theater shows.

How to generate PERC usage:

- The facility needs to **be open 7 days a week** and not sit vacant. Host morning childcare, gym use, and regular classes during the day, and host rentals (concerts, tournaments, business trainings) during the evenings. Design the facility to be multipurpose so you do not have downtime. Separate the regular routine uses from the one-time rental uses.
- Engage in **active marketing**. Marketing cannot be passive. Hire a salesperson or a general manager who has sales experience. Ensure that someone in a high enough position (with training, background, salary) is in charge of the building on weekend nights.
- Identify revenue generators.
- Be cognizant of **yield management** in booking guidelines. Be aware of when to book what to maximize use of spaces.
 - Do not put small meetings in a large space.
 - Requires maximum use or minimum spend (for example, minimum spend for a Saturday evening in August).
 - Keep key dates open for large tournaments (Labor Day, Fourth of July, or spring break weekends).
 - Offer classes to different groups at different times of day.
 - Have programming as late as possible.
- Use City's existing marketing materials and use existing channels like the Parks and Recreation guide. Market through the college and events like the farmer's market.
- Steer clear of membership fee requirement.
- Reach out to businesses who could use the PERC for trainings.

Regional draw and hotel use:

- The nearby hotel is critical to the PERC's success. Ideally, the conference center and hotel would be managed by one entity to produce a thoughtful sales and yield strategy.
- Start to **build relationships with the hotel** right away. The hotel and the PERC can help each other be successful.
- Make sure PERC meeting space(s) complements the hotel's space. If the hotel has enough conference rooms, the City does not need to build more.
- Guests of the PERC should get **hotel group discounts**. Use event packages tied to the hotel. Visitors could come to Poulsbo for a weekend and get dinner and a show. The City could line up events; for

example, the musical theater productions coincide with Viking Fest.

- A punch card or monthly pass could be popular.
- The hotel will likely be in high demand from leisure travels/tourists, people visiting relatives, wedding guests, and contractors. But those rooms will be unavailable for multi-day meetings and events that will want to reserve rooms 1-2 years in advance at a special group rate.
 - The PERC should focus on attracting single-day events that do not rely on overnight lodging but have visitors willing to pay premium rates.

Other guidance:

- In order to serve as economic driver and bring in business from outside of the community, the PERC needs to be large enough to host events, indoor sports (basketball, volleyball), and outdoor sports (soccer tournaments, ultimate frisbee, field sports).
- Legislators are more likely to fund a facility that creates economic impact.
- Make the website interactive so people can submit their ideas.
- If going out for a bond to fund the facility, the City needs to communicate to people how it will save them money. They might pay more now, but less later as the facility generates economic impacts for the city. Message to taxpayers “this is how the facility will save you money.”