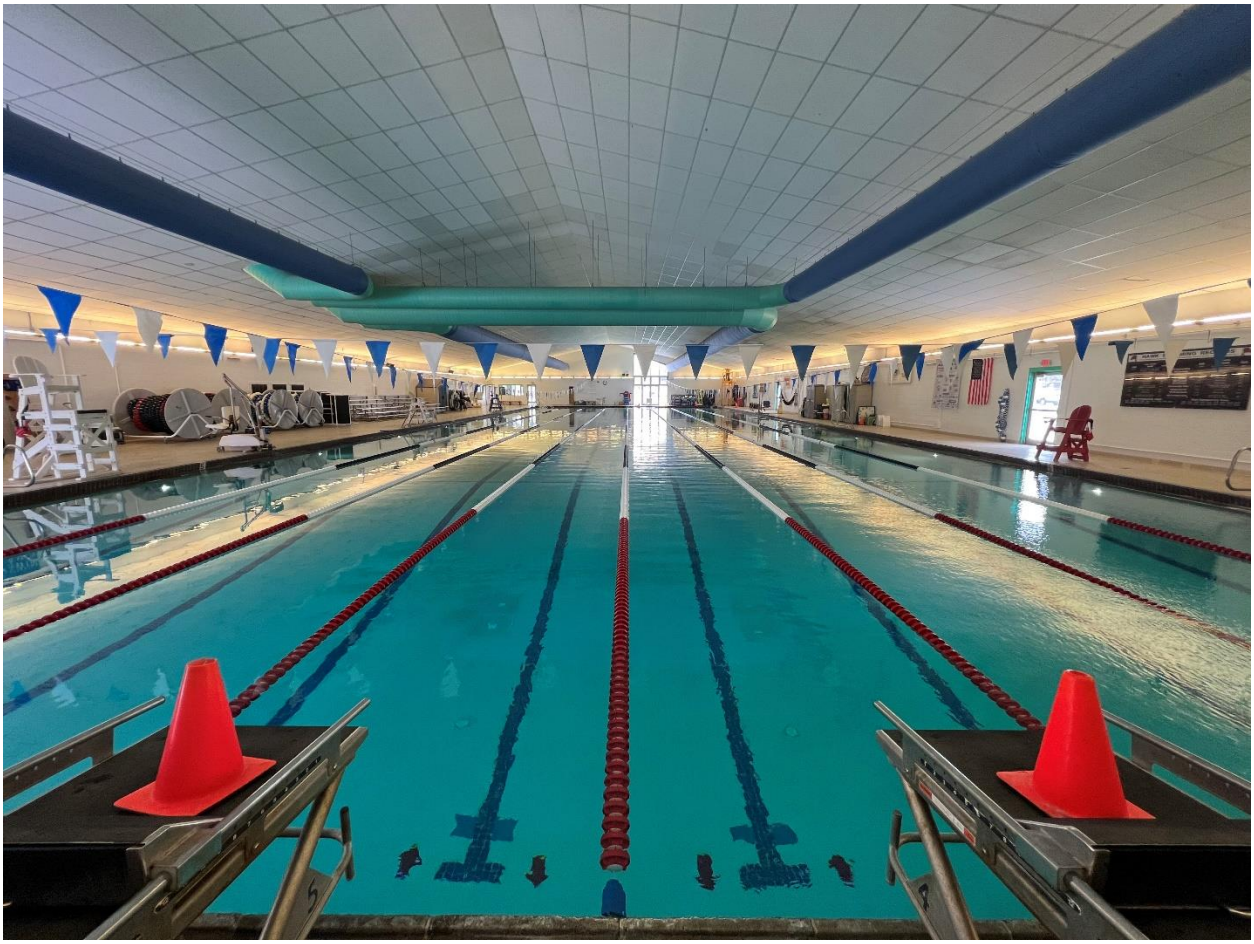

Bozeman Swim Complex

Operational Review

City of Bozeman

BALLARD*KING

& ASSOCIATES LTD

BALLARD*KING & ASSOCIATES LTD
Recreation Planning and Operations Consultants

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Introduction

The City of Bozeman (City) entered a contract with Ballard*King & Associates (B*K) to complete an assessment of the Bozeman Swim Center (Pool). The purpose of the assessment is to conduct an independent third-party review of the whole Pool operation.

To complete this assessment, B*K had a representative, Darin Barr, on-site April 12-14. While on-site, Darin spent a significant amount of time at the pool observing operations, visiting with full-time aquatic staff, visiting with Department and City leadership, and engaging members of the public and special interest groups in stakeholder meetings.

The intention of the report was to focus on the following areas:

- Scheduling/Priorities of Use
- Staffing (full-time and part-time)
- Partnerships
- Rentals
- Programs
- Opportunities & Gaps
- Pricing & Fees
- Operations Policies & Procedures

The reality is that some of these areas were challenging to review because of the current level of staff employed at the Pool. As such, there will be a heavier focus on some of the immediate issues facing the Pool operation, with subsequent recommendations if those areas are corrected.

Executive Summary

- It is the opinion of B*K that the Bozeman Swim Center is operating safely. At no time did B*K feel that the facility was being operated outside industry standards regarding risk management procedures or daily operating procedures.

- The Bozeman Swim Center is a valued asset to the community and region. The reality is that it is a public facility, with the public having very limited drop-in access to the facility.

- The biggest challenge facing the Bozeman Swim Center is a lack of part-time lifeguard staff. This lack of staff is impacting the hours of operation, availability to the public, and availability to the competitive aquatic community. The City's number one priority should be solving the staffing shortage. B*K has provided recommendations for the City to employ to try and solve this problem, but it should be noted that this is not unique to the City of Bozeman.

- The lack of part-time staffing has placed the management of the Swim Center into a reactionary mode. They are attempting to do the maximum possible with minimal staffing resources. The result is one minor glitch in staffing (someone calling in sick or not showing up to work) which means the staff must be reactionary in their approach to solve the problem.

- This reactionary management mode has led to many outside user groups feeling that the Swim Center is being mismanaged. The result is that the environment on the pool deck while the swim teams are on deck is challenged, if not toxic. This is compounded when special interest groups are more than willing to go to Department and City administration to voice their concerns.

- Even if the staffing shortage is not solved, there needs to be a mutual understanding that the aquatic staff and the City are doing everything possible to accommodate as many groups as possible. To help provide clarity to usage and lane allocation, B*K has provided recommendations for prioritization and scheduling.

- If the staffing shortage is solved and the relationships with outside user groups are repaired, the reality is that the Swim Center does not have the lap lane availability to accommodate all requests from outside user groups and public access.

- To facilitate many of the recommendations outlined in this report, it will require that the Aquatics Director and Assistant Aquatics Director have more of a physical presence when some of the primary user groups are in the pool. While that current relationship is strained at best, face-to-face communication and interaction are integral in making changes.

Implementation Priority

- Continue to maintain a safe environment for those using the Swim Center.

- Both the Assistant Aquatics Director and the Aquatics Director need a physical presence on the pool deck at high use times. Specifically during the late afternoon and evening hours during the school year. This is not to suggest both are present simultaneously, but a two-person approach is appropriate. This is particularly important in the short term (6-8 months) when changes are implemented.

- Address part-time staffing shortage in an obvious and aggressive manner. Over-communicate the need for additional staffing and the steps the City is taking to overcome this shortfall.

- Analyze the recommendations for prioritization of user groups and adopt the resulting prioritization. Once this has been adopted, distribute it to all current user groups.

- Compile and document all Swim Center policies and procedures. Once that has been updated, distribute to user groups, and post where necessary. These should be reviewed annually, and changes noted.

- Explore other avenues to communicate with users of the Swim Center. The newsletter is a great resource. However, consideration should be given to the use of social media, e-mail list serves, and the like.

Bozeman Swim Center

The Bozeman Swim Center is physically attached to Bozeman High School, and the facility was constructed in the 1970s. The facility consists of:

- 50M x 20Y Indoor Pool
  - Seasonal/Temporary Bulkhead
- Men's & Women's Locker Rooms
- Full-Time Staff Office(s)
- Guard Room
- Ample Deck Space
  - Tip & Roll Bleachers
- Temporary Storage Units
- Filtration Room
  - DE System for Filtration
  - Accutab and a combination of Acid & CO2 for Water Chemistry
  - Clear Comfort to assist with Air Quality

The facility is unique in a variety of ways, those being (and in no specific order of importance):

1. The only indoor 50M body of water in the state.
2. The only indoor municipally operated pool in the City.
3. The staff at the facility are not only responsible for the safety of the facility and maintaining the operation. B*K would define maintaining the operation as maintaining water chemistry, pool room operation, cleanliness of the locker rooms, etc.
4. The staff has also maintained the interior physical structure. This came to light because the staff is responsible for touch-up painting, tile repair, etc.

Item #4 is particularly unique to this facility. In most cases, it is not uncommon for aquatic staff to be responsible for items 1-3; it is most uncommon for the aquatic staff to be responsible for item 4.

Impressions of the Facility

- B*K was impressed with the cleanliness of the facility while on-site. It was clear that the staff took great care in ensuring the facility was clean for its patrons. Guards were observed conducting locker room walkthroughs and picking up the pool deck while off stand. This is what one would expect from a well-functioning aquatic operation.

- The water chemistry is what one would expect for a DE filtration system. These systems maintain a superior level of water clarity but can be a maintenance challenge regarding the time required to backwash and recoat the system. This sentiment was echoed by the aquatic staff.

- The aquatic staff employs a three-check system for ensuring proper water balance. There is an automated chemical feeding system that is the primary treatment and monitoring of the pool. In addition, the aquatic staff has a Taylor Test Kit available to them to check chemical balance. Finally, the aquatic staff also has a Photometer available to check chemical balance. By having both a Taylor and Photometer test available to them, the aquatic staff can ensure the automated system is functioning properly. Further, the aquatic staff is checking the pool chemistry on a regular basis and documenting those readings.

- Air Quality. As with most pools of this vintage, air quality can be an issue, or more pointedly bad air quality. Since the pool was constructed, the air handling system has been replaced at least once. There is a single point of return for air on deck level. Ideally, if the pool were designed and built by today's standards, there would be multiple air returns at deck level. To augment the air handling system and move air with chloramines off the water surface, the aquatic staff uses two large box fans to push air across the water's surface to the air return. In addition to employing the box fans, a Clear Comfort System has been installed and is functioning appropriately.

- Air v. Water Temperature. The air and water temperature differential was appropriate. To ensure as close to a 50% humidity level in pools, the air temperature should be approximately 2 degrees higher than the water temperature. This limits the amount of water evaporation, keeping the humidity close to 50%, ensuring the building doesn't corrode from the inside out. This is something that the aquatic staff is currently doing.

- Lighting. The facility is challenged in regards to the overhead lighting. The current lighting, combined with the overhead air returns, makes the facility "dark." This is a reality of the facility, not something that staff can remedy. However, the darker environment does create challenges with blind spots and glare on the top of the water. The aquatic staff is doing a more than adequate job placing guards and guard stands in appropriate locations to combat this issue. Further, the staffing positions are adjusted based on bather load and times of the day to minimize these blind spots.

- Safety. While B*K was on site, there was not a time when it felt the Pool was being operated unsafely. The lifeguard staff was attentive while on the stand and appeared to interface well with the user groups that were present.

The City is currently undertaking an assessment of all City-owned facilities, including the Pool. It will be important for the City to assess not only the physical structure around the pool but the pool itself. This is to say, having a group evaluating the integrity of the pool shell and physical plant will be essential to assess the full lifespan of the facility.

Aquatics In Bozeman

There are a few options regarding pools in the City. The City operates the Bozeman Swim Center, which is the focus of this report, but they also operate a seasonal outdoor facility, Bogert Pool. In addition to these City-operated facilities there are also:

- Lone Mountain Gymnastics – indoor teach pool
- Eagle Mount – indoor pool associated with a larger membership-based facility
- Black Bull - Private Club Swim Center
- Wavefront Aquatics
- Riverside Country Club
- Bozeman Hot Springs

While not all these facilities offer a full complement of aquatic facilities and programs it is important for purpose of the report to at least acknowledge that they do exist within the market.

To that end, it is important to note that the Bozeman Swim Center caters to a clientele that reaches well outside of the City boundaries. In discussion with aquatic staff and stakeholders, it is not uncommon to have participants travel from up to 35-miles. Given this distance, B*K would classify the Bozeman Swim Center as having a regional draw for participation in aquatic activities.

Demographic Realities

Given the distance that participants are willing to travel to use the facility, it is important to understand the demographics of the area. B*K uses ESRI for demographic information. To date, ESRI has not released the 2020 Census with their future projections. However, the following can be offered about the population in the 35-mile radius.

- 80,628 2000 Census
- 102,688 2010 Census
- 133,634 2021 Estimate

This shows a dramatic increase in population within the 35-mile radius. For the City of Bozeman, proper B*K can access 2020 Census data.

- 29,593 2000 Census
- 37,354 2010 Census
- 53,293 2020 Census
- 54,539 2021 Estimate

Echoing the trend with the 35-mile radius, the City of Bozeman has experienced tremendous growth as well.

Using information produced annually by the National Sporting Goods Association (NSGA), B*K can determine based on age distribution, income levels, region of the country, and national figures, that approximately 15.5% of the population in the City of Bozeman participate in "swimming."

- 8,026[1] – Individuals participating in "swimming" in the City of Bozeman based on the 2022 estimate of 56,456.

- 19,931[2] – Individuals participating in "swimming" in the 35-Mile Radius based on the 2022 estimate of 140,493.

It is important to note that these figures are conservative, but provide a glimpse into the market for services, specifically pool usage.

The NSGA further defines swimming as the following:

• Frequent Part.	8.5% of Swimming Population	110+ Uses per Year
• Occasional Part.	41.7% of Swimming Population	25-109 Uses per Year
• Infrequent Part.	49.8% of Swimming Population	6-24 Uses per Year

Applying these figures and usage numbers to the 20,847 swimming participants in the 35-Mile Radius equates to approximately 854,284 pool visits annually. It is important to note that these pool visits are not specific to a single facility, but more importantly, are specific to a calendar year and can be used at any location. It is equally important to note that this is a significant number.

The NSGA further defines participation in an activity as organized v. recreational. The realities for swimming are:

• Organized Only	4% of Participants
• Organized & Recreational	20% of Participants
• Recreational Only	76% of Participants

The reality of the Bozeman Swim Center is that based on the design it caters to approximately 24% of the swimming population. Those looking for organized and organized/recreational activities. The organized activities the Swim Center caters to would include competitive swimming, artistic swimming, masters swimming, group exercise, and swim lessons. It is challenging to cater to individuals looking for a recreational experience with a 50M pool.

This data would suggest that the Swim Center, as it currently operates, caters to the individuals seeking organized activities, leaving the majority of potential aquatic users minimal access. This

[1] Total population participating in swimming age 7 and up.
[2] Total population participating in swimming age 7 and up.

is not an indictment of the current operation but is the reality of operating an indoor 50M pool with minimal public access.

Stakeholder & Interview Summary

While B*K was on-site a series of stakeholder meetings were conducted. Participation in those stakeholder meetings included members of the public, program participants, and representatives of special interest groups. Additionally, B*K was able to conduct one-on-one interviews with most of the full-time aquatic staff members.

Stakeholder Trends

- The Bozeman Swim Center is a valued asset to the community and the region.
- The lifeguards that are currently on staff do a good job and work hard to make the pool work.
- There were no concerns expressed about the water quality of the facility. Air quality, especially into the evening hours, and heavier use becomes a concern.
- Most groups acknowledged that they were "against" the concept of the bulkhead when it was first implemented, but it has since been welcomed. The concept of moving from only an 8-lane pull to a 16-20 lane pool depending on the configuration.
- There is an acknowledgment that the Pool is short-staffed. At the same time, there is a feeling that there is a lack of urgency from the City to solve the staffing problem.
- Most feel that the swimming community, defined as the City of Bozeman and a larger regional area, has outgrown the capacity of the current Pool.
- There is a feeling that there is not enough transparency in how decisions are being made by management on lane allocation and other operational matters.
- Some long-term users want to be able to use the pool unsupervised as they did in the past.
- There is a division amongst some of the user groups. Some feel that staff and management are being more than accommodating, while others feel the same group is doing an inadequate job.
- The school district specifically has enjoyed the long-term partnership between their classes and competitive programs.

Staff Trends

- The staff were extremely nervous about B*K being on-site and assessing the current operation.

- The staff were very concerned with the safety of the facility and ensuring that a safe environment was maintained for all that used the facility.

- Most of the staff described the relationship between the staff and the youth competitive swim community as strained. Some even described the relationship as hostile.

- Due to previous interactions with some of the competitive swim groups, the staff felt that it was difficult to be customer service friendly. As one staff member described it, "We want to afford groups additional lanes as usage dictates. However, when we've done that in the past those additional lanes become the expectation of the user groups. It's not viewed as a one-time or occasional occurrence because of usage. The result is a confrontation when that accommodation cannot be continually met."

- Several staff members felt that the public was not getting the level of access that they should to the facility. Some of that is predicated on staff, and some of it is predicated on the demand for lane space from the competitive swim community.

- Almost all the staff felt that they, and their decisions, were not being supported by the administration of the Parks & Recreation Department and the City.

Staffing

The City of Bozeman finds itself in the same position that many municipal pool operators do across the country. There are not enough lifeguards to operate the pool during the hours they would have pre-pandemic and that is putting a significant strain on availability, programming, and special interest group access.

To give a quick example, since being on-site, B*K learned that the City of Austin, TX requires 750 lifeguards to manage their outdoor pool inventory. As of Memorial Day Weekend 2022, they had 30% of the necessary lifeguards.

Many of the problems and concerns expressed by the stakeholders, public, and staff could be solved with additional part-time lifeguard staff. Those problems would include the potential for longer days of operation and the availability of weekend hours. The problem that CAN NOT be solved by additional lifeguard staff is that demand from 4:00-9:00P for lap lane space has exceeded the capacity of the Bozeman Swim Center.

The current staffing structure of the Bozeman Swim Center is as follows:

- Aquatics Director (1 FTE)
- Assistant Aquatics Director (1 FTE)
- Lead Lifeguards (6 FTE)
- Part-Time Lifeguards (Up to 10 for indoor operations)

At the time of the site visit, there were only 3 lead lifeguards, and there were less than 10 part-time lifeguards.

In order to begin to solve the lifeguard shortage, the City needs to approach the allocation of part-time staff differently. They need to begin to think of lifeguarding as hours needed to maintain a consistent pool operation.

The following table is representative of what a normal week could look like at the Swim Center.

Day(s)	Times	Lifeguards	Hours
Mon-Fri	5:30A-9:00A	3	9.5
	9:00A-3:00P	4	24
	3:00-9:00P	5	30
Saturday	7:00A-12:00P	3	15
	12:00-8:00P	4	32
Sunday	10:00A-12:00P	2	4
	12:00-8:00P	4	32
Total Hours			400.5

From the 400.5 hours of weekly operation, one could subtract 200 hours. This would account for 6 full-time lead lifeguards guarding (in the stand) for 30 hours per week, with another 10 hours per week going to on-deck management and other managerial responsibilities. It would also account for the Assistant Aquatics Director spending 20 hours guards (in the stand) with another 20 hours per week going to on-deck management and other managerial responsibilities. This leaves approximately 200.5 hours of lifeguarding that needs to take place in order to have a full schedule at the Swim Center.

Based on feedback that B*K has received from other aquatic facility operators across the country, most part-time lifeguards are willing to work 10-15 hours per week. Given that equation, the City would need to employ another 14-20 part-time lifeguards to complete the schedule.

Recommendation: *The City must begin, if they have not done so already, to look at the total hours required for operation, and not place a hard cap on the total number of part-time lifeguards that can be employed. This can be said for both indoor and outdoor pool operations.*

There is the feeling, amongst some of the user groups, that there is not enough done to facilitate the hiring of lifeguard staff to solve the problem by the City. At one time the hiring and training of lifeguard staff were seasonal in nature, generally speaking. There were specific times of the year that agencies would push to hire staff, and once that staff was hired, they didn't need to continue to look for additional. That paradigm has shifted so that advertising, training, and hiring of staff is a year-round obligation. This puts a significant strain on the full-time staff but is the reality of current-day aquatics.

Recommendations: *The City needs to get more aggressive in the hiring of the part-time lifeguard staff. In addition, they need to seek out traditional and non-traditional options for reaching out to prospective staff members. This can take the form of any or all the following:*

- *Signage. Big, Bold, Lots. At the Swim Center have obvious signage that indicates the need for more lifeguards. The same can be said for other City-operated facilities.*

- *Social Media. Begin to have a much strong presence on the City's social media accounts illustrating the need for more lifeguards. Equally important, are testimonials from current lifeguard staff about the benefits, other than pay, to the job.*

- *Partnerships.*
    - *School District. The District runs learn to swim classes in the Swim Center. Working with the instructors the Lead Lifeguard Staff should facilitate a conversation between those participating in the class and how they can translate what it is they have learned into a part-time seasonal job.*
    - *Montana State. Working with the University, have a presence at job fairs and hiring opportunities. Equally important, work with the Parks & Recreation Department on campus to get students in-chair lifeguard experience before they go into the field.*

  - *User Groups. Work with user groups in the facility to see if there are opportunities for their participants to be part-time staff. This can create challenges if a large group of them attend a competition, but it is a source of staffing that should not be overlooked.*

- *Non-Traditional. Tapping into older adults that are looking for part-time employment is an opportunity to fill hours. B*K would not suggest building one's staff around this model, but it is something that should be explored.*

Additional Recommendations:

- *Staff Sharing. Working with the other pool providers in the community and determining if there can be cross-over and having staff work in multiple facilities if their schedule so allows.*

- *Wage Scale. The City budget has allowed for the Swim Center to dramatically increase the entry-level pay. This should continue.*

- *Training Reimbursement / Fee Waived. The City should continue this practice.*

- *Signing Bonus & Longevity Pay. The City is currently exploring these possibilities and should continue to do so.*

- *Hiring Time Frame. The City needs to look a narrowing the timeline it takes to hire part-time lifeguards, and looking at the process in blocks. How long does it take to get from the point of application to the interview? How long does it take to get from interview to hire? How long does it take from hire to on-stand? Making this as quick as possible helps secure potential staff.*

- *Prerequisite. There is a strong likelihood that most candidates that are interviewed will need to be trained as a lifeguard. That needs to be welcomed, not viewed as an obstacle to employment. The same can be said for availability. If a candidate can only work on specific days and times, and those days and times fill a need, they should be considered. The same could be said for flexibility of shift length.*

- *Unguarded Swim Practices. B*K would not recommend having swim practices at the Swim Center without City of Bozeman certified lifeguard staff present.*

*Lastly, the Swim Center needs to be a place where candidates want to come to work. The staff was nervous about B*K being on-site, but time and time again, the current staff described an environment that is challenging. This does not just fall on the management of the pool, but also on the user groups and how they interface with the part-time and full-time staff of the Swim Center.*

Prioritization & Usage

The Swim Center is an asset to the City, the region, and from a competitive swim perspective, the State of Montana as it is the only indoor 50M pool. It is also worth noting that the current pool, even with the implementation of the bulkhead, cannot meet all the demands of the special interest groups that utilize the facility.

The limited availability means that to accommodate as many users as possible the City must establish some priorities of use. The priorities of use may mean that some groups get more pool time, and other groups get less pool time. Further, pool usage should shift based on the priorities, but also on a seasonal basis.

Recommendations: *B*K would propose developing a prioritization that resembles the following:*

- *Priority #1 General Public*
  - *Defined by the following programs: lap swim, open swim, swim lessons, water fitness, open boating.*
  - *B*K would suggest that there always be water available to the public which will often take the form of lap lanes. For the 25Y and 50M seasons, this could equate to a minimum of 2-4 lanes.*

- *Priority #2 Partners*
  - *Defined as the School District.*
  - *The School District currently pays approximately $80,000 towards the operation of the Swim Center. In addition, the Swim Center is located on school property.*
  - *Programs would include learn to swim and high school swim team.*

- *Priority #3 Competitive Aquatics*
  - *Defined as competitive swim teams (youth), masters swim team, artistic swim team (youth), Montana State Club, Montana State Triathlon, etc.*
  - *B*K would suggest that priority be given to those programs with the highest enrollment of Bozeman residents and that lane allocations be made from there.*
  - *B*K would also strongly recommend that rosters be provided to the Swim Center and that athletes check-in daily as they enter the facility. It would be the responsibility of the individual groups to provide the Swim Center with accurate rosters and track whether their athletes have paid the team.*

  - *Note: In some special instances, in particular when a facility is new, or when there is significant tension amongst the competitive teams, cities have established their own competitive programs, hired their own coaches, and provided their program with the preferred practice times and lane allocations. B*K would not recommend that the City take this immediate step, but it is something to consider.*

- *Priority #4 Private for Profit Agencies*
    - *Defined as groups that are for-profit agencies that use the Swim Center to their financial benefit.*
    - *Programs would include SCUBA and outside (non-City employed) private swim lesson instructors.*

With priorities established it gives the Aquatics Director and their staff a road map by which lane allocations can be made. It is also important to note that those lane allocations can shift by season (25Y v. 50M) and high school v. non-high school. Further, there should be specific dates when the Swim Center staff accepts lane requests for an upcoming season and a specific turnaround time for approval.

Currently, the Swim Center utilizes 3 blocks of time in the evening that competitive swim groups can use. Those times are approximately 4:00-5:30P, 5:40-7:10P, and 7:20-8:50P. The breaks in between groups allow for one group to exit the water and the other to enter.

Recommendations: *B*K would recommend a hybrid approach to the schedule. It is important to note that this allocation considers the priorities previously mentioned.*

- *Pre-Post High School Season* *4:00-6:00P and 6:15-8:15P*
- *High School Season* *4:00-5:30P, 5:40-7:10P, and 7:20-8:50P*

<u>Sample Schedule #1 Fall 2022</u>

Pre-Post High School Season (25Y)

Time	Group	Lanes
4:00-6:00P	Lap Swim	4 Lanes (shallow)
	Barracudas	8 Lanes (deep)
		8 Lanes (shallow)
6:15-8:15P	Lap Swim	4 Lanes (shallow)
	Brookies	4 Lanes (shallow)
	Special Olympics	4 Lanes (shallow)
	Stingrays	8 Lanes (deep)

High School Season (25Y)

Time	Group	Lanes
4:00-5:30P	Lap Swim	4 Lanes (shallow)
	High School	8 Lanes (deep)
5:40-7:10P	Lap Swim	4 Lanes (shallow)
	Barracudas	8 Lanes (deep)
		8 Lanes (shallow)
7:20-8:50P	Lap Swim	4 Lanes (shallow)
	Brookies	4 Lanes (shallow)
	Special Olympics	4 Lanes (shallow)
	Stingrays	8 Lanes (deep)

Sample Schedule #2 Fall 2023

Pre-Post High School Season (25Y)

Time	Group	Lanes
4:00-6:00P	Lap Swim	4 Lanes (shallow)
	Brookies	4 Lanes (shallow)
	Special Olympics	4 Lanes (shallow)
	Stingrays	8 Lanes (deep)
6:15-8:15P	Lap Swim	4 Lanes (shallow)
	Barracudas	8 Lanes (deep)
		8 Lanes (shallow)

High School Season (25Y)

Time	Group	Lanes
4:00-5:30P	Lap Swim	4 Lanes (shallow)
	High School	8 Lanes (deep)
5:40-7:10P	Lap Swim	4 Lanes (shallow)
	Brookies	4 Lanes (shallow)
	Special Olympics	4 Lanes (shallow)
	Stingrays	8 Lanes (deep)
7:20-8:50P	Lap Swim	4 Lanes (shallow)
	Barracudas	8 Lanes (deep)
		8 Lanes (shallow)

*B*K recognizes that there is some inconvenience in switching practice times mid-way through a season. However, the recommended schedules address the partnership between the School District and the City. Students should not have to leave school at the end of the day and come*

back later to practice. Also, it addresses a need expressed by the user groups to have a 2-hour window of practice time and access to starting blocks.

The bulkhead is an item that has been mentioned multiple times during this report. As previously stated, it was not popular when first implemented, but over time participants have come to appreciate the flexibility it provides the facility.

The bulkhead at the Bozeman Swim Center is one that was custom designed and built for the facility. It is the responsibility of the aquatic staff to put the bulkhead in and take it out on a seasonal basis.

Recommendations:

- *B*K would suggest to the City that the time the bulkhead stays in the water be extended, so that it is put in at the beginning of September, and remains in the water through the end of April. The reality is that this will take away a month of long-course practice from the competitive swim team programs. However, it will afford the facility the flexibility with the number of lanes available for an additional month. In B*K's opinion, this will offer the Swim Center additional program flexibility in the month of April.*

- *The City should consider a commercial solution to the current bulkhead. In that investigation, the City should consider implementing 2 bulkheads in the facility. Many commercial grade bulkheads for pools have a bladder system that inflates and allow the bulkhead to be pushed (2 people) from one location to the next. If the City were to employ 2 movable bulkheads, they would then have 2, 8-lane 25Y courses from the months of September-April, along with 2-3 width lanes between the bulkheads. The positive to this solution is more 25Y lanes for practice purposes. The negative is that if both bulkheads remain in the water, it will take the 50M pool to a 48M pool. The City would need to consider the cost/benefit of this solution.*

Policies & Procedures

As mentioned earlier the Swim Center is operating in a very safe fashion. At no time did B*K feel that there were inadequate, or sub-par risk management procedures being employed.

The procedures that they are employing for day-to-day operations are consistent with what B*K sees as an industry-standard across the country. The exception is some of the physical maintenance of the facility interior that they are required to perform.

An area of concern is policies, not in the policies that they employ, but rather a documentation and availability of said policies. In discussion with staff, it was acknowledged that they need to get better regarding policies. That was echoed by many of the user groups.

This challenge is not new to the City of Bozeman or the Swim Center. Many facilities have policies that are appropriate, but when asked to physically document said policy, they are unable to do so. This is not to suggest that the policy is inaccurate, or inappropriate, it is merely not documented. The lack of documented policies can lead to a feeling of mistrust and/or lack of transparency in how decisions are made. Further, it can lead groups in a direction where they feel they are being targeted or treated differently than other groups.

Recommendation: *B*K would recommend that all policies, rules, regulations, and otherwise be documented at the swim center. Once those policies have been documented and reviewed, there should be a copy of them available in the Aquatics Director's Office, and the Lead Lifeguard and Lifeguard office. Further, if lifeguards are enforcing, or employing a policy, they can reference said book and have an off-stand staff assist in showing the documentation.*

*B*K would recommend taking the policy manual one step further. There should be a set of expectations for groups that are renting the facility. This should apply to the groups identified in Priorities #2, #3, and #4 previously listed in this document. In developing those expectations, B*K would recommend involving the aforementioned groups. At the beginning of the season, when groups receive their lane allocations for the season, all coaches should be required to sign that they have read the expectations and that they will abide by them while at the Swim Center.*

It is important to note that this is going to take time to assemble. However, if the staff at the Swim Center are going to use the phrase "its our policy" when enforcing rules, granting requests, or denying requests, they need to have this in place.

Programs

Currently, the programming at the Swim Center is extremely limited. The reason for this is twofold.

1. Staffing. There simply isn't the staff in place to run many of the types of robust programs that are often found in a municipal aquatic facility.

2. Facility Availability. During the school year, the prime time for programming is in the evening. As has previously been mentioned the facility is not able to accommodate the requests for lane rental from outside groups during this time span because lack of space. During the summer months, it is again a combination of usage by outside groups and availability of staff that hamper the ability to run programs.

If the Swim Center were fully staffed, they would need to determine their priorities for programming the facility. B*K would offer the following commentary on the programming of the Swim Center.

- Lap Swim. Currently offering public lap lanes is one program that the Swim Center can accommodate. They should continue to do so and protect that lane space in the evening hours. The guards should be willing to offer unused lap lane space to the competitive programs based on the demand of a particular evening. However, the competitive programs must respect that lap swimming is a program the City offers, and use by lap swim supersedes that of an outside group if a lap lane is offered.

- Group Swim Lessons. For many facilities, this program is a Hallmark. During the school year, a group swim lesson program is typically offered in the evening hours, preferably in the 6:00-8:00P time frame. As has been previously discussed, the Swim Center currently cannot meet the demand for outside groups during this time. To offer a group swim lesson program, it would require the Swim Center to limit the number of lap lanes available to the public, or potentially eliminate them at a specific time given the size of the program. B*K would suggest that the Swim Center could offer a robust Saturday morning swim lesson program in the fall, winter, and spring months and still accommodate their evening use groups.

- Private Swim Lessons. There are several ways to deliver this program. Some agencies have a request system, and instructors schedule them based on their availability and that of the pool. Other groups schedule them at specific times, with specific instructors and the public can sign up. Finally, other groups like the Swim Center allow outside instructors to use their pool, when available to deliver the program. It is B*K's opinion that the Swim Center could use some or all these methods to deliver the program.

- Group Exercise. This is a program that the Swim Center is currently trying to offer with some success. These programs are typically offered during the morning and mid-day hours. These are typically low-use periods of time when there is ample lane space

available. The ability to expand these programs into the evening hours is preferable but would be hampered by lane availability.

- Master Swim. This program is typically designed for those individuals who want a more formal workout than what can be provided by individual lap swimming. The Swim Center currently delivers this program through an outside group. They rent lane space during the day and pay coaches an hourly rate. B*K would recommend the Swim Center continue in this fashion.

- SCUBA. Most municipal pools will have some type of snorkeling or SCUBA program. They are typically offered through an outside group and can take place at a variety of times. Most SCUBA classes are focused on a Fri-Sun time frame. This is the method by which the Swim Center has offered this in the past. The biggest challenge in the delivery of this program is the availability of lane space. That combined with the fact that they are sometimes canceled due to lack of enrollment.

- Open Public Swim. Along with lap swimming, and swim lessons, this is typically a Hallmark of most swim facilities. Currently, and due to the lack of staffing, the Swim Center is not able to accommodate any open swim hours for the public. If the staffing issue were resolved, B*K would suggest that there be a robust open swim time on Saturday and potentially Sunday. To attract maximum participation, it may require the adjustment (slight increase) of the water temperature. Additionally, the Swim Center would want to investigate the use of inflatables (WiBit) to activate the pool and make it more attractive to the non-competitive swimmer who is looking for a social/play experience.

Based on historical data that was shared while on-site, B*K would characterize the pricing structure for programs as very reasonable. The price points that B*K reviewed would lead to maximizing participation.

Also based on information that was shared while on-site, B*K would characterize the pricing structure for lap lane rental as very reasonable. Based on the work that B*K has completed across the country the average cost of a 25Y lap lane is between $10-$15 per hour with a 50M lane being double that price point. Many pool operators would like to close the subsidy required to operate their pool. If the same facility is heavily involved in the competitive aspects of swimming the per lane rate for a 25Y lane should start close to $25 per hour.

Group rentals or per day rentals should be and are currently being built off the per lane rental rate that the Swim Center employs.

Appendix A – Market Review

Market Review

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2020 Census data and their demographers for 2022-2027 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

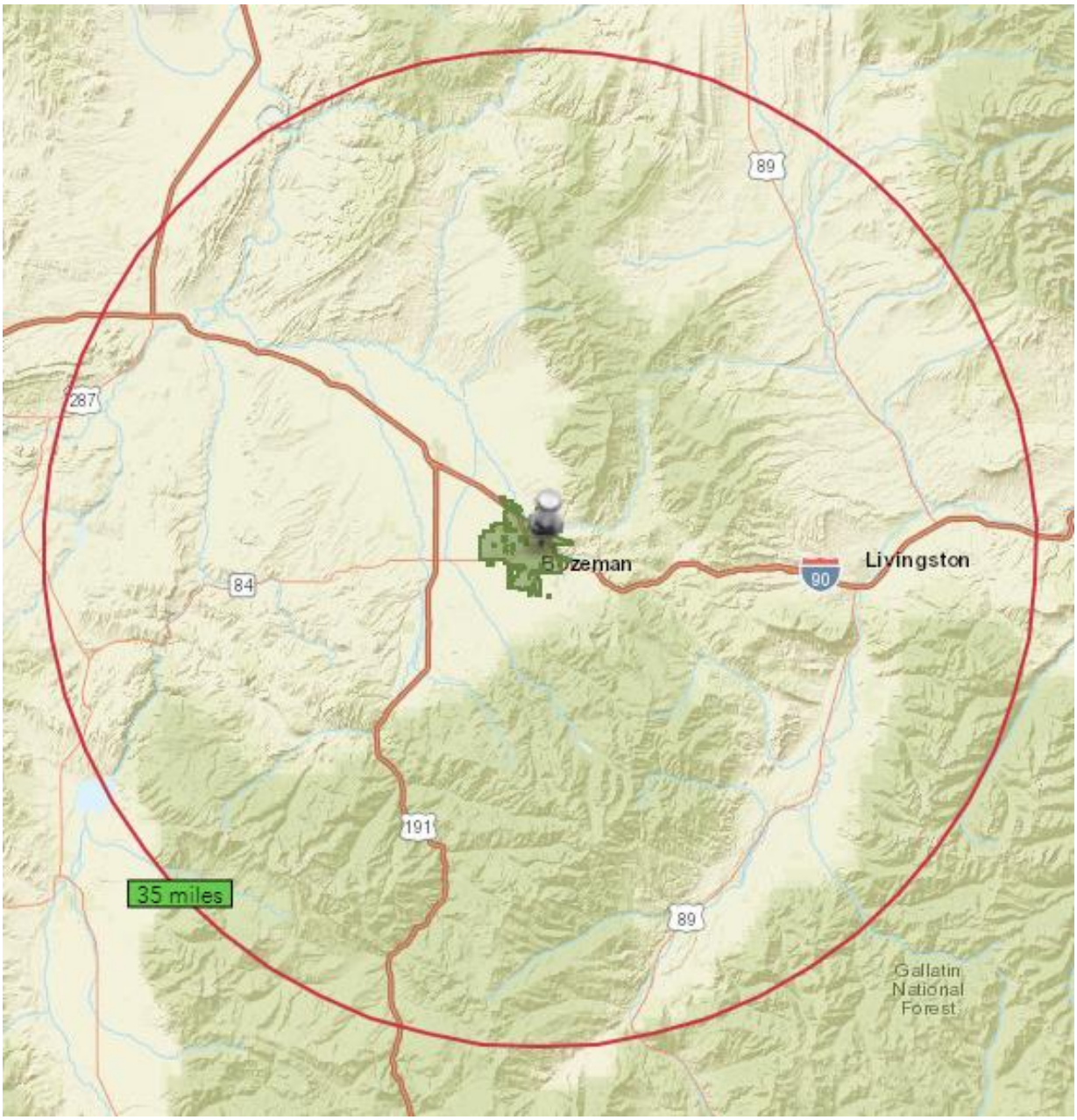
Service Areas: The following is a summary of the demographic characteristics within current service areas and as identified as the Primary Service Areas. For the purposes of the review, the Primary Service Area is the City of Bozeman and the Secondary Service Area is the 35-Mile Radius.

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.

Map A – Service Area Maps



- Green Boundaries – City of Bozeman, Primary Service Area
- Red Boundaries – 35-Mile Radius, Secondary Service Area

Demographic Summary

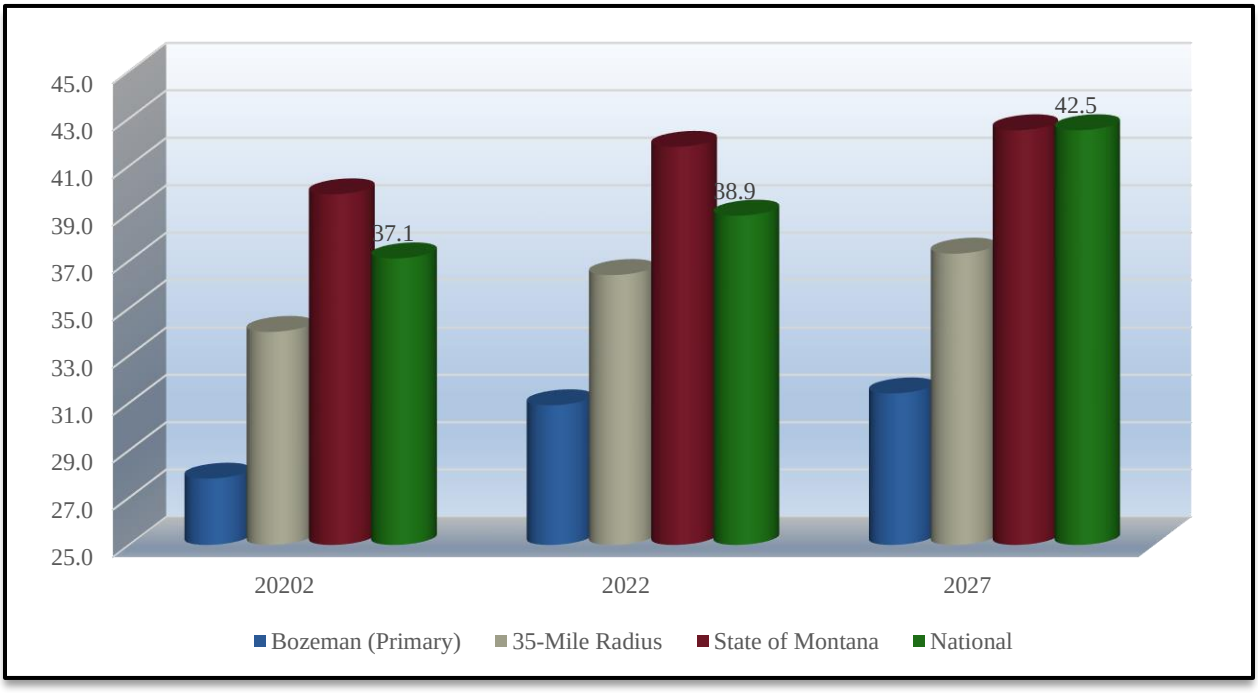
	Bozeman	Secondary Service Area
Population:		
2020 Census	53,301	134,040
2022 Estimate	56,465	140,493
2027 Estimate	61,153	150,489
Households:		
2020 Census	21,737	54,045
2022 Estimate	23,146	56,767
2027 Estimate	25,199	60,971
Families:		
2020 Census	7,340	24,883
2022 Estimate	10,071	31,936
2027 Estimate	10,912	34,146
Average Household Size:		
2020 Census	2.17	2.33
2022 Estimate	2.27	2.40
2027 Estimate	2.27	2.40
Ethnicity (2022 Estimate):		
Hispanic	5.0%	4.6%
White	87.7%	89.1%
Black	0.6%	0.4%
American Indian	1.2%	0.8%
Asian	1.8%	1.1%
Pacific Islander	0.1%	0.1%
Other Race Alone	1.8%	1.7%
Two or More	6.9%	6.7%
Median Age:		
2020 Census	27.8	34.0
2022 Estimate	30.9	36.4
2027 Estimate	31.4	37.3
Median Income:		
2022 Estimate	$76,569	$83,113
2027 Estimate	$81,731	$94,073

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	2022 Projection	2027 Projection
Bozeman (Primary)	27.8	30.9	31.4
35-Mile Radius	34.0	36.4	37.3
State of Montana	39.8	41.8	42.5
Nationally	37.1	38.9	39.6

Chart A – Median Age:



The median age in the 35-Mile Radius is lower than the State of Montana and the National number. A lower median age typically points to the presence of families with children. Recreation Centers, and in particular aquatic centers draw a large demographic from youth to seniors. 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 service areas with children.

Table B – Households w/ Children

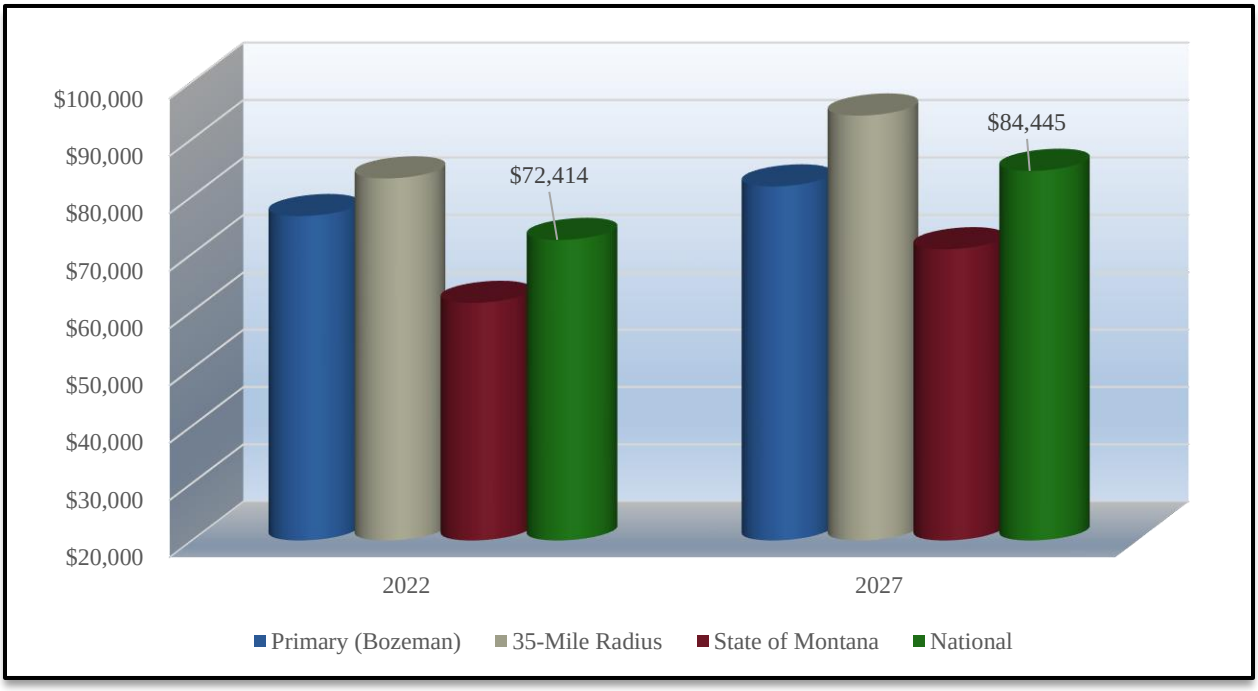
	Number of Households w/ Children	Percentage of Households w/ Children
Bozeman (Primary)	3,532	21.5%
35-Mile Radius	11,645	27.3%
State of Montana	-	28.4%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2010 Census, 33.4% of households nationally had children present. A factor that is potentially driving down the median age in the City of Bozeman is the presence of Montana State University and the student population.

Table C – Median Household Income:

	2022 Projection	2027 Projection
Bozeman (Primary)	$76,569	$81,731
35-Mile Radius	$83,133	$94,073
State of Montana	$61,456	$70,975
Nationally	$72,414	$84,445

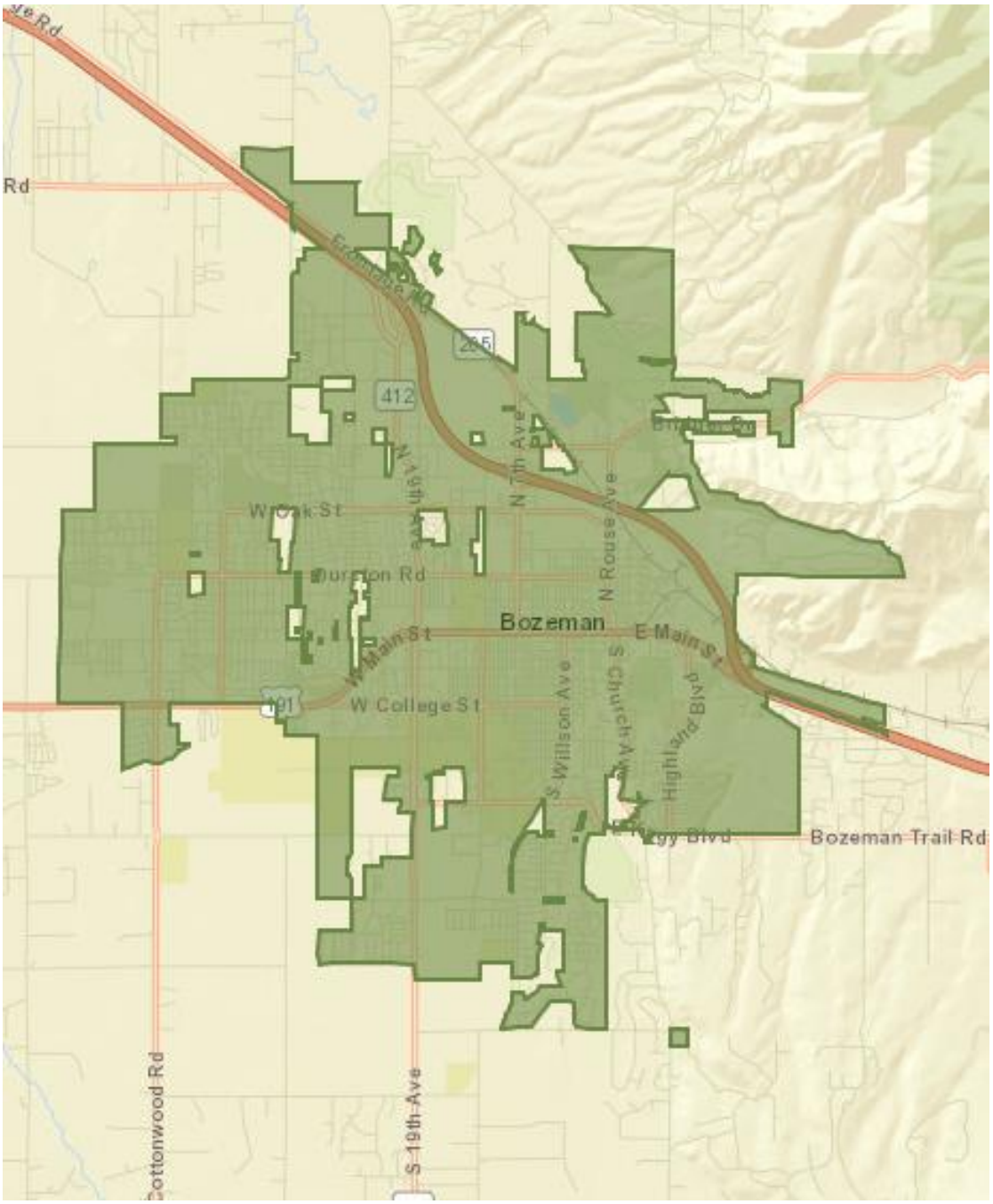
Chart B – Median Household Income:



Based on 2020 projections for median household income the following narrative describes the service areas:

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.

Map E – Primary Service Area



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

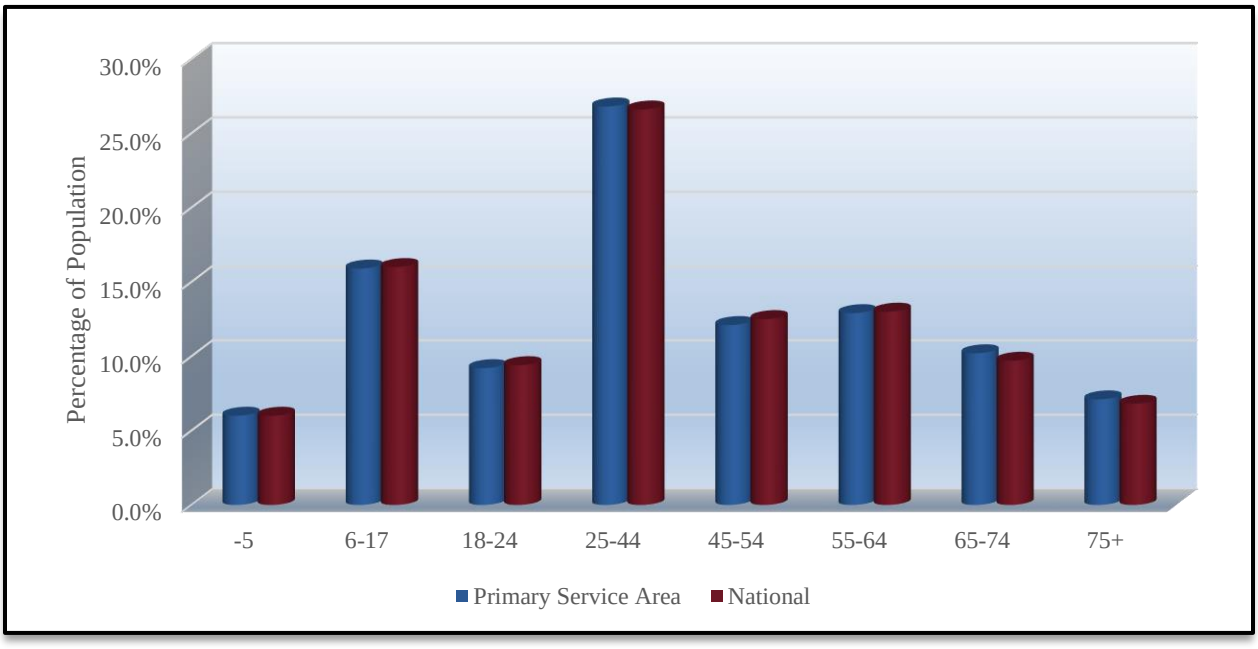
Table F – 2020 Primary Service Area Age Distribution

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	2,786	4.9%	6.0%	-1.1%
5-17	5,953	10.5%	15.9%	-5.4%
18-24	12,011	21.3%	9.2%	+12.1%
25-44	19,043	33.7%	26.8%	+6.9%
45-54	4,955	8.8%	12.1%	-3.3%
55-64	5,089	9.0%	12.9%	-3.9%
65-74	3,655	6.5%	10.2%	-3.7%
75+	2,973	5.3%	7.1%	-1.8%

Population: 2022 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 – 2020 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 larger population in the 18-24 and 25-44 age groups. A smaller population in the age groups of -5, 5-17, 45-54, 55-64, 65-74 and 75+. The greatest positive variance is in the 18-24 age group with +12.1%, while the greatest negative variance is in the 5-17 age group with -5.4%.

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

Table G – 2020 Primary Service Area Population Estimates
(U.S. Census Information and ESRI)

Ages	2010 Census	2020 Projection	2025 Projection	Percent Change	Percent Change Nat'l
-5	2,932	2,786	3,082	-9.0%	+5.1%
5-17	5,543	5,953	6,247	+3.8%	+12.7%
18-24	14,658	12,011	13,254	-20.1%	-9.6%
25-44	16,630	19,043	19,841	+2.6%	+19.3%
45-54	5,010	4,955	5,446	-14.2%	+8.7%
55-64	4,264	5,089	5,311	-8.4%	+24.6%
65-74	1,972	3,655	4,232	+52.3%	+114.6%
75+	2,345	2,973	3,740	+19.6%	+59.5%

Chart G – Primary Service Area Population Growth

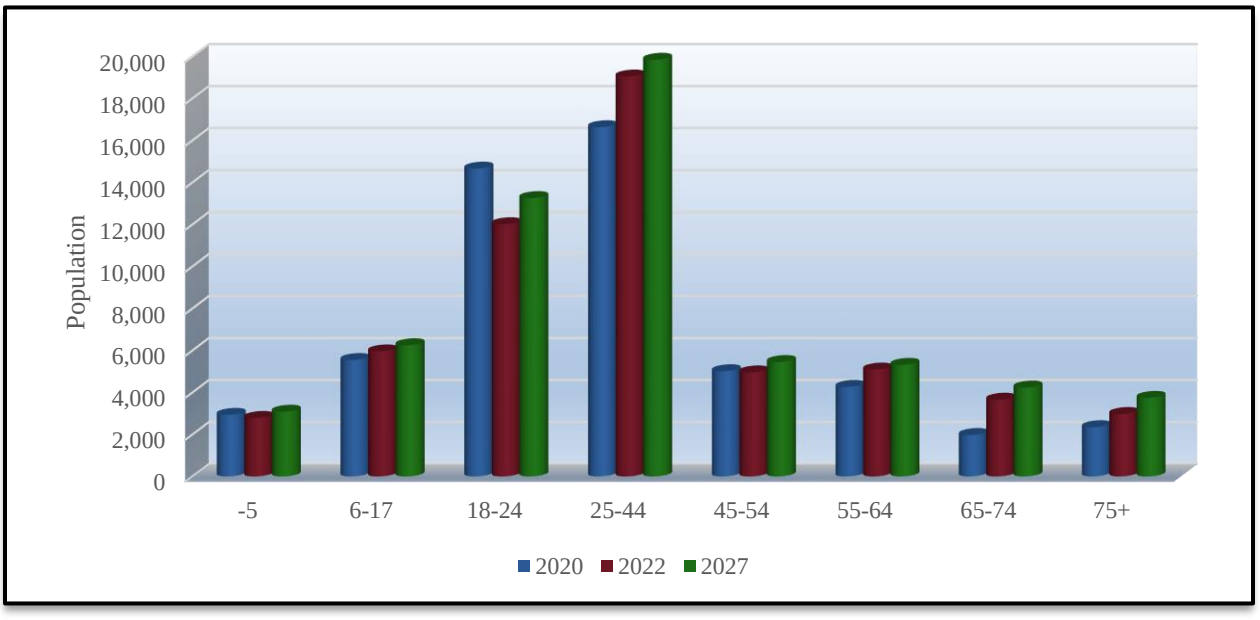


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2025. It is projected that all age categories, except 18-24, will see an increase in population. The population of the United States is aging, and it is not unusual to find negative growth numbers in the 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 Service Area for 2020 population projections. Those numbers were developed from 2010 Census Data.

Table H – Primary Service Area Ethnic Population and Median Age 2022
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of MT Population
Hispanic	2,845	25.4	5.0%	4.1%

Table I – Primary Service Area by Race and Median Age 2022
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MT Population
White	49,493	31.7	87.7%	84.2%
Black	338	26.8	0.6%	0.5%
American Indian	657	25.1	1.2%	6.2%
Asian	1,002	29.6	1.8%	0.8%
Pacific Islander	58	29.5	0.1%	0.1%
Other	1,028	30.5	1.8%	1.4%
Multiple	3,889	23.8	6.9%	6.8%

2020 Primary Service Area Total Population: 68,481 Residents

Chart H – 2020 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 Bozeman. 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.

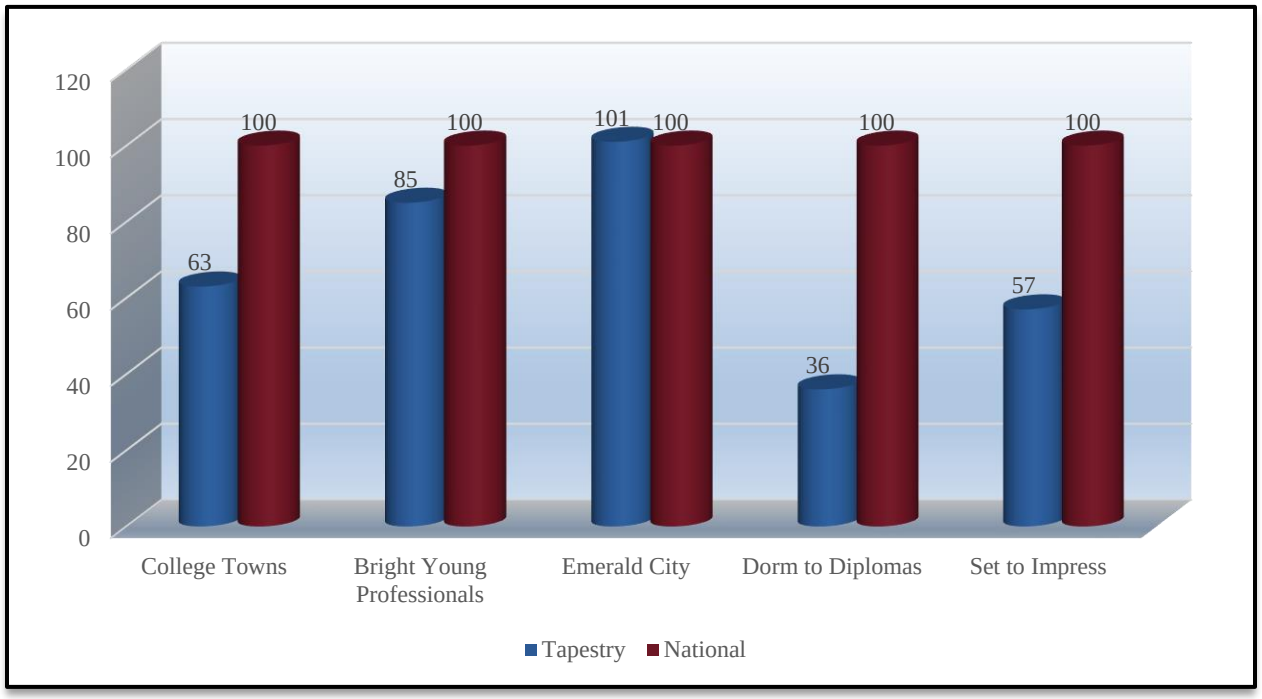
The following pages and tables outline the top 5 tapestry segments in each of the service areas and provide a brief description of each. This information combined with the key indicators and demographic analysis of each service area help further describe the markets that the Primary Service Area looks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

Table J – Primary Service Area Tapestry Segment Comparison

(ESRI estimates)

	Secondary Service Area		*Demographics*	
	Percent	**Cumulative Percent**	**Median Age**	**Median HH Income**
College Towns (14B)	35.9%	35.9%	24.5	$32,200
Bright Young Professionals (8C)	20.8%	56.7%	33.0	$54,000
Emerald City (8B)	14.7%	71.4%	37.4	$59,200
Dorm to Diplomas (14C)	4.6%	76.0%	21.6	$16,800
Set to Impress (11D)	4.6%	80.6%	33.9	$32,800

Chart I – Primary Service Area Tapestry Segment Entertainment Spending:



Market Potential Index for Adult Participation: In addition to examining the participation numbers for various outdoor activities through the National Sporting Goods Association, 2019 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in outdoor activities.

Table K – Market Potential Index (MPI) for Participation in Activities in Primary Service Area

Adults participated in: Swimming	Expected Number of Adults	Percent of Population	MPI
Primary (Bozeman)	8,047	16.9%	108
35-Mile Radius	19,474	17.1%	109

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

Market Assessment

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

Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto the Primary Service Area to determine market potential. The information contained in this section of the report, utilizes the NSGA's most recent survey. For that data was collected in 2019 and the report was issued in June of 2020.

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

Table A –Participation Rates in the Primary Service Area

Swimming	Age	Income	Region	Nation	Average
Bozeman (Primary)	13.2%	16.7%	15.0%	16.1%	15.2%
35-Mile Radius	13.6%	16.7%	15.0%	16.1%	15.4%

Age: Participation based on individuals ages 7 & Up of the Primary Service Area.
Income: Participation based on the 2020 estimated median household income in the Primary Service Area.
Region: Participation based on regional statistics (West North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-A above plus the 2010 census information and census estimates for 2020 and 2025 (over age 7) the following comparisons are available.

Table E –Participation Growth or Decline for Indoor Activities in Primary Service Area

Swimming	Average	2020 Population	2022 Population	2027 Population	Difference
Bozeman (Primary	15.2%	6,652	8,026	8,686	2,034
35-Mile Radius	15.4%	17,023	19,931	21,345	4,322

The chart below outlines the frequency of participation in Swimming.

Table B – Participation Frequency Swimming

The NSGA classifies Swimming based on how often individuals participate:

	Frequent	Occasional	Infrequent
Swimming Frequency	110+	25-109	6-24
Swimming Percentage of Population	8.5%	41.7%	49.8%

In Table-B one can look at swimming and how it is defined with respect to visits being Frequent, Occasional, or Infrequent and then the percentage of population that participates.

Table C – Participation Numbers in Primary Service Area

	Frequent	Occasional	Infrequent	Total
Swimming Frequency	140	67	15	
Population	693	3,402	4,063	
Visits	95,513	224,247	59,956	**379,716**

Table-C takes the frequency information one step further and identifies the number of times individuals may participate in the activity, applies the percentage from Table-A to the 2022 swimming population (8,026) and then gives a total number of swimming days. This would indicate that a total of 379,716 swimming day are available within the Primary Service Area market. It is also important to note that those are being absorbed, on some level, by the other service providers in the area.

The chart below outlines the frequency of participation in Swimming.

Table B – Participation Frequency Swimming

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In Table-B one can look at swimming and how it is defined with respect to visits being Frequent, Occasional, or Infrequent and then the percentage of population that participates.

Table C – Participation Numbers in Primary Service Area

	Frequent	Occasional	Infrequent	Total
Swimming Frequency	140	67	15	
Population	1,694	8,311	9,926	
Visits	237,180	556,855	148,885	**942,920**

Table-C takes the frequency information one step further and identifies the number of times individuals may participate in the activity, applies the percentage from Table-A to the 2022 swimming population (19,931) and then gives a total number of swimming days. This would indicate that a total of 942,920 swimming day are available within the Primary Service Area market. It is also important to note that those are being absorbed, on some level, by the other service providers in the area.

The NSGA identifies participation in all activities that they track as frequent, occasional and infrequent as illustrated in Table C. It is also important to further identify the uses of those categories.

Frequent Swimmers (8.5% of total swimming population) – These participants are largely the individuals participating in programs like club swimming. They can be described as competitive athletes of all variety to include multi-sport athletes. These participants are interested in traditional flat-water facilities, i.e. lap pools. Their preference is for deep water (greater than 6 feet) and cooler water temperatures (between 76-80).

Occasional Swimmers (41.7% of total swimming population) – These participants and the in between group of swimmers. The individuals on the high end of the uses per year are interested in swimming, or aquatic activities, as a means of exercise and prefer water like that of frequent swimmers. As you make your way to the mid-point and lower level of participation the reason for aquatic participation changes. Those individuals are either interested in aquatic participation for exercise/therapy or strictly the entertainment and social aspects of being in a pool. Those individuals on the mid and lower level of participation are interested in a different kind of water. They are more interested in a warmer water temperature (82-86 degrees) shallow water (less than 4 feet up to a zero-depth entry).

Infrequent Swimmers (49.8% of total swimming population) – These participants are strictly interested in the social and entertainment aspects of swimming. They typically don't use participation in aquatic programs as a means of exercise, but rather socialization. The water that they are interested in is identical to the lower end of the occasional swimmers. However, they are also interested in a "wow-factor" which plays a key role in determining which facility they spend time at.

National Cross Participation: The table below identifies sports or activities that participants in swimming also participate in. For organizations that want to maximize revenue generation this information becomes important as it informs other types of activities they may want to consider offering.

Table D – Cross Participation for Swimming

Activity	% Participating in	Total US Participation	Index
Exercise Walking	55.9%	35.6%	157
Exercising with Equipment	38.6%	19.0%	204
Hiking	35.5%	15.6%	228
Running/Jogging	34.2%	14.8%	230
Bicycle Riding	29.6%	12.5%	237
Aerobic Exercising	26.6%	15.5%	172
Basketball	19.3%	8.4%	231
Weightlifting	16.8%	12.2%	137
Workout At Club	15.8%	12.6%	125
Yoga	13.7%	10.2%	134

% Participating in: % of swimmers that also participated in this activity.
Total US Participation: % of the US population that participated in this activity.
Index: An index of 100 represents the average as compared to the total US population.

This would indicate that the "swimming" community is very active and has a high level of participation in activities outside of swimming.

National Summary of Sports Participation: The following chart summarizes participation for indoor activities utilizing information from the 2019 National Sporting Goods Association survey.

Table G – Sports Participation Summary

Sport	Nat'l Rank3	Nat'l Participation (in millions)
Exercise Walking	1	106.5
Exercising w/ Equipment	2	58.3
Swimming	4	48.0
Aerobic Exercising	5	47.4
Running/Jogging	6	46.0
Workout @ Club	8	39.6
Weightlifting	9	37.8
Bicycle Riding	10	37.8
Yoga	12	31.8
Basketball	14	25.2
Volleyball	25	10.6
Table Tennis	27	9.9
Martial Arts MMA	37	6.0
Gymnastics	39	5.9
Pilates	40	5.9
Cheerleading	48	3.7
Wrestling	50	3.3
Lacrosse	52	2.8
Pickleball	57	2.0

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

3 This rank is based upon the 57 activities reported on by NSGA in their 2019 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 H – Participation by Age Group:

Activity	Largest	Second Largest	Third Largest
Aerobics	35-44	25-34	45-54
Basketball	12-17	25-34	18-24
Billiards/Pool	25-34	34-44	45-54
Bowling	25-34	35-44	18-24
Cheerleading	12-17	7-11	18-24
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
Swimming	55-64	12-17	7-11
Tables Tennis	25-34	18-24	12-17
Volleyball	12-17	25-34	18-24
Weightlifting	25-34	45-54	35-44
Workout at 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 Sports Participation Trends: Below are listed several sports activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2010-2019).

Table I – National Activity Trend (in millions)

	2010 Participation	2019 Participation	Percent Change
Kayaking	5.6	10.7	90.9%
Yoga	20.2	31.8	57.6%
Running/Jogging	35.5	46.0	29.7%
Gymnastics	4.8	5.9	23.8%
Aerobic Exercising	38.5	47.4	23.2%
Weightlifting	31.5	37.8	20.0%
Cheerleading	0.0	3.7	18.0%
Wrestling	2.9	3.3	15.0%
Exercise Walking	95.8	106.5	11.2%
Workout @ Club	36.3	39.6	9.1%
Lacrosse	2.6	2.8	7.5%
Pilates	5.5	5.9	7.1%
Exercising w/ Equipment	55.3	58.3	5.5%
Ice/Figure Skating	8.2	8.6	5.3%
Soccer	13.5	14.2	5.2%
Volleyball	10.6	10.6	0.2%
Hockey (ice)	3.3	3.3	0.0%
Tennis	12.3	12.2	-0.6%
Baseball	12.5	12.2	-2.0%
Football (flag)	0.0	6.5	-2.9%
Football (touch)	0.0	8.9	-4.0%
Bicycle Riding	39.8	37.8	-5.1%
Martial Arts / MMA	0.0	6.0	-5.8%
Basketball	26.9	25.2	-6.2%
Softball	10.8	10.1	-6.8%
Swimming	51.9	48.0	-7.4%
Golf	21.9	17.9	-18.3%
Football (tackle)	9.3	7.3	-21.3%
Mountain Biking (off road)	7.2	5.6	-21.7%
Table Tennis/Ping Pong	12.8	9.9	-22.4%

2010 Participation: The number of participants per year in the activity (in millions) in the United States.
2019 Participation: The number of participants per year in the activity (in millions) in the United States.
Percent Change: The percent change in the level of participation from 2010 to 2019.

Market Assessment

Section III – Trends

Aquatic Participation Trends: Swimming is one of the most popular sports and leisure activities, meaning that there is a significant market for aquatic pursuits. Approximately 15.0% of the population in the Mountain region of the country participates in aquatic activities. This is a significant segment of the population.

Despite the recent emphasis on recreational swimming, the more traditional aspects of aquatics (including swim teams, instruction, and aqua fitness) remain an important part of most aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive swim team programs through USA Swimming, high schools, masters, and other community-based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.

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

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

There are a couple of other aquatic sports that are often competing for pool time at competitive aquatic centers. However, their competition base and number of participants is relatively small. Water polo is a sport that continues to be reasonably popular on the west coast but is not nearly

as strong in Wisconsin and uses a space of 25 yards or meters by 45-66 feet wide (the basic size of an 8-lane, 25-yard pool). However, a minimum depth of 6 foot 6 inches is required which is often difficult to find in more community-based facilities. Synchronized swimming also utilizes aquatic facilities for their sport and they also require deeper water of 7-8 feet. This also makes the use of some community pools difficult.

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

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

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

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

Aquatic Facilities Market Orientation: Based on the market information, the existing pools and typical aquatic needs within a community, there are specific market areas that could be addressed with **any** aquatic facility. These include:

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

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

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

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

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

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

Specific market segments include:

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

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

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

4. **Teens** – Another aspect of many pools is meeting the needs of the teenage population. Serving the needs of this age group will require leisure pool amenities that will keep their interest (slides) as well as the designation of certain "teen" times of use.

5. **Adults** – This age group has a variety of needs from aquatic exercise classes to lap swimming, triathlon training and competitive swimming through the master's program.

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

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

8. **Special Interest Groups** – These include swim teams (and other aquatic teams), school district teams, day care centers and social service organizations. While the needs of these groups can be great, their demands on an aquatics center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

With the proper pools and strong utilization of the aquatics area, it is possible to meet most of the varied market orientations as outlined above.