

WOODLAND SPORTS FIELD MARKET ANALYSIS

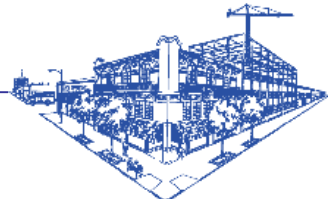
Prepared for:
**Woodland
Rotary Club**

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Economic and Development Services



AT-A-GLANCE SUMMARY

On behalf of the Woodland Rotary Club, the economic and development consulting firm E. D. Hovee & Company, LLC (EDH) has prepared this market analysis for development of a sports field complex – proposed for six baseball and softball fields together with three (and potentially up to six) soccer fields, on a 40 acre site at Scott Hill in Woodland. A summary of report observations and findings follows.

Current Sports Field Inventory. The primary Ridgefield to Kalama market served by this proposed facility comprises a residential population base of 30,700 residents – as part of a larger secondary market encompassing all of Cowlitz and Clark County, with about 554,000 residents as of 2015. Currently, there are an identified 740 baseball/softball, soccer and associated multi-use fields in the two-county area – including 43 fields in the primary area most readily served from Woodland.

Based on comparison with national standards, the two-county market (including the Woodland primary area) appears to be well served with sports field facilities. Facilities in Cowlitz County tend to be more oriented to baseball/softball; Clark County is more soccer-focused. Situated at the county line, Woodland likely represents a blend of these diverse sports preferences.

Sports Field Demand. In terms of the number of fields available, a case can be made that both the primary (local) and secondary (two-county) markets for sports fields are relatively well served **at present** – with potential capacity for transitioning at least some community and school facilities to added league play if warranted by demand. However, the quality of existing fields (including those not now dedicated for league use) may not meet standards for league play. Of particular interest is the desire for more facilities that will be open more hours (with lighting) and available year round (with synthetic turf fields).

Future demand with population growth in Cowlitz and Clark Counties is estimated at an added 36 baseball and softball fields and 30 added soccer fields over the next 10 years to 2025. Depending on growth actually experienced, which could be quite varied (especially for the Ridgefield area), there may be a need for anywhere from 4-13 added sports fields to serve added primary market area demand.

What has been identified with current plans might accommodate 70-75% of anticipated population growth for the two counties combined. Based on known plans in Kalama, Ridgefield and at Scott Hill in Woodland, added facilities may exceed what is supported by primary area population growth alone.

Market Opportunity. As indicated, full utilization of the Scott Hill planned sports field complex should not be expected to happen on its own. However, provision of high quality fields with extended hours of play and winter use will serve to generate strong interest for local team practice, league, and also tournament play. Options to consider for maximizing facility use and revenues could include all or some combination of: shifting the mix of anticipated fields to include more soccer and fewer baseball fields, broadening the market area to also serve teams from outside the immediate Ridgefield to Kalama area, shifting existing team play from older or substandard facilities to high quality lighted (including synthetic turf) fields, and placing substantial marketing emphasis on attracting tournament play.

Achievable usage fees likely will be higher with soccer than baseball/softball. Fees should be fine tuned with a detailed schedule of tiered rates in advance of facility opening. It can be expected that rates will be adjusted on an as-needed basis in response to realized utilization over the initial years of operational break-in. Also recommended is that more extensive personal contacts be made with leagues and teams in the Ridgefield to Kalama area prior to finalizing design, construction and operating arrangements.

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I. MARKET ANALYSIS INTRODUCTION

The Woodland Rotary Club is partnering with the City of Woodland to plan and fund a multi-use Scott Hill Park and Sports Complex. As part of the project planning process, the Rotary Club has contracted with the economic and development consulting firm E. D. Hovee & Company, LLC to conduct a market analysis for the proposed multi-field facility.

Focused on what are planned as revenue generating baseball/softball and soccer fields, this analysis is aimed to address the competitive environment of comparable facilities locally and regionally, current and prospective sports field demand, and resulting market opportunity.

SPORTS FIELD CONCEPT

In 2011, the City of Woodland purchased approximately 40 acres of land on the top of Scott Hill. This land has been designated for public park and sports field development and use.

The Rotary Club of Woodland is partnering with the City to build the Scott Hill Park and Sports Complex by creating the vision for the park and sports complex, raising funds needed to build the park, overseeing park construction, and planning for sustainable operations and management of the park. Pursuant to an agreement between the City and Rotary Club, the City will retain land ownership and be responsible for maintenance. The Rotary will be responsible for fundraising and park development.

Facility Features

As depicted by the concept plan on the following page, sports fields are planned to include:

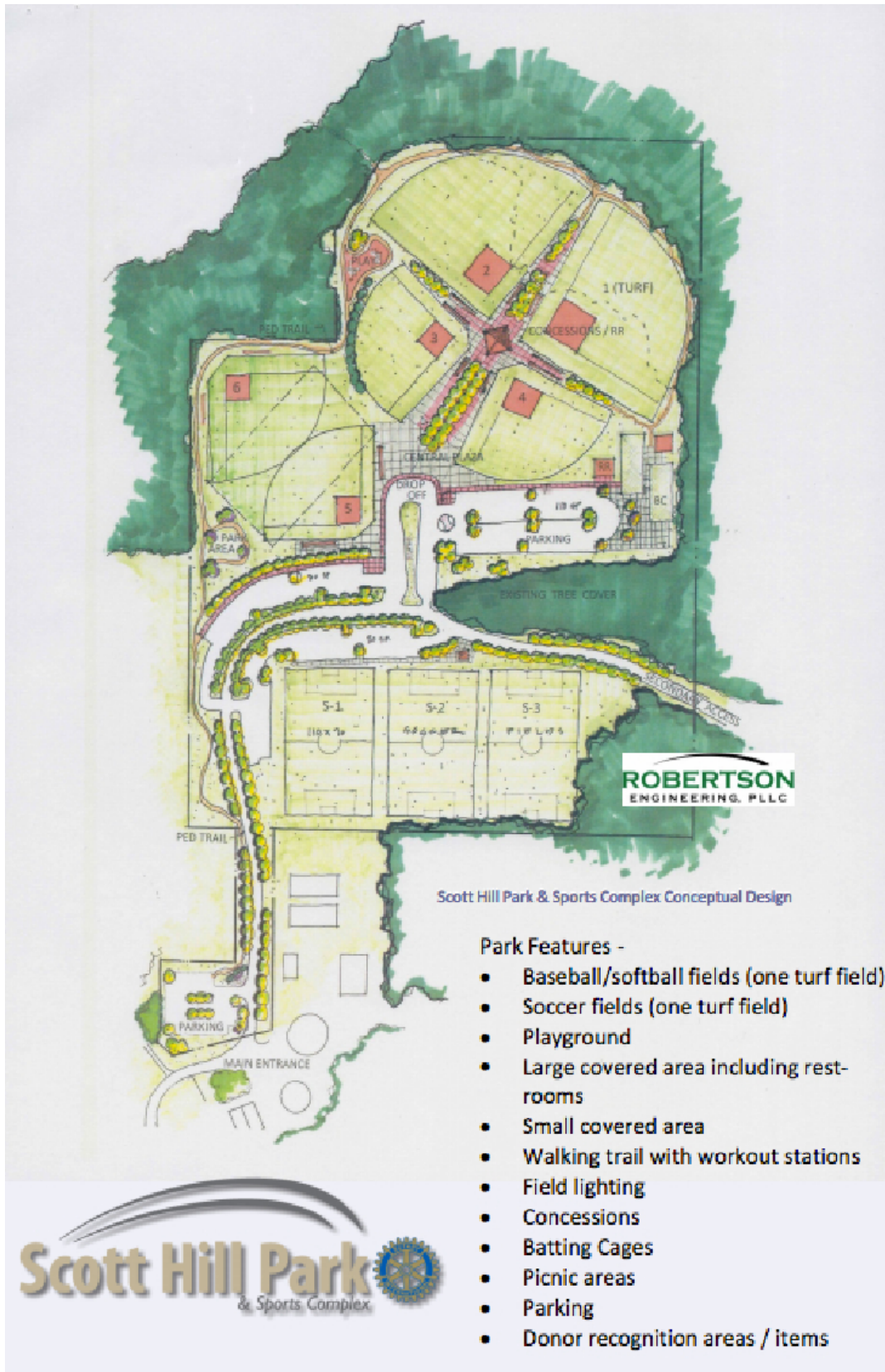
- 6 baseball and softball fields (with dugouts and one synthetic turf field)*
- 3 dedicated soccer fields (also with one turf field) with capacity for up to 6 fields*
- Batting cages, bleachers, concessions stand, and announcer booth
- Approximately 45 parking spaces per sports field plus entry area parking

* *Note:* The sports complex is designed for soccer field set-up in the outfields of the two larger baseball fields and one of the smaller multi-use fields. This offers capacity for up to six soccer fields (including two with artificial turf) as needed for league or tournament play.

The sports complex is intended to provide fully lighted, tournament-quality playing fields for youth and adult baseball, softball and soccer with spectator seating – also suitable for ancillary uses of pee-wee football, lacrosse, rugby and other field events. All together, the sports fields will comprise 16.1 acres of turf and grass multi-use athletic fields with netting and fencing.

The sports field complex will be set within a public park area that also includes an interactive ADA playground, picnic areas, large covered area including restrooms, small covered area, walking trail with workout stations – together with opportunities for donor recognition.

Sports Field Concept Plan



Design Considerations

As outlined by a 2013 *Scott Hill Park & Sports Complex Project Fact Sheet*, key project design considerations are noted as follows:

- Primary access is from Scott Hill Road based on proximity to existing roads and traffic from the I-5 freeway. Entry views will generally be looking north.
- Views exist to Mt. Adams (northeast) and the Columbia River (north-northwest).
- The site has previously been mass graded, with an estimated 300,000 cubic yards of material removed, so that much of the site is generally flat and in a "bowl" condition.
- Site design for approximately 45 parking spaces per sports field, with the understanding that actual need, usability, and efficiency of the parking lots will rely greatly on the coordinated scheduling of games and activities, as is typical for a sports complex.
- Maintain a focus on the "park" features so that they can have their own identity, feel well integrated, and not be lost within the land-intensive "sports complex" components of the project.
- Trails and pathways run throughout the park. Provide parking at the entry for those who only want to use the trails (which can also be used for overflow sports field parking).
- Accommodate secondary access east to Meriwether.
- Utilize "inside-out" infrastructure with access roads and parking on the "inside" and fields on the "outside". This approach allows infrastructure costs to be minimized, centralized parking can be shared, and the large existing treed area in the center of the site can be preserved.
- Due to Scott Hill's elevated location, this site also provides opportunity as an emergency gathering location in the event of future flooding elsewhere in Woodland.

SCOPE OF MARKET ANALYSIS

This sports field market analysis is aimed to address three primary questions:

- What existing facilities are comparable and/or competitive with what is being planned for the Scott Hill sports fields?
- What is the current and prospective demand for sports fields?
- What are the market opportunities that a Scott Hill sports field complex might most effectively serve?

In conducting this analysis, E. D. Hovee has reviewed background material provided by the Woodland Rotary Club – including planning and design concepts prepared by Robertson Engineering, PLLC and financial pro forma projections prepared by the Rotary for the planned facility. Also reviewed has been information from existing operators of public and private sports field facilities in Cowlitz and Clark Counties – including the most recent park and sports fields master planning documents as available for the two counties and multiple city jurisdictions.

While providing information that may be useful for financial planning, this market analysis is not intended to provide financial due diligence and/or assess feasibility of capital funding or ongoing operating sustainability. The market report also is not intended to supplant updates to public sports field planning – especially as is underway for many Clark County jurisdictions in conjunction with 2016 Comprehensive Plans in compliance with the state-adopted Growth Management Act (GMA).¹

REPORT ORGANIZATION

The remainder of this market analysis report is organized to cover the following topics:

Current Sports Field Inventory
Sports Field Demand
Scott Hill Market Opportunity

A preliminary draft of this market report was reviewed with the Woodland Rotary Club for accuracy and completeness of the analysis. Revisions have been made with this final report to address questions and comments received.

Four appendices are included with this market analysis report. *Appendix A* briefly profiles the economic and development consulting firm E. D. Hovee & Company, LLC as market analysis preparer. *Appendix B* contains a detailed listing of identified comparable sports field facilities in Cowlitz and Clark Counties. *Appendix C* summarizes results of league contacts. *Appendix D* provides results of rate comparisons for potentially comparable or competitive facilities.

II. CURRENT SPORTS FIELD INVENTORY

This analysis begins by reviewing what is known regarding the current inventory of baseball/soccer, soccer and related sports fields within the market areas of facilities that might be regarded as complementary and/or competitive with the Scotts Hill Park and Sports Complex as currently planned. Covered in this section is discussion of relevant market geographies, followed by an inventory of all fields, and then by an inventory of dedicated league fields.

MARKET AREA GEOGRAPHIES

Three sets of market area geographies are of potential relevance to evaluation of prospective Scotts Hill sports field utilization:

- **Primary market area** – the geography from which Scotts Hill can be expected to draw teams for regular practice, as well as much of league play. For purposes of this analysis, the market geography is defined as being centered on Woodland, but extending north to Kalama and south to Ridgefield – with an estimated population of 30,700 residents as of 2015.
- **Secondary market area** – from which non-local teams may be drawn on a relatively regular basis for league play, as well as tournaments. This is defined as comprising all of Cowlitz and Clark Counties – with an estimated 2015 combined two-county population of about 554,000 residents.
- **Tertiary market area** – a somewhat more amorphous geography from which teams might be drawn for major tournament play. This could include tournaments which draw participants, in some instances, from throughout the Portland-Vancouver metropolitan area. For other tournaments, the draw could be much wider – extending to all of western Washington, the entire state or, less often, to a multi-state region.

Primary Woodland Market Area



Sources: Greater Clark Parks District,
E. D. Hovee & Company, LLC. Preliminary 2015 population
estimates are per Claritas.

Advantages of a Woodland tournament location include direct I-5 access, small community setting adjacent to a major metro area, and recreation attractions as a complement to tournament activity.

ALL FIELDS INVENTORY

The focus of this analysis and associated fields inventory is on the primary and secondary market areas. The inventory of Clark County fields is facilitated by an update compiled by the Greater Clark Parks District – covering all public and private fields in both the urban and rural areas of the county.

For Cowlitz County, we have not discovered a comparable one-source inventory, but rather have compiled information from individual jurisdictions together with review of league web sites. Consequently, the Cowlitz portion of the inventory may be less fully comprehensive than the information available for Clark County.

The Woodland market area includes a mix of fields within southern Cowlitz County (Kalama and Woodland) and in northern Clark County (Ridgefield). Summary results are depicted below:

- **Cowlitz and Clark Counties** have a total of 740 identified sports fields. This includes 258 baseball/softball fields, 279 soccer fields and 203 multi-use fields (as with football fields and park areas that may be available for formal or informal baseball/softball or soccer use). Cowlitz has more baseball/softball fields per 1,000 residents, while Clark County has more soccer fields.
- The **Woodland primary market** area comprises an estimated 43 sports fields – at school sites, community parks (in Ridgefield and La Center), and Little League fields (in Kalama and Woodland).

There are 1.34 sports fields for every 1,000 residents in Cowlitz and Clark Counties. The Woodland area appears to be somewhat better served, at 1.40 fields per 1,000 residents. These local ratios are well above a national standard of just 0.50 sports fields per 2,000 residents (as cited by the 2010 *Cowlitz County Comprehensive Parks Plan Update*).²

All Fields Inventory

| Sports Field Type & Location | # of Fields | Fields/1,000 Population |
|---------------------------------------|-------------|-------------------------|
| Baseball & Softball | | |
| Cowlitz County | 85 | 0.82 |
| Clark County | 173 | 0.38 |
| 2-County Total | 258 | 0.47 |
| Woodland Area | 21 | 0.68 |
| Soccer | | |
| Cowlitz County | 43 | 0.42 |
| Clark County | 236 | 0.52 |
| 2-County Total | 279 | 0.50 |
| Woodland Area | 18 | 0.59 |
| Multi-Use (including Football) | | |
| Cowlitz County | 4 | 0.04 |
| Clark County | 199 | 0.44 |
| 2-County Total | 203 | 0.37 |
| Woodland Area | 4 | 0.13 |
| All Fields Total | | |
| Cowlitz County | 132 | 1.27 |
| Clark County | 608 | 1.35 |
| 2-County Total | 740 | 1.34 |
| Woodland Area | 43 | 1.40 |

Sources: Greater Clark Parks District, E. D. Hovee & Company, LLC. Based on preliminary 2015 population per Claritas. See Appendix B for complete inventory.

LEAGUE DEDICATED FIELDS

Of the total 740 sports fields estimated for Cowlitz and Clark Counties, 278 facilities (or 38% of the total) are indicated as being dedicated for league play. For the Woodland area, 17 of 43 fields (40%) are dedicated for league use.

As with the all fields inventory, a greater degree of reliability is attached to the Clark County portion – as the Greater Clark Parks District listing includes explicit identification of facilities dedicated for league use. With Cowlitz County facilities, less information is available regarding which facilities are dedicated for league play versus available on a multi-use basis. Determinations were made based on information as was most readily available.

Additional observations regarding the league dedicated fields inventory are noted as follows:

- When viewed on a **countywide level** from the standpoint of fields per 1,000 residents, Cowlitz County appears to have a greater level of service for dedicated baseball and softball fields than does Clark County. Conversely Clark County is better served with dedicated fields for soccer than Cowlitz County.
- The **Woodland area** has a greater representation of dedicated soccer fields than either Clark or Cowlitz Counties. With respect to baseball/softball, the Woodland area also appears better served than Clark County but not as well served as the rest of Cowlitz County.

League Dedicated Fields Inventory

| Sports Field Type & Location | # of Fields | Fields/1,000 Population |
|--------------------------------|-------------|-------------------------|
| Baseball & Softball | | |
| Cowlitz County | 43 | 0.42 |
| Clark County | 109 | 0.24 |
| 2-County Total | 152 | 0.27 |
| Woodland Area | 9 | 0.29 |
| Soccer | | |
| Cowlitz County | 19 | 0.18 |
| Clark County | 107 | 0.24 |
| 2-County Total | 126 | 0.23 |
| Woodland Area | 8 | 0.26 |

Sources: Greater Clark Parks District, E. D. Hovee & Company, LLC. Based on preliminary 2015 population estimates per Claritas.

IMPLICATIONS FOR SCOTT HILL PARK & SPORTS COMPLEX

To the extent that existing facilities reasonably accommodate existing demand, it does not appear that the Woodland market area is currently underserved relative to all of Cowlitz or Clark County. This suggests two potential means of achieving effective use for a new facility:

- Ability to shift existing league play from older/inconvenient facilities (which may be an issue for some private little league facilities, as well as older soccer fields) and/or draw league use for teams extending beyond the immediate Kalama to Ridgefield area.³
- Focus on serving net new demand associated with Woodland area population growth, as well as current needs (a topic to which this market analysis now turns).

III. SPORTS FIELD DEMAND

Sports field demand in Cowlitz and Clark Counties – and more specifically for the Woodland area – can be considered from two perspectives:

- What is the need for added sports fields **today** – in terms of the number and quality of facilities available.
- What reasonably can be anticipated as the demand for additional sports fields in the **future** – whether in response to overall population growth or other factors that may affect player and league interests.

CURRENT DEMAND

Discussion of current demand begins by addressing the overall question of whether the existing demand for sports fields is in balance with the available inventory of sports fields. This is followed by added considerations related more specifically to what can be gathered regarding Woodland area interests and then competitive use fees.

Supply / Demand Balance?

Based on the data available, it might be assumed that sports field demand is roughly in balance with available supply – both in Cowlitz and Clark Counties, as well as in the Woodland area. This assumption might be supported by the following factors:

- On a per capita basis, sports field usage appears to be relatively strong by comparison with national experience and also based on a review of other jurisdictions in the state of Washington.
- As less than 60% of all identified baseball/softball fields and 45% of soccer fields are currently in league use, there appears to be added capacity for conversion of at least some added community and/or school facilities to dedicated league use, if warranted by demand – to the extent that such conversion would be consistent with facility plans or policies for publicly owned and operated field facilities.⁴

However, these observations may be countered with recognition that: a) not all school and community facilities realistically could be transitioned to primarily league play; and b) not all facilities – including some used by leagues currently – are viewed as being in prime condition, but have been utilized due to lack of more suitable alternatives.

It is also possible that lack of quality fields may be limiting league or tournament play below what could be realized if new baseball/softball and/or soccer facilities were added. In effect, there may be as yet unrealized (or latent) demand that could readily materialize – as with new teams, leagues and/or regional tournaments – if new state-of-the art facilities were to come on-line. With a more suitable overall inventory, there also may be shifting of demand to facilities viewed as being of better quality, more convenient, and/or cost-competitive.

Obtaining fields with synthetic turf and lighting is a priority for premier teams and for improved scheduling, including tournament opportunities. A concern with some of the older and shared use sports fields – both public and privately owned facilities – is that they are not viewed as providing the quality of competitive sports fields desired.

To better gauge the existing balance of demand and supply, additional testing has been conducted in two ways – contacting leagues that might most conveniently be served from this location and assessing comparative rate structures.

Woodland Area League & Team Interests

As is further detailed by Appendix C to this report, contacts with baseball and soccer league representatives active in the Woodland area indicate strong support for the provision of additional facilities in the Woodland area. This appears to be for three primary reasons:

- Existing fields are in short supply and arrangements are not satisfactory. Locations now being used extend across a wide geographic area – including use of facilities south of the Columbia River in Oregon.
- Lack of high quality fields available at reasonable prices to teams is in short supply.
- There is strong interest expressed in having more fields which are lit and more synthetic turf fields available to be used throughout winter months.

Comparative Tournament Facilities & Rates

The preliminary financial pro forma prepared by the Woodland Rotary Club for the Scott Hill complex assumes average rates of \$70 and \$65 per hour for baseball/softball and soccer fields, respectively. These rates apply to synthetic and natural turf fields with multi-purpose fields (either soccer or baseball) charged at the \$65 rate. Our understanding is that this rate schedule was based on comparison of rates with other facilities primarily in Clark County and at Delta Park in Portland.

To augment this analysis, E. D. Hovee has compiled current use fee data for a total of 10 sports complexes located along the I-5 corridor from Tukwila, Washington (in the Seattle-Tacoma metro area) south to Portland, Oregon. Five of the sports complexes profiled have both baseball/softball and soccer fields, and the remaining five accommodate soccer only. All of the complexes profiled are used for tournament, as well as local, play.

Detailed facility-by-facility results of this rate comparison are provided with Appendix D to this report. What follows are summary observations from this analysis:

- Variables which seem to influence rates are the sport the field is made for, turf (synthetic or grass), and lights. Soccer fields are often rented out at a higher hourly rate than baseball/softball fields. This seems to be, in part, due to the higher proportion of synthetic soccer fields. Only one of the 10 comparable sports complexes has a synthetic

infield for baseball/softball, while seven of the 10 comparables have synthetic fields for soccer.

- The benefits of synthetic fields include minimal maintenance and the ability to use them year-round, in all weather, and for extended periods of time without downtime for recovery. However, the initial expense of purchase and installation is higher than for natural surfaces, approximately \$9 per square foot according to one source.⁵ The current industry standard warranty on a synthetic field is eight years; depending on durability, maintenance and use, synthetic fields may last five or more years beyond the warranty.
- Consequently, the full spectrum of lifecycle cost – installation, maintenance and replacement – is now being wrapped into the formula for rental rates. One effect is that many of the comparable sports complexes profiled charge the same rate for youth and adult users. Portland Parks & Recreation (which operates the sports complexes at Delta Park) is currently in a process to incrementally raise the youth rental rates for synthetic fields to equate the adult rates within a two-year timeframe. When fully implemented, the youth rental rates for synthetic soccer fields will have increased from \$20 to \$70 per hour.
- Rental rates for all synthetic fields (predominantly soccer with one baseball/softball field) at the comparable sports complexes range widely from \$15-\$130 per hour, averaging \$58 per hour. Rates for comparable grass soccer fields range from \$12-\$81 per hour, for an average \$34 per hour. Grass fields for baseball and softball rent for \$12-\$45 per hour and average \$30 per hour.
- Rental rates tend to be set differentially for non-profit versus private users or for off-peak versus peak usage times. Extra fees also may be charged for non-resident users and/or for application fees, deposits, and field preparation and maintenance.
- If lights are available, rental rates specific to lighting are typically included as an additional fee, ranging from \$10-\$50 per hour and averaging \$21 per hour. For example, lights at The Regional Athletic Complex in Tukwila are included in the field hourly rental rate, where available. By comparison, Luke Jensen Sports Park charges \$10 per hour, while Battle Ground High School's stadium charges a flat fee of \$25 for lights.

In summary, it would appear that the soccer rates anticipated appear to be roughly in line with what the market could be expected to support for fields at Scott Hill. However, baseball and softball rates anticipated with the pro forma are on the high side of what the market likely will support – especially for local practice and league play.

Also noted is that facilities in Woodland will need to be sensitive to rates in the Longview/Kelso area – which tend to be at the lower end of the competitive rate spectrum. As other multi-field sports complexes are finding, it can be anticipated that Scott Hill will need to develop a fairly sophisticated rate schedule – varying rates by type of use and amenities offered and adjusted in the early years of operation to result in user demand.

FUTURE DEMAND

While there may be opportunities to shift existing demand to a new, high quality sports field complex in Woodland, an overall conclusion of this analysis is that the more *sure bet* for Scott Hill is to look to future demand resulting from area population growth.

Forecast Population Growth

With economic recovery from the Great Recession of the last decade, population growth from 2010-15 has been at a somewhat slower pace than in the past. Population gains were very limited in the early part of this decade, picking up some in the last couple of years. Looking forward:

- **Cowlitz County** population growth is expected to increase over the next 5-10 years, but remain below rates of population growth in adjoining Clark County.
- **Clark County** population growth likely will be maintained at overall rates not appreciably different than what has been experienced in the first half of this decade.
- **Woodland area** population (for the area extending from Ridgefield to Kalama) growth rates are expected to pick-up – with a net population gain of about 3,000 residents over the next 10 years indicated by current population projections.

Population Trend & Forecast (2010-25)

| Geography | Actual / Forecast Year | | | | % Change | | |
|----------------|------------------------|---------|---------|---------|----------|-------|-------|
| | 2010 | 2015 | 2020 | 2025 | 10-15 | 15-20 | 20-25 |
| Cowlitz County | 102,400 | 103,600 | 106,200 | 111,700 | 1.2% | 2.5% | 5.2% |
| Clark County | 425,400 | 450,300 | 476,300 | 508,100 | 5.9% | 5.8% | 6.7% |
| 2-County Total | 527,800 | 553,900 | 582,500 | 619,800 | 4.9% | 5.2% | 6.4% |
| Woodland Area | 29,700 | 30,700 | 32,000 | 33,700 | 3.4% | 4.2% | 5.3% |

Sources: U.S. Census, Claritas, and State of Washington Office and Financial Management (OFM).

The Woodland area population growth projection may well prove to be conservative – if small communities of Ridgefield, La Center, Woodland and/or Kalama again prove to be attractive for families seeking a non-urban lifestyle. The signs of a possible uptick are most readily apparent for Ridgefield – at the southern edge of the market geography readily served by the proposed Scott Hill Park and Sports Complex.

With a 2016 Comprehensive Plan update process now underway, Clark County appears prepared to assign an added growth increment to Ridgefield – now one of the fastest growth communities in Washington state. Predicated on the level of residential development that may materialize in Ridgefield with spillover to other communities, realization of an alternative *high growth* scenario for the Woodland area could result in as many as 12,000 additional residents by 2025.⁶

Added League Sports Field Demand

Based on the population forecasts noted, it is possible to assess the need for added sports fields for the two-county region and, more specifically, for the Woodland area. Key assumptions of this forecast process are noted as follows:

- The focus is on revenue generating sports fields for league use; not included is a projection of the need for other general community sports field uses.
- Based on previous sports field analysis, rates of sports field demand are anticipated to be about twice as high in areas of population growth as in more established, mature areas of Cowlitz and Clark County.
- For the Woodland area, results of two alternative population growth scenarios are provided – a baseline (or low growth) forecast predicated on 3,000 net new residents and a high growth scenario assuming potential for up to as many as 12,000 added residents.

Added League Fields Supported with Population Growth (2015-25)

| Sports Field Type & Location | # of Fields | | Added Population | | Comments |
|--------------------------------|-------------|------|------------------|--------|--|
| | Low | High | | | |
| Baseball & Softball | | | | | |
| Cowlitz County | 7 | | 8,100 | | Assuming field demand for growth areas @ twice the rate of mature population areas |
| Clark County | 28 | | 57,800 | | |
| 2-County Total | 36 | | 65,900 | | |
| Woodland Area | 2 | 7 | 3,000 | 12,000 | Serving Ridgefield to Kalama |
| Soccer | | | | | |
| Cowlitz County | 3 | | 8,100 | | Assuming field demand for growth areas @ twice the rate of mature population areas |
| Clark County | 27 | | 57,800 | | |
| 2-County Total | 30 | | 65,900 | | |
| Woodland Area | 2 | 6 | 3,000 | 12,000 | Serving Ridgefield to Kalama |

Source: E. D. Hovee & Company, LLC based on inventory data and population growth projections as noted.

Population growth over the next 10 years is anticipated to support a total of approximately 10 sports fields in Cowlitz County (focused toward baseball/softball) and 55 fields in Clark County (with a roughly even mix of both baseball/softball and soccer facilities). The Clark County forecast need is consistent with estimates of added field need being prepared by the Greater Clark Parks District.

The Woodland area (extending from Kalama to Ridgefield) would support between 4-13 added facilities. As noted, this is a wide range of potential added demand (depending on the rates of market area population growth actually experienced). The greatest potential for a substantial ramp-up of population growth in the next 5-10 years can be expected in the Ridgefield area.

Planned New Inventory

In conjunction with the inventory of existing sports fields, additional inventory information has been obtained regarding possible new facilities. The primary source of this information has been from local jurisdiction parks and recreation planning.

What has been identified to date includes the possibility of five additional soccer and four baseball and soccer fields in Cowlitz County. The Altrusa and Harry Gardner Parks in Longview are each adding a soccer field. Development of Harry Gardner Park involves a longer range plan for a baseball/softball diamond.

Closer to Woodland, the Port of Kalama is underway with construction of three baseball/softball and three soccer/football fields as a \$4.5 million investment on a 24-acre site. In addition to these all-grass fields, the park complex will include a horse arena, tennis and basketball courts, a concession stand, restrooms, and on-site trailer parking.

Kalama will have no artificial turf, so the facility will not be useable year-round. Kalama also dedicates some of their space for a horse arena. However, the combination of the Kalama and Woodland fields may complement each other or work together for larger tournament play.

Proposed facilities in Clark County include identified plans for potentially 18 baseball/softball and 12 soccer fields in Ridgefield, Camas, Washougal, and the Greater Clark Parks District. Not included are added facilities that may be identified for Battle Ground or Vancouver – as Comprehensive Plans are to be updated in 2016.

Taken together, planned projects identified could account for another 39 fields across the two-county area, primarily in Clark County and more oriented to baseball/softball if these plans proceed. Coupled with the 9 fields planned for Scott Hill, the total of 48 fields would account for about 73% of the 66 fields identified as needed for the two-county region by 2025 – leaving room for yet further sports field development to serve anticipated need over the next 10 years.

In addition to Scott Hill and the Port of Kalama, the only other planned development identified for the market area is by the City of Ridgefield. Taken together, the three projects account for as much as an added 14 baseball/softball and 6 soccer fields (or up to 9 on a multi-use basis).

While serving the upper end of the added soccer demand, this could prove to represent more of a baseball/softball addition than needed to serve additional local market demand alone. However, this concern may be offset by means that might include all or some combination of:

- Shifting the mix of anticipated fields to include more soccer and fewer baseball fields.
- Broadening the market area to serve teams from outside the immediate Ridgefield to Kalama area.
- Shifting existing team play from older or substandard facilities to high quality lighted (including synthetic turf) fields.
- Placing substantial emphasis on attracting tournament play.

IV. SCOTT HILL MARKET OPPORTUNITY

From the research conducted for this report, it seems clear that development of a sports field complex at Scott Hill represents a significant opportunity to better serve Woodland recreation needs together with a growing regional opportunity for high quality, year-round sports fields.

Compared to much of the U.S., Cowlitz and Clark Counties generally appear to be well served with baseball/softball and soccer opportunities at present. Available data on sports fields relative to population indicates that this also may be the case at the junction between the two counties – for a primary market area stretching from about Ridgefield to Kalama.

While difficult to quantify, there is also evidence that the sports field play would increase even without population growth – as more and better fields would make it possible for other youth and adults to participate in active outdoor recreation. There likely is latent demand to capture, as expressed by the suggestion of a league representative to “build as many fields as you can.”

Constructing high quality fields offering extended hours and winter use will generate strong interest for local team practice, league, and also tournament play. However, full utilization of the Scott Hill planned sports field complex should not be expected to happen on its own.

Options to consider for maximizing facility use and revenues could include all or some combination of:

- Shifting the mix of anticipated fields to include more soccer and fewer baseball fields – especially to better capture the more rapidly growing Clark County sports demographic.
- Broadening the market area to serve teams from outside the immediate Ridgefield to Kalama area – reaching further north toward Longview/Kelso and/or south into the Vancouver area market based on the reputation of new, state-of-the-art facilities.
- Shifting existing team play from older or substandard facilities to high quality lighted (including synthetic turf) fields – of importance for winter play and as oriented to premium youth and/or adult activity.
- Placing substantial marketing emphasis on attracting tournament play – which for soccer likely could also be enhanced with added multi-use or dedicated fields.

Achievable usage fees likely will be higher with soccer than baseball/softball. Usage fees can be expected to play a significant role as either an incentive or disincentive to full utilization of Scott Hill – especially in the early years of operations. Planned usage fees will need to be fine-tuned with a more detailed schedule of tiered rates in advance of facility opening.

Rates should be expected to be adjusted on an as-needed basis in response to realized utilization over the first several years of operational break-in. Also recommended is that more extensive personal contacts be made with interested leagues active in the Ridgefield to Kalama area prior to finalizing design, construction and operating arrangements.

APPENDIX A. PREPARER PROFILE

This Woodland Sports Field Market Analysis has been prepared by the Vancouver-based economic and development consulting firm E. D. Hovee & Company, LLC. Since 1984, E. D. Hovee has provided market/feasibility reports, economic impact analyses, and strategic business planning services for private, public and non-profit clients – primarily focused in the Pacific Northwest states of Washington and Oregon.

Related project experience is noted as including:

- Preparation in 2003-04 of a Youth Sports Field Needs Assessment together with a site-specific sports park market analysis for Vancouver-Clark Parks & Recreation. This analysis is currently being updated by Vancouver and Clark County as part of the 2016 Comprehensive Plan update process.
- More recent 2010 market and feasibility analysis for proposed expansion and long-term development plans of the Cowlitz County Exposition and Conference Center – including a possible indoor/outdoor sports complex.
- Blue Lake feasibility study and facility improvement concept for Metro’s regional park facility in Troutdale.
- Market/feasibility analysis for potential private athletic facility development in Battle Ground and Washougal.
- Economic impact analysis for the IAAF World Indoor Track and Field Championships and USA National Championships to be hosted in Portland in 2016.
- Market and financial due diligence evaluations for major public event venues including the Clark County Fairgrounds (and amphitheater), Vancouver Hilton Conference Center, Portland Expo Center, Spokane Convention Center expansion, Kittitas Fairgrounds repositioning, and Wenatchee Town Toyota Center strategic marketing.

This market analysis report has been prepared by Eric Hovee (Principal) and Andrea Logue (Research Coordinator).

APPENDIX B. INVENTORY DETAIL

Cowlitz / Clark County Sports Fields Inventory

| Facility | Number of Fields | | | | | Comments |
|--------------------------------------|------------------|----------------|--------------|------------|--------------|---|
| | Total Baseball | Total Softball | Total Soccer | Multi-Use | Total Fields | |
| Scott Hill Sports Complex | 2 | 4 | 3 | | | As proposed |
| Combined Clark / Cowlitz | 153 | 110 | 279 | 203 | 745 | |
| Dedicated for League Use | 98 | 54 | 126 | 1 | 279 | |
| Cowlitz County | 52 | 38 | 43 | 4 | 137 | |
| Dedicated for League Use | 27 | 16 | 19 | - | 62 | |
| Woodland Area | 13 | 8 | 18 | 4 | 43 | |
| Dedicated for League Use | 8 | 1 | 8 | - | 17 | |
| Woodland | 1 | 3 | - | - | 4 | |
| City of Woodland Parks | | | | | - | None identified, 40 acre purchase Scott Hill |
| Woodland Middle/High School | 1 | 3 | | | 4 | |
| Kalama | 1 | 1 | - | 1 | 3 | |
| City of Kelso Parks | | | | | - | No parks with identified sports fields |
| Kalama Middle/High School | 1 | 1 | | 1 | 3 | Multi-use includes football field |
| Kelso | 6 | 5 | 13 | - | 24 | |
| Manasco Park | | | 5 | | 5 | |
| Tam O'Shanter Park | 5 | 3 | 2 | | 10 | 3 girls fast pitch SB, 2 lighted BB fields |
| Kelso High School | 1 | 2 | 3 | | 6 | Kelso High School |
| Other School Facilities | | | 3 | | 3 | 3 football fields at HS + 2 middle schools |
| Longview | 13 | 21 | 22 | 2 | 58 | |
| <i>City of Longview:</i> | | | | | | |
| Archie Anderson Park | 2 | 2 | | | 4 | Central Youth Baseball |
| John Null Park | 4 | | | | 4 | 2 lighted youth baseball fields |
| Roy Morse Park | 4 | 2 | 2 | | 8 | 2 lighted softball fields, 2 soccer w/perm goals |
| 7th Avenue Park | | 4 | 8 | | 12 | Expanded to Kaiser Permanente by soccer assn |
| Victoria Freeman Park | | 1 | 1 | | 2 | Informal soccer field |
| <i>Longview School District</i> | | | | | | |
| Elementary / Middle | | 8 | 5 | | 13 | Count is # of schools, not fields, may include BB |
| LCC / High School | 3 | 4 | 6 | 2 | 15 | LCC/Mark Morris & RA Long HS w/football fields |
| Castle Rock | 5 | 5 | 5 | 1 | 16 | |
| North County Sports Complex | 2 | 3 | 1 | | 6 | Potential for added soccer field, phased project |
| Castle Rock High School | 2 | 2 | 1 | 1 | 6 | Multi-use includes football field |
| Middle/Elementary Schools | 1 | | 3 | | 4 | 2 standard soccer fields |
| Cowlitz County | 20 | 3 | 3 | - | 26 | |
| Riverside Park (Lexington) | 3 | | 3 | | 6 | Youth baseball |
| Private Fields (countywide) | 6 | - | - | - | 6 | |
| Kalama Little League | 1 | | | | 1 | |
| Lewis River Little League (Woodland) | 5 | | | | 5 | 4 little leagues; also softball, no adult fields |
| Proposed Cowlitz Facilities | 4 | - | 5 | - | 9 | |
| Altrusa Park Longview | | | 1 | | 1 | Village at Mt. Solo site |
| Harry Gardner Park | 1 | | 1 | | 2 | Long range plan for baseball/softball diamond |
| Port of Kalama | 3 | | 3 | | | Combo BB/softball & soccer/football - all grass |

| Facility | Number of Fields | | | | | Comments |
|--|------------------|----------------|--------------|------------|--------------|--|
| | Total Baseball | Total Softball | Total Soccer | Multi-Use | Total Fields | |
| Clark County | 101 | 72 | 236 | 199 | 608 | |
| Dedicated for League Use | 71 | 38 | 107 | 1 | 217 | |
| Vancouver | 8 | 11 | 6 | 4 | 29 | 40 sites w/28 specific use & 12 multi-use |
| Bagley Park | - | 3 | - | | 3 | Adult softball |
| Burnt Bridge Creek Fields | - | - | 2 | | 2 | Adult soccer |
| Burton Stormwater Drainage Field | - | - | 1 | | 1 | |
| David Douglas Community Park | 5 | 5 | - | | 10 | 1/4 adult/youth BB, 4/1 adult/youth softball |
| Fisher Basin Community Park | - | - | - | 2 | 2 | Multiuse field |
| Leroy Haagen Community Park | - | - | 2 | | 2 | 1/1 adult/youth soccer |
| Leverich Park | - | - | - | 1 | 1 | |
| Marshall Community Park | - | 1 | 1 | | 2 | Adult softball, youth soccer |
| Memory/Mill Plain Park | 3 | 2 | - | 1 | 6 | 1/2 adult/youth BB, 1/1 adult/youth soccer |
| Greater Clark Parks District | 13 | 11 | 17 | 4 | 45 | Completed 26 of 41 youth sports fields |
| Felida Park | - | - | 3 | | 3 | 2 full size and 1 mini-mod field |
| Harmony Sports Complex | 6 | 3 | 9 | | 18 | Leased to the Harmony Sports Association, grass |
| Hockinson Community Park | 4 | 2 | 4 | | 10 | Little League fields also used for t-ball/soccer |
| Lewisville Park | 1 | - | - | | 1 | |
| Luke Jensen Sports Park | 2 | - | - | 4 | 6 | Completed 2012, multi-use are synthetic turf |
| Salmon Creek Park | - | 6 | - | | 6 | |
| Wy'East Park | - | - | 1 | | 1 | |
| Privately Owned (CC maintains) | 5 | - | 5 | - | 10 | Partially owned or maintained by Clark County |
| All Saints Episcopal Church Field | - | - | 1 | | 1 | |
| HB Fuller Park | 5 | - | 4 | | 9 | |
| Parks w/Sports Field Amenities | - | - | 1 | 11 | 12 | |
| 12 Urban Park Facilities | - | - | 1 | 11 | | 11 in Vancouver, 1 Clark County |
| Community Fields (other cities) | 2 | - | 7 | 6 | 15 | |
| Crown Park (Camas) | 1 | | | 1 | 2 | Baseball diamond |
| Dorothy Fox Park (Camas) | - | - | 1 | | 1 | Not in Clark County inventory, assume youth |
| Fairgrounds Park (Battleground) | - | - | - | 3 | 3 | |
| Grass Valley Park (Camas) | 1 | - | - | | 1 | Not in Clark County inventory, assume youth |
| Hamlík Park (Washougal) | - | - | 1 | | 1 | |
| Hathaway Park (Washougal) | - | - | 2 | 1 | 3 | |
| LaCenter Community Park | - | - | 1 | | 1 | |
| Louis Bloch Park (Camas) | 1 | - | - | | 1 | Adult baseball, bleachers, concessions |
| Prune Hill Sports Park (Camas) | | | 1 | | 1 | Proposed youth baseball with bleachers |
| Yacolt Park (Yacolt) | - | - | 1 | 1 | 2 | |
| League Dedicated (other cities) | 15 | 5 | 6 | - | 26 | |
| Abrams Park (Ridgefield) | 2 | 1 | 2 | | 5 | |
| Angelo Park (Washougal) | - | - | 1 | | 1 | |
| Bates Field (Washougal) | 1 | - | - | | 1 | |
| Fairgrounds Park (Battle Ground) | 2 | 1 | - | | 3 | |
| Fallen Leaf Field (Camas) | - | 1 | - | | 1 | With bleachers |
| Forest Home Park (Camas) | 2 | - | - | | 2 | |
| Goot Park (Camas) | 1 | - | - | | 1 | Adult softball |
| Hamlík Park (Washougal) | 1 | - | - | | 1 | |
| Hathaway Park (Washougal) | 1 | | | | 1 | |
| Ione Park (Camas) | - | - | 2 | | 2 | |
| La Center Community Park | 2 | 1 | - | | 3 | |
| Prune Hill Sports Park (Camas) | - | - | 1 | | 1 | |
| Town Well Park (Yacolt) | 3 | 1 | - | | 4 | |

| Facility | Number of Fields | | | | | Comments |
|---|--|-------------------|-----------------|---------------|-----------------|--|
| | Total Baseball | Total Softball | Total Soccer | Multi- Use | Total Fields | |
| Private Fields (dedicated) | 20 | 10 | 3 | - | 33 | |
| North Clark Little League (Yacolt) | 5 | 1 | - | | 6 | |
| Belisle Fields (Orchards) | 4 | 1 | - | | 5 | |
| Glenwood Little League (Orchards) | 3 | 1 | - | | 4 | |
| Hazel Dell Little League (Salmon Creek) | 2 | - | - | | 2 | |
| Pendleton Woolen Mills (Washougal) | 1 | - | - | | 1 | |
| Prairie Field (Brush Prairie) | - | 6 | - | | 6 | |
| WA School for the Deaf (Vancouver) | - | - | 3 | | 3 | |
| Wineberg Little League (Orchards) | 5 | 1 | - | | 6 | |
| Private Fields (not dedicated) | - | 4 | 2 | 2 | 8 | |
| Brush Prairie Baptist Church (NE 179th) | - | 1 | - | 1 | 2 | Also has football field, shown as multi-use |
| Columbia Academy (Battle Ground) | - | 1 | - | 1 | 2 | Also has football field, shown as multi-use |
| Hewlett Packard (east Vancouver) | - | 1 | - | | 1 | |
| Meadow Glade Elem (Battle Ground) | - | 1 | 1 | | 2 | |
| School Fields (All) | 38 | 31 | 189 | 172 | 430 | Would be 402 without football fields |
| (Dedicated league use) | 13 | 9 | 75 | - | 97 | This figure applied to Clark County total |
| Dedicated League Use | 13 | 9 | 75 | | 97 | Includes no football fields |
| Available | - | - | 8 | 11 | 19 | Multi-use includes football fields |
| Primarily for School Use | 25 | 22 | 106 | 161 | 314 | Multi-use includes football fields |
| Proposed Clark Facilities | 13 | 5 | 12 | 5 | 35 | Based on local jurisdiction park plans |
| Greater Clark Parks District | 6 | 2 | 9 | | 17 | Hockinson 15 fields, Pacific Community 2 fields |
| Camas Lone Street Sports Park | - | - | - | 1 | 1 | Proposed as lighted BB, SF, soccer, football field |
| Proposed Camas Sports Complex | 2 | 3 | 3 | | 8 | Proposed for 4-5 SB/BB & 3+ soccer fields |
| Danielson Fields (Washougal) | | | | 4 | 4 | Potential for 4-gull sized turf grass fields |
| Ridgefield | 5 | | | | 5 | Need for 5 fields identified as of 2006 |
| Battle Ground | Youth fields for baseball, softball, soccer | | | | | High priority with 2009 Rec/Open Space Plan |
| Vancouver | Needs analysis targeted for 2015/Plan update | | | | | |

Sources: Compiled by E. D. Hovee & Company, LLC from Greater Clark Parks District database plus review of local jurisdiction and league web sites. Information is preliminary and subject to revision.

APPENDIX C. LEAGUE CONTACTS

Representatives of leagues active with baseball/softball and soccer from Kalama to north Vancouver were contacted to provide information about the proposed Scott Hill Park and Sports Complex and seek input. With an initial email and subsequent follow-up, limited response was received – but did include league representation for both baseball/softball and soccer. Responses are summarized as follows:

- 1. The City of Woodland and Woodland Rotary are jointly considering the construction and operation of the Scott Hill Park and Sports Complex. If this is built, would your team/league be likely to use the facility? If so, for what purposes and how often?**

Respondents indicated league play 4-7 times per week (per league).

- 2. At what locations is your team/league typically playing now?**

The range of locations being used now includes Portland, Beaverton, North Marion County, Keizer, Vancouver, and all of Clark County.

- 3. Are current field arrangements satisfactory – in terms of availability for practice/games/tournaments, quality of fields, usage fees? Satisfaction with other important features?**

The simple answer appears to be no, the current field arrangements are not satisfactory. There are not enough fields to support the interests of families in SW Washington. Reasons can vary widely between leagues. On one end of the spectrum, facilities like Luke Jensen Sports Park are considered too expensive. The majority of the facilities in the Portland metro area which are lower cost are of fair quality. On the opposite end of the spectrum is cited high demand for synthetic turf fields which are in very short supply, especially for winter and spring soccer.

- 4. What fields and/or related amenities do you think are most important to provide with a Scott Hill Sports Complex?**

Important fields and amenities cited include:

- Adult baseball fields with minimum 320 foot lines and 350 foot center
- Lighting for late night games and practices, of most importance on synthetic turf that would be used in the winter

- 5. What usage fees would be appropriate – for practice, games, and tournaments?**

It has been suggested to use Luke Jensen Sports Park as a guide. Other specified usage fees are \$40 per hour for an average of two hours (approximately a seven inning game).

- 6. In your opinion, would Scott Hill be able to attract tournaments similar to those your team/league participates in?**

The response is an emphatic yes, for teams/leagues that play tournaments.

- 7. Do you have any other suggestions for facility design and operation?**

Other suggestions for facility design and operation are listed as:

- Lights for night games
- Baseball fields with 90 foot bases, 60.5 foot mound, and grass or turf infield
- Focus the funding to “build as many fields as you can” because sports fields are in short supply. Most communities already have playgrounds, covered areas, and jogging trails.

APPENDIX D. RATE COMPARISONS

Shown are rate comparisons for soccer fields (this page) and baseball/softball fields (next page).

Rate Comparison of Sports Complexes with Soccer Fields

| Facility | Location | Youth | | Adult Game | Lights | Comments |
|--|---------------|----------------------|-------------------|---------------|---------|--|
| | | Practice (1/2 field) | Game (full field) | | | |
| Soccer Comparables | | | | | | |
| Delta Park | Portland | | | | | |
| Synthetic incl Strasser | | NA | \$40 | \$70 | \$17 | By 12/2015, Y\$ = A\$ (\$70); Application fee/field = \$9/\$25 (Y/A); Non-Resident Fee + 30%; \$100 Key Deposit may be required for lights |
| East Delta Sports Complex grass (Level 2) | | NA | \$12 | \$30 | \$17 | Application fee/field = \$36/\$100 (Y/A); Non-Resident Fee + 30%; \$100 Key Deposit may be required for lights; Secondary Season Usage Fee + 30% |
| The Regional Athletic Complex | Lacey | | | | | |
| Synthetic | | NA | \$47.25 | \$47.25 | NA | May-Sept no lights; \$350 rental deposit due w/ tournament confirmation; min charge 1.5 hrs, 0.5 increments after |
| Synthetic | | NA | \$68.25 | \$68.25 | incl | May-Sept w/ lights & Oct-Apr w/ or w/o lights; \$350 rental deposit due w/ tournament confirmation; min charge 1.5 hrs, 0.5 increments after |
| Grass | | NA | \$26.25 | \$26.25 | NA | \$350 rental deposit due w/ tournament confirmation; min charge 1.5 hrs, 0.5 increments after |
| Starfire Sports | Tukwila | | | | | |
| Synthetic - Starfire Stadium, adidas Field, Fields 3 & 4 | | \$21.50/\$44 | \$38/\$76 | \$59.50/\$119 | \$29.50 | Rates off-peak/peak; min 1.5 hr; late night rates & hours also avail; peak = Jul-Aug all times, Sep-Jun M-F 5pm-9:30pm & all day S-S; off-peak = Sep-Jun M-F 9am-5pm |
| Synthetic - Field 11 | | NA | \$38/\$87 | \$59.50/\$130 | \$29.50 | Rates off-peak/peak; min 1.5 hr; late night rates & hours also avail; peak = Jul-Aug all times, Sep-Jun M-F 5pm-9:30pm & all day S-S; off-peak = Sep-Jun M-F 9am-5pm |
| Synthetic - MOD Fields 9 & 10 | | NA | \$51.50 | \$81 | \$18 | Min 1.5 hr; late night rates & hours also avail |
| Synthetic - Pavilion Field | | NA | \$33 | \$43.50 | \$18 | |
| Grass - Fields 5-8 | | \$18.50/\$36 | \$29.50/\$59.50 | \$40/\$81 | NA | Rates off-peak/peak; min 1.5 hr; open Apr-Sep, limit two teams/field; peak = Jul-Aug all times, Sep M-F 5pm-9:30pm & all day S-S; off-peak = Apr-Jun M-F 9am-5pm |
| Tam O'Shanter Park (grass) | Kelso | NA | \$25/\$35 | \$25/\$35 | NA | Rates non-profit/private for 4 hrs; non-resident fee of \$25; leagues typically using the fields are charged an annual rate |
| 7th Avenue Park (grass) | Longview | NA | \$32/\$39 | \$32/\$39 | NA | Rates non-profit/private for 4 hrs, rates \$2 less Sep-May; non-resident fee of \$5 |
| Luke Jensen Sports Park | Vancouver | | | | | |
| Synthetic lit | | NA | \$35/\$55 | \$45/\$55 | \$10 | Rates Clark Co/non-Clark Co; tournament all fields \$750/day + \$55/day prep & maintenance |
| Synthetic unlit | | NA | \$15/\$35 | \$25/\$35 | NA | Rates Clark Co/non-Clark Co; tournament all fields \$750/day + \$55/day prep & maintenance |
| Ridgefield High School (synthetic) | Ridgefield | NA | \$60 | | \$13 | |
| Kiggins Bowl (synthetic) | Vancouver | NA | \$50 | \$50 | \$50 | |
| Prairie High School (grass) | Vancouver | NA | \$75 | | incl | |
| Battle Ground High School (synthetic) | Battle Ground | NA | \$100 | | \$25 | Hourly fee; addition of lights flat fee \$25 |

Rate Comparison of Sports Complexes with Baseball / Softball Fields

| Facility | Location | Youth | | Adult Game | Lights | Comments |
|---|-----------|----------------------|-------------------|------------|--------|--|
| | | Practice (1/2 field) | Game (full field) | | | |
| Baseball / Softball Compables | | | | | | |
| Delta Park | Portland | | | | | |
| Owens Sports Complex grass (Level 1) | | NA | \$16.75 | \$40 | \$17 | Application fee/field = \$9/\$25 (y/a); Non-Resident Fee + 30%; \$100 Key Deposit may be required for lights; Secondary Season Usage Fee + 30% |
| East Delta Sports Complex grass (Level 2) | | NA | \$12 | \$30 | \$17 | Application fee/field = \$36/\$100 (y/a); Non-Resident Fee + 30%; \$100 Key Deposit may be required for lights; Secondary Season Usage Fee + 30% |
| The Regional Athletic Complex | Lacey | | | | | |
| Synthetic infield | | NA | \$26.25 | \$26.25 | incl | \$350 rental deposit due w/ tournament confirmation; min charge 1.5 hrs, after 0.5 increments |
| Tam O'Shanter Park | Kelso | NA | \$25/\$35 | \$25/\$35 | NA | Rates non-profit/private for 4 hrs; leagues typically using the fields are charged an annual rate |
| 7th Avenue Park | Longview | NA | \$32/\$39 | \$32/\$39 | NA | Rates non-profit/private for 4 hrs, rates \$2 less Sep-May; non-resident fee of \$5 |
| Luke Jensen Sports Park (grass) | Vancouver | NA | \$25/\$45 | \$35/\$45 | \$10 | Rates Clark Co/non-Clark Co, same for lit & unlit fields; tournament all fields \$750/day + \$55/day prep & maintenance |

Source: Compiled by E. D. Hovee & Company, LLC from web sites.
Fields are selected based on availability for tournament as well as local and league play.

ENDNOTES

- ¹ Information for this market analysis report has been obtained from sources generally deemed to be reliable. However, the accuracy of information obtained is not guaranteed and is subject to change. The observations and findings in this report are those of the authors and should not be construed as representing the opinion of any other party prior to express approval, whether in whole or part.
- ² The September 2010 *Cowlitz County Comprehensive Park Plan Update* cites a national standard by the National Recreation & Parks Association (NRPA) as 1 per 5,000 population for baseball fields (or 0.20 fields per 1,000 residents). A similar 0.2 per 1,000 residents ratio applies to softball fields and 0.1 fields per 1,000 residents for soccer. This equates to a total standard of 0.50 fields per 1,000 residents for baseball/softball and soccer fields combined. Compared to actual use in Cowlitz and Clark Counties, the NRPA standard cited appears particularly low for soccer.

Cowlitz/Clark and Woodland area field counts also appear to be relatively strong compared to other comparables in Washington state – which covered both dedicated and multi-use fields. A 2007 study of 21 comparables found that baseball/softball fields were provided at rates within a mean range of 0.20-0.50 fields per 1,000 residents. The only cities above a 0.50 ratio were Ellensburg, Gig Harbor and Moses Lake (topping out at 1.05), as these cities provide centrally located fields used on a larger regional basis both by regional residents and visitor-oriented tournaments. At 0.38 fields per 1,000 residents, Clark County falls toward the upper end of the mean range; at 0.82, Cowlitz has a rate of fields that lies above the mean range (below only Moses Lake in the 21 city survey).

For soccer, the mean statewide range of 0.24-0.38 fields per 1,000 residents (including multi-purpose fields). Both Cowlitz and Clark County appear to exceed this mean range at 0.42 and 0.52 fields, respectively. Of 21 statewide comparables, only Mercer Island exceeded the Clark County average at 0.50 fields per 1,000 residents. The sample did not include cities such as Tukwila and Lacey, which have major regional, tournament quality facilities considered elsewhere in this report. The comparables analysis is from an *Athletic Field Analysis* prepared by Beckwith Consulting Group for the City of Mercer Island, October 2007.
- ³ While providing five fields, the Lewis River Little League complex situated near the Scott Hill site is described by some as relatively small, and safety is a concern with nearby traffic. The Kalama Little League field is a single field offering little flexibility for added play. With soccer, the only identified non-school site is two fields at Abrams Park in Ridgefield. While in an attractive setting, the fields do not offer other amenities as might be associated with a larger soccer field complex – including synthetic turf fields and lighting.
- ⁴ As an example, the Greater Clark Parks District inventory identifies 16 school-owned soccer fields as available, i.e., not committed to league or exclusive school use.
- ⁵ From *FieldTurf* at <http://www.fieldturf.com/de/artificial-turf/faq>.
- ⁶ Additional housing demand may be associated with the proposed Cowlitz Casino at La Center. If approved, it is not likely that significant residential impetus would occur before the latter part of the 2015-25 forecast period.