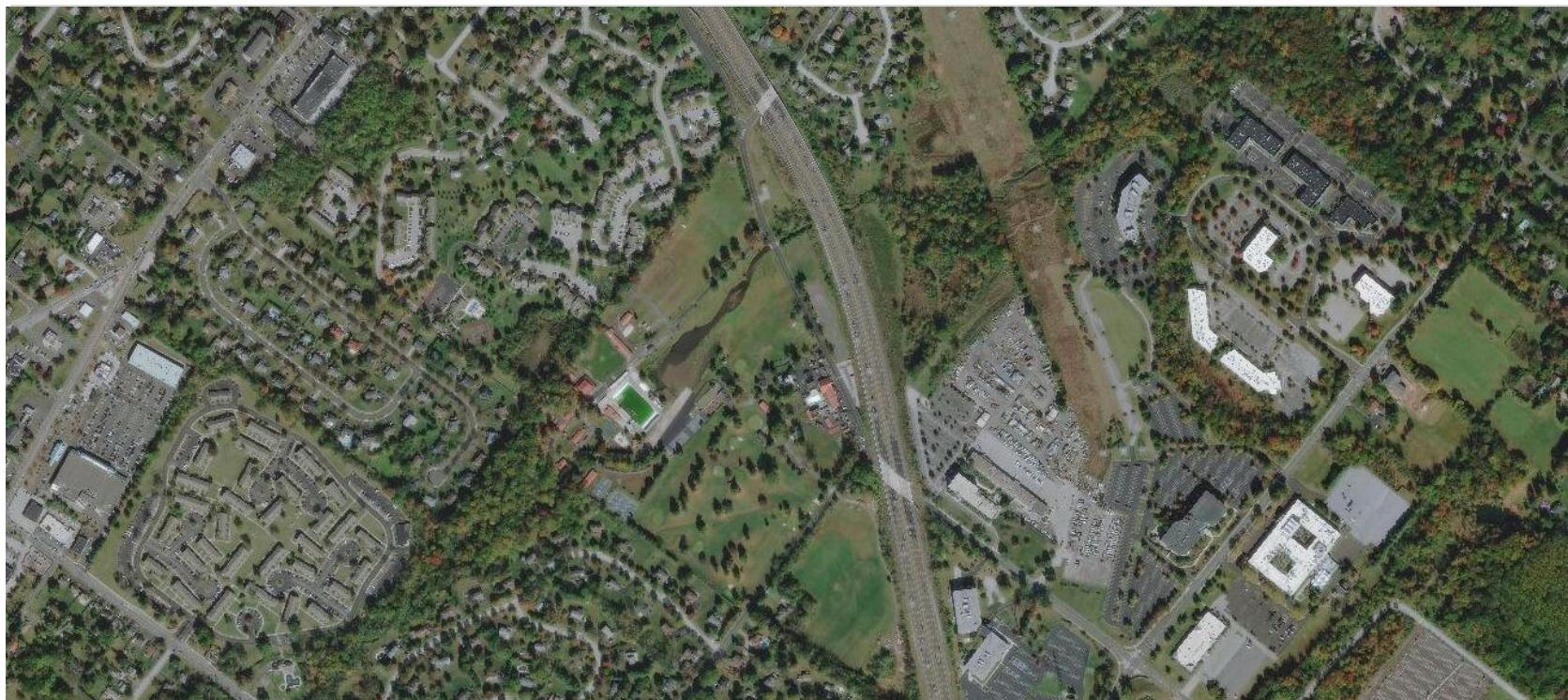




Mermaid Lake Master Plan

January 27, 2021



ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™

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EXECUTIVE SUMMARY

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



Background: Park History

Over the years, the 63.5-acre Mermaid Lake site located on Jolly Road in Whitpain Township has had a longstanding history with recreation. It has served as a nine-hole golf course, a swim club, an event facility, and a summer day camp. In the 1930s, a dam was constructed on the property's creek to create a pond for a swim club, and a swimming pool was later built in the 1960s. The day camp was established in the early 1990s, with waterslides and playgrounds added over the years. After Mermaid Lake closed for business in 2019, Metropolitan Development Group (MDG) acquired the property from a private owner and proposed a by-right plan to develop 53 single-family homes. After staunch community opposition, the Township purchased the property from MDG in August 2020 for \$8.177 million with plans to permanently preserve the property as open space. Whitpain Township opened the property for limited use as a park in October 2020 and is currently seeking public input to help create a vision and Master Plan for the park.



Background: Park Vision

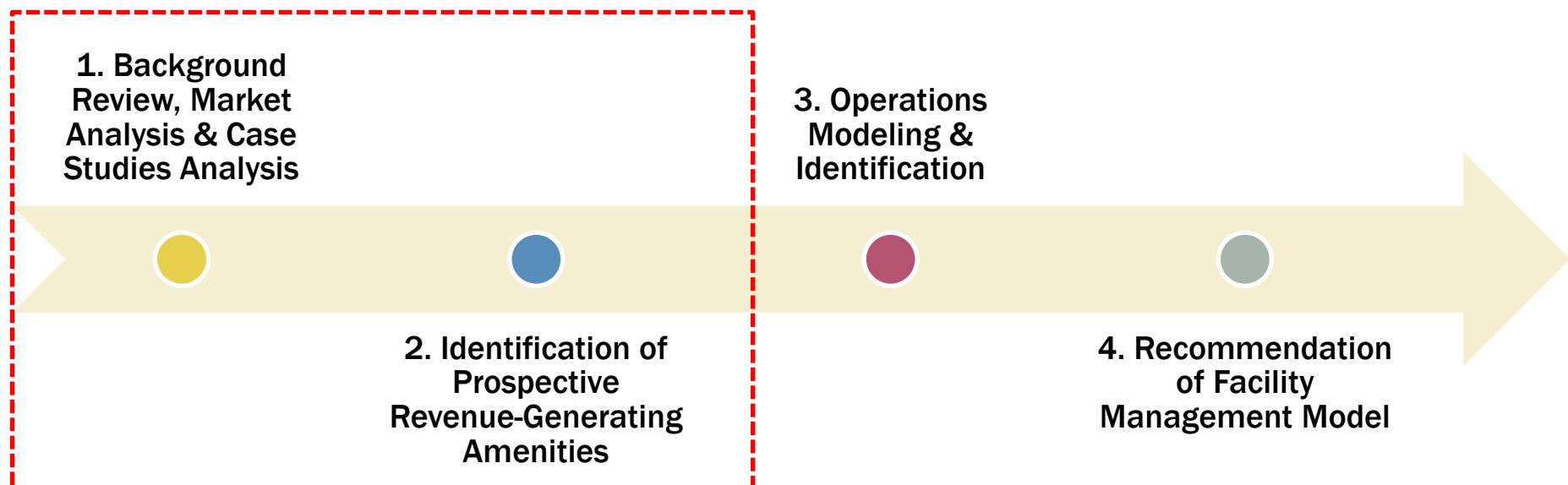
Mermaid Lakes many existing facilities and its open lands have the potential to be rehabilitated into a wide range of facilities. For example, existing buildings like the rustic barn, which has kitchen and bar facilities, and the two-story main house (formerly used as the main residence of the owner and property caretaker) have potential use for wedding receptions, company parties, and retreats.

Most, if not all, of the existing buildings and recreational facilities are in need of improvements, the cost of which will influence prospective reuse options.



Background: Project Scope

4ward Planning is part of the Simone Collins Landscape Architecture Team retained by Whitpain Township to provide market and revenue-generation analyses services in support of the Mermaid Lake Master Plan. The market analysis portion of our work will help identify prospective revenue-generating amenities that could be accommodated within Mermaid Lake Park. 4ward Planning's project approach is built upon a series of sequential steps including quantitative and qualitative analysis, creating a strong foundation for market receptive land-uses and estimating viable revenue generating opportunities associated with park uses. These steps are provided in more detail in each section of the report and analysis and key findings of the study portions. As highlighted below, this report completes steps one and two of the market analysis conducted by 4ward Planning. 4ward Planning will address steps three and four of our market analysis in a subsequent report.



Background: Impacts of Covid-19

Covid-19 Adjustments:

Unprecedented. Extraordinary. Unparalleled.

These are common and apt refrains describing the personal and financial toll caused by the ongoing coronavirus disease 2020 (Covid-19) global pandemic. In the near term, the economic impact is prominent and measurable. Over the longer horizon, this pandemic will undoubtedly leave its mark on socio-economic and demographic trends.

Prior to the pandemic, the national economy entered its 11th year of expansion, operating near full capacity with unemployment hovering at historic lows. The pre-Covid-19 expansion began in July 2009, and by 2020, many were expecting a downturn as part of the historical ebb and flow of the economy. As Covid-19 captured the world's attention, it became clear that this year would indeed be the start of a period of economic uncertainty.

By mid-March 2020, it was clear that the U.S. would be dealing with a major health and economic crisis. Federal, state, and local governments scrambled to implement the nation's largest ever quarantine effort.

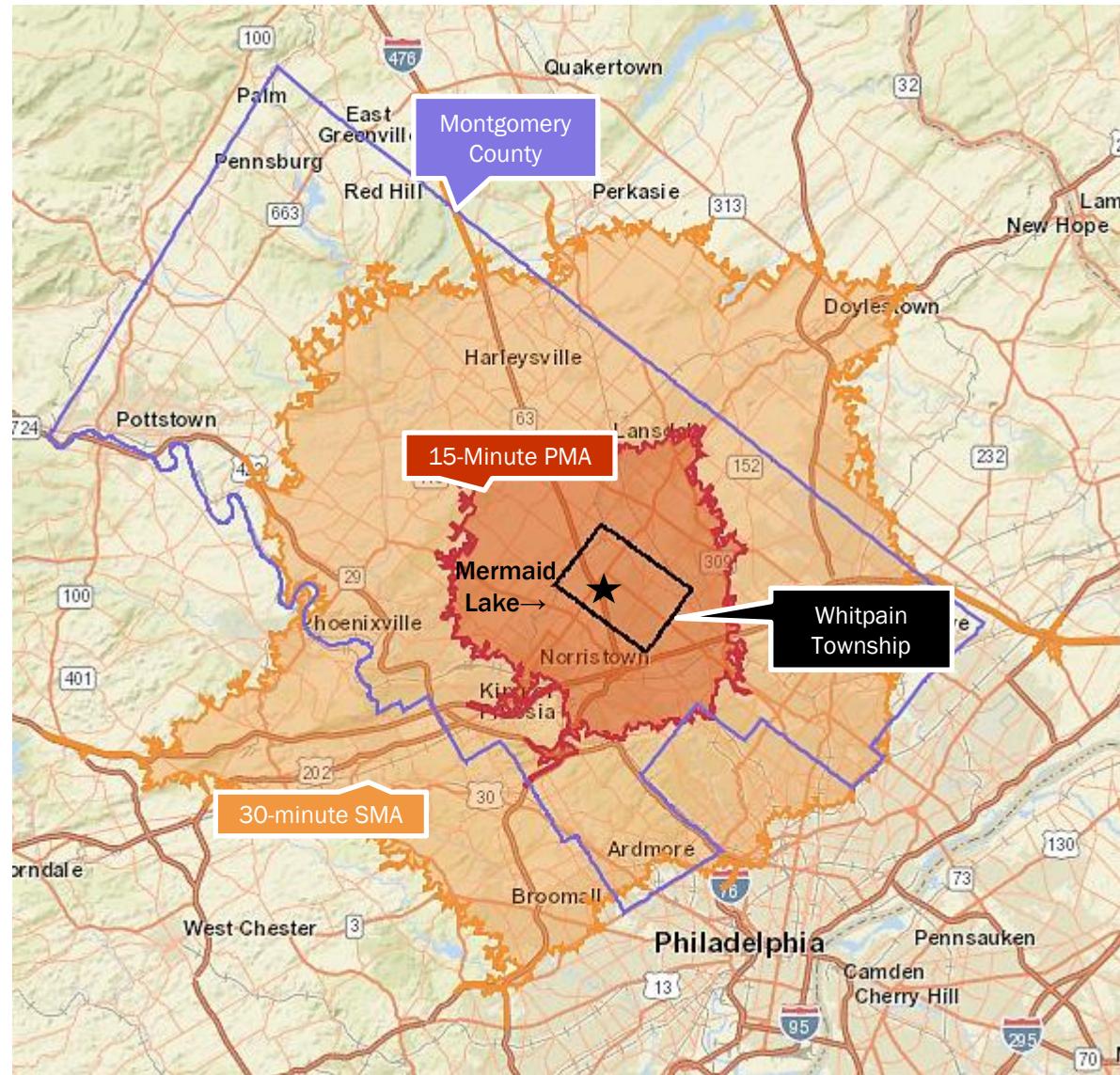
Businesses were shuttered, travel restricted, and shelter-in-place rules were issued. The response was like flipping off an economic light switch across many industries. Wealth evaporated as financial markets reacted and markets fell into a historic economic tailspin. U.S. jobless claims skyrocketed, overwhelming unemployment insurance programs. From February to April 2020, the unemployment rate in Montgomery County, Pennsylvania rose from 3.9 to 13.6 percent. Although the County's unemployment rate has lowered in recent months, it remains relatively high (5.8 percent as of October 2020) and the County's economy may take years to fully recover.

Socio-economic data in this report is based on current-year estimates and five-year projection data provided by Esri. Esri data is a conservative effort to try to best forecast the "new normal" of our society as of July 1, 2020. Covid-19 adjustments were focused on socio-economic characteristics, as these variables are prone to change abruptly in a global pandemic. Demographic trends such as births, deaths, and migration are likely to be affected, as well, but take longer to transpire.

Source: U.S. Bureau of Labor Statistics (BLS), Local Area Unemployment Statistics; Esri; 4ward Planning Inc., 2020

Background: Study Areas

- **Whitpain Township:** As defined by Township boundaries
- **15-Minute PMA:** The primary market area (PMA) is defined as a 15-minute drive-time contour from the center of the park (an approximate six-mile radius).
- **30-Minute SMA:** The secondary market area (SMA) is defined as a 30-minute drive-time contour from the center of the park (an approximate 15-mile radius).
- **Montgomery County:** As defined by county boundaries



Source: Esri; 4ward Planning Inc., 2020

Study Takeaways: Project Takeaways

Although Whitpain Township and its primary and secondary market areas are expected to experience rather flat population growth over the next five years (increasing only 0.3 to 0.4 percent per year), the aging of the region's population will likely influence park and recreation demand in the foreseeable future.

Park programming for aging baby boomers

Baby boomers (those born between 1946 and 1964) currently represent a relatively high share of Whitpain Township's population (27 percent in the Township compared to 23 percent in both the PMA and SMA) and are expected to experience the strongest near-term population growth. As this generation continues to age and approach traditional retirement years, these residents (currently between ages 56 and 74) will be looking for both passive and recreational programming for mature adults. Demand for park programming offering fitness, sports, arts and cultural events, and other activities will increase in the near term.

Young adults and early-stage families

Through 2025, the Township is also expected to experience some population growth among those ages 25 to 34 (representing young workforce and recent college graduates) and 40 to 44 (representing early-stage families). Although the millennial generation represents a smaller share of Whitpain Township's current population (19 percent in the Township compared to 22 and 23 percent in the PMA and SMA, respectively), as these residents age and start families, there will likely be near- to long-term demand for park programming typically targeted to young families (e.g., indoor and outdoor skating/hockey, swimming, day/summer camps). Park programming at Mermaid Lake targeted to young adults and early-stage families will be most successful if it can also attract residents within the larger primary and secondary market areas, increasing opportunities for revenue generation.

Study Takeaways: Project Takeaways (continued)

Based on our market analysis findings and review of the existing competitive supply of recreation facilities and event space in the primary and secondary market areas, the following recreation and revenue-generating opportunities may be most appropriate for the Mermaid Lake site.

A mini-golf and pitch and putt golf course: While there is an ample supply of traditional golf courses in the region, accommodating a different golf format at Mermaid Lake could appeal to a new market. For example, a mini-golf course or a pitch and putt course (a substantially shorter 18-hole course) may have wider market appeal.

Swimming Pool: While there are at least 10 large swimming pools in the PMA, just half offer public access and only two are located outdoors. According to interviews, there is likely unmet demand for a daily pay pool option for residents.

Playground & splashpad: With the closest splash pad located eight miles away, there is likely unmet local demand among local area families with young children.

Outdoor skating facility: While there are seven indoor skating rinks in the SMA, there are no outdoor skating options. An outdoor skating space at Mermaid Lake could also provide a strong revenue-generating opportunity.

Small- to mid-size event space: According to interviews with local event planners, Montgomery County will likely see increased demand for unique small- to mid-size private party space in authentic, natural settings, particularly in the aftermath of the Covid-19 pandemic, as many clients have delayed celebrations and will be seeking venues just beyond large urban areas. Venues that include adjacent nature or recreational opportunities (e.g., park or lake) will likely be particularly appealing.

Outdoor wellness space: As a result of Covid-19 pandemic, spending time in outdoor spaces has become essential for many. People are rediscovering an appreciation for the solace and stress-reduction found outdoors. An outdoor space offering art and natural features fostering wellness will likely have broad appeal.

Study Takeaways: Project Takeaways (continued)

Mermaid Lake site could support a multi-use recreation complex.

As two privately owned recreation centers, both the Chester County Sports Arena (CCSA) (located just off Route 30 in Caln Township, a 45-minute drive from the Mermaid Lake property) and the 422 Sportsplex (located just off Industrial Highway in Pottstown Borough, a 30-minute drive from the Mermaid Lake property), offer Mermaid Lake elements for consideration.

- CCSA features 25,000 square feet of indoor recreation and entertainment space (e.g., a multi-sport rink, arcade, and full-service café) and 26 acres of both active and passive outdoor recreation space (e.g., swimming pool, mini-golf course, rope-climbing structure, trails, creeks, and woods).
- 422 Sportsplex features 102,000 square feet of indoor recreation and entertainment space, including three basketball courts, two multi-purpose fields, and a rink.

These facilities offer an array of indoor and outdoor offerings and year-round programming appealing to a varied audience, including working families and older residents. Furthermore, through embracing community engagement opportunities such as free community sports days and sponsorship opportunities with local businesses and clubs, such facilities can respond to changing community demand/need while enhancing positive public relations within the surrounding neighborhoods.

With greater population density than those surrounding both the CCSA and the 422 Sportsplex, its proximity to the Philadelphia metro area, and better access from major arterials, Mermaid Lake is likely an even more attractive site for situating a multi-use recreation complex. Although a new multi-use recreation complex at Mermaid Lake should not exactly emulate the CCSA or 422 Sportsplex models, it could successfully borrow features and programs tailored to its unique and diverse target audience.

Study Takeaways: Project Takeaways

Relatively high incomes and favorable spending

The median household income in Whitpain Township (\$135,150) is relatively high compared to household incomes in the PMA and SMA (\$87,600 and \$85,010, respectively), with over 74 percent of Township households earning more than \$75,000 per year. Due to their relative affluence, Township households typically spend more on food, entertainment, and recreation than the national average. Potential revenue-generating offerings at the park (e.g., concessions, fees, memberships, rentals) will likely offer opportunities for supporting park maintenance, operation, and capital improvements. With reasonably comparable median household incomes for purposes of recreation and entertainment, the drive-time contours served by the CCSA, the 422 Sportsplex, and Mermaid Lake have median household incomes that likely support such operations.

Market Analysis

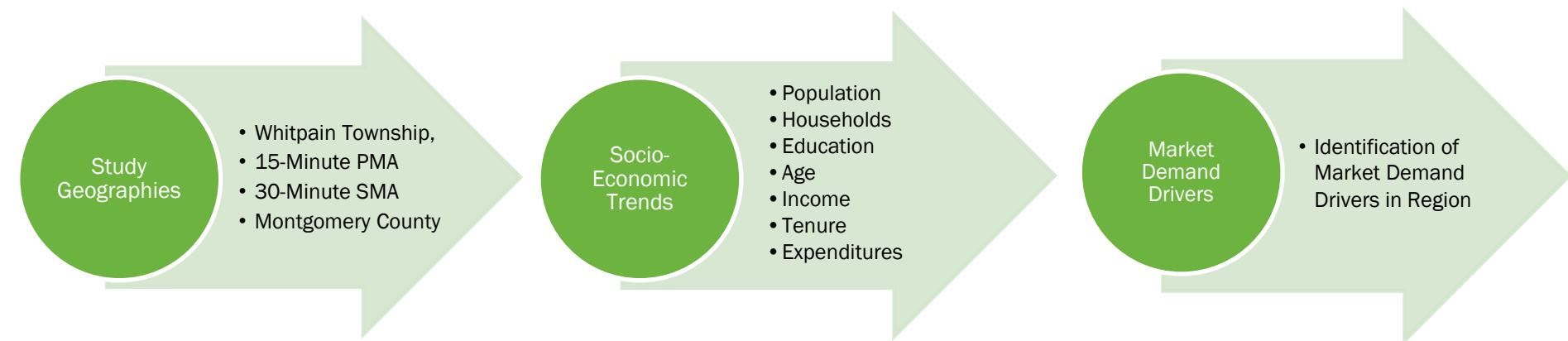
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Socio-Economic Trends

Methodology: Socio-Economic Trends Analysis

Given the current pandemic crisis and the unquestionable negative economic impacts it will have on local and regional economies, it will be of particular importance to not only evaluate past and current socio-economic trends (particularly those associated with household incomes and consumer expenditures), but also to project how these trends are likely to change over the next three to five years (and beyond). For example, preliminary analysis suggests that households reduce discretionary spending during times of economic uncertainty, generally, and during recessions, in particular. However, discretionary spending on “experiences” versus “things” typically rises during challenging economic times. The key to capturing that patronage is ensuring the “experience” or entertainment/recreational proposition is affordable and offers patrons significant value. Using a combination of published government data (U.S. Census Bureau) and proprietary analysis software (ESRI Community Analyst), 4ward Planning prepared a series of data tables comparatively illustrating socio-economic trends across several geographies, including Whitpain Township and Montgomery County, and two drive time contours (15- and 30-minutes from the Mermaid Lake site). Trends examined include growth in population and household formation, age, household income, educational attainment, and consumer expenditures on recreation and entertainment. Demographic data is displayed for 2010, 2020 (estimated), and 2025 (projected).



Key Findings: Socio-Economic Trends

Relatively flat near-term population growth

Whitpain Township is expected to experience rather flat population growth over the next five years (increasing by 0.3 percent per year), while population growth in the PMA and SMA will also remain relatively flat (both growing by just 0.4 percent per year). Average to robust growth is above 1.0 percent per annum.

High share of baby boomers, relatively active park users

Compared to the other geographies, the Township has a relatively high share of baby boomers (27 percent), representing those born between 1946 and 1964. As the baby boom generation ages and approaches traditional retirement years, these residents will likely have more free time to participate in potential new park and recreational activities, especially those fostering education and social development, and mental and physical health.

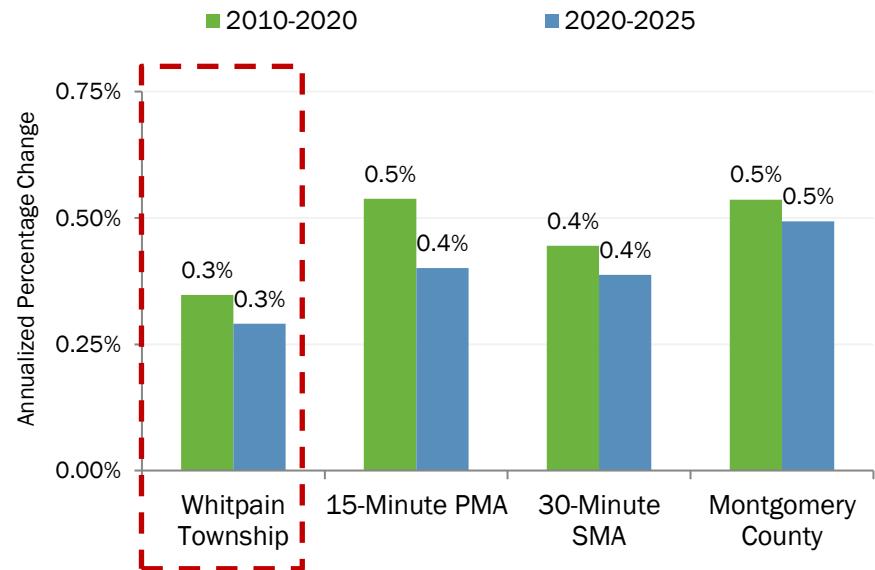
Relatively high incomes and favorable spending

While the Township's relatively high average household spending is quite favorable for prospective revenue-generating opportunities at the park, preliminary analysis suggests that households reduce discretionary spending during times of economic uncertainty, generally, and during recessions, in particular. However, discretionary spending on "experiences" versus "things" typically rises during challenging economic times. The key to capturing that patronage is ensuring the "experience" or entertainment/recreational proposition at the park is affordable and offers patrons significant value.

Total Population

Near-term demand for uses and potential park programming will be driven largely by Township residents and workers, as well as regional visitors. Whitpain Township is expected to experience rather flat population growth over the next five years (growing by 0.3 percent per year or by approximately 280 residents from 2020 to 2025), while population growth in the PMA and SMA will also remain relatively flat (both growing by just 0.4 percent per year).

Annualized Percentage Change, Total Population



Population by Geography

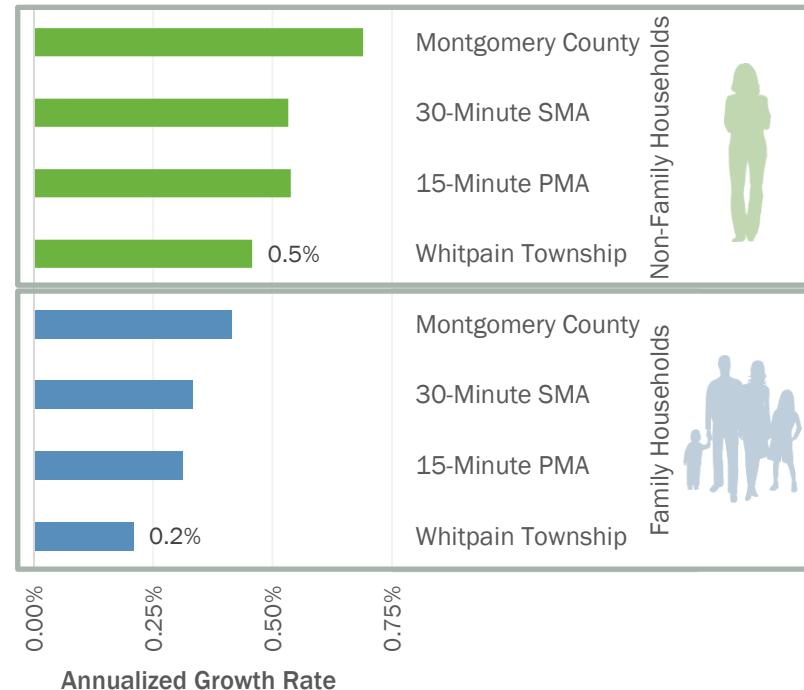
Geography	2000	2010	2020	2025	Net Change (2020-2025)
Whitpain Township	18,562	18,892	19,549	19,833	284
15-Minute PMA	182,435	193,585	204,002	208,091	4,089
30-Minute SMA	1,145,191	1,182,041	1,234,644	1,258,574	23,930
Montgomery County	750,097	800,355	843,278	864,083	20,805

Source: US Census Bureau; Esri; 4ward Planning Inc., 2020

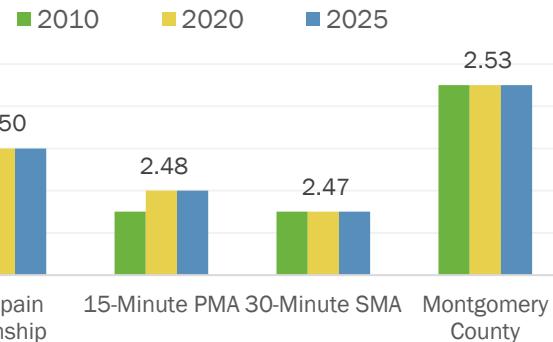
Household Formation

Overall near-term household formation growth in Whitpain Township is also expected to remain relatively flat through 2025 (growing by 0.3 percent per year). As illustrated in the chart to the right, the rate of non-family household growth (top right) in the PMA is projected to be slightly greater than the rate of family household growth (0.5 versus 0.2 percent per year over the next five years). As illustrated below, average household size in the Township (2.5 persons) is comparable to the other geographies and is expected to remain stable in the near-term.

Household Formation Projections, 2020-2025



Household Size Trends



Households by Geography

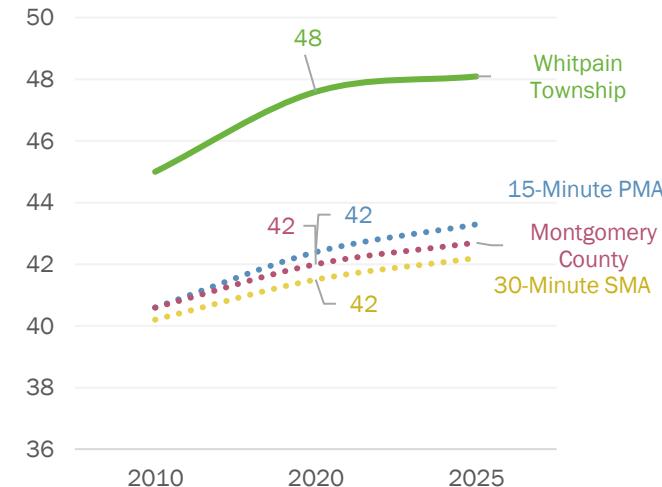
Geography	2000	2010	2020	2025	Net Change (2020-2025)
Whitpain Township	6,960	7,466	7,760	7,869	109
15-Minute PMA	71,642	76,895	80,851	82,440	1,589
30-Minute SMA	441,179	461,584	483,409	493,189	9,780
Montgomery County	286,098	307,943	324,572	332,766	8,194

Sources: US Census Bureau; Esri; 4ward Planning Inc., 2020

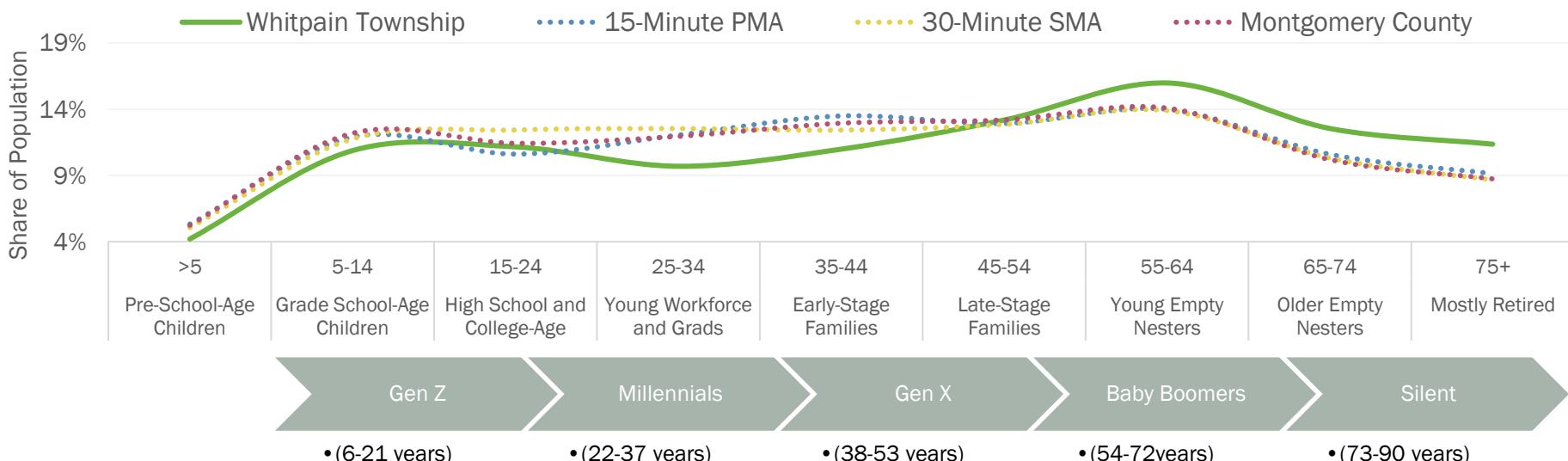
Median Age

The median age in Whitpain Township (48 years) is slightly older than that within the other geographies (42 years), with the Township having a lower share of young persons (between ages 25 and 34), and the early-stage family cohort (between ages 35 and 44), generally, and a higher share of older residents (ages 55 and older). Park programming should consider the age and outdoor activity preferences of local residents. For example, young and pre-teen age groups are considered the target market for splash pads and summer camp, while older adults may prefer more lower-intensity recreational offerings, or educational and nature-based outdoor activities.

Median Age 2010-2025



Age Distribution, 2020

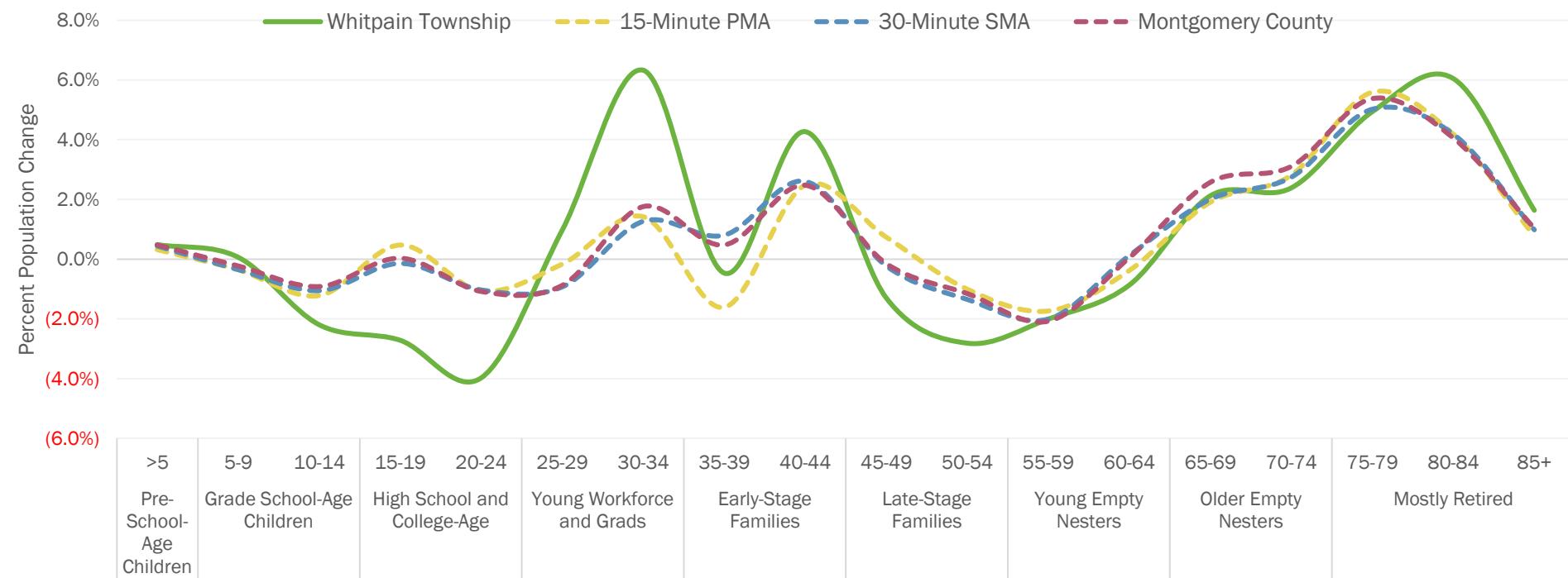


Source: Esri; 4WARD Planning Inc., 2020

Population Change by Age: Percent Change

Through 2025, the Township is expected to experience population growth among the following age groups: 25 to 34, 40 to 44, and those over 65 (largely representing older empty nesters and mostly retired persons). Conversely, the Township is expected to see population decline among those ages 10 to 24 (representing elementary school through college-age residents) and those ages 45 to 64 (representing late-stage families and young empty nesters). Planning for uses at Mermaid Lake, based on population trends is critical to ensuring current and future investments are aligned with demographic needs.

Annualized Population Change by Age Cohort, 2020-2025



Source: Esri; 4ward Planning Inc., 2020

Population Change by Age: Persons

The table below compares near-term population change across geographies. The notable decline in elementary, high school, and college-age residents suggests there may be decreasing near-term demand for recreational opportunities targeted to these age groups (e.g., camps, skate parks, BMX facilities). Interviews with local event planners, however, suggest there is a current lack of recreational opportunities for area teens.

Population Change by Age Cohort, 2020-2025

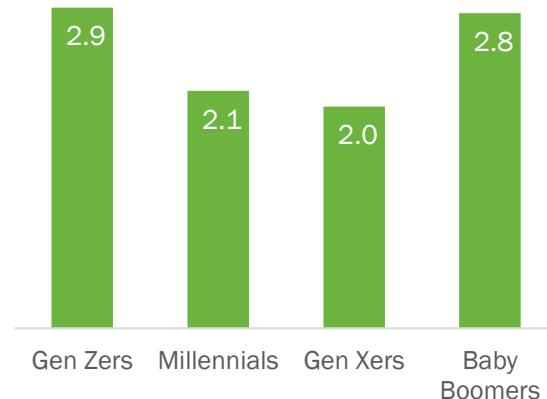
Overall Population Forecast	Age Cohort	Age Range	Whitpain Township	15-Minute PMA	30-Minute SMA	Montgomery County
Decline	Flat Growth	Pre-School- Age Children	>5	20	171	1,370
		Grade School-Age Children	5-9	3	(208)	(1,217)
			10-14	(130)	(781)	(4,035)
		High School and College-Age	15-19	(161)	264	(561)
Mixed			20-24	(198)	(555)	(3,907)
		Young Workforce and Grads	25-29	48	(104)	(3,636)
			30-34	287	880	4,861
		Early-Stage Families	35-39	(26)	(1,167)	3,186
Decline			40-44	221	1,621	1,335
		Late-Stage Families	45-49	(76)	469	(881)
			50-54	(198)	(686)	(5,555)
		Young Empty Nesters	55-59	(159)	(1,265)	(8,927)
Strong Growth			60-64	(67)	(269)	(6,382)
		Older Empty Nesters	65-69	141	1,133	485
			70-74	134	1,362	132
		Mostly Retired	75-79	205	1,935	7,073
			80-84	173	1,030	6,134
			85+	67	259	5,939
					10,347	7,469
					6,085	4,052
					1,804	1,336

Source: Esri; 4ward Planning Inc., 2020

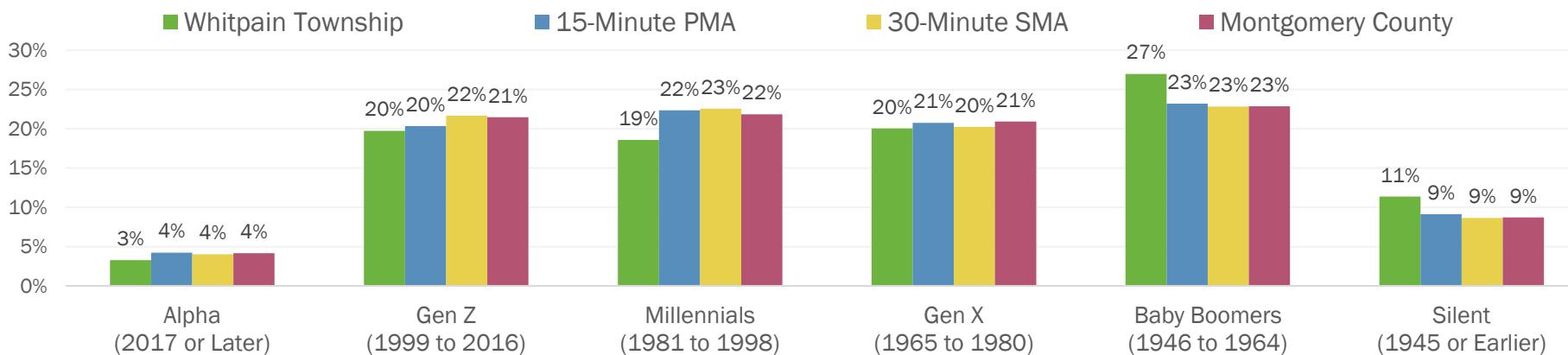
Age Distribution by Generation

As illustrated below, compared to the other geographies, the Township has a relatively high share of baby boomers (27 percent or 5,275 residents). As the baby boom generation ages and approaches traditional retirement years, they will be looking for opportunities in fitness, sports, outdoors, arts and cultural events, and other activities suiting their lifestyles. According to a 2020 survey conducted by the National Recreation And Park Association, baby boomers are relatively active park users, visiting local park and recreation facilities nearly three times a month on average. It should also be noted that many who fall within this age group are grandparents and will also, from time to time, visit parks for the sole purpose of recreating with their grandchildren.

Average Park Visits Per Month



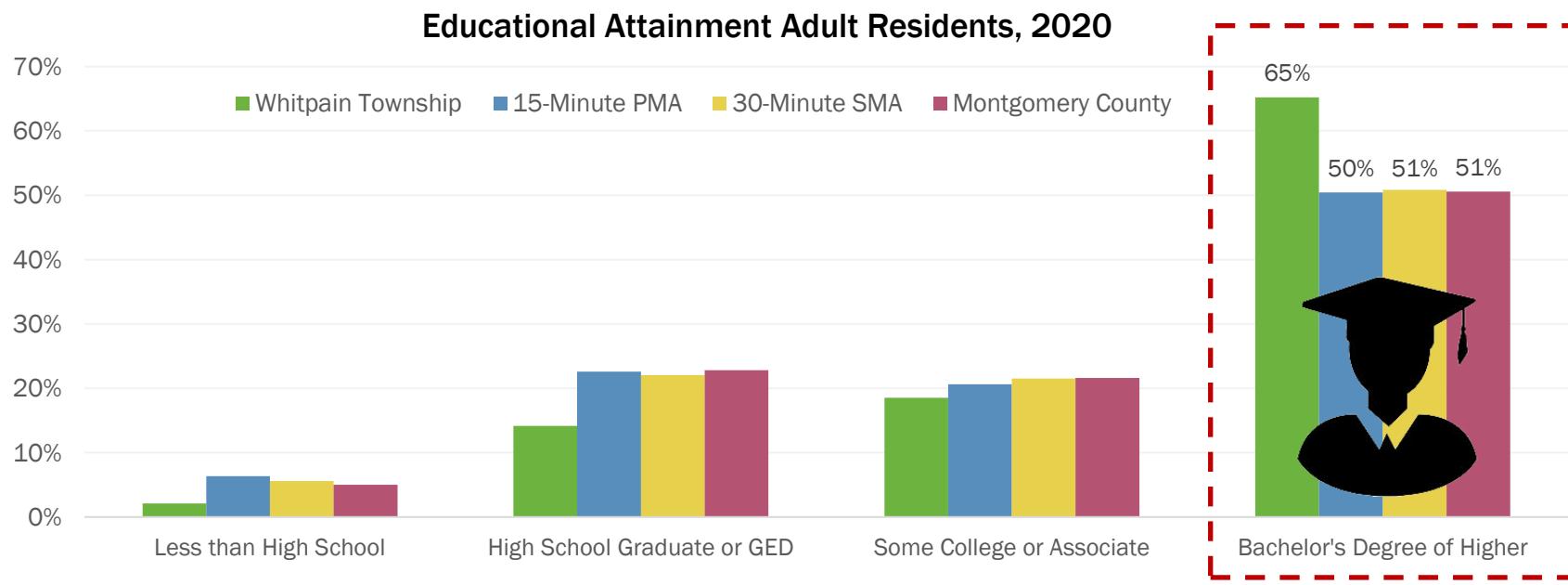
Generation by Population Share 2020



Source: Esri; National Recreation And Park Association, 2020 Americans' Engagement with Parks Report

Educational Attainment

The chart below compares estimated 2020 educational attainment across all four geographies. Educational attainment is, currently, relatively high in the Township, where 65 percent of adult residents ages 25 and older hold a bachelor's degree or higher level of education (compared to between 50 and 51 percent in the other geographies). According to a 2019 report published by Outdoor Industry Association (OIA), the "average" outdoor participant tends to be relatively well-educated and resides in a household with a higher-than-average income (48 percent had household incomes of at least \$75,000). This finding suggests Whitpain Township residents are more likely than not to participate in outdoor recreational activities.



Income Distribution

The relatively high median household income in Whitpain Township (\$135,150 in the Township compared to \$87,600 and \$85,010 in the PMA and SMA, respectively) and the share of Township households earning more than \$75,000 per year (74.3 percent) are positive signs for potential revenue-generating offerings at the park (e.g., fees, memberships, rentals).

Estimated Median Household Income

	2020	2025	2020-2025	% Change
Whitpain Township	\$135,150	\$143,980	\$8,830	1.3%
15-Minute PMA	\$87,600	\$93,250	\$5,650	1.3%
30-Minute SMA	\$85,010	\$92,120	\$7,110	1.7%
Montgomery County	\$90,700	\$98,210	\$7,510	1.7%

35.0%

Median Household Income, 2020

30.0%

Whitpain Township

15-Minute PMA

30-Minute SMA

Montgomery County

25.0%

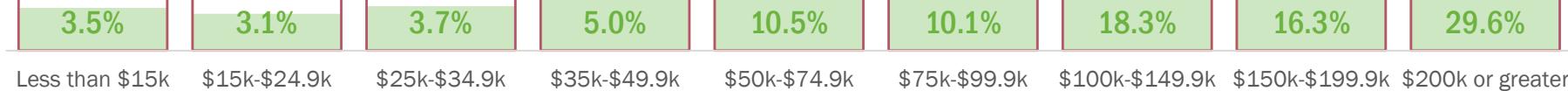
20.0%

15.0%

10.0%

5.0%

0.0%

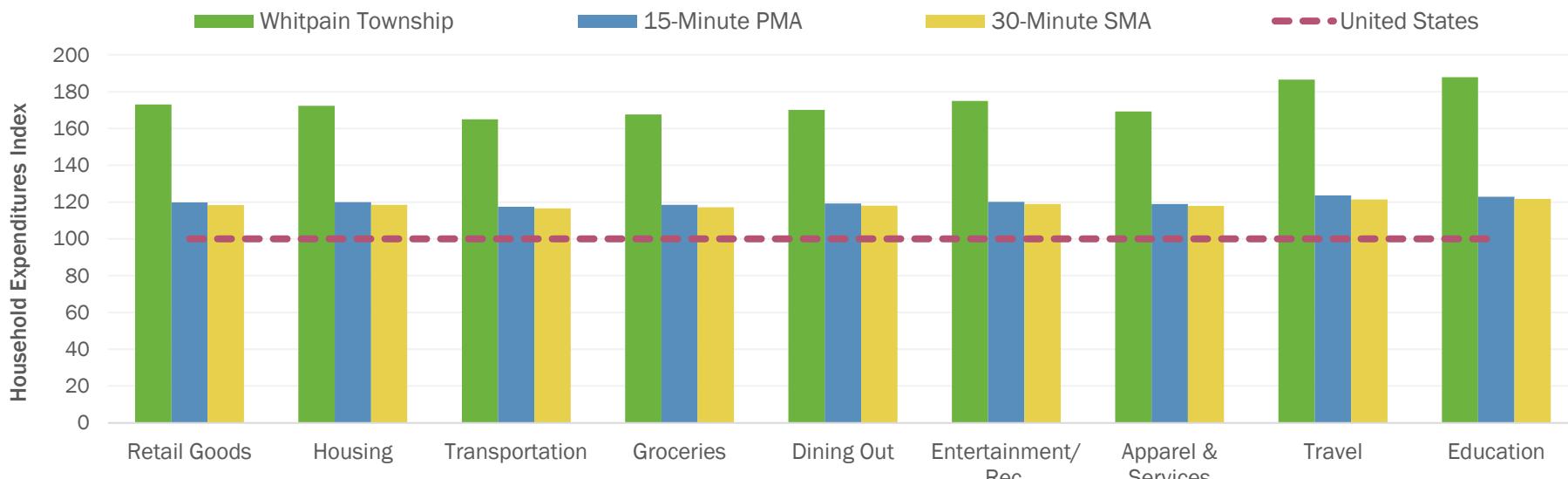


Source: Esri; 4ward Planning Inc., 2020

Household Expenditures

The graphic below illustrates the spending habits of households in each study geography, on a select set of entertainment and retail spending categories. Average household spending in the Township is higher than the national average (an index value of 100) in all selected spending categories. While relatively high spending is quite favorable for prospective revenue-generating opportunities at Mermaid Lake, preliminary analysis suggests that households reduce discretionary spending during times of economic uncertainty, generally, and during recessions, in particular. However, discretionary spending on “experiences” versus “things” typically rises during challenging economic times. The key to capturing that patronage is ensuring the “experience” or entertainment/recreational proposition at the park is affordable and offers patrons significant value.

2020 Average Household Expenditures by Geography



Source: Esri; 4ward Planning Inc., 2020

Tapestry Segments: An Overview

Esri's Tapestry Segmentation process classifies U.S. residential neighborhoods into 65 unique segments based on demographic variables such as age, income, home value, occupation, household type, education, and other consumer behavior, demographic, and socio-economic characteristics.

According to Esri, companies, agencies, and organizations have used segmentation to divide and group consumer markets to more precisely target their best customers and prospects. This targeting method is, purportedly, superior to using "scattershot" methods that might attract preferred groups. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyles and life-stages, and incorporates a wide range of data.

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes - "like seeks like." These behaviors can be measured, predicted, and targeted. Esri's Tapestry Segmentation system combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods with addresses into distinct behavioral market segments.

4ward Planning used Esri's Tapestry Segments to identify PMA's top socio-economic groups and better understand demand for potential park programming.

Source: Esri; 4ward Planning Inc., 2020

Top Tapestry Segments

The figure below compares the top 10 Tapestry Segment profiles within the 15-minute PMA, along with notable national socio-economic characteristics. The Savvy Suburbanites, Golden Years, Top Tier, and Enterprising Professionals segments combined represent 91 percent of Township households. The Township's top three segments (Golden Years, Savvy Suburbanites, and Top Tier) represent older households (median ages between 46 and 53), while the Township's fourth largest segment (Enterprising Professionals) represents relatively younger households (median age of 36). Over the past decade, there has been strong national growth among the Enterprising Professionals segment (increasing by 1.7 percent per year between 2010 and 2019). Due to relatively high affluence, Township households typically spend more on food, entertainment, and recreation than the national average. Successful parks and recreation revenue-generating opportunities should target these top socio-economic groups and cross-promote services/offerings with local area entertainment and dining establishments.

Top 10 Tapestries	Household Type	Share of Households				Key National Demographics			Avg. HH Budget Index	
		Whitpain Township	15-Minute PMA	30-Minute SMA	Montgomery County	2010-2019 Ann. Pop Change %	Avg. HH Income	Median Age	Food	Entert. & Rec
Golden Years	Singles	24.9%	12.3%	6.8%	6.7%	0.8%	\$77,300	53	121	124
Savvy Suburbanites	Couples	25.7%	12.3%	9.3%	12.1%	0.9%	\$114,100	46	152	163
Enterprising Professionals	Couples	16.8%	11.0%	4.3%	6.1%	1.7%	\$94,200	36	133	130
Parks and Rec	Couples	-	9.5%	4.4%	6.7%	0.4%	\$64,700	41	87	91
In Style	Couples w/No Kids	-	6.8%	3.5%	3.8%	0.9%	\$78,400	42	115	117
Top Tier	Couples	24.0%	6.1%	7.8%	7.2%	0.6%	\$180,100	48	260	289
Pleasantville	Couples	2.4%	5.8%	9.1%	8.8%	0.4%	\$101,000	43	123	132
Exurbanites	Couples	6.2%	5.3%	3.4%	2.8%	0.8%	\$108,100	52	159	172
Emerald City	Singles	-	5.2%	5.7%	3.0%	1.0%	\$66,700	38	103	101
Front Porches	Couples	-	4.1%	1.5%	3.1%	0.6%	\$47,600	35	71	69

Source: Esri; 4ward Planning Inc., 2020

Top Tapestry Segments: 15-Minute PMA

The graphic below illustrates market profile characteristics and interests for each of the top 10 identified Tapestry Segment profiles in the 15-minute PMA. The Tapestries highlighted in bold represent the four most prominent in the Township (representing 91 percent of Township households).

Golden Years	Independent, active seniors Leisure time is spent on sports or walking
Savvy Suburbanites	Families, include empty nesters Physically fit, residents actively pursue sports and invest in sports gear
Enterprising Professionals	Residents are relatively young, diverse, and well-educated Strive to stay youthful and healthy, eat organic and natural foods, run and do yoga
Parks & Rec	Many of these families are two-income married couples approaching retirement age Residents take advantage of local parks for a quick jog, swim, or run
In Style	Married couples without kids Actively support the arts, theater, concerts, and museums
Top Tier	Married couples with strong purchasing power Exercise at exclusive clubs
Pleasantville	Many couples are empty nesters. Residents spend their spare time participating in a variety of sports and outdoor gardening.
Exurbanites	Empty nesters, married couples with no children Sociable and hardworking, they still find time to stay physically fit
Emerald City	Single-person and nonfamily types Attend venues like art galleries, museums, and concerts
Front Porches	Young families with children or single households Participate in leisure activities including sports, playing board games and video games

Outdoor Consumer Segments: National Trends

As presented in the table below, the Outdoor Industry Association (OIA) identifies seven segments of the U.S. outdoor consumer population in order of physical intensity. According to OIA, consumers within the millennial and baby boom generations (the nation's largest consumer groups) diverge significantly in how they relate to the outdoors, as well as in their attitudes, goals, and purchasing habits. For example, millennials (characterized below by the Achiever, Urban Athlete, and Aspirational Core segments) often look for outdoor activities that foster social connection, thrill-seeking, and/or competition. By contrast, baby boomers (characterized below by the Athleisureurist and Sideliner segments) often look for lower-intensity, nature-based outdoor activities that foster time with friends and family. It should be noted that some of the differences in activity preferences are matters of changes in physical capabilities due to aging and not necessarily generational personality distinctions.

Name	Description	Percent US Outdoor Consumer Population	Spent per Year on Outdoor Equipment	Hours Spent Outside per Week	Median Age
Achiever	Everything outdoors performance-driven engagement at its fullest	10%	\$799	27	34
Outdoor Native	Highly involved experience-driven established	12%	\$637	22	40
Urban Athlete	Athletic competitive stressed	20%	\$781	24	32
Aspirational Core	Adventure-seeking aspirational moderate engagement	14%	\$476	20	34
Athleisureurist	Low-intensity enjoyment emotionally driven	20%	\$284	19	49
Sideliner	Lessened involvement inhibited interested	12%	\$162	13	53
Complacent	Excluded unmotivated unfit	14%	\$143	11	46

Source: Outdoor Industry Association, 2020 Forecasting Report

Competitive Supply

Methodology: Competitive Supply

In order to better understand the competitive supply of potential revenue-generating opportunities and determine what, if any, market gaps may exist and be appropriate for the Mermaid Lake site, 4ward Planning examined the supply of competitive land uses within the 15-minute, Montgomery County and/or the 30-minute drive-time contour from the Mermaid Lake site. 4ward Planning identified golf courses, swimming pools, suburban splash pads, skating rinks, BMX facilities, large meeting spaces, and outdoor wedding venues. For further understanding of area facility and event space supply and demand, 4ward Planning reached out to local event planners. We also reached out to three contacts, as provided by the Township, who expressed interest in partnering with the Township on the redevelopment of the Mermaid Lake property. These conversations included discussions regarding the competitive supply of sports centers, golf courses, swimming pools, suburban splash pads, in particular.



Key Findings: Competitive Supply

Golf courses abound in the 15-minute PMA

According to data provided by Esri and Golf Now, there are 12 golf courses in the 15-minute PMA, including ten 18-hole golf courses and two nine-hole golf courses. Nine are private or semi-private and three are public. None of these golf courses appear to offer pitch and putt (18-hole courses with a length typically under 1,310 yards).

Half of all parcels in the Township already served by a pool

According to GIS data from Montgomery County, 51 percent of all parcels in Whitpain Township are served by a private community pool or a pool on an individual private lot.

Seven skating rinks in 30-minute SMA

According to data provided by Eri, while there are no skating rinks in the 15-minute PMA, there are seven skating rinks in the 30-minute SMA (all indoor ice-skating rinks). Most facilities offer public and member access, lessons, and event space for birthday parties.

Three existing large outdoor wedding venues in the Township

According to venue data provided by VFTCB and capacity and price data provided by The Knot (a wedding planning website), there are three large outdoor wedding venues in Whitpain Township. The Manor House at Prophecy Creek Park, the Country House at Bluestone Country Club, and the Normandy Farm Hotel & Conference Center are all located in Whitpain Township. Each have the capacity to accommodate approximately 300 guests.

Sports Centers

According to data provided by Valley Forge Tourism and Convention Board, presented below, there are three outdoor sports centers located in the 15-minute PMA, including a membership-based multi-sports center (The Proving Grounds) and two public school sports centers (Colonial School District and Germantown Academy). There are seven sports centers (both indoor and outdoor) within the larger 30-minute SMA. While there are a good number of quality outdoor facilities located near Whitpain Township, there may not be enough indoor facilities to meet local demand from adult and youth sports communities. Mermaid Lake may be an ideal location for an indoor multi-sports facility. The following slide presents more detail on identified sports centers.

Driving Distance (Miles)	Name	Town	Square Feet	Facility	Type	Focus
5.1	Colonial School District	Plymouth Meeting	NA	Public School	Outdoor	Multi-Sports
5.3	The Proving Grounds	Conshohocken	NA	Sports Center	Outdoor*	Multi-Sports
6.0	Germantown Academy	Fort Washington	NA	Private School	Outdoor	Multi-Sports
6.9	Competitive Edge Sports	King of Prussia	60,000	Sports Center	Indoor	Basketball/Volleyball
7.4	Temple Univ. Ambler Sports Complex	Ambler	NA	Private School	Outdoor	Baseball/ Softball/ Soccer
11.7	Villanova University Athletics	Villanova	NA	Private School	Outdoor	Multi-Sports
12.0	All Sports Center	Upper Providence	49,441	Sports Center	Indoor	Multi-Sports
12.9	Sofive Elkins Park	Elkins Park	NA	Sports Center	Both	Soccer
13.0	XL Sports World	Hatfield	78,000	Sports Center	Indoor	Multi-Sports
13.1	YSC Sports	Wayne	120,000	Sports Center	Both	Soccer

* While the facility also contains a 10,000-square-foot indoor turf facility, the facility is largely composed of outdoor sports fields.

Sources: Valley Forge Tourism and Convention Board; Google Map; 4ward Planning, 2020

Sports Centers (continued)



Colonial School District

- Colonial School District & Plymouth Whitemarsh High School facilities - with up to 10 fields, including baseball, softball, soccer, and lacrosse fields.



Villanova University Athletics

- Division 1 sports facilities to accommodate baseball, basketball, track and field, and more



The Proving Grounds

- A regional multi-sports tournament complex with five competitive-level synthetic turf fields for lacrosse, soccer, and field hockey. The facility also contains a 10,000-square-foot indoor turf facility.



All Sports Center

- Indoor space, featuring two state-of-the-art artificial turf competition fields



Germantown Academy

- Outdoor athletic complex includes a baseball field, football field, 12 USTA competition tennis courts, three natural grass fields, and three artificial turf surfaces.



Sofive Elkins Park

- Indoor and outdoor soccer facility with viewing lounge, a bar & café, and free on-site parking



Competitive Edge Sports

- Regional basketball/volleyball facility offering five courts with 6,000-square-foot SAQ area, facility rentals, catering, and café



XL Sports World

- Full-service, indoor sports complex specifically designed for youth sports; programs and camps; adult sports; tournaments; and facility rentals with catering



Temple University Ambler Sports Complex

- University sports complex featuring regulation-size, collegiate-level baseball, softball, and soccer fields



YSC Sports

- Dedicated soccer facility featuring indoor and outdoor synthetic fields; home to the youth program of the MLS' Philadelphia Union

Sources: Valley Forge Tourism and Convention Board; 4ward Planning, 2020

Golf Courses: 15-Minute PMA

According to data provided by Esri and Golf Now, presented below, there are 12 golf courses in the 15-minute PMA, including ten 18-hole golf courses and two nine-hole golf courses. Nine are private or semi-private and three are public. None of these golf courses appear to offer pitch and putt (18-hole courses with a length typically under 1,310 yards). A comparison of golf and pitch and putt is provided on the following slide.

Driving Distance (Miles)	Name	Course Type	City	Holes	Par	Length (Yards)	Type
1.9	Bluestone Country Club	Golf	Blue Bell	18	71	6,023	Private
2.6	The 1912 Club	Golf	Plymouth Meeting	18	72	6,575	Private
3.3	Cedarbrook Country Club	Golf	Blue Bell	18	72	6,873	Semi-Private
4.5	Sunnybrook Golf Club	Golf	Plymouth Meeting	18	72	6,823	Private
6.3	Whitemarsh Valley Club	Golf	Plymouth Meeting	18	72	6,629	Private
6.8	Old York Road Club	Golf	Blue Bell	18	71	6,558	Private
6.9	Jefferson Golf Course	Golf	Norristown	18	70	6,443	Public
7.4	Gulph Mills Golf Club	Golf	King of Prussia	18	71	6,289	Private
7.4	Worcester Golf Club	Golf	East Norriton	9	35	3,047	Public
7.6	Skippack Golf Club	Golf	Skippack	18	70	6,007	Public
9.8	Flourtown Country Club	Golf	Flourtown	9	35	2,884	Private
11.8	Sandy Run Country Club	Golf	Ambler	18	72	6,525	Private

Sources: Esri; GolfNow; Google Map; 4ward Planning, 2020

Golf Courses: Pitch and Putt

According to the International Pitch & Putt Association, pitch and putt is a golf specialty, with an equivalent form of play, fewer clubs, and smaller courses, which sometimes consist of synthetic grass, tees, and greens. As pitch and putt courses do not require large areas of land and can be built relatively inexpensively. Further, this form of golf is not time-consuming; anyone with an hour or two to spare can enjoy a practice session at a driving range or a round on a pitch and putt course. Such a recreational facility could easily fit within the boundaries of Mermaid Lake.



Comparison with Golf

	Golf	Pitch and Putt
Number of holes per round	18	18
Combined length of 18 holes	6,560 to 8,200 yards	1,310 yards max
Maximum distance to hole (from tee)	n/a	100 yards
Total par in a round (typical)	72	54
Type of shots	Driving, pitching/chipping and putting	Pitching/chipping and putting
Clubs	Complete set	Maximum of 3 clubs which must include a putter
Approximate time per course	4-5 hours	1-1.5 hours
Land required for developing 18-hole course	100 to 150 acres for championship course	12 to 15 acres for championship course

Sources: International Pitch & Putt Association; 4ward Planning, 2020

Swimming Pools: 15-Minute PMA

According to GIS data from Montgomery County, 51 percent of all parcels in Whitpain Township are served by a private community pool (e.g., Blue Bell Country Club) or private residential pools. According to data provided by Swimmers Guide and Eri, presented below, there are at least 10 large swimming pools in the 15-minute PMA (an approximately six-mile radius), with five providing public access and two located outdoors. Although there are two outdoor pools located the 15-minute PMA, one is a private country club facility, while the other is a community pool serving primarily lower-income residents. Our conversations with local athletic and swimming facilities directors indicate the area's pools are generally well-utilized throughout the year by schools, community groups, and residents. A few interviews revealed potential demand for an outdoor pool with daily pass options.

Radius Distance Facility (Miles)		Town	Type	Public Access	Pricing
1.5	LA Fitness - East Norriton/Swede Square	East Norriton	Indoor	Yes	Drop-in: \$15
1.5	Greater Plymouth Community Center	Plymouth Meeting	Indoor	Yes	Drop-in: \$10-\$14 for residents/non
2.1	Blue Bell Country Club	Whitpain Township	Outdoor	No	
3.4	Wissahocken High School Natatorium	Ambler	Indoor	Yes	Free community swim (Wednesdays)
3.4	Plymouth Whitemarsh High School Swimming Pool	Lafayette Hill	Indoor	No	
4.0	Germantown Academy	Fort Washington	Indoor	No	
4.8	Upper Dublin Community Pool	Fort Washington	Outdoor	Yes	Adults: \$2-\$6 weekdays, \$4-\$8 weekends
5.0	Life Time Fitness - Fort Washington	Fort Washington	Indoor	Yes	Drop-in: \$35
5.1	Ambler YMCA	Ambler	Indoor	No	
5.9	Upper Merion Area Middle & High School Pool	King of Prussia	Indoor	No	

Sources: Montgomery County; Swimmers Guide; 4ward Planning, 2020

Suburban Splash Pads: 30-minute SMA

Data provided by MommyPoppins, a website catering to families in the Philadelphia area, identified eight suburban splash pads in the 30-minute SMA, with one in the 15-minute PMA (the Montgomery Township Community & Recreation Center). Located in the 30-minute SMA, Alverthorpe Park in Abington Township features a lake, wading pool, Par-3 golf course, as well as other recreation and open space amenities. The park offers both year-round (Par-3 golf, tennis courts, basketball courts, playground, and fishing) and summer activities (mini golf, wading pool, camping), as well as various rental facilities (picnic shelter and tables, pre-school pavilion, min-golf pavilion). Alverthorpe Park is only open to residents of Abington Township. Our interviews local event planners suggest there may be demand for a splash pad at Mermaid Lake.

Driving Distance (Miles)	Name	Town	Description
7.9	Montgomery Twp. Community & Rec. Center	Montgomeryville	Shade sail section with smaller sprinklers for younger children and a section with larger sprinklers for older children
10.3	Everybody's Playground	Horsham	Located within Lukens Park, playground has a spray station for hot summer days
13.3	Freedom Playground at Haverford Reserve	Haverford	The water misters at Freedom Playground
13.6	Alverthorpe Park	Jenkintown	The site has a lake, wading pool, a Par 3 golf course, as well as various other recreation and open-space amenities.
14.2	Masons Mill Park	Huntingdon Valley	This 76-acre park also provides a fun water spray pole.
15.7	Warwick Community Park	Jamison	Spray pole at this Warwick Township park

Sources: MommyPoppins; Google Maps; 4ward Planning, 2020

Skating Rinks: 30-Minute SMA

According to data provided by Eri, presented below, there are seven indoor skating rinks in the 30-minute SMA, with the large majority of them accommodating ice skating. Most facilities offer public and member access, lessons, and event space for birthday parties. Located just outside the 15-minute PMA, the Wissahickon Skating Club is the closest facility to Mermaid Lake. Operating as a private, not-for-profit, this family-oriented indoor skating club offers both member and public sessions for ice skating and hockey (both senior and youth) and two birthday party rooms (\$100-\$150 flat fees). Our interviews with local event planners suggest there may be demand for an outdoor ice-skating facility at Mermaid Lake.

Driving Distance (Miles)	Business Name	Town	Skating Rink Type	Type	Pricing
9.6	Wissahickon Skating Club	Philadelphia	Ice	Indoor	Admission: \$7 Skate rental: \$3
10.8	Oaks Center Ice Hockey Rink	Oaks	Ice	Indoor	Admission: \$7 Skate rental: \$3
11	Hatfield Ice World	Colmar	Ice	Indoor	Admission: \$10, Skate rental: \$3
12	Wintersport Ice Sports Arena	Willow Grove	Ice	Indoor	\$10 Admission & includes skate rentals
12	In Line 309	Hatfield	Roller	Indoor	\$12 Admission & includes skate rentals
12.1	Philadelphia Skating Club	Ardmore	Ice	Indoor	Admission: \$10, Skate rental: \$5
13.9	Bucks County Ice Sports Ctr	Warminster	Ice	Indoor	Admission: \$15

Sources: Esri; 4ward Planning, 2020

BMX Facilities

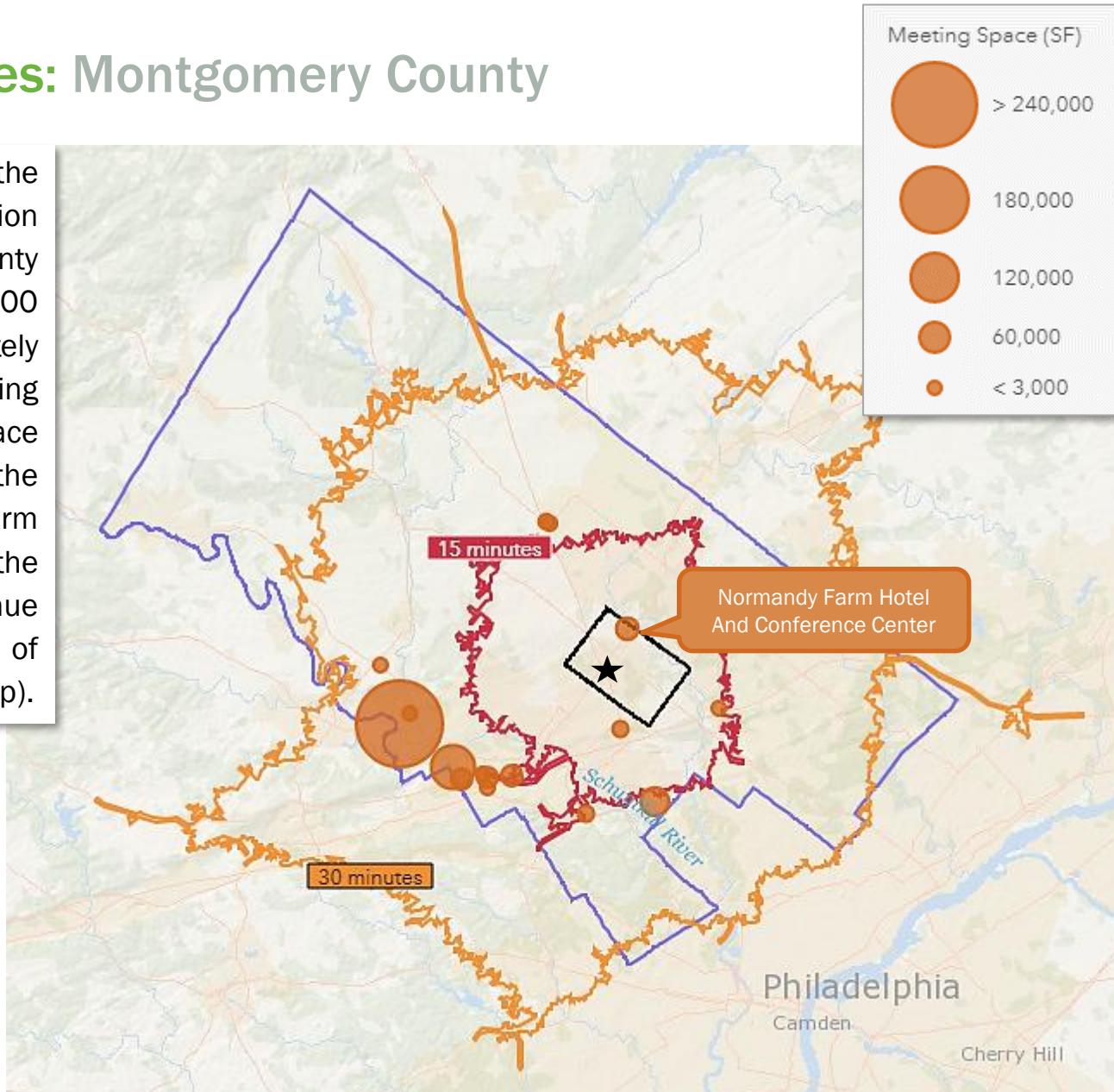
BMX is a type of off-road bicycle racing with a format stemming from motocross. The map below illustrates the two closest BMX facilities to Mermaid Lake, based on data provided by USA BMX. Trilogy Park BMX is the only identified BMX track located in Montgomery County. While accommodating a new BMX facility at Mermaid Lake could offer a new youth-programming alternative not currently found in the SMA, the Trilogy Park BMX facility located in Pottstown (approximately 40 minutes from Mermaid Lake) may already be meeting local demand.



Sources: Esri; USA BMX; 4ward Planning, 2020

Large Meeting Venues: Montgomery County

According to data provided by the Valley Forge Tourism and Convention Board (VFTCB), Montgomery County is home to more than 80 hotels, 300 meeting venues, and approximately one million square feet of meeting space. Based on large meeting space venues provided by VFTCB, the 30,000-square-foot Normandy Farm Hotel and Conference Center is the closest large meeting space venue (located just two miles north of Mermaid Lake in Whitpain Township).



Sources: Valley Forge Tourism and Convention Board, Meeting Inspiration Guide, Esri, 4ward Planning, 2020

Large Meeting Venues: Montgomery County (continued)

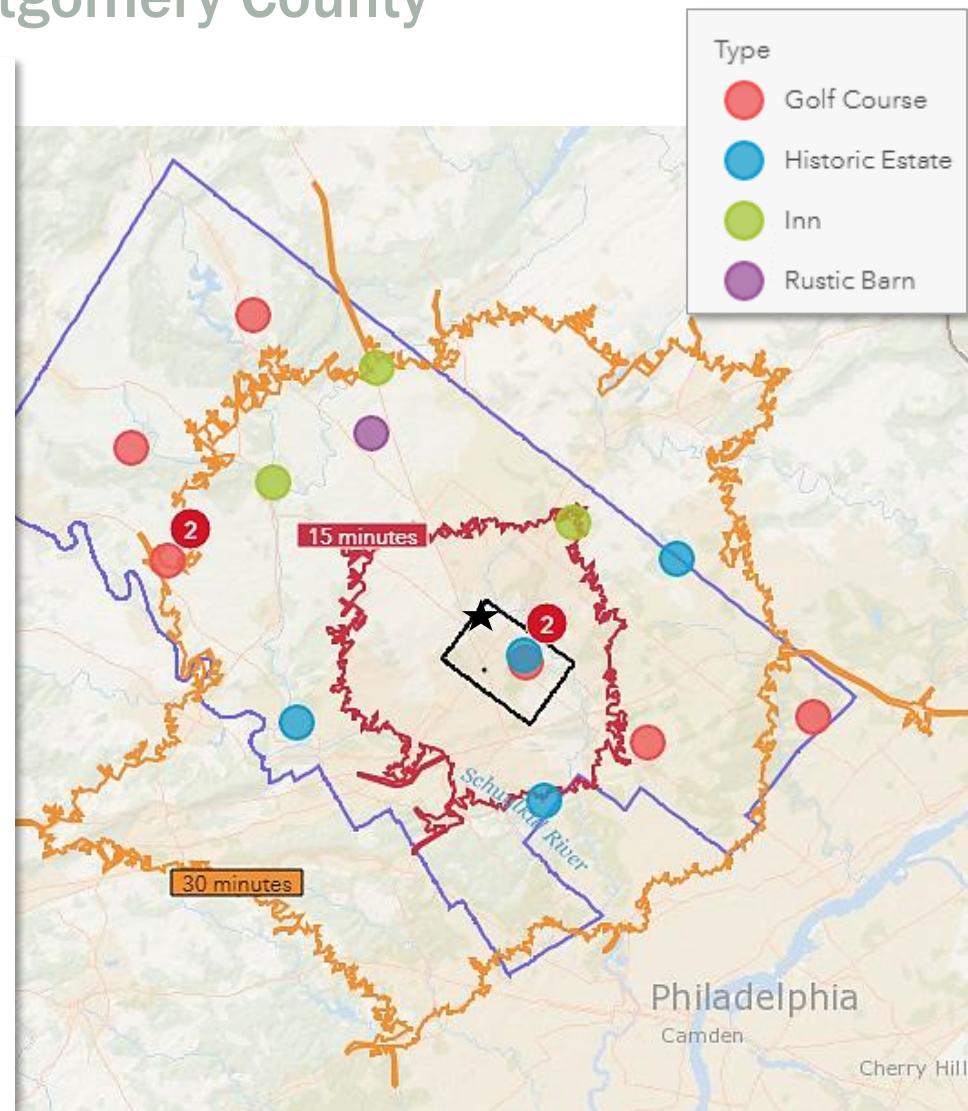
Venues	Location	Guest Rooms	Meeting Rooms	Meeting Space (SF)	Largest Room (SF)	Banquet
Greater Philadelphia Expo Center	Upper Providence Township	-	-	240,000	-	-
Valley Forge Casino Resort	King of Prussia	445	39	100,000	54,000	2,500
Chubb Conference Center And Hotel	Whitemarsh Township	120	42	50,000	6,100	350
Normandy Farm Hotel And Conference Center	Whitpain Township	141	17	30,000	4,565	300
Alloy King of Prussia, A Doubletree Hotel	King of Prussia	327	18	25,500	7,020	500
Sheraton Valley Forge	King of Prussia	180	16	25,000	10,054	600
Crowne Plaza, Valley Forge/Liberty Conference Ctr.	King of Prussia	225	18	24,000	8,400	700
Marriott Philadelphia West	West Conshohocken	288	11	10,000	4,840	420
Doubletree Guest Suites By Hilton - Philadelphia W.	Plymouth Meeting	253	13	8,900	2,856	200
Holiday Inn Lansdale	Kulpsville	183	3	6,500	4,680	260
Courtyard By Marriott Lansdale	Lansdale	135	9	5,000	2,700	120
Hilton Garden Inn Oaks	Phoenixville	135	3	3,400	2,870	149
Hilton Garden Inn Fort Washington - Philadelphia	Fort Washington	146	4	3,400	2,829	175
Hyatt House Philadelphia - King of Prussia	King of Prussia	147	4	3,300	3,011	120
Courtyard By Marriott Philadelphia - Collegeville	Collegeville	132	4	3,300	2,120	110
Best Western Plus - The Inn of King of Prussia	King of Prussia	168	5	3,000	1,430	80

Sources: Valley Forge Tourism and Convention Board, Meeting Inspiration Guide, 2020

Outdoor Wedding Venues: Montgomery County

According to venue data provided by VFTCB and capacity and price data provided by The Knot (a wedding planning website), there are 16 large outdoor wedding venues in Montgomery County (with capacity to host between 70 to 300 or more guests). The Manor House at Prophecy Creek Park, the Country House at Bluestone Country Club, and the Normandy Farm Hotel & Conference Center are three outdoor wedding venues located in Whitpain Township, each with the capacity to accommodate 300 guests.

According to interviews with local event planners, Montgomery County will likely see increased demand for unique small- to mid-size private party space in authentic, natural settings, particularly in the aftermath of the Covid-19 pandemic, as many clients have delayed celebrations and will be seeking venues just beyond large urban areas. Venues that include adjacent recreational opportunities (e.g., park space) will likely be particularly appealing.



Sources: Valley Forge Tourism and Convention Board; The Knot; Esri, 4ward Planning, 2020

Outdoor Wedding Venues: Montgomery County (continued)



**Country House at
Bluestone Country
Club**



**Normandy Farm
Hotel & Conference
Center**



**Manor House At
Prophecy Creek
Park**

Name	Type	Location	Capacity	Cost
Chubb Hotel & Conference Center	Historic Estate	Whitemarsh Township	250	\$\$\$ - Moderate
Country House at Bluestone Country Club	Golf Course	Whitpain Township	320	\$\$\$ - Moderate
Historic House and Barn at Graeme Park	Historic Estate	Horsham Township	250	\$\$ - Affordable
John James Audubon Center At Mill Grove	Historic Estate	Lower Providence Township	250	NA
Joseph Ambler Inn	Inn	North Wales Borough	200	\$\$\$ - Moderate
La Massaria At Bella Vista Golf Course	Golf Course	Douglass Township	200	\$\$ - Affordable
Macoby Run Golf Course	Golf Course	Green Lane Borough	200	\$\$ - Affordable
Normandy Farm Hotel & Conference Center	Historic Estate	Whitpain Township	300+	\$\$ - Affordable
North Hills Country Club	Golf Course	Cheltenham Township	250	\$\$\$ - Moderate
Philmont Country Club	Golf Course	Lower Moreland Township	300+	\$\$ - Affordable
Rising Sun Inn Barn	Inn	Franconia Township	70	NA
Spring Ford Country Club	Golf Course	Royersford Borough	250	\$4,950/50 guests
The Barn at Mennonite Heritage Center	Rustic Barn	Franconia Township	NA	NA
The Loft At Landis Creek	Golf Course	Limerick Township	200	\$\$ - Affordable
The Manor House At Prophecy Creek Park	Historic Estate	Whitpain Township	300	\$\$\$ - Moderate
Woodside Lodge At Spring Mountain	Inn	Schwenksville Borough	100	NA

Sources: Valley Forge Tourism and Convention Board; The Knot; Esri, 4ward Planning, 2020

Case Studies Analysis

Key Findings: Case Studies Analysis

Using the Chester County Sports Arena (CCSA) and 422 Sportsplex for comparative purposes and assuming their successful operation, the following findings reflect the likely advantages of and considerations for a similar type of facility, were it to be developed, at Mermaid Lake.

Favorable population density and highway accessibility

With greater population density than that surrounding the CCSA, its proximity to Philadelphia, and better access from major arterials, Mermaid Lake could likely support the development of a similar recreation complex.

Favorable median household incomes

With reasonably comparable median household incomes for purposes of recreation and entertainment, the drive-time contours served by the CCSA and potential Mermaid Lake facility have median household incomes that likely support such operations.

Demographics demand a balance of activities and features

Given that the drive-time contours of the CCSA and Mermaid Lake have comparable demographics for purposes of recreation and entertainment, and that the number of children and working-age residents in the Mermaid Lake PMA and SMA is expected to decline, albeit remain relatively flat, in the near term, a balance of activities and features targeted to a range of age groups is likely needed to be competitive in the primary and secondary market areas. Thus, while a Mermaid Lake recreational facility should not exactly emulate the CCSA model, it could successfully borrow features and programs tailored to its unique and diverse target audience, as well as fill the gap in recreational opportunities for area teens, as suggested by our interviews with local event planners.

Key Findings: Case Studies Analysis (continued)

Seek community engagement

A sports facility that integrates community engagement in its operation, such as offering free community sports days and support of local social, environmental, and economic initiatives becomes a mutually beneficial arrangement for the sports center and its surrounding neighborhood.

Find a well-balanced mix of sponsors

Local businesses and clubs with missions complementary to that of a sports center should be identified for sponsorship opportunities. A well-balanced mix of sponsors enhances positive public relations and raises awareness of all organizations involved.

Case Study: Chester County Sports Arena, Downingtown, PA

Background

After purchasing the former Caln Roller Rink property in Downingtown, Pennsylvania, its new owners began significant renovations on what would become the Chester County Sports Arena (CCSA). Opened in late 2016, the Sports Arena was designed to be a “premium sports and childcare facility,” including indoor and outdoor camp opportunities. With new features and programs added since its opening, the business most recently built a 40-foot rope-climbing complex and swimming pool with a 24-foot waterslide in 2019. Both features were built for camp use but are also available to the public for private birthday parties and group outings. The Chester County Sports Arena, located just off Route 30 in Caln Township, is an approximately 45-minute drive from Mermaid Lake.

Features & Programs

CCSA features 25,000 square feet of indoor space, including a multi-sport rink, arcade, and full-service café. The surrounding 26-acre property offers a swimming pool, mini-golf course, an extensive rope-climbing structure, a kickball field, a gaga ball pit, and acres of trails, creeks, and woods. Activities include roller and dek hockey, laser tag, moon bounces, knockerballs, giant hamster balls, swimming, kayaking, and fishing. The Sports Arena offers summer camps, day camps, an after-school program (CCSA provides transportation from eight area schools), daycare (maximum capacity: 77 children), and a newly established Virtual School Camp, in response to the Covid-19 pandemic. Additionally, it hosts birthday parties, fundraisers, school functions, banquets, and corporate events, with a variety of skate, ropes courses, and pool



Images: Chester County Sports Arena exterior: mapquest.com; logo: Chester County Sports Arena Facebook page

Case Study: Chester County Sports Arena (continued)

party packages ranging from \$199 to \$375 for 1.5- to two-hour sessions. Skating and hockey clinics are also available, as well as hockey leagues for ages four to adult. Additionally, the Sports Arena is home to the Brandywine Roller Derby, a women's flat-track league based in Downingtown that meets monthly at the rink.

Considerations & Relevance

As a privately owned recreation center, CCSA offers Mermaid Lake elements for consideration. Its array of indoor and outdoor offerings and year-round programming appeals to a varied audience, despite its initial development as a youth-oriented business. Over the years, CCSA has expanded its programming to meet the needs of the local population, with a focus on working families and club-based recreation. The provision of after-school transportation and programming, as well as its newest Virtual School Camp offering suggest a response to community demand.



Images: Chester County Sports Arena rink and ropes complex: chestercountysportsarena.com

While the evolution of CCSA's programming has made it more inclusive of older residents, activities geared toward participants ages 45 and older is still limited to those with lifestyles active enough to include hockey and skating. Its swimming pool, mini-golf course, and nature trails are reserved only for young camp participants, and private birthday parties and group outings.

Sources: www.chestercountysportsarena.com; Hostutler, Mark "Business Partners Breathe New Life into Caln Roller Rink," Dec 2016; McGuane, Kimberly "Chester County Sports Arena's Latest Addition a Rope-Climbing Complex," Vista Today, May 2019.

Case Study: Chester County Sports Arena (continued)

Chester County Sports Arena Activities and Features by Market Appeal

	Pre-School-Age Children	Grade School-Age Children	High School and College-Age	Young Workforce and Grads	Early-Stage Families	Late-Stage Families	Young Empty Nesters	Older Empty Nesters	Mostly Retired
Skating/Hockey	X	X	X	X	X	X	X	X	
Swimming	X	X	X	X	X	X	X	X	X
Kayaking		X	X	X	X	X	X	X	X
Fishing		X	X	X	X	X	X	X	X
Park Trails	X	X	X	X	X	X	X	X	X
Mini-Golf	X	X	X	X	X	X	X	X	X
Summer/Day Camp	X	X	X		X				
After-School Camp			X						
Daycare	X					X			
Ropes Course		X	X		X				
Kickball		X			X				
Gaga Ball	X	X			X				
Laser Tag		X	X		X				
Moon Bounce, Knockerbball, etc.	X	X							

Case Study: 422 Sportsplex, Pottstown, PA

Background

With 102,000 square feet of indoor sporting activity space for ages three to seniors, the 422 Sportsplex, located on Route 422 in Pottstown Borough, Pennsylvania, hosts a wide variety of sports programs, leagues, and camps. The Sportsplex has become an entirely membership-only facility.

Features & Programs

The 422 Sportsplex features three basketball courts, two multi-purpose fields, and a rink. Youth programs include flag football, basketball, inline and dek hockey, field hockey, rugby, softball, baseball, lacrosse, volleyball, badminton, disc golf, and Nerf battles. There is a wide, creative variety of camp offerings including the more traditional soccer, basketball, inline and dek hockey, flag football, field hockey, lacrosse, and multi-sports (the Sportsplex's most popular camp) camps, as well as a Study Hall (a virtual school camp developed in response to the Covid-19 pandemic) and Day Camp with daily and weekly options, and a Create Your Own Day Camp, in which counselors/coaches are hired to conduct weeklong multi-activity or sport-specific camps in the comfort of a family's backyard. The Sportsplex's youth leagues include soccer, dek and inline hockey, and lacrosse. Its adult leagues include soccer, inline and dek hockey, flag football, kickball, cornhole, and pickleball. The Sportsplex is available for rent, with different "field trip" package options (e.g., scrimmages, field days, relay races). It also hosts parties, with sports, Nerf, and toddler party package options, inclusive of pizza and cake catering.



Images: 422 Sportsplex exterior: mapquest.com; logo: the422sportsplex.com

Case Study: 422 Sportsplex (continued)

Considerations & Relevance

The 422 Sportsplex is backed by a well-balanced mix of sponsors, including numerous local businesses (e.g., insurance company, orthodontist, learning center), a local swim club, Kutztown University, and the National Guard.

In June 2019, the Sportsplex hosted its first All Girls Sports Day, a free two-hour event open to girls ages five to 10, offering participants the opportunity to try six different sports, as coaches guided them through drills and scrimmages. A definitive success, the event's 72 free spots were filled within 18 hours of its announcement.

With an eye toward community-building, the Sportsplex management has initiated and encouraged the support of

small local businesses and clean-up along the Route 422 corridor. In June 2020, the Sportsplex was the venue for a comedy, food, and music night, hosted by a local comedy club and lounge.

While the 422 Sportsplex provides Mermaid Lake an example of a sports center appealing to all age groups, it also presents a model for community engagement. Offering free community sports days and support of local initiatives becomes a mutually beneficial proposition for the sports center and the surrounding neighborhood.

Sources: 422 Sportsplex, www.the422sportsplex.com; McCue, Owen "422 Sportsplex Hosts All Girls Sports Day," The Mercury, Jun 2019; Patterson, Michilea, "Youth Sports Can Keep Kids Healthy in More Than Just the Physical Aspect," The Mercury, Aug 2016; Rovins, Donna "Shop Small to Win Big Launches Second Round, Focusing on Area Small Businesses," The Times Herald, May 2020.



Images: 422 Sportsplex rink: mapquest.com; indoor soccer field: pottsmmerc.com; basketball camp: discovernepa.com

Case Study: 422 Sportsplex (continued)

422 Sportsplex Activities and Features by Market Appeal

	Pre-School-Age Children	Grade School-Age Children	High School and College-Age	Young Workforce and Grads	Early-Stage Families	Late-Stage Families	Young Empty Nesters	Older Empty Nesters	Mostly Retired
Skating/Hockey	X	X	X	X	X	X	X	X	
Flag Football		X	X	X	X	X			
Basketball		X	X	X	X	X	X		
Field Hockey		X	X						
Lacrosse		X	X						
Softball/Baseball		X	X	X	X	X	X		
Volleyball		X	X	X	X	X	X		
Multi-Sports Camp		X	X		X				
Badminton/Pickleball		X	X	X	X	X	X	X	X
Disc Golf		X	X	X	X	X	X	X	X
Kickball		X			X				
Cornhole	X	X	X	X	X	X	X	X	X
Study Hall & Day Camp		X	X		X				
Create Your Own Day Camp	X	X			X				

Case Studies: Demographic Comparison

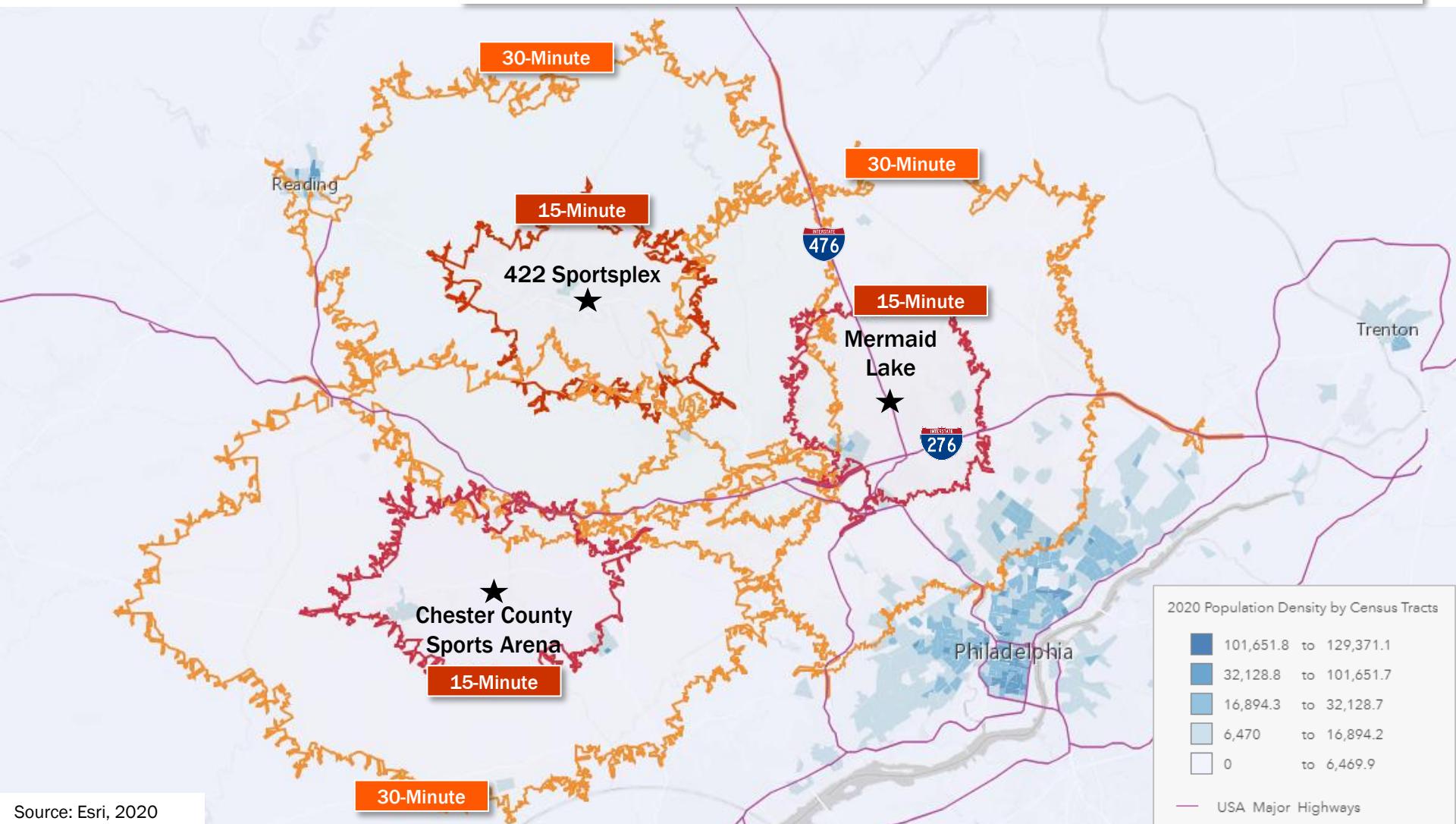
While the Chester County Sports Arena's 15-minute PMA and 30-minute SMA have slightly higher household incomes and near-term population growth rates (albeit relatively flat), Mermaid Lakes' PMA and SMA have the greatest population density, given their proximity to the Philadelphia metro area. Although Mermaid Lakes' drive-time contours have higher shares of persons ages 65 and older, both Chester County Sports Arena and 422 Sportsplex's drive-time contours have relatively comparable demographics for purposes of recreation and entertainment. Given that the number of children and working-age residents in the Mermaid Lake PMA and SMA is expected to decline, albeit remain relatively flat, in the near term, a balance of activities and features targeted to a range of age groups is likely needed to be competitive in the primary and secondary market areas.

Key Metric	Mermaid Lake		Chester County Sports Arena		422 Sportsplex	
	PMA	SMA	PMA	SMA	PMA	SMA
Total Population	204,002	843,278	133,822	485,585	123,925	514,585
Population per Square Mile	2,038	1,746	1,186	740	1,120	819
Total Population Growth (2020-2025)	4,089	20,805	5,515	17,054	2,598	13,351
Annual Growth Rate: Pop. (2020-2025)	0.4%	0.5%	0.8%	0.7%	0.4%	0.5%
Median Household Income	\$87,598	\$90,700	\$96,108	\$101,176	\$77,611	\$86,142
Median Household Income: Householder Age 65+	\$58,689	\$59,939	\$60,894	\$65,160	\$48,812	\$55,045
Annual HH Spending: Entertainment/Recreation	\$4,355	\$4,453	\$4,346	\$4,863	\$3,530	\$4,082
Median Age	42.4	42.0	39.4	40.1	40.2	40.9
Population 65+ years	19.7%	18.9%	14.6%	17.0%	15.9%	16.5%
Annual Growth Rate: Senior Pop. (2020-2025)	2.8%	3.1%	4.1%	3.6%	3.2%	3.5%
Child Population (0 - 17 years)	21%	21%	25%	23%	24%	23%
Annual Growth Rate: Child Pop. (2020-2025)	-0.3%	-0.2%	0.3%	0.0%	0.0%	0.0%
Working Age Population (18 - 64 years)	60%	60%	61%	60%	60%	61%
Annual Growth Rate: Working Age Pop. (2020-2025)	-0.2%	-0.1%	0.3%	0.1%	-0.1%	-0.1%
Senior Population (65+ years)	20%	19%	15%	17%	16%	4%
% Annual Growth Rate: Senior Pop. (2020-2025)	2.8%	3.1%	4.1%	3.6%	3.2%	3.2%

Source: Esri, 2020

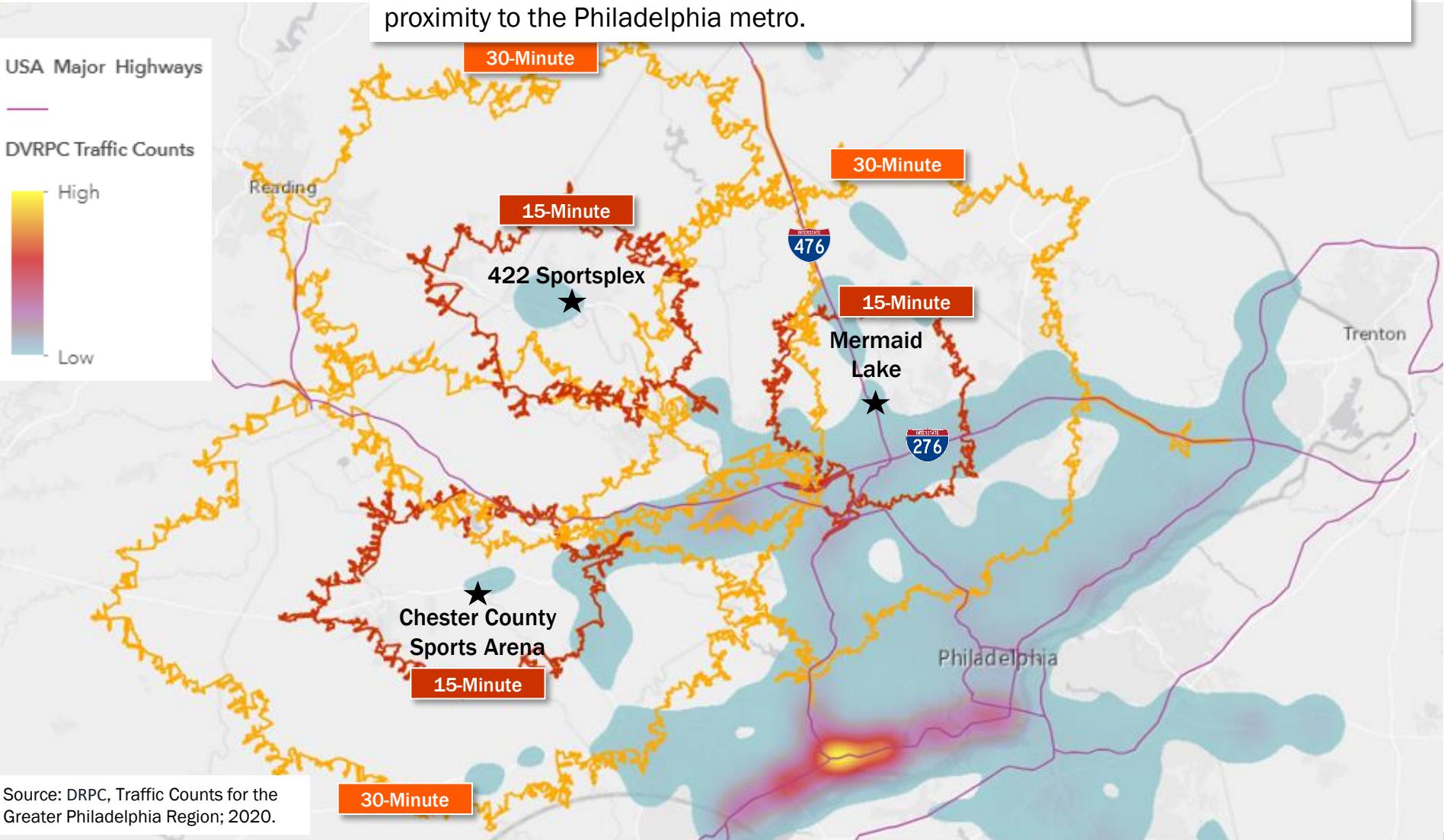
Case Studies: Population Density

Compared to the 422 Sportsplex and Chester County Sports Arena drive-time contours, Mermaid Lake has greater population density in the PMA and SMA drive-time areas.



Case Studies: Traffic Volumes

Compared to both the Chester County Sports Arena and the 422 Sportsplex drive-time contours, Mermaid Lake has higher annual average daily traffic (AADT) volumes in the surrounding area, given the site's accessibility to major arterials and proximity to the Philadelphia metro.



Appendix

Contacts

The following is a list of 11 contacts with whom we successfully conducted information-gathering telephone conversations, in support of the Mermaid Lake Master Plan market analysis.

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Plymouth Meeting, PA 19462
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