



FEASIBILITY STUDY: DEVELOPING AN INDOOR/OUTDOOR TENNIS COMPLEX IN PRINCE GEORGE'S COUNTY, MARYLAND

PRESENTED TO: MARYLAND STADIUM AUTHORITY



FINAL REPORT

April 2022



April 15, 2022

Mr. Al Tyler, Vice President, Economic Development
Maryland Stadium Authority
Capital Projects Development Group
351 West Camden Street, Suite 300
Baltimore, MD 21201

Dear Mr. Tyler:

Crossroads Consulting Services LLC, in association with Maryland Marketing Source, Inc. and Populous, has completed its feasibility study for a proposed new indoor/outdoor tennis complex in Prince George's County Maryland. This report summarizes our findings and principal conclusions from the research and analysis.

The findings contained in the report reflect analysis of information provided by secondary sources that are assumed to be correct. We have utilized sources that are deemed to be reliable but cannot guarantee their accuracy. We have no obligation, unless subsequently engaged, to update our report or revise the information contained therein to reflect events and transactions occurring after the date of this report.

In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by Maryland Stadium Authority management and may not be relied upon by any party for any purpose, including financing. Notwithstanding these limitations, it is understood that this document may be subject to public information laws and, as such, can be made available to the public upon request.

Although you have authorized reports to be sent electronically for your convenience, only the final hard copy report should be viewed as our work product.

We have enjoyed serving you on this engagement and look forward to the opportunity to provide you with continued services.

Sincerely,

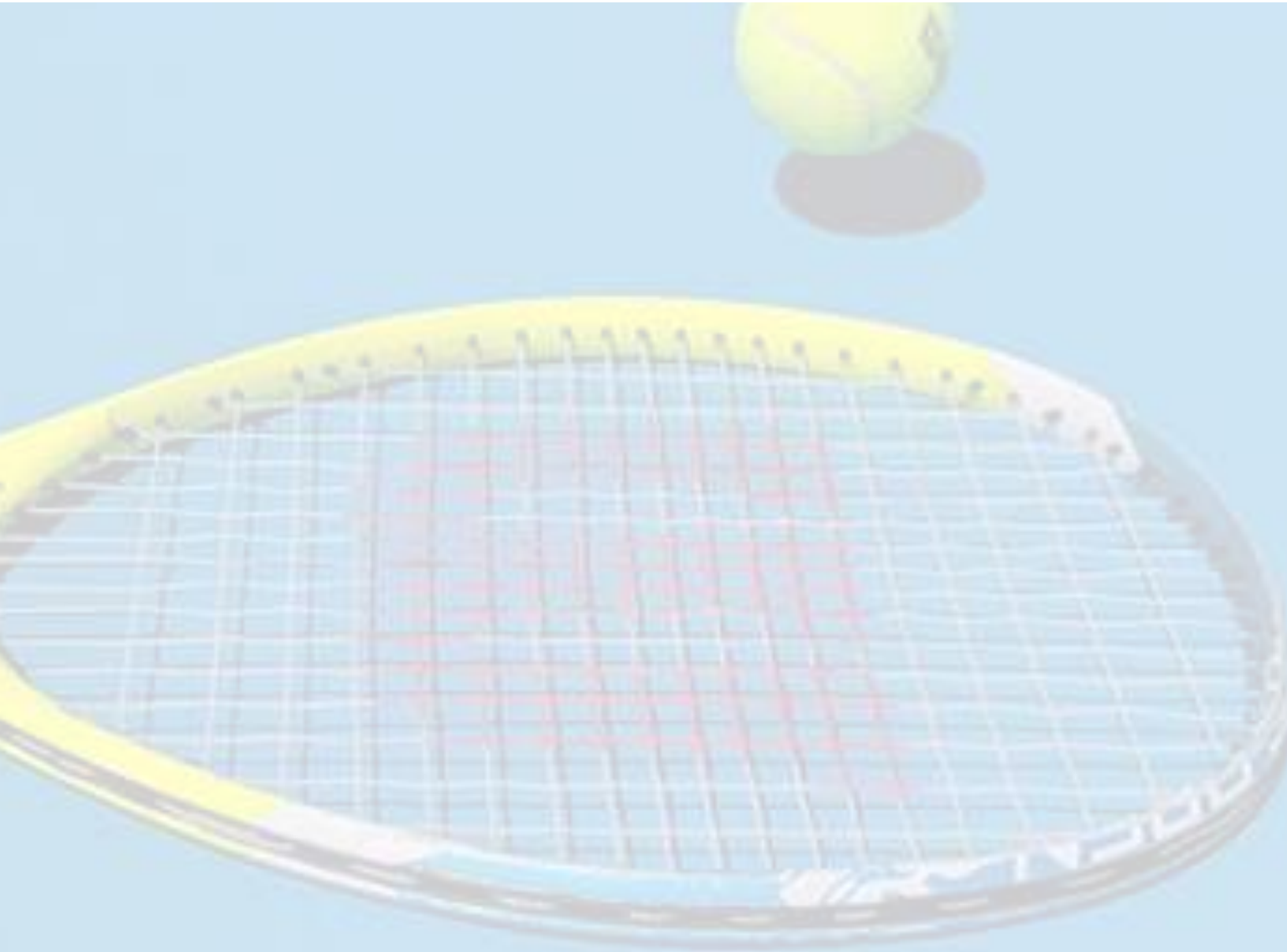
Crossroads Consulting Services LLC

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1. INTRODUCTION AND EXECUTIVE SUMMARY



PROJECT BACKGROUND

Located in the heart of the Baltimore/Washington corridor, Prince George's County (County) encompasses nearly 500 square miles and is the second highest populated county in the State of Maryland (State). The County borders Washington, D.C. and is less than 40 miles south of the City of Baltimore. The County benefits from its diverse offerings, robust transportation system and centralized location and has developed a reputation for having an urban atmosphere that provides a scenic and calm place to live, work and play. In addition, the County places high importance on education. According to the Maryland Department of Commerce, the County features Prince George's Community College, which is a two-year college, and four (4) four-year colleges/universities including Bowie State University, Capitol Technology University, University of Maryland, College Park and University of Maryland Global Campus.

Notable attractions in the County for residents and visitors include the National Harbor on the Potomac, Gaylord National Resort and Convention Center, FedEx Field (home to the Washington Football Team), Six Flags America, NASA Goddard Space Flight Center, National Wildlife Visitor Center, Capital Wheel, Rosecroft Raceway, Tanger Outlets, Clarice Smith Performing Arts Center and MGM National Harbor Resort Casino.

In addition to these attractions, residents have diverse leisure options including those provided by the Maryland-National Capital Park and Planning Commission (M-NCPPC). The M-NCPPC was founded in 1927 and is recognized as a leader in land use, planning parks, and recreation. The M-NCPPC has won numerous awards for innovation, stewardship and exemplary vision for enhancing the lives of residents and visitors. The agency, which is chartered by the State of Maryland, has geographic authority in both Prince George's and Montgomery counties. Existing facilities in the County planned by and/or owned by the M-NCPPC include Show Place Arena; Prince George's Sports and Learning Complex; a 10,000 seat Double-A Minor League Baseball Stadium home to the Bowie Baysox; community centers; recreational buildings; aquatic facilities; ice rinks; golf courses; and tennis courts, among others.

The M-NCPPC is comprised of seven (7) departments including the Department of Parks and Recreation. Consistent with input from various community groups and stakeholders as well as the overarching goals of the M-NCPPC, the Department of Parks and Recreation has identified the need to determine the merits of developing a new tennis complex in Prince George's County. Studies suggest that parks and recreational facilities can have positive impacts on the physical, mental, and social health of individuals and their communities.

The proposed new tennis complex is envisioned to complement the existing recreational facilities available in the County and potentially become an economic driver by hosting tournaments and other special events that draw attendance from outside the County. The proposed new tennis complex could feature both outdoor and indoor courts as well as support

space/amenities such as a learning center/classroom(s), community meeting rooms, a pro shop, courts for other racquet sports, etc.

PURPOSE OF THE STUDY

Given this backdrop, the Maryland Stadium Authority (MSA) and M-NCPPC retained Crossroads Consulting Services LLC (Crossroads Consulting) to conduct a study that assesses the merits of developing a new tennis complex to accommodate both the County's recreational needs and other uses and special events, including those that could potentially generate economic benefits to Prince George's County and the State. At this juncture, the market and economic analysis outlined in this report is non-site specific other than the fact that the site will be located in Prince George's County. As part of the study effort, the M-NCPPC identified potential sites for the proposed new tennis complex. Populous, a global architectural design firm, was engaged to evaluate the identified sites as well as develop a high-level preliminary program that outlines facility requirements as well as a conceptual layout.

The research and analysis contained in this report are intended to allow M-NCPPC to draw informed conclusions regarding the viability associated with future development of a new tennis complex.

In March 2020, the global outbreak of a "novel coronavirus" known as COVID-19 was officially declared a pandemic by the World Health Organization (WHO). As future impacts related to the pandemic remain uncertain, it should be noted that the analysis found within this report does not account for potential short- or long-term implications resulting from COVID-19.

WORK PLAN

Tasks completed as part of this study effort included, but were not limited to, the following.

- Conducted phone calls with client representatives to develop an understanding of the background, history and key issues related to the study; confirm the study scope and objectives; review existing data related to the project; and discuss the project schedule.
- Obtained feedback from area stakeholders regarding potential market opportunities and potential challenges to development and sustainability of the proposed tennis complex.
- Analyzed market attributes including demographic and socioeconomic metrics, transportation access, hotel supply and climate characteristics.
- Profiled the supply of existing local and area tennis facilities.
- Analyzed information from secondary sources regarding historical tennis activity occurring in Prince George's County.
- Summarized regional and national tennis participation trends.

- Conducted market surveys/interviews with area residents as well as organizations that represent tennis events.
- Analyzed building program attributes and operating data from a select number of peer facilities.
- Summarized estimated primary uses for the proposed new tennis complex and building program recommendations.
- Developed a high-level facility program and evaluated three potential site locations.
- Developed a financial proforma and related assumptions regarding potential usage and facility operations in terms of operating revenues and operating expenses.
- Estimated the economic and fiscal impacts associated with ongoing facility operations.

EXECUTIVE SUMMARY

This section provides a summary of key observations and findings related to the proposed new tennis complex in Prince George's County based on the research and analysis conducted as part of this study effort.

U.S. Tennis Trends

The following summarizes key trends in the U.S. tennis industry based on recent reports published by the Tennis Industry Association (TIA).

- Tennis participation in the U.S. has remained relatively stable in recent years and was 17.68 million in 2019. With that said, the total number of play occasions has trended downward, as has the number of core participants (those that participate a minimum of 10 times annually).
- The South Atlantic Region, within which Maryland is categorized by the TIA, had 3.65 million total participants in 2019, which was the 2nd highest among the regions in the U.S. The South Atlantic Region had the highest number of core participants (those that participate a minimum of 10 times annually) at 2.06 million.
- Research suggests tennis has fared well during the COVID-19 pandemic due to the natural distance among participants.
- Pickleball has experienced significant growth in recent years and provides an opportunity for additional programming at tennis facilities.

Local Market Conditions

An area's demographics; supply of amenities such as hotels, retail, dining, entertainment, etc.; transportation access; and climate can impact demand for a new tennis complex.

- Favorable market attributes associated with the proposed new tennis complex include a relatively large, growing, affluent and well-educated population base in the County, of which a large percentage spend their spare time participating in sports; strong

accessibility to/from the County from other State and regional locations; clusters of hotels, retail, dining and entertainment options predominantly along I-95; and proximity to surrounding areas that feature relatively large populations.

- Market research also indicated several challenges associated with the proposed tennis complex in Prince George's County. Although the study is non-site specific, the southern portion of the County features a smaller population and fewer hotels, retail, dining and entertainment options in comparison to the central and northern portions. Further, new outdoor tennis courts in the County would not be available for a portion of the year due to climate.

Supply of Local and Area Tennis Facilities

The degree that existing facilities in the area meet the needs of residents and other target markets is also an important consideration when assessing the merits of developing a new tennis complex in the County. According to the United States Tennis Association (USTA), a public or private tennis facility requires a minimum of four (4) courts for effective programming. While public facilities with less than four courts can service a portion of local demand, they are limited in the amount and type of programming that they offer. In addition, private and school facilities can service some local demand, but the cost of membership can prevent some tennis participants from using private facilities and school facilities generally focus on meeting their internal programming needs.

- Most public tennis facilities in the County offer less than four courts, which limits the amount and type of programming at these facilities.
- Public tennis facilities with four or more courts in the County offer a total of 45 outdoor courts and 15 indoor courts. The 15 indoor courts are located within three (3) tennis facilities – Fairland Regional Park (Fairland Tennis Bubble), Watkins Regional Park (Watkins Tennis Bubble) and Louise F Cosca Regional Park (Cosca Tennis Bubble). Although not public, the Tennis Center at College Park is the largest tennis facility in the County with 15 outdoor and 15 indoor courts and partners with the M-NCPPC to coordinate a junior instructional program. Management at the Tennis Center at College Park indicated that they are considering expanding the facility.
- As a point of reference, Prince George's County offers one public court per 15,082 people, which is higher than the general industry rule of thumb of one public court per 10,000 people. This metric suggests that additional courts could be supported from a supply perspective.
- There is a significant supply of existing tennis facilities in Montgomery County and in the Washington, D.C. area and a new tennis center is being planned in northern Anne Arundel County at Millersville Park.
- Based on the geographic layout of the County and the location, supply and historical usage of existing courts in the County, some residents face challenges finding available

court time, particularly indoors, and are traveling long distances within or outside the County to play tennis.

Potential Demand Generators

Given the objectives of the proposed tennis complex to accommodate local recreation and host events that generate economic benefits, market outreach was conducted to assess potential market demand for the proposed new tennis complex.

Crossroads engaged Maryland Marketing Source, Inc., a local market research firm, to conduct a community survey process. The online survey was live between December 14th, 2020, and February 3rd, 2021. More than 1,560 individuals completed the survey. A large percentage of respondents (68%) reside in Prince George's County while others indicated they reside in the surrounding areas. The following summarizes key findings from the community survey.

- There is demand for the proposed new tennis complex, with the majority of respondents stating that either they, or someone in their household, would be interested in playing tennis at a new tennis complex in Prince George's County.
- Just over half of respondents indicated they would anticipate using the proposed new tennis complex one to three times per week.
- The majority suggested they would want to play on both indoor and outdoor courts.
- Other than tennis, respondents also indicated that they would be interested in playing pickleball at a new tennis complex in the County.
- As it relates to attracting non-local participants, most respondents residing in counties outside Prince George's County indicated that they would travel a maximum of 30 to 45 minutes to play at a new tennis complex in the County.

Input was also obtained from organizations that program various tennis events including M-NCPPC, management at Tennis Center at College Park, Prince George's County Tennis Association (PGCTA), USTA, Intercollegiate Tennis Association (ITA), Maryland Public Secondary Schools Athletic Association (MPSSAA), Maryland Interscholastic Athletic Association (MIAA) and Prince George's County Tennis and Education Foundation (PGTEF). The following summarizes feedback received from these organizations.

- There is demand for additional tennis courts to increase programming for both recreational programming and tournaments that draw non-local attendees.
- The tennis community in the County is very active. As a result of high demand, there is limited court availability during peak times, causing people to leave the County to find available court time.
- Many facilities in the County lack the necessary number of courts and/or amenities to host tournament activity.
- Tennis programming at a new tennis complex could include recreation, leagues, camps, instructional/lessons, tournaments, etc. In addition, local tennis organizations indicated

that a new tennis complex with multi-purpose indoor space could potentially accommodate after school programs and other community-based, non-tennis activities.

- The USTA specializes in the programming and management of tennis facilities and is recognized as a leader in the development of tennis from the grassroots to professional levels. Representatives from the USTA indicated that Prince George’s County is a primary focus for them and expressed a strong interest in providing programming at a new or expanded facility in the County. Further, they would strongly consider a potential partnership with M-NCPPC for facility management and co-branding. A potential partnership with the USTA would help foster participation in the County at the grassroots level and develop players through all levels of the sport.
- Management at the Tennis Center at College Park indicated they would be interested in potentially partnering to develop and/or operate a new tennis facility in the County.
- Proximity to amenities such as hotels, restaurants and entertainment is important when selecting a site location for competitive tennis events.

Case Studies

As part of the market analysis, data from the following peer facilities was analyzed to provide a frame of reference to assist the M-NCPPC in drawing conclusions regarding the proposed new tennis complex in Prince George’s County:

- Princeton Racquet Club
- Mercer County Tennis Center
- Montgomery TennisPlex
- Wheaton Indoor Tennis Center
- Tennis Center at College Park
- WTEF – East Capitol Campus
- Southeast Tennis & Learning Center
- Ida Lee Park Tennis Center
- XS Tennis Village

The following summarizes key findings based on a review of these peer facilities.

- The profiled facilities have various ownership structures and operating models.
- The total number of indoor tennis courts at the profiled facilities ranges from four (4) to 15 and averages eight (8).
- The total number of outdoor tennis courts at the profiled facilities ranges from four (4) to 22 and averages 11.
- In addition to tennis courts, many of the profiled facilities offer other amenities such as designated pickleball courts, classrooms, multi-purpose indoor space, seating/viewing areas, pro shops, food and beverage and fitness rooms. Based on industry research, while some tennis facilities offer pro shops, this service is generally not profitable.
- The profiled facilities have diverse programming that includes open play, reserved/contract play, leagues, lessons, camps, clinics, tournaments, etc. Tournaments typically account for a small percentage of total facility usage in comparison to other

types of tennis play. Further, tournaments are generally not a primary source of operating revenue.

- Operating deficits are common among similar tennis facilities. Many are developed to grow the game of tennis, serve a community need, generate economic benefits, etc. and receive operating subsidies.

Program Recommendations and Site Fit Analysis

The following outlines major program elements, patron amenities and other related supporting infrastructure recommended for the proposed new tennis complex. More detailed building program recommendations can be found in the Market Findings and Program Recommendations section of this report. It should be noted that these building program recommendations could be achieved through construction of a new complex or expansion of an existing tennis facility.

Indoor Component

- Permanent indoor structure with eight (8) hard courts
- Portable spectator seating
- Two multi-purpose rooms of 1,500 SF each that can be utilized as classrooms, meeting rooms, banquet space, etc.
- Administrative offices, lobby area and gathering space, locker rooms
- Café with area for seating

Outdoor Component

- 12 outdoor hard courts with lights
- Portable spectator seating

Strictly in terms of accommodating community needs, a fitness area and stand-alone outdoor pickleball courts should be given consideration when a site has been selected and available funding sources have been identified.

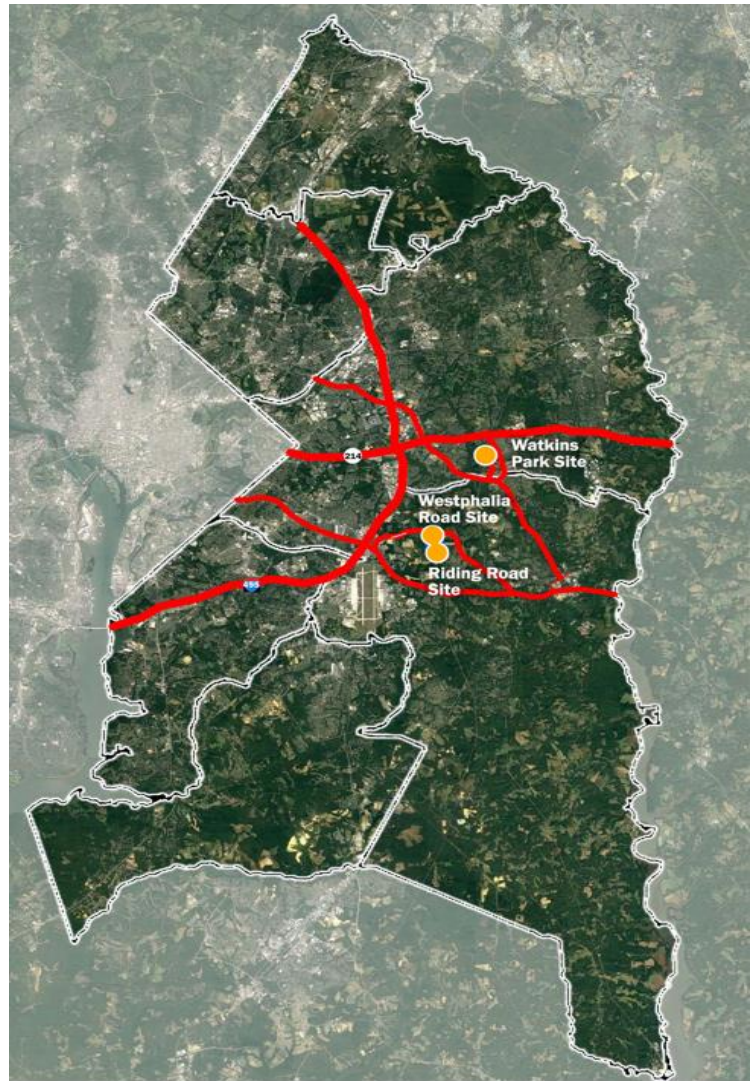
Populous, a global architectural design firm, was tasked with further developing the building program recommendations in terms of square footage and acreage requirements as well as evaluating three (3) potential sites identified by the M-NCPPC within Prince George's County. As part of the evaluation process, Populous developed conceptual tennis complex layouts for each of the three potential sites which can be found in the Site Fit Analysis section of this report.

Based on the recommended program above, it is estimated that the indoor tennis facility will require approximately 97,000 SF while the outdoor courts and exterior support spaces will require 91,100 SF. The proposed tennis complex will require a minimum of 10 acres which includes parking, stormwater management areas (if required), perimeter space, etc.

The three potential sites M-NCPPC identified for the proposed new tennis complex in Prince George's County are depicted on the adjacent graphic. Both the Westphalia Road Site and the Riding Road Site are currently undeveloped while the Watkins Park Site has an existing tennis facility (Watkins Tennis Bubble).

It should be noted that the potential development of the proposed tennis complex is not limited to these three sites and other locations could be considered by M-NCPPC should they decide to move forward with the project.

Market research suggests that a central site location in the County could provide the opportunity to attract participants from other surrounding counties as well as from eastern Virginia and Washington, D.C. depending on the event type.



Populous evaluated these sites using a site evaluation matrix, which is shown on the next page. This matrix contains a collection of site selection criteria typical for a project of this type. An initial or raw score was assigned to each factor based on the evaluation of each site. The raw scores are based on the following scale:

5 – Excellent 4 – Good 3 – Average 2 – Below Average 1 – Poor

A weight factor was applied to each raw score to calculate the weighted score. The weight factors are based on a scale of relative importance as follows:

4 – Critical 3 – Important But Not Critical 2 – Mildly Important 1 – Unimportant / Non-issue

Proposed New Tennis Complex in Prince George's County, Maryland							
Site Evaluation Matrix							
	Raw Scores			Weight Factor	Weighted Scores		
	Watkins Park Site	Westphalia Road Site	Riding Road Site		Watkins Park Site	Westphalia Road Site	Riding Road Site
Criteria - Physical Site Factors							
Project Fit	3	2	5	4	12	8	20
Potential For Future Expansion	4	1	5	2	8	2	10
Disruption/Conflicts With Existing Utility Infrastructure (Streets, Utilities, etc.)	2	5	5	3	6	15	15
Adequacy/Availability of Existing Utility Infrastructure	4	2	1	4	16	8	4
Vehicular Access	4	3	1	4	16	12	4
Alternate Transportation Access	4	2	1	3	12	6	3
Pedestrian Access	4	1	1	3	12	3	3
Independence From Additional Off-Site Infrastructure Improvements	4	3	1	4	16	12	4
Topographic Considerations	4	1	2	3	12	3	6
Subtotal Physical Site Factors	33	20	22		110	69	69

Based on the completed site evaluation matrix, the Watkins Park Site scored the highest (110) of the three sites evaluated and appears to be the best candidate for development of the proposed tennis complex. The Watkins Park Site has adequate access for vehicles, alternative forms of transportation and pedestrians. Further, the site is not limited by topography or size, and has an abundance of existing parking. From an operational perspective, development of a new tennis complex on the Watkins Park Site differs from the other evaluated sites in that it would create the opportunity for operating efficiencies such as shared staffing and resources given the site's current use as a tennis complex.

The Westphalia Road Site appears to be barely large enough for the tennis complex as currently programmed and would offer no opportunity for future expansion of the project. Although the site can be vehicularly accessed by Westphalia Road, there are no existing pedestrian or alternative transportation networks proximal to the site. The primary limitations of the Westphalia Road Site involve the extreme existing topography coupled with the size and configuration of the site, which would potentially result in extremely high development costs for a project of this type.

Similarly, the Riding Road Site would likely be very expensive to develop for a project of this type due to the need for extensive off-site infrastructure improvements (primarily utilities and roadways) that would be necessary to make the site viable.

Economic Analysis

The economic analysis includes an estimate of annual usage, financial operations and economic and fiscal impacts. These estimates are based on key assumptions related to the ownership, operations, program and design of the proposed new tennis complex, which are outlined in the Economic Analysis section of this report.

Usage

The table that follows summarizes the estimated annual usage for the proposed new tennis complex in terms of court hours in a stabilized year of operation. Assuming the proposed new tennis complex is open for 13 hours per day with the exception of major holidays, the total number of court hours available is estimated to be approximately 93,300. It is estimated that tennis/pickleball activity at the proposed new tennis complex will account for 58,566 hours which yields an overall occupancy rate of 63%. The occupancy rate at the indoor tennis facility and outdoor courts is estimated to be 74% and 55%, respectively. Although not quantified in this analysis, it is anticipated that the proposed new tennis complex will also host non-tennis activities such as after-school programs and other community-oriented programming.

Proposed New Tennis Complex in Prince George's County, Maryland				
Estimate of Annual Usage in Court Hours (Stabilized Year)				
Activity Type	Indoor Court Hours	Outdoor Court Hours	Total Court Hours	% of Total
Tournaments	2,400	4,200	6,600	11%
Leagues	5,600	5,600	11,200	19%
Instructional/Program	7,593	5,736	13,329	23%
Reserved	7,356	9,446	16,802	29%
Open Play	4,765	5,870	10,635	18%
Total Court Hours Used	27,714	30,852	58,566	100%
Total Court Hours Available	37,335	56,004	93,339	
Occupancy Rate	74%	55%	63%	

This analysis estimates that the proposed new tennis complex will host 26 tournaments that generate approximately 33,100 attendee days annually. The outdoor courts are estimated to host 14 tournaments and the indoor courts are estimated to host 12. Based on market research, it is estimated that 90% of tournament activity would be new to the County while approximately 56% of tournament activity would be new to the State. It is also likely that a relatively small percentage of non-tournament participants at the proposed new tennis complex would be new to the County and State. The estimate of economic and fiscal impacts associated with the ongoing operations of the proposed tennis complex is based on the incremental new activity, not the total activity.

Financial Proforma

The proposed new tennis complex is estimated to operate at a deficit before a capital reserve fund, debt service and depreciation in a stabilized year.

Proposed New Tennis Complex in Prince George's County, Maryland	
Estimate of Annual Financial Operations (Stabilized Year)	
Net Operating Revenues	\$940,000
Net Operating Expenses	\$1,062,000
Operating Loss Before Capital Reserve, Debt Service and Depreciation	(\$122,000)

Notes: Excludes potential non-operating revenues and expenses.

Excludes potential cost savings associated with development on an existing tennis site.

The proposed new tennis complex could potentially generate revenues from other sources such as advertising and sponsorship, memberships, and naming rights that would positively impact the bottom line. Further, there may be opportunities to obtain grant money to assist with various programming opportunities. These potential revenue sources are not included in this analysis given the preliminary planning stage of the project. In addition, this analysis does not include any potential cost savings associated with constructing a new tennis complex at a site with an existing tennis facility.

Given the preliminary nature of this project, the following table provides a sensitivity analysis to reflect the impact of individual assumptions on financial operations. Multiple variations can be combined to show the overall impact of different scenarios. For instance, a 10% decrease in non-tournament rental revenue would have a net impact of (\$75,000) and a 10% increase in operating expenses would have a net impact of (\$106,000). In aggregate, this scenario would result in an increased operating loss of \$181,000.

Proposed New Tennis Complex in Prince George's County, Maryland			
Sensitivity Analysis - Net Operating Income/Loss			
Baseline Estimate - Net Operating Loss			(\$122,000)
Assumption	Adjustment	Net Impact	Adjusted Cash Flow
Tournament Rental Revenue			
Increase	10%	\$12,000	(\$110,000)
Decrease	-10%	(\$12,000)	(\$134,000)
Non-Tournament Rental Revenue			
Increase	10%	\$75,000	(\$47,000)
Decrease	-10%	(\$75,000)	(\$197,000)
Food & Beverage Revenue			
Increase	10%	\$7,000	(\$115,000)
Decrease	-10%	(\$7,000)	(\$129,000)
Operating Expenses			
Increase	10%	(\$106,000)	(\$228,000)
Decrease	-10%	\$106,000	(\$16,000)

Economic and Fiscal Impact Analysis

The table below summarizes the estimated annual new economic impacts generated from ongoing operations of the proposed new tennis complex in a stabilized year.

Proposed Tennis Complex in Prince George's County, Maryland Estimate of Annual New Economic Impacts from Ongoing Operations (Stabilized Year)		
Category	Prince George's County	State of Maryland
Output		
Direct Spending	\$2,502,000	\$1,741,000
Indirect & Induced Spending	897,000	1,252,000
Total Output	\$3,399,000	\$2,993,000
Total Jobs (Full-Time & Part-Time)	40	30
Total Earnings	\$1,162,000	\$1,161,000

Note: Local and State amounts are not additive.

Net new direct spending associated with ongoing operations of the proposed new tennis complex is estimated to be \$2.5 million annually in Prince George's County and \$1.7 million in the State. Total output (i.e. direct, indirect and induced spending) is estimated to be \$3.4 million annually in Prince George's County and \$3.0 million in the State.

Outputs from the IMPLAN model indicate that this new spending is estimated to support a total of 40 full- and part-time jobs and \$1.2 million in earnings annually in Prince George's County and 30 full and part-time jobs and \$1.2 million in earnings annually in the State. It should be noted that a person can hold more than one job, so total jobs is not necessarily the same as the count of employed persons.

This analysis takes into account that some of the events estimated to be programmed at the proposed new tennis complex are currently occurring elsewhere in the State. As such, these events have a greater economic impact to the County than to the State.

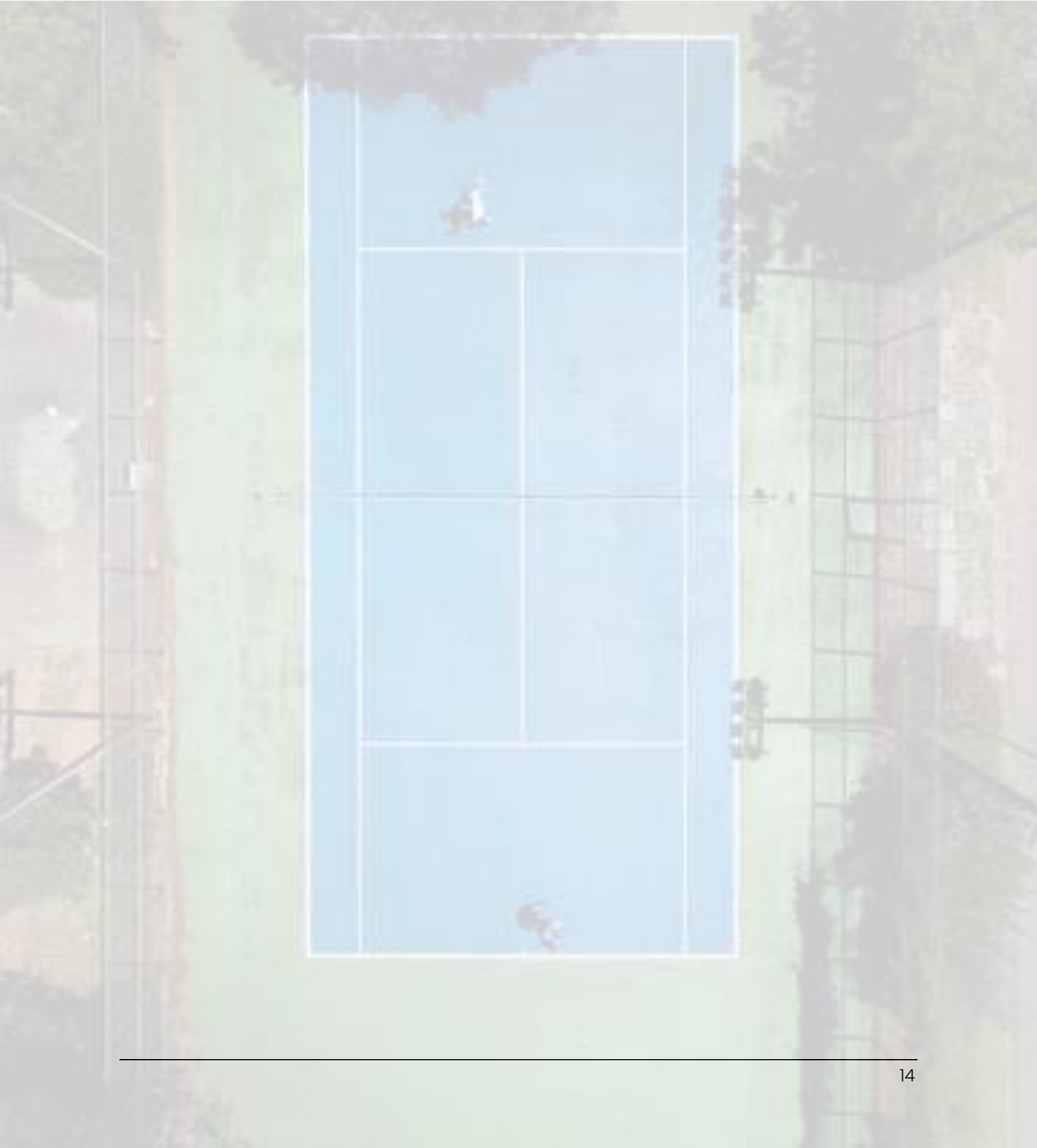
Annual new tax revenues generated from ongoing operations of the proposed new tennis complex are estimated to be \$95,000 at the County level and \$185,000 at the State level in a stabilized year.

Potential Next Steps

If the M-NCPPC chooses to move forward with development of a new tennis complex in Prince George's County, potential next steps would include further evaluating and selecting a site that can accommodate the required programmatic elements, preparing development cost and schedules based on the selected site, finalizing an operating strategy, developing a sustainable financial plan, and creating a funding plan for development costs that may include public and private sector partners.

The information in the executive summary is extracted from the more detailed report. As such, it is important for the reader to review the report in its entirety to gain a better understanding of the research, methodology and assumptions used.

2. TENNIS INDUSTRY OVERVIEW



TENNIS INDUSTRY OVERVIEW

This section includes an overview of tennis governing bodies and other organizations focused on developing and promoting tennis as well as a summary of trends in the U.S. tennis industry.

KEY TENNIS ORGANIZATIONS

The following provides a brief description of the governing bodies of tennis and other key tennis organizations, both worldwide and in the U.S.

International Tennis Federation (ITF)

Based in London, the ITF, the world governing body of tennis, oversees administration and regulation, organizing international competition, structuring the game, developing the game and promoting the game. The ITF is responsible for the rules of tennis, including technical specifications for courts and equipment, controls the major international team events for all age groups including the Davis Cup for men, the Billy Jean King Cup for women and the Hopman cup for mixed teams. The ITF also sanctions the Grand Slam events, as well as organizes Olympic tennis and wheelchair tennis events on behalf of the International Olympics Committee. The ITF is affiliated with 211 national and 6 regional tennis associations.

Association of Tennis Professionals (ATP)

The ATP is the principal organizing body for the men's professional tennis circuits worldwide. Based in London, the ATP features three tournament circuits including the main ATP tour, the ATP Challenger tour, and the ATP Champions Tour.

The ATP holds 63 tournaments across the globe. The calendar of ATP men's events includes ATP World Tour Masters 1000, 500, and 250 events. The season concludes with the Nitto ATP Finals where the world's top eight singles players and doubles teams compete to determine the number one ATP Ranking.

Women's Tennis Association (WTA)

Serving as the global leader in women's professional tennis, the WTA includes more than 2,500 players from nearly 100 countries. Headquartered in St. Petersburg, Florida, the WTA is responsible for 67 tour events worldwide totaling nearly \$150 million in prize money. In 2019, the WTA was watched by a record-breaking global audience of 700 million.

World TeamTennis (WTT)

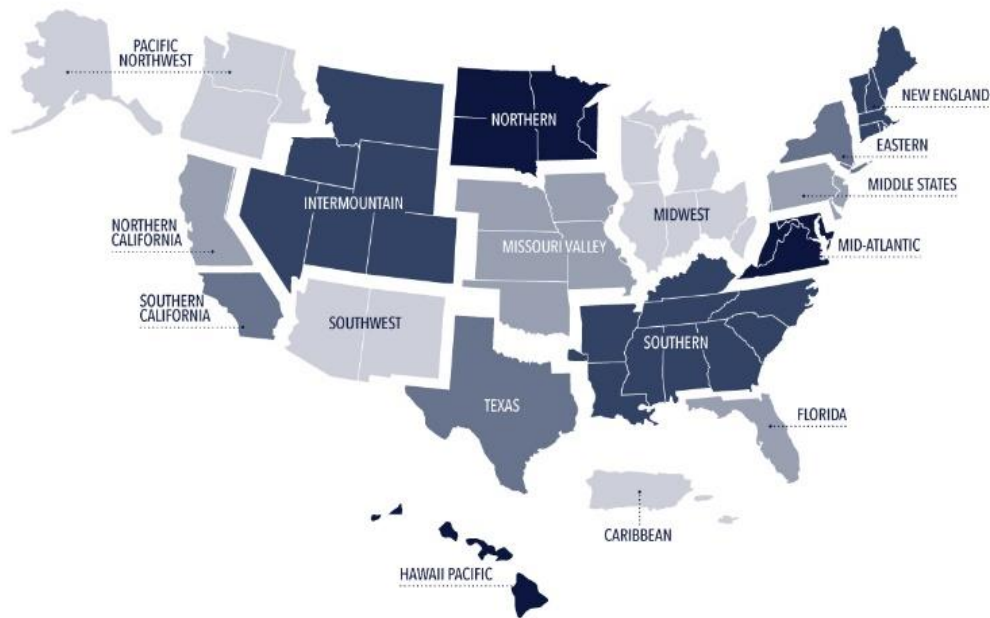
Headquartered in Rancho Santa Fe, California, World TeamTennis operates as the governing body for mixed-team doubles tennis matches. Each team who competes in World TeamTennis consists of two men, two women and a coach. Since its inception, WTT has featured tennis professionals including the Williams sisters, Andy Roddick, John McEnroe, and Maria Sharapova.

The league also operates on a non-professional basis with recreational and competitive leagues available to both youth and adults with national championships available to participants in competitive settings.

United States Tennis Association (USTA)

Established in 1881, the USTA is the official governing body for tennis in the U.S. and is responsible for promoting and developing the sport's growth at every level. A non-profit organization based in White Plains, New York, the USTA is the national governing body for the sport of tennis and the largest tennis organization in the world, with 17 geographical sections, more than 700,000 individual members and more than 7,000 organization members. The USTA hosts numerous adult and junior leagues/tournaments across the country. Its mission statement is to promote and develop the growth of tennis.

USTA Geographical Sections



Its four major focus areas are Community Tennis, Professional Tennis, USTA Player Development and Diversity and Inclusion.

- *Community Tennis* strives to grow tennis at every level with a goal of making the game accessible to everyone. It supports a wide range of programs designed to help people learn the game, play the game and take advantage of tennis' many health, fitness, and social benefits.

- *Professional Tennis* manages all aspects of the USTA's involvement in the professional sport including the US Open and the Emirates Airline US Open Series. Professional Tennis generates – through television, sponsorship, ticket sales, merchandising and digital media – significant revenue for funding the USTA mission and works to increase the popularity of the pro game.
- *USTA Player Development* facilitates the development of world-class American players through a clearly defined training structure and competitive pathway as well as through the implementation of a comprehensive coaching philosophy and structure. USTA Player Development encompasses several areas of oversight, including coaching education, player identification and development, sport science, strength and conditioning, and player services.
- *Diversity and Inclusion* is essential to achieving the USTA mission to promote and develop the growth of tennis. The USTA is committed to removing barriers and creating opportunities for all to participate. It also strives to serve as a model for all organizations that aspire to achieve maximum growth potential by reaching out to all of America.

Professional Tennis Players Association (PTPA)

The PTPA is an association of professional male and female tennis players. Founded by players who had previously served on the ATP Players Council, the stated goal of the PTPA is not to replace the ATP, but rather to provide players with a self-governance structure. It was recently reported that approximately 150 ATP and 200 WTA professionals had agreed to join the new association.

Universal Tennis

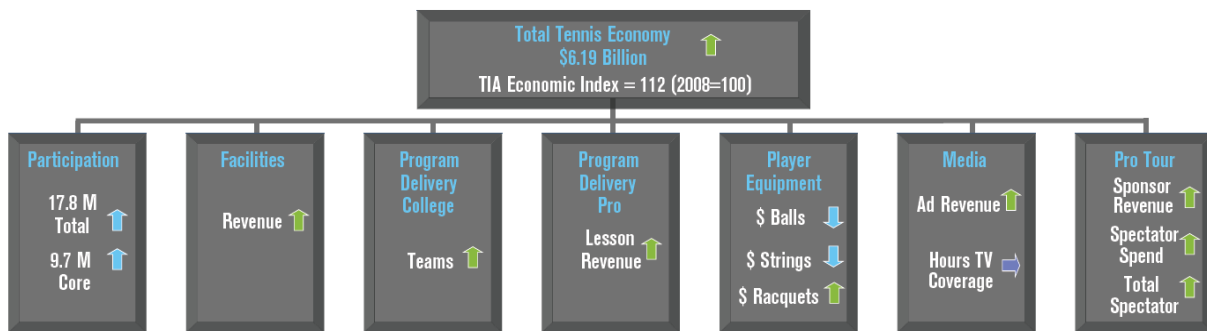
Universal Tennis is based in San Francisco, California. The organization's mission is to make tennis more affordable, accessible and fun by creating opportunities and pathways for players all over the world. The organization has multiple products and services that are anchored by Universal Tennis Rating (UTR) which is a global rating system for tennis players in both singles and doubles play. All players, regardless of age, gender, geography, socioeconomic status, or skill level are rated on the same scale between 1.00 and 16.50 based on actual match results. UTR creates value for players, coaches, tournament organizers and Federations through providing a real-time view of a player's skill and allowing players to find level-based play to create better matches and expand tennis networks. Universal Tennis is also the owner of the UTR Powered Events platform which allows tournament organizers to select entrants, sort players into flights, and create seeding draws. This platform has grown rapidly from hosting 100 events in 2016 to over 900 events in 2020. In addition, Universal Tennis owns and organizes the UTR Pro Tennis Tour, which features singles-only events around the world for men and women.

SUMMARY OF U.S. TENNIS TRENDS

The following summarizes key trends in the U.S. tennis industry based on reports published by the Tennis Industry Association (TIA) including, but not limited to, the *2020 Participation Report* and the *Industry Insider 2020 Edition*. TIA was founded in 1974 as the American Tennis Federation. The association is a not-for-profit association for tennis and operates with the mission to promote the growth of tennis and the economic vitality of the tennis industry. The association produces more than 70 annual research reports to assist tennis businesses in making informed strategic business decisions.

The Economy and Tennis

The TIA's Economic Index measures the overall "worth" of the tennis industry. TIA estimates that the industry had an estimated worth of \$6.19 billion in 2018. The industry grew an estimated 2.1% from the prior year, which was largely attributable to increases in facility revenue, coach revenue, media advertising revenue and pro tour sponsorship.



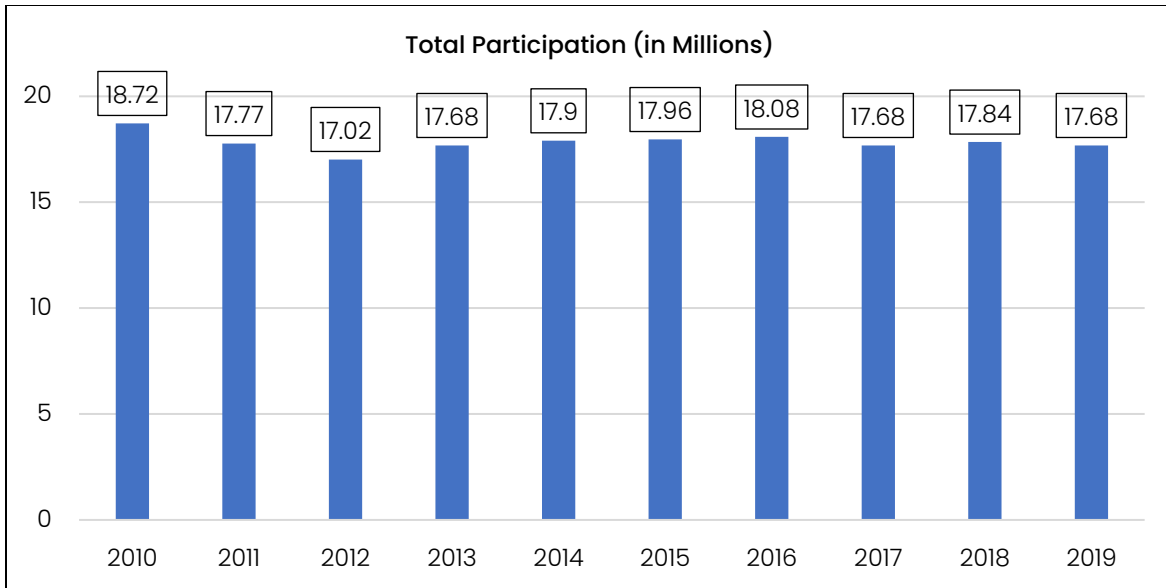
Arrows reflect component changes from 2017 to 2018

Total U.S. tennis economy value for 2018: \$6.19 billion, a 2.1% increase from 2017. Increases in participation, facility & lesson revenue, sponsorship & ad revenue offset losses in play occasions and player equipment sales.

Source: TIA Industry Insider publication.

Total Participation

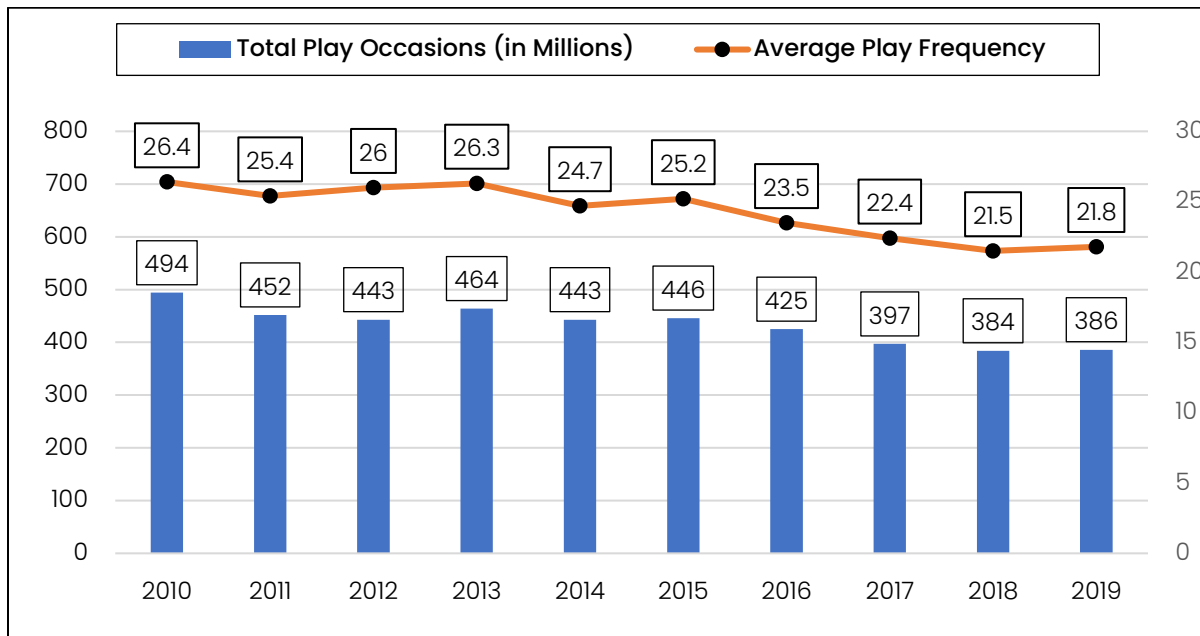
According to the TIA *2020 Participation Report*, the total number of tennis players ages 6 & older in the U.S. was 17.68 million in 2019, a 0.9% decrease from 17.84 million in 2018. Total U.S. tennis participation has declined by approximately 1 million players over the past 10 years with the biggest decline occurring in 2012. Total U.S. tennis participation has remained relatively stable since 2013. The percentage of the U.S. population that participated in tennis at least once a year has been relatively consistent since 2010 at around 6%. With that said, 2019 is the third consecutive year that the rate was below 6% and the lowest rate (5.8%) recorded since 2007.



Source: TIA.

Total Play Occasions

The number of total play occasions decreased by 108 million (22%) from 494 million in 2010 to 386 million in 2019. From 2018 to 2019, the total number of play occasions increased by 2 million, which was the first increase since 2015. Average play frequency, or the number of times played per year, has trended downward from 26.4 in 2010 to 21.8 in 2019.

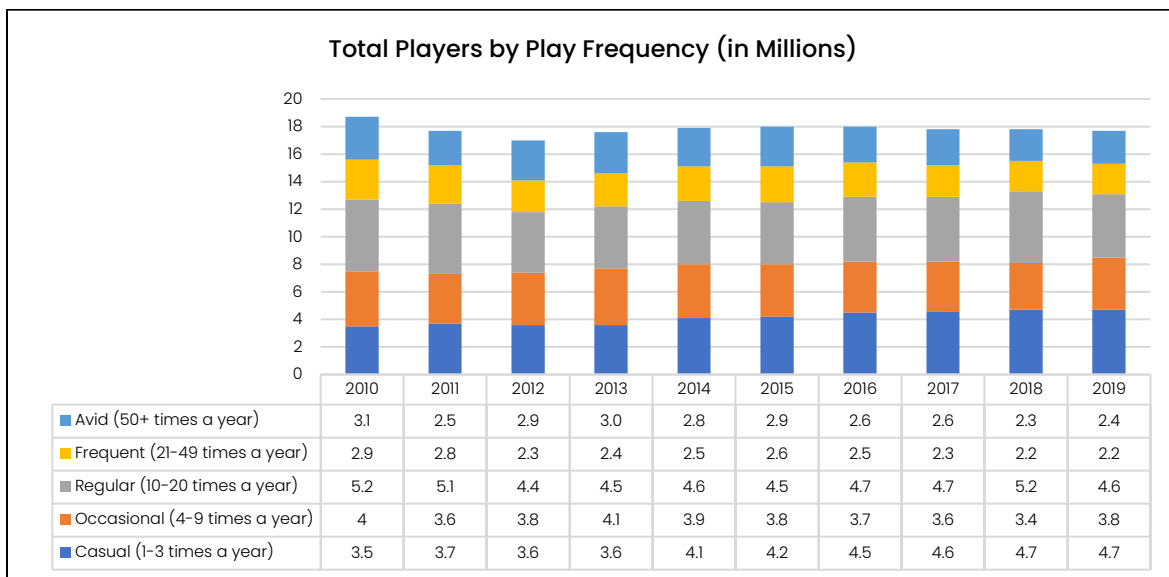


Source: TIA.

Participation by Frequency

Frequency of tennis participation is separated into five categories: casual (1 to 3 times annually), occasional (4 to 9 times annually), regular (10 to 20 times annually), frequent (21 to 49 times annually) and avid (50+ times annually). Of the 17.68 million total tennis participants, core tennis players, defined as regular, frequent and avid participants, accounted for 9.15 million participants (52%) and 91% of all tennis play occasions in 2019. Casual and occasional participants accounted for 8.5 million (48%) and 9% of tennis play occasions in 2019. According to TIA, core tennis participants account for approximately 86% of the money spent in the “tennis economy”.

Since 2010, the total number of core tennis players has declined by 18%. The number of core tennis players fell 5.3% from 2018 to 2019, from 9.67 million players to 9.15 million, respectively. By contrast, non-core tennis players (players playing less than 10 play occasions a year) increased 13% in the same period of time. The declining number of core participants and increasing number of casual and occasional participants is consistent with a trend toward more casual play for sports overall, rising inactivity levels, aging baby-boomers and new generations of players that participate in multiple sports instead of just one.

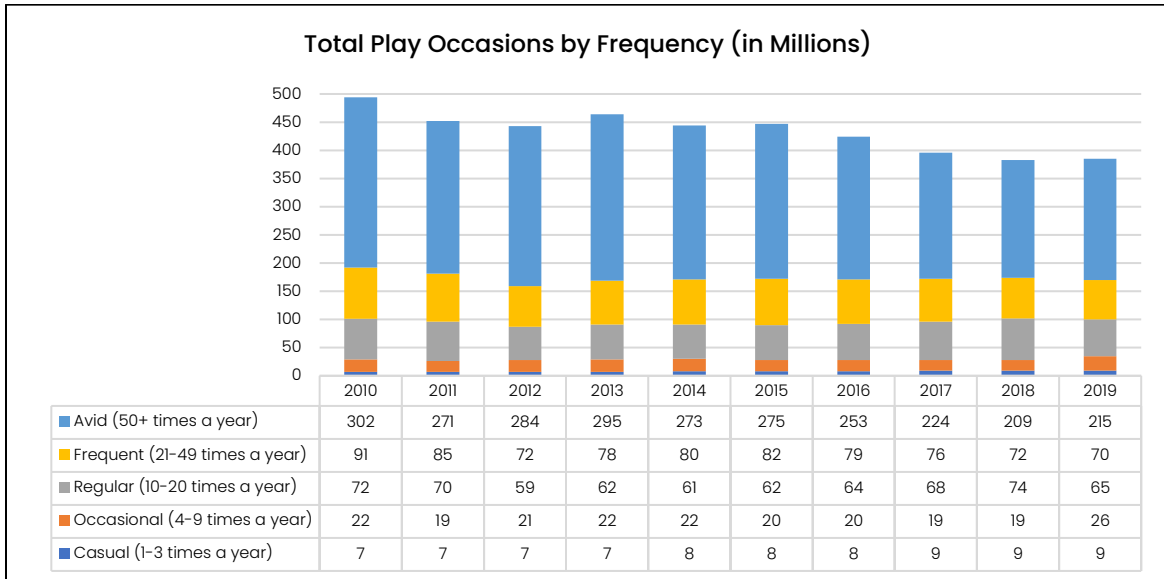


Source: TIA.

Play occasions by core tennis players have decreased by approximately 25% from 465 million in 2010 to 350 million in 2019. Declines in avid play occasions (50+ times a year) are a major factor. In 2019, there were 215 million avid tennis play occasions, which was a decline of 29% from 302 million in 2010. Play occasions by non-core tennis players increased by 21% during the same period.

On average, core tennis players played 38 times in 2019. Since 2010, the average number of play occasions per core player decreased by approximately 8.4% which was especially impactful on

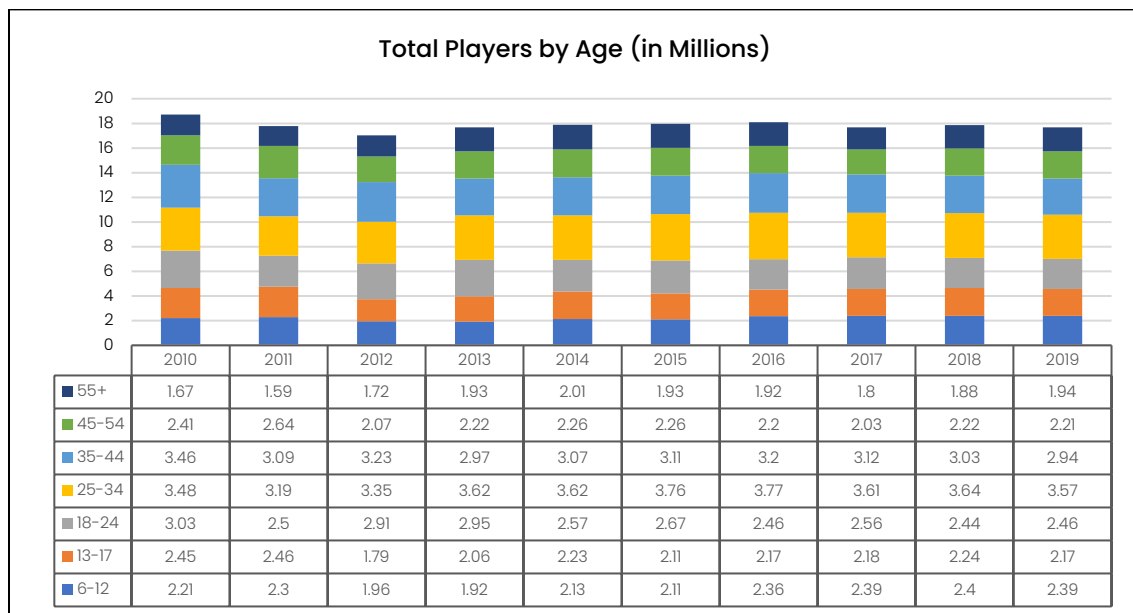
tennis clubs, facilities and public parks that generate revenue from court fees and retail operations.



Source: TIA.

Participation by Age

From 2010 to 2019, youth (ages 6 to 17) have accounted for an average of 4.4 million participants (25%) while adults have accounted for 13.4 million (75%). As with total tennis participants, the number of participants in each of the profiled age groups has been relatively consistent from 2013 to 2019. As shown below, ages 25 to 34 and 35 to 44, respectively, have accounted for the highest number of tennis participants over the past ten years while those aged 55 and older have accounted for the smallest number of participants.

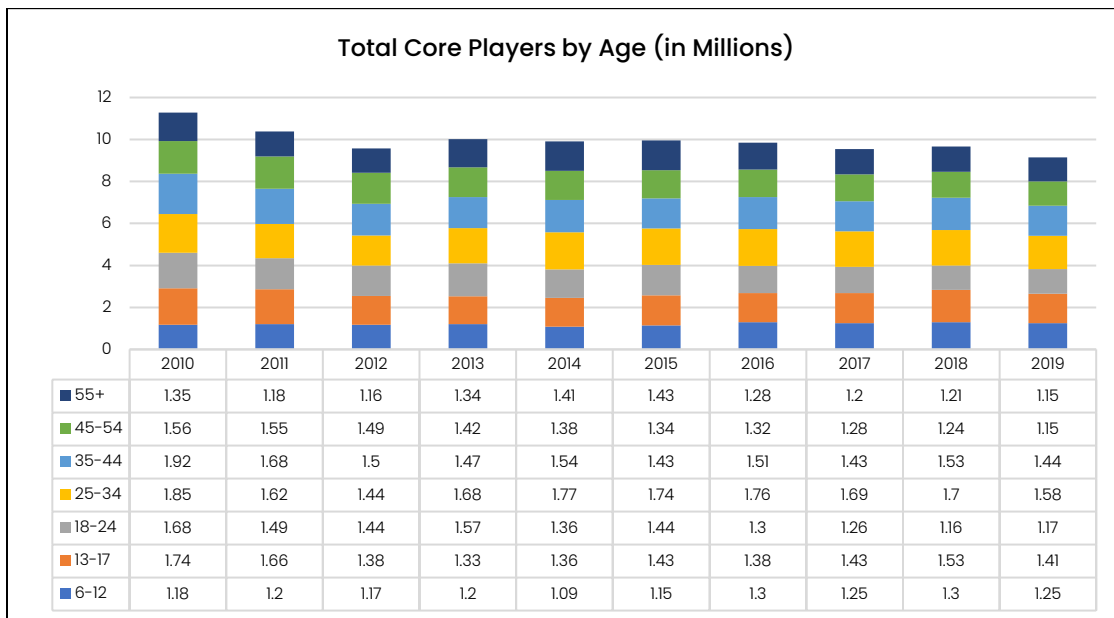


Source: TIA.

On average, 61% of total youth participants are core players while 54% of total adult participants are core players. As with total participants, the age groups of 25 to 34 and 35 to 44, respectively, account for the highest number of core participants.

Core youth participation experienced a decrease of 6% overall from 2018 to 2019. Driving new youth players to the sport through USTA initiatives and industry-supported efforts is important factor in terms of the long-term sustainability of tennis.

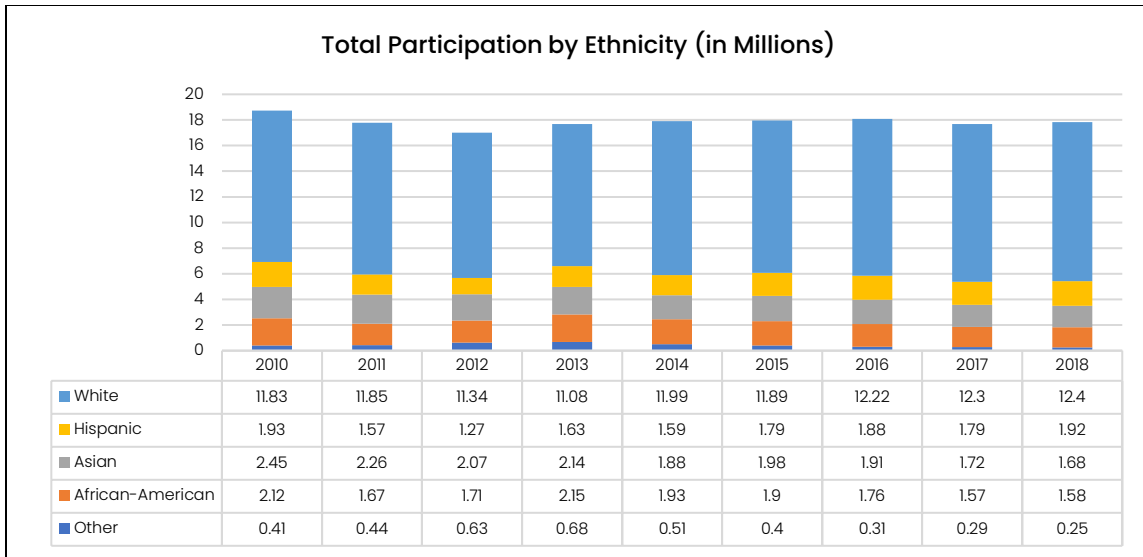
While other traditional sports, such as baseball, basketball and soccer, general experience declines in youth participation rates as kids age, tennis is one of the few sports to show a steady linear increase in participation among players ages 6 to 17. Although there is a small dip in participation rates in tennis as kids transition to their teenage years, these rates pick back up and continue to increase during a player’s high school years, with a total participation rate in the 17-year-old age group of 12% which is greater than or similar to sports such as baseball, soccer, tackle football and volleyball.



Source: TIA.

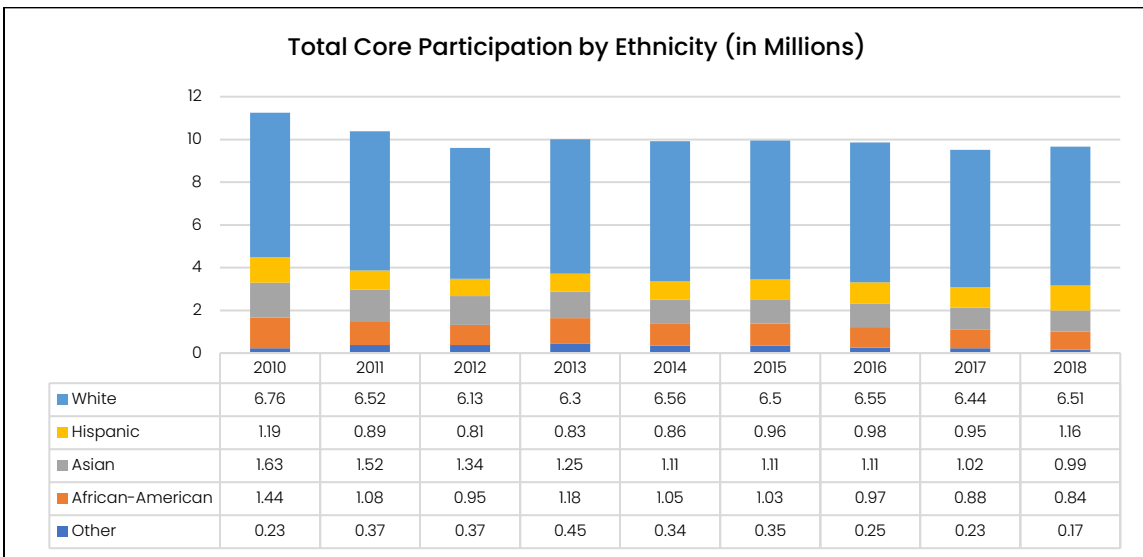
Participation by Ethnicity

Individuals classified as White have historically accounted for the majority of tennis participants. In 2018, there were 12.4 million White players (70% of total players). The number of White tennis players has increased each year from 2015 to 2018. The number of Hispanic players reached 1.92 million in 2018, the second highest since 2010 in which there was 1.93 million Hispanic players. The number of Asian players was the lowest in 2018 at 1.68 million. The number of African American players has fluctuated over the profiled period but was the lowest in 2017 at 1.57 million which remained relatively consistent in 2018.



Source: TIA.

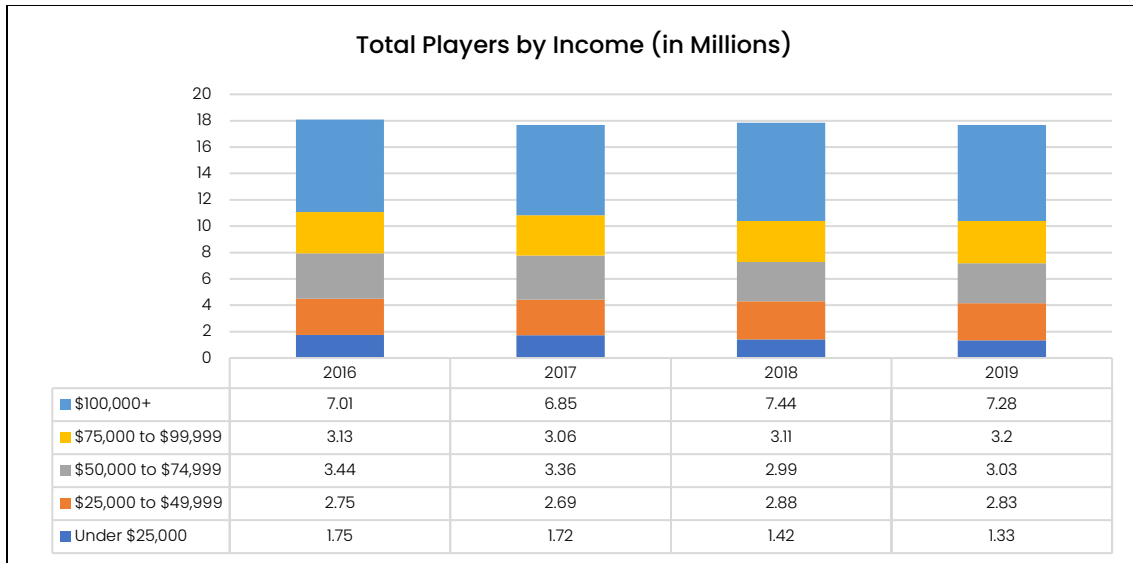
Consistent with total participation, most core participants are classified as White.



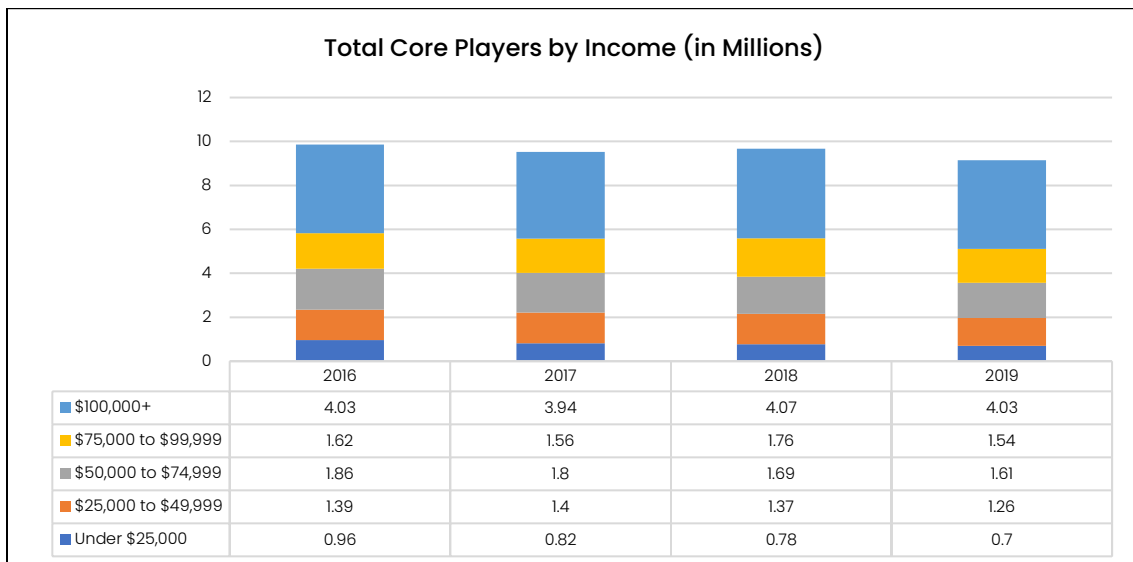
Source: TIA.

Participation by Income

Many tennis participants have incomes of \$100,000 or more. The majority of total and core tennis participants have a household income of at least \$75,000. The smallest group of players make less than \$25,000 a year.



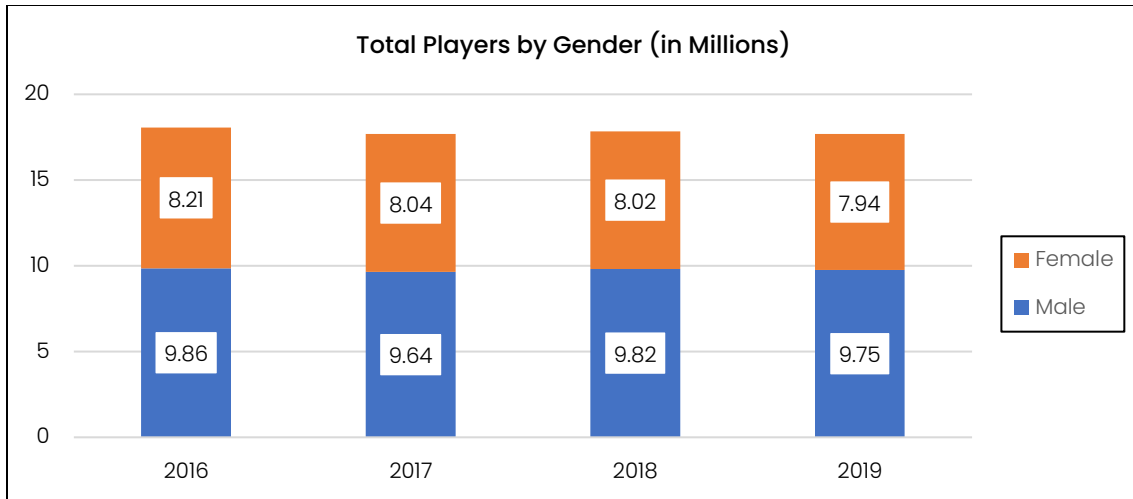
Source: TIA.



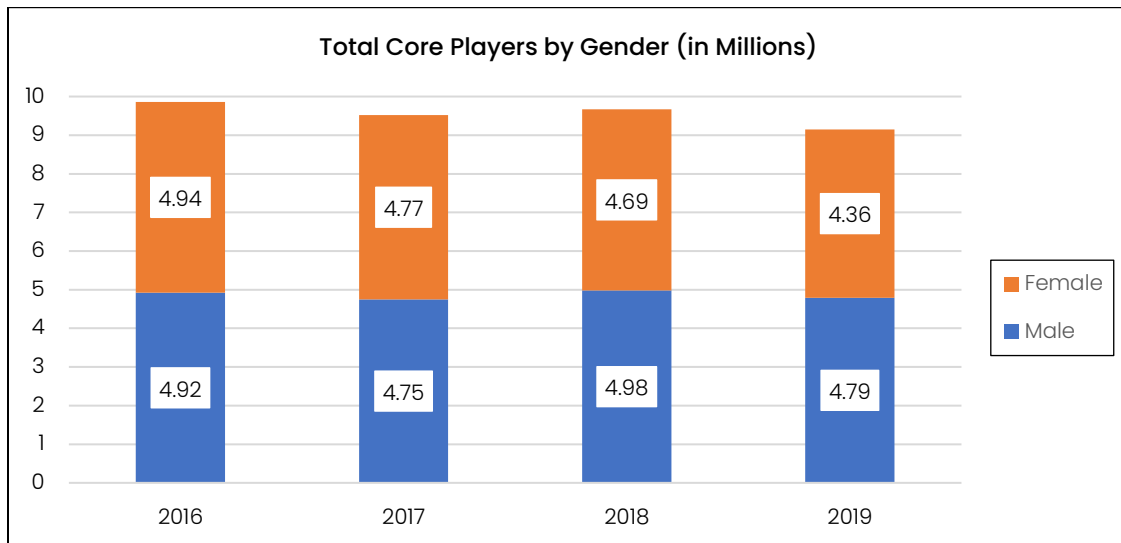
Source: TIA.

Participation by Gender

Males comprise approximately 55% of total tennis players and females 45%, which remained steady from 2016 through 2019. During the same period, the number of core players has been split relatively equally among male and female players.



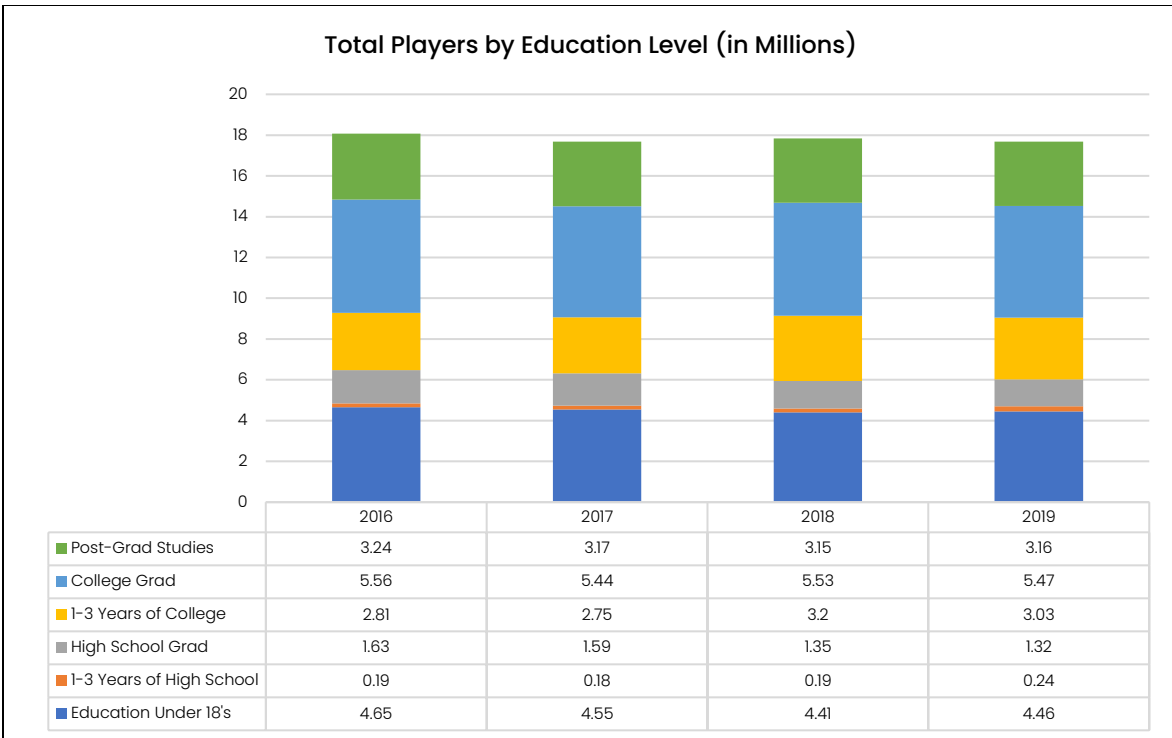
Source: TIA.



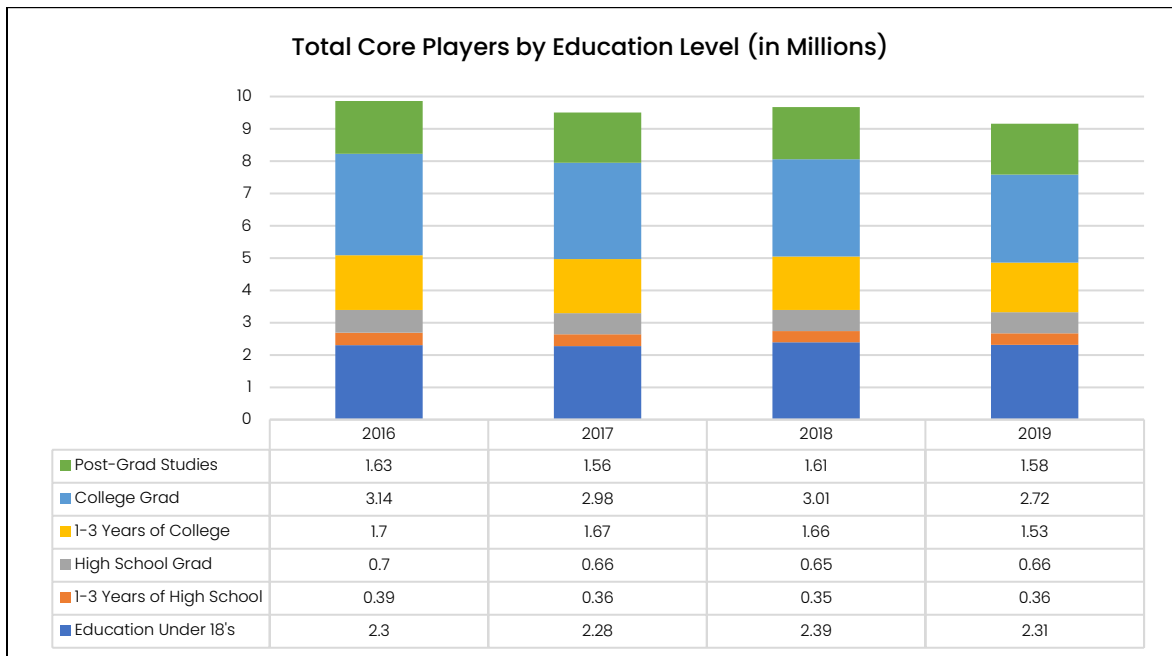
Source: TIA.

Participation by Education Level

The following charts illustrate participation by education level. In 2019, college graduates accounted for the highest number of total and core players which is consistent with prior years. Individuals under the age of 18 in the primary education system accounted for the second highest number of total and core players. Those within the one to three years of high school education level accounted for only 1% of total players.



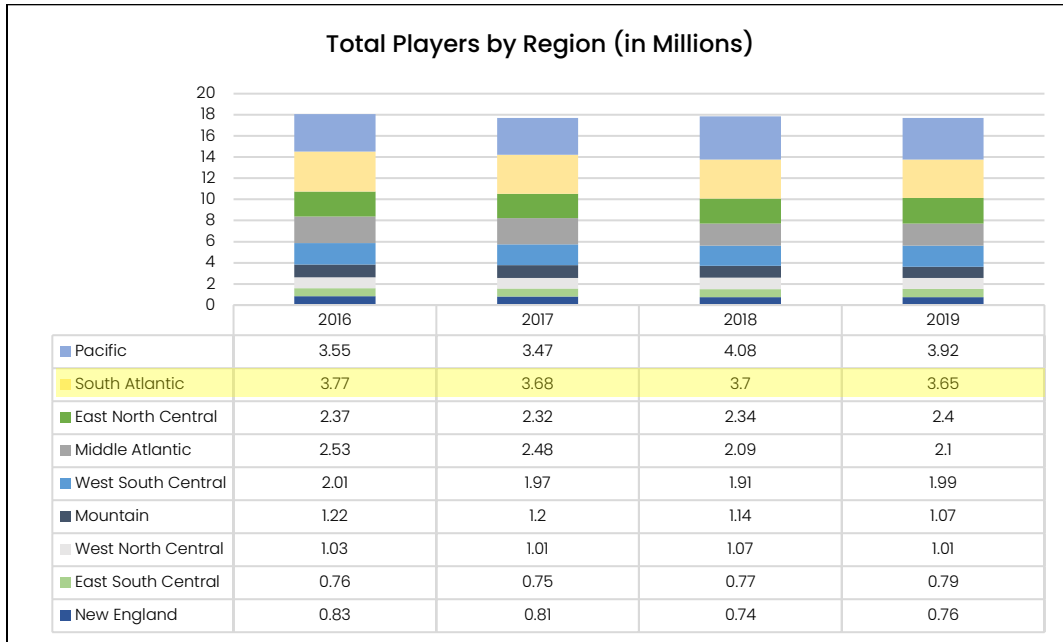
Source: TIA.



Source: TIA.

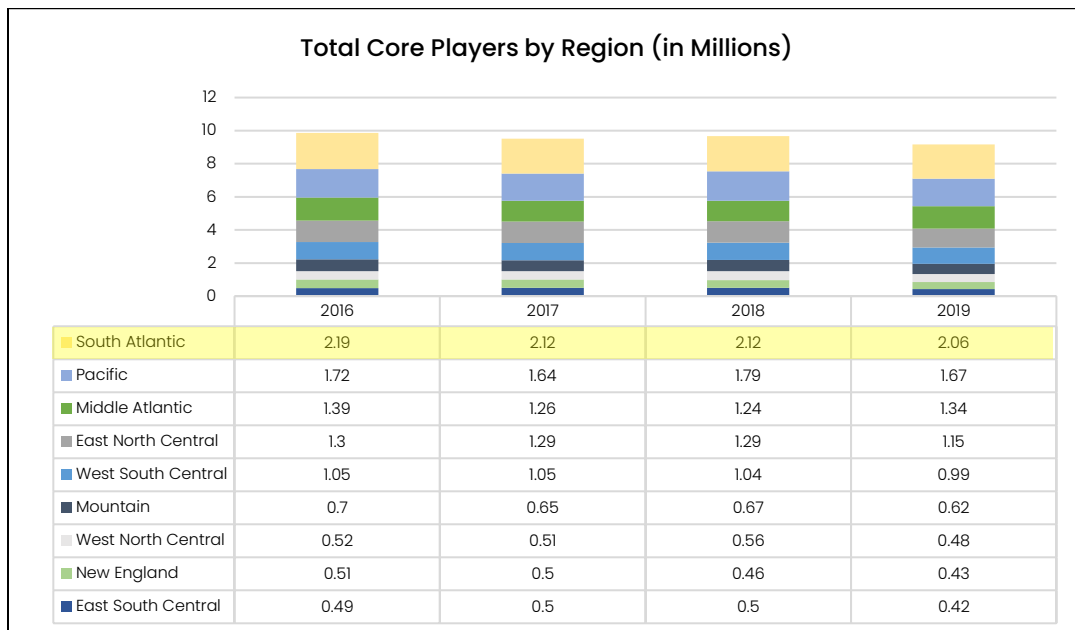
Participation by Geographic Region

As of 2019, the Pacific region had the most players with 3.92 million. The Pacific also had the highest participation rate of all the regions. The TIA study classifies Maryland in the South Atlantic region, which had the 2nd highest number of players in 2019 (3.65 million).



Source: TIA.

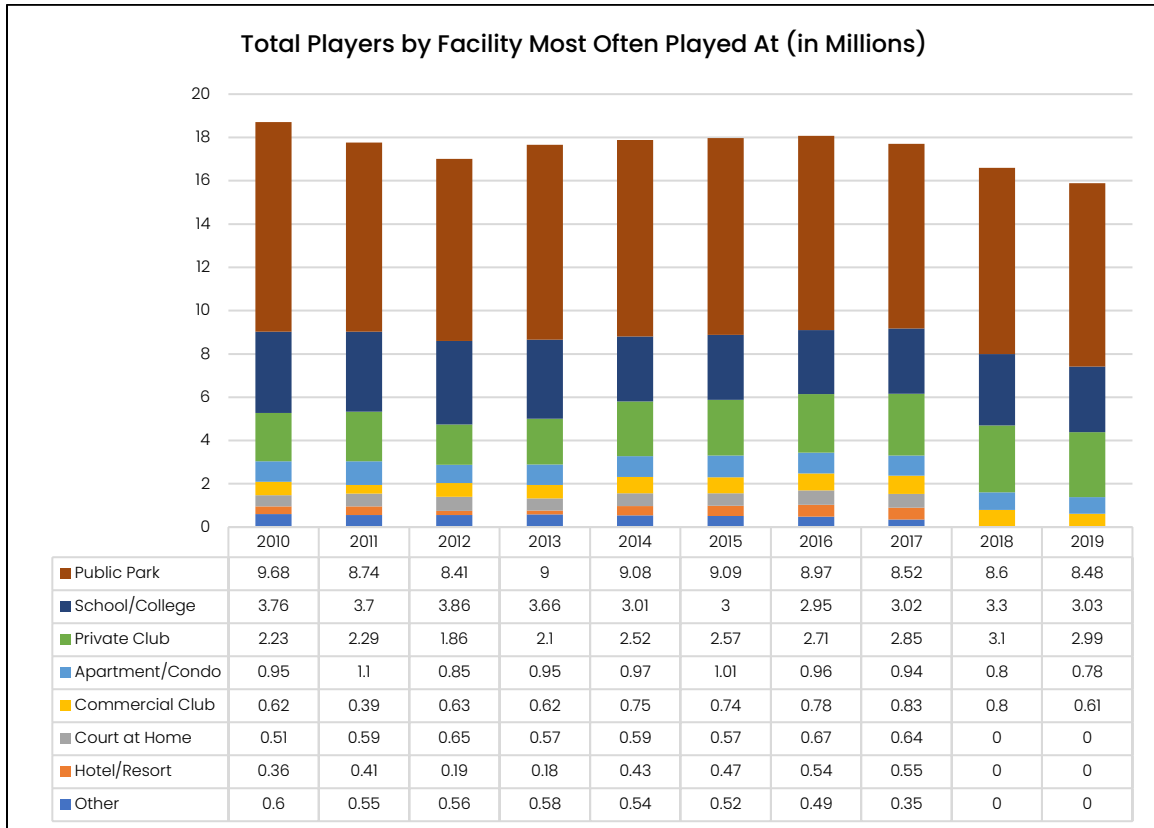
The South Atlantic region had the highest number of core tennis participants at 2.06 million in 2019.



Source: TIA.

Most Used Facilities

From 2010 to 2019, public parks have been the most popular type of facility for players to play at with an average of 8.9 million players indicating they utilize these facilities most frequently. Even with its popularity, the total number of players who say they most often play at public parks decreased slightly in 2019 and has trended downward since 2010. The second most common facility that players indicate they use are those at schools and colleges with an average of 3.3 million players annually playing there most frequently.



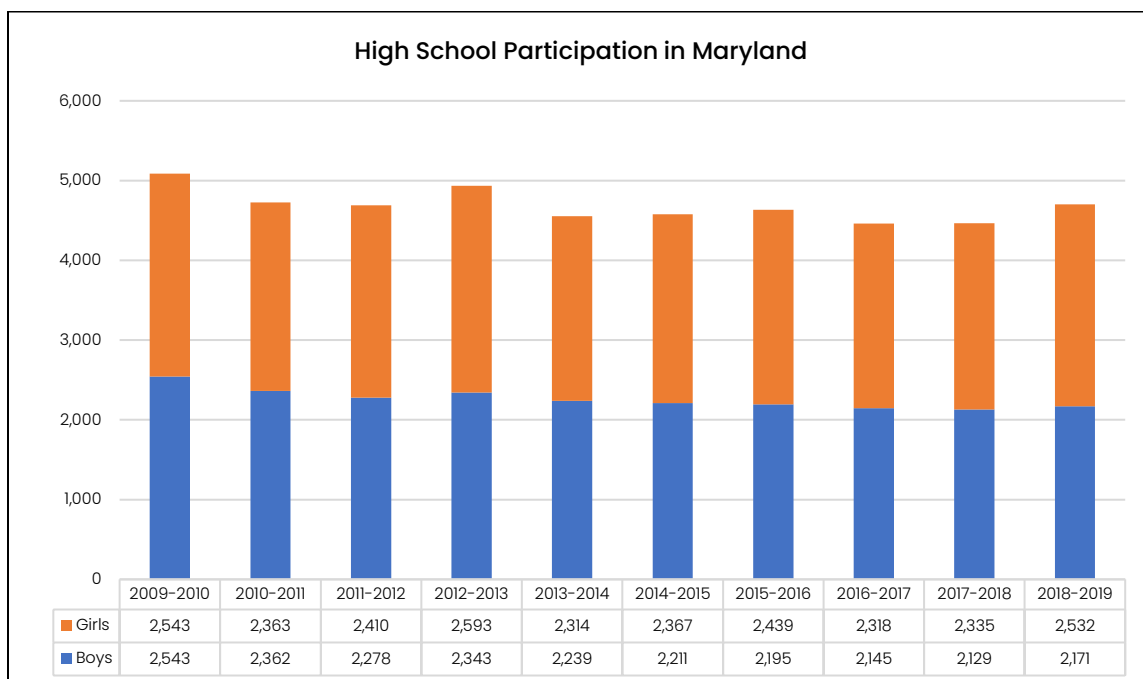
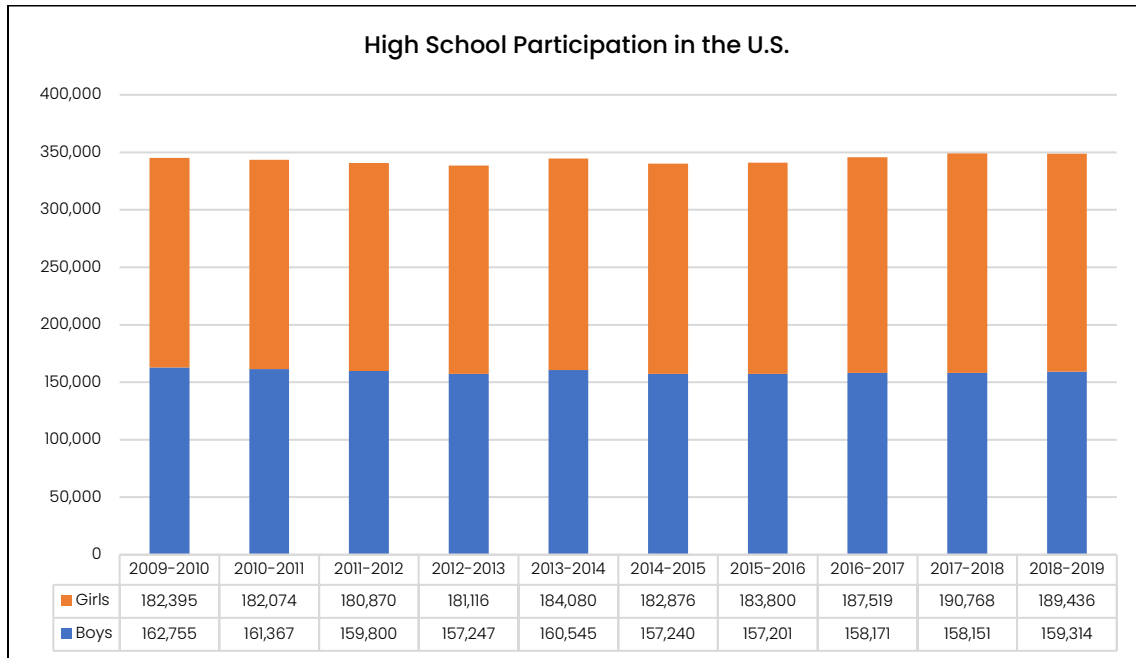
Source: TIA.

According to a recent TIA survey of tennis facility owners/managers, 99% of respondents indicated they offer adult programs, 92% offer junior programs and 78% offer 10 and under programs.

As it relates to tennis facilities, the racquet sports landscape is seeing a rise in participation for a number of activities distinguished as smaller variations of tennis. Owners and managers are utilizing existing assets to include other formats of racquet sports. With smaller courts, these sports are being played by both tennis and non-tennis players who, often due to health or injury, are unable to participate in the traditional game. In the survey of tennis facility owners/managers, 92% of owners/managers said that they replaced or resurfaced existing tennis courts with pickleball courts in 2018.

High School Participation

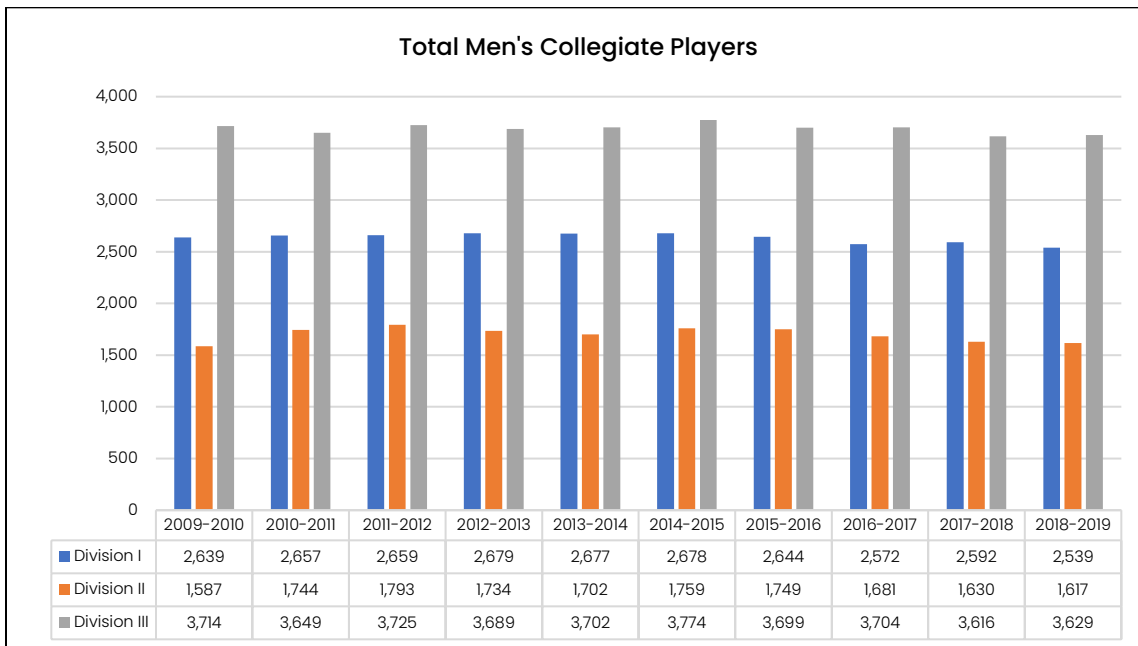
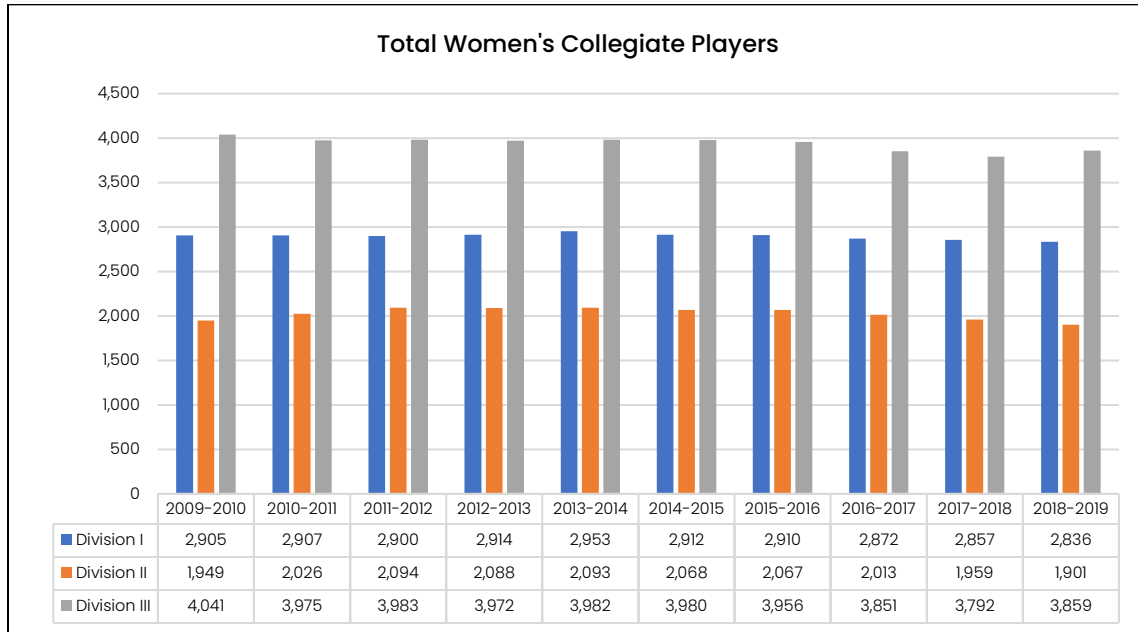
As shown below, high school tennis participation has remained relatively steady in recent years. During the profiled period, participation between boys and girls has been comparable, with girls accounting for slightly more than half of total participation in both the U.S. and Maryland. There are over 4,700 high school tennis participants in Maryland.



Source: The National Federation of State High School Associations 2018-2019 Survey.

College Participation

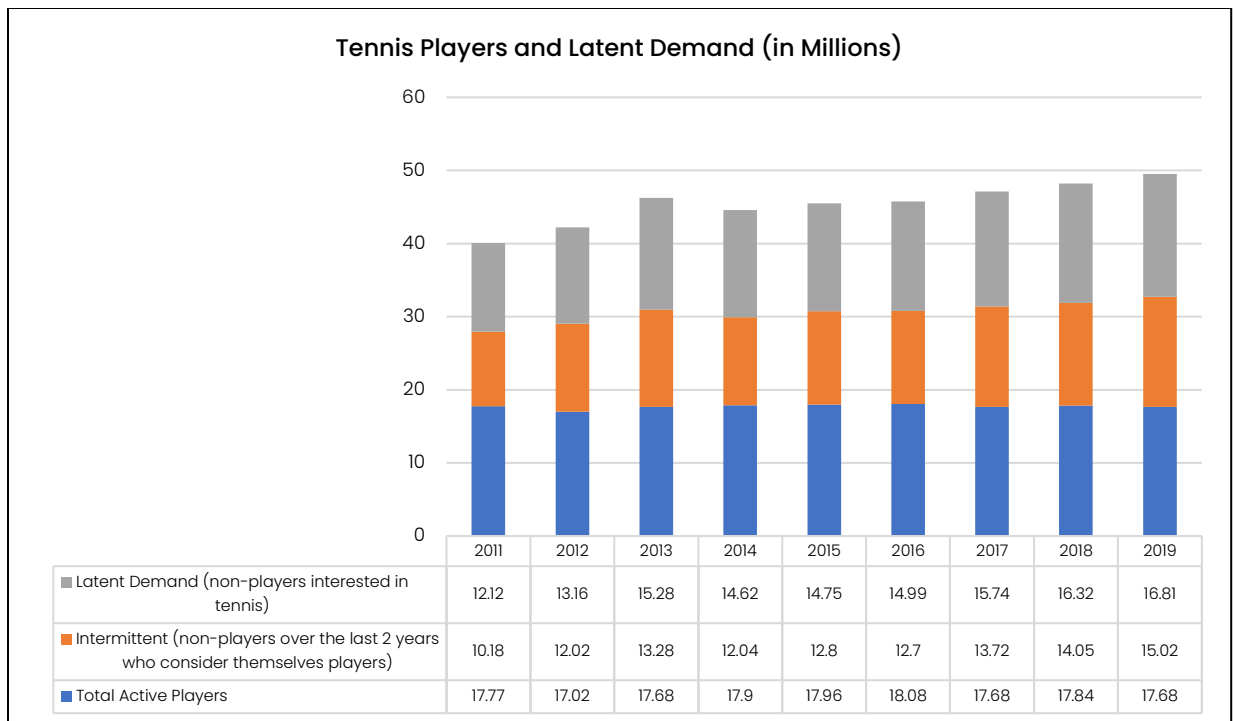
As with high school, tennis participation at the collegiate level has remained relatively consistent in recent years and has been comparable between men and women. Division III tennis has considerably more men and women players than either Division I or Division II.



Source: NCAA Sports Sponsorship and Participation Rates Report 2018-19.

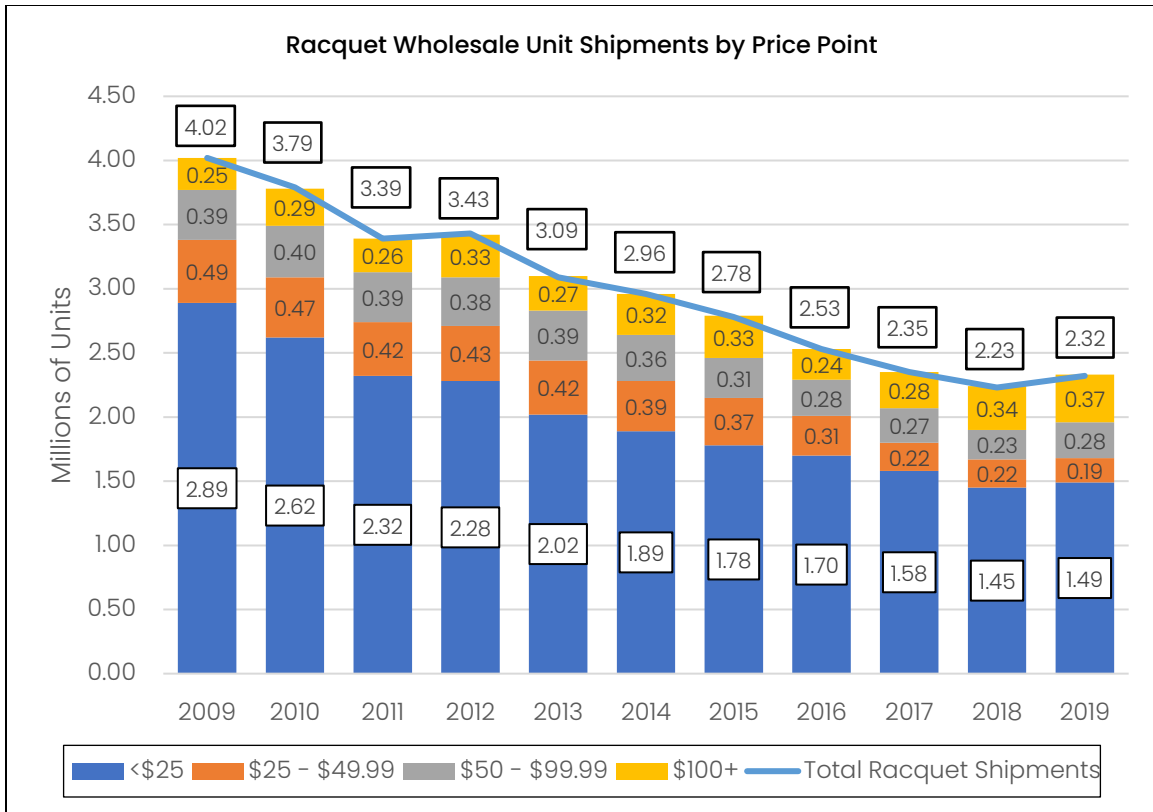
Tennis Players & Latent Demand

In addition to current tennis participants, there are many others that are interested in playing or have not played in recent years. These groups of potential participants represent millions of unrealized dollars for the industry. In 2019, nearly 17 million non-players indicated they were interested in playing tennis – an increase of 3% from 2018 and an increase of 39% since 2011. Another 15 million Americans consider themselves tennis players but have not played in two years. Individuals interested in the sport and the number of intermittent players were higher in 2019 than in the previous eight years.



Source: TIA.

Providing introductory, short-court play and “welcome back” programs are crucial to converting this latent demand for tennis into actual demand. One measure that provides insight into converting latent demand is the number of racquets sold, particularly those in the lower price range as beginners are generally more likely to start with less expensive equipment. As shown in the chart that follows, total racquet sales increased in 2019 which only occurred one other time during the profiled period (2012). In terms of racquets priced under \$25.00, 2019 was the first year during the profiled period that experienced an increase in sales which suggest an increase in new participation in the sport. In addition, sales of racquets priced \$100+ were the highest in 2019.



Source: TIA.

COVID-19

As it relates to participation and the COVID-19 pandemic, tennis has been considered one of the safer sports to participate in given the distance among participants in comparison to many other sports. With that said, many tennis facilities temporarily closed in 2020 as a result of the pandemic. In April 2020, the TIA began the first of a series of surveys of tennis businesses in the U.S. as part of a larger industry effort to study the impact of the COVID-19 pandemic. The aim was to better understand how tennis facilities & retailers are dealing with the crisis and provide insight to governing bodies & other key stakeholders as they establish action plans to support the tennis community.

In the latest available TIA COVID-19 Impact survey released in July 2020, approximately 15% of facilities and 16% of retail operations said they were temporarily closed. Approximately 97% of tennis businesses implemented safety measures in response to the COVID crisis and 42% of tennis businesses were requiring facemasks and/or gloves for customers which is a significant increase from 23% in May. The most widely implemented safety measures include more vigilant/frequent sanitation, asking employees to stay home if they are sick, and maintaining sanitation stations. Facilities postponed/canceled social activities, reduced the size of group lessons, and increased the amount of one-on-one coaching. The TIA July COVID-19 Impact survey showed that about 45% of tennis businesses were back to pre-COVID staffing levels while about 25% currently had a staff of less than 60% of their numbers before the pandemic.

While tennis operations at some facilities were impacted during 2020 from the pandemic, the Physical Activity Council reported in September 2021 that tennis participation grew significantly in 2020, largely in part to increased participation in individual and outdoor sports.

Key Research Findings

The following provides a summary of key findings related to trends in the U.S. tennis industry prior to COVID-19.

- Total U.S. tennis participation has remained relatively stable since 2013. However, the number of total play occasions has trended downward.
- The number of core tennis players has declined in recent years. Play occasions by core players has also declined.
- According to a survey of tennis facility owners/managers, many existing tennis courts are being replaced or resurfaced for pickleball.
- According to the TIA, the South Atlantic Region (which includes Maryland) had the 2nd highest number of tennis players and the highest number of core participants in 2019.
- There is increasing interest in tennis by those that do not currently play or have not played in the last two (2) years. Providing introductory, short-court play and “welcome back” programs are crucial to converting this latent demand for tennis into actual demand.

3. LOCAL MARKET CONDITIONS

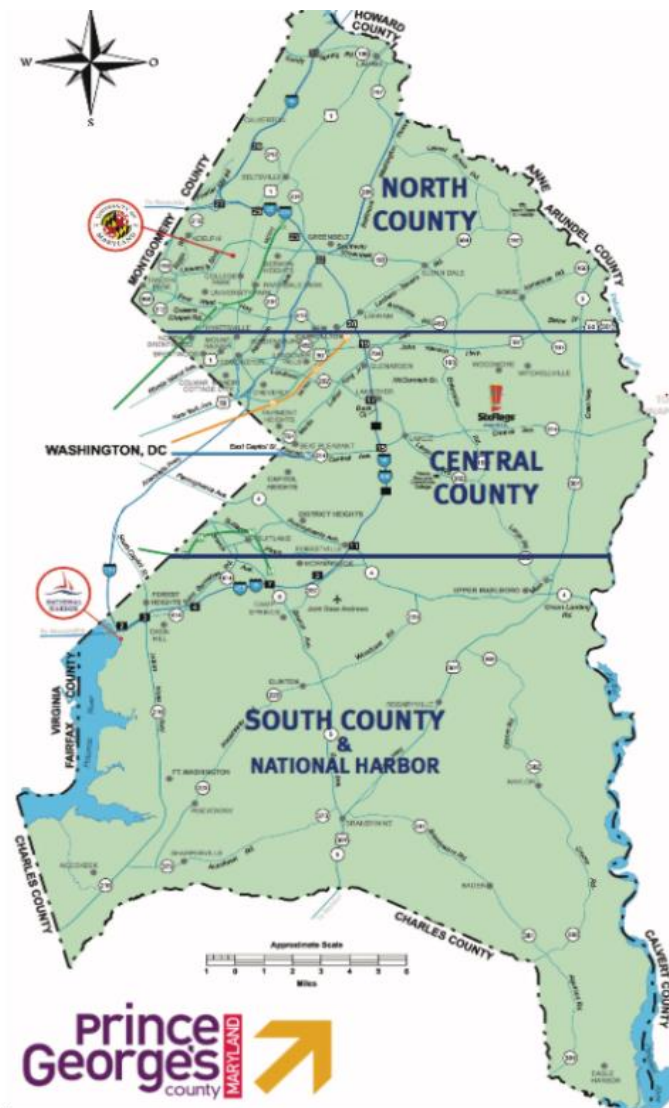


LOCAL MARKET CONDITIONS

Understanding the market in which the proposed new tennis complex would operate is important. This section profiles various attributes of the County including demographic and socioeconomic statistics, tapestry segmentation, transportation access, hotel supply and climate characteristics as well as the existing supply of tennis facilities. The target market area, competitive facilities, and user demand will drive programming opportunities and facility needs.

As a point of reference to the analysis that follows, the County is commonly divided into three portions: North, Central and South. These sections are graphically shown below.

Map of Prince George's County



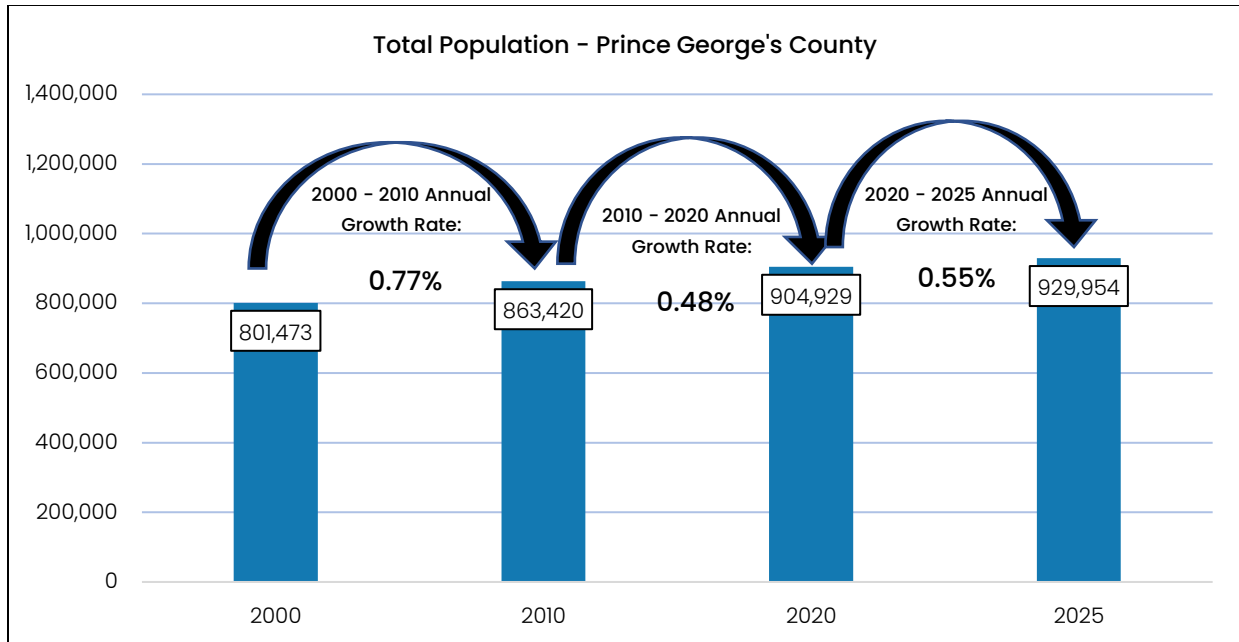
Source: Prince George's County Conference & Visitors Bureau.

DEMOGRAPHIC AND SOCIOECONOMIC STATISTICS

Demographic and socioeconomic indicators are pertinent to assessing demand for participant-driven sports activities. The potential event base at the proposed tennis facility is anticipated to be diverse and include youth and adult recreational/instructional and competitive activities at all levels as well as other community events. The following summarizes key demographic statistics for the County.

Population

Population serves as a base from which the proposed new tennis complex will draw attendance and financial support. According to secondary sources, a general rule of thumb when developing tennis facilities is that one tennis court generally supports tennis recreation for 10,000 residents. As shown below, total population within the County has increased over the profiled period and was 904,929 in 2020. Based on the aforementioned metric, the County's population could potentially support a total of 90 tennis courts. With that said, factors such as supply, quality, geographic location, accessibility, and availability impact support for new tennis facilities.

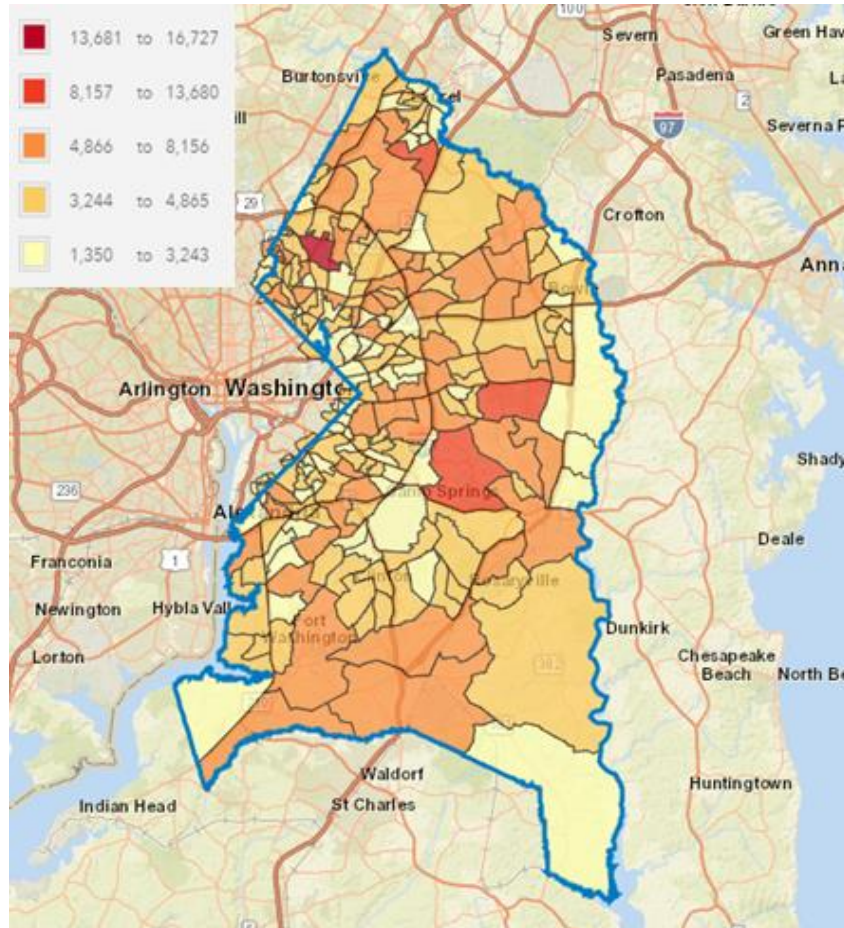


Note: 2020 – 2025 annual growth rate is a projection.

Source: Esri.

The following map depicts population clusters within the County. As shown, the central and northern portions of the County feature clusters of densely populated areas.

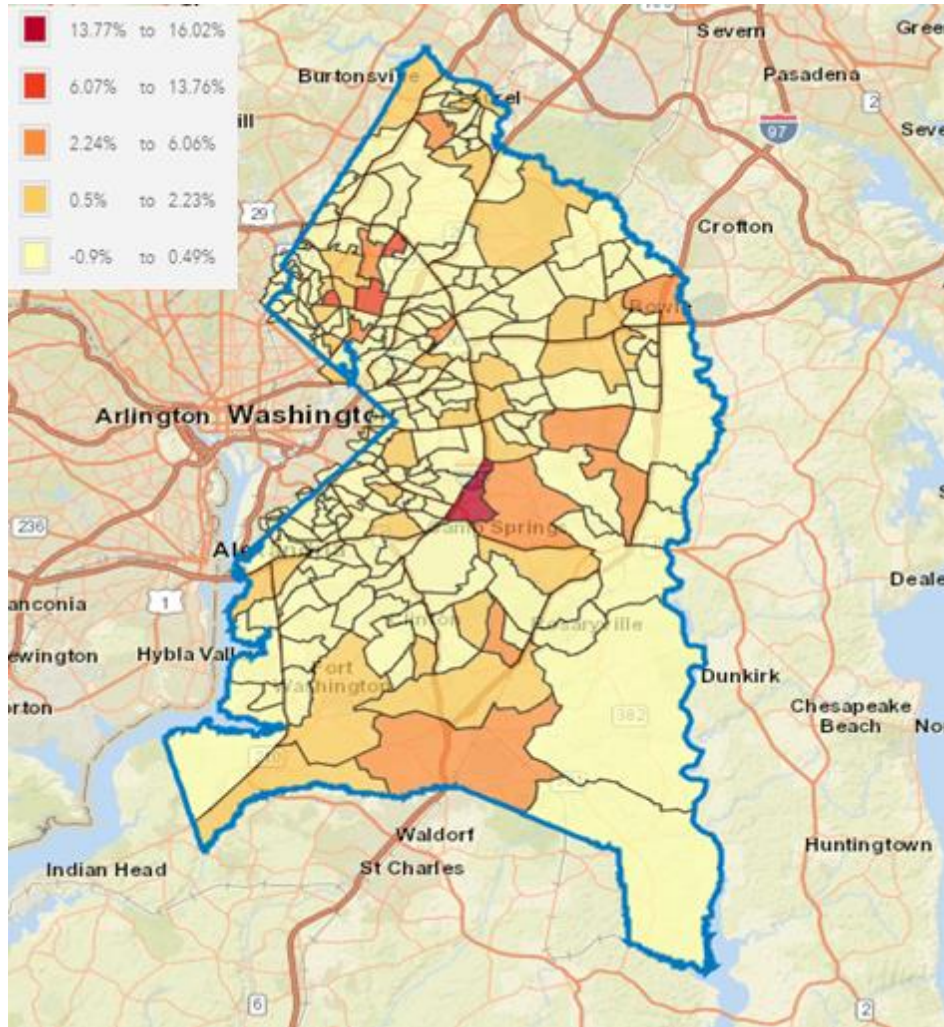
Density Map of Population – Prince George’s County



Source: Esri.

As shown on the following page, the central and northern portions of the County also contain areas that are estimated to grow between 6.07% and 16.02% in population from 2020 to 2025. Most areas in the County are estimated to grow less than 0.5% during this time period.

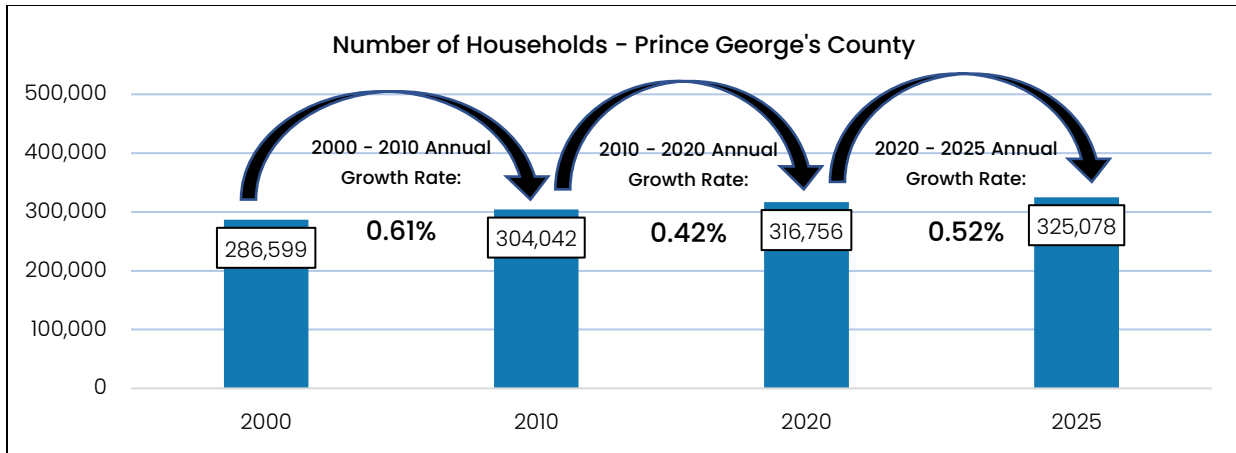
Map of Projected Population Growth Rate (2020 to 2025) – Prince George’s County



Source: Esri.

Number of Households

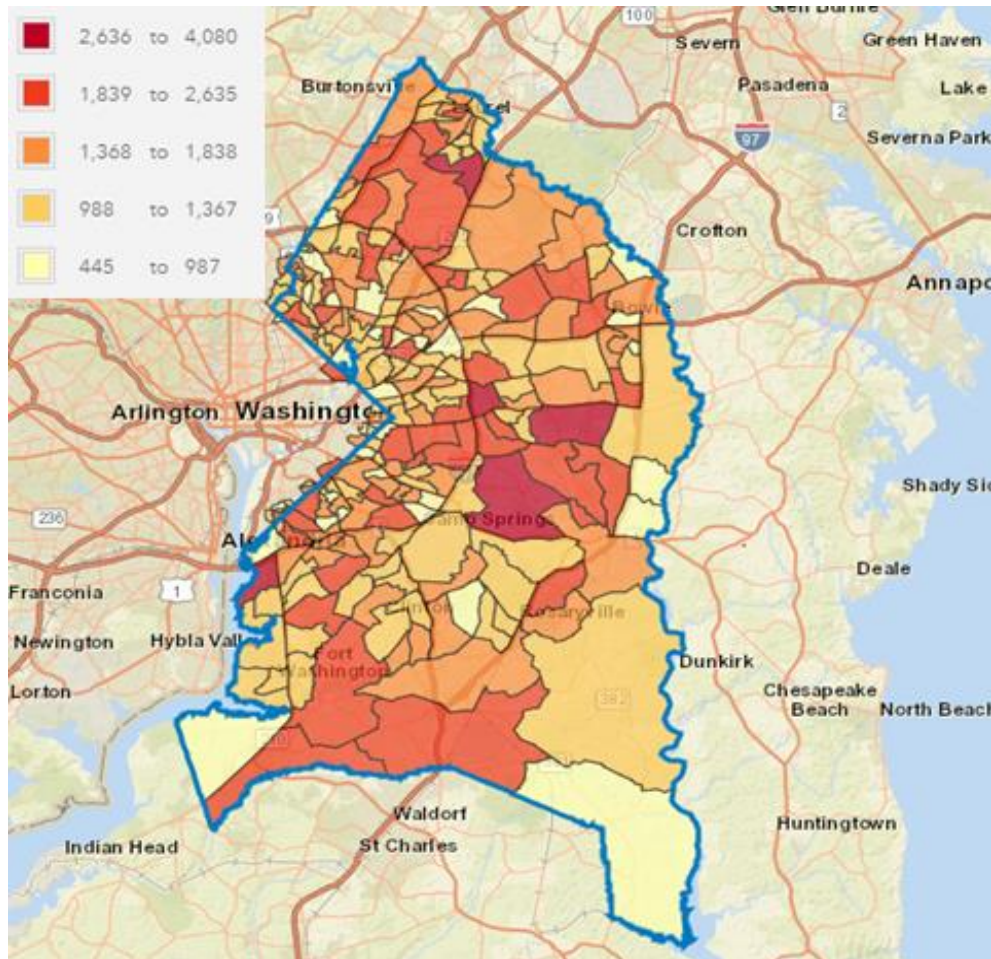
The following table illustrates the number of households within the County. A household consists of one or more people occupying a single housing unit. As shown, the number of households within the County is anticipated to increase from 316,756 in 2020 to 325,078 in 2025, which is generally consistent with projected population growth.



Note: 2020 - 2025 annual growth rate is a projection.
Source: Esri.

Consistent with population clusters in the County, the central and northern areas feature more households in comparison to the southern portion of the County.

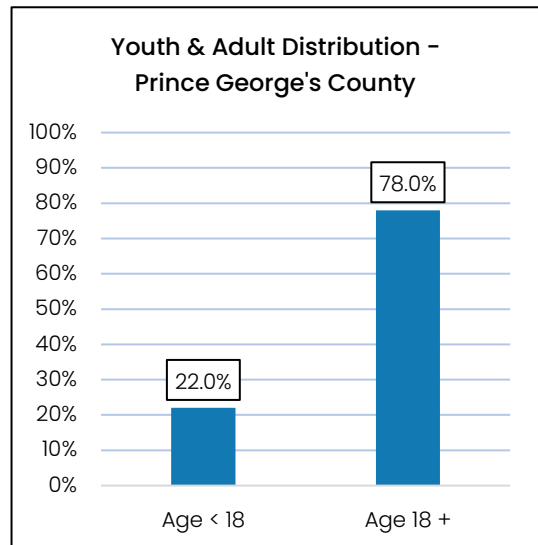
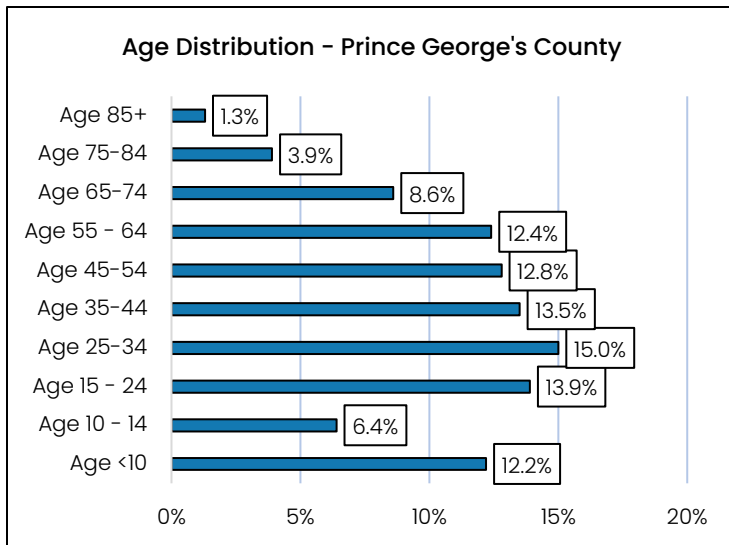
Density Map of Households - Prince George's County



Source: Esri.

Age Distribution

Analysis by age group is useful since certain events and activities are targeted toward consumers who fall within specific age categories. For instance, while the USTA holds tournaments across the country for every age and skill level, it also has several initiatives that specifically promote youth participation. The USTA Youth Progression system is designed to assist players of the age 10 or under develop their skills and progress through the USTA tournament system. Junior Team Tennis is designed for youth between the ages of six (6) and 18 and offers players the opportunity to compete with friends. As shown below, approximately 22% of the population is under the age of 18. As previously mentioned, TIA reports that age 25 to 34 and 35 to 44, respectively, have accounted for the highest number of tennis participants. These age groups represent a high percentage of the population within the County. The median age of the County in 2020 was 36.7 years old.

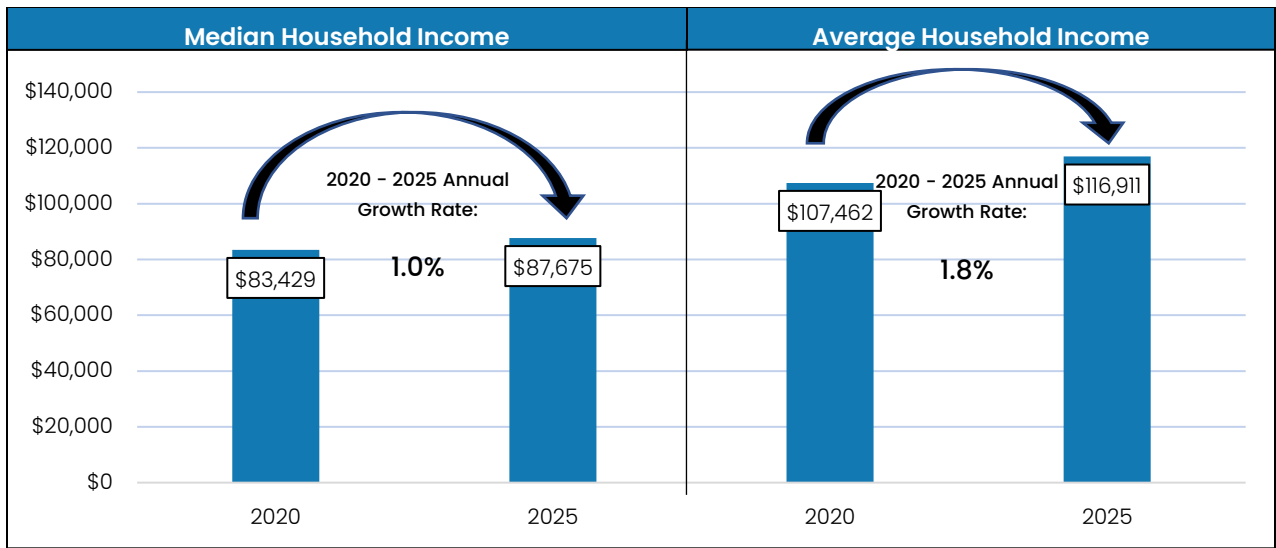


Source: Esri.

Income Distribution

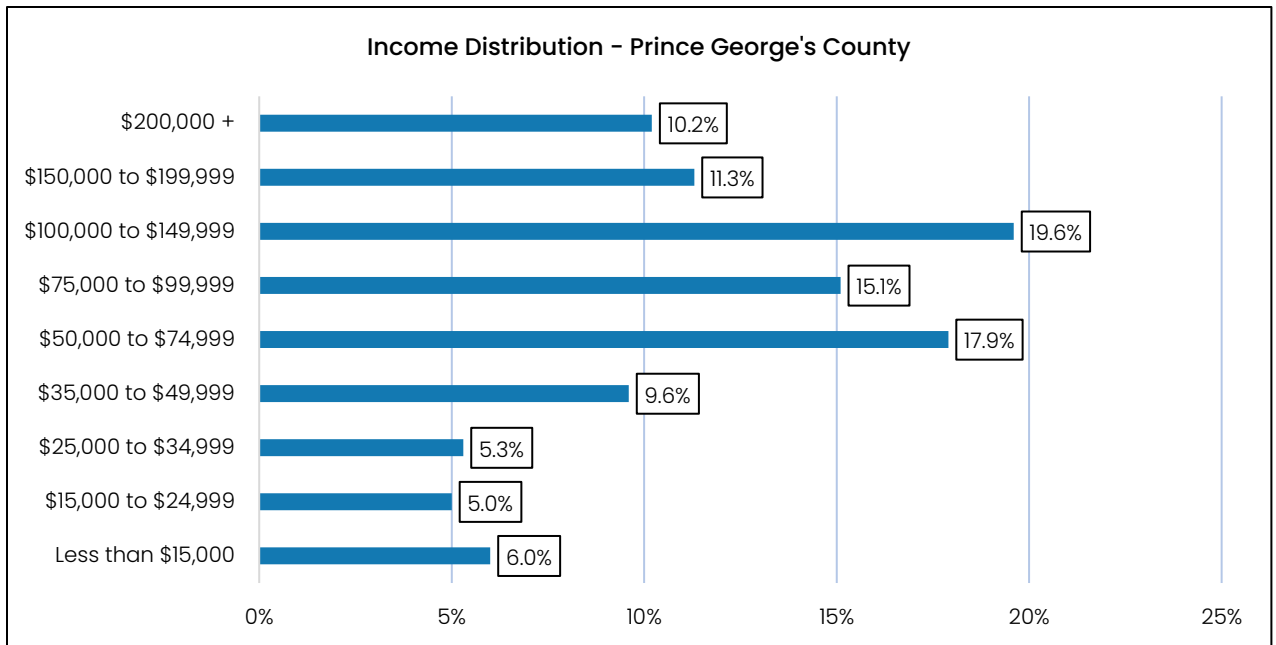
Household income offers a broad measurement of spending potential for a specific population because it indicates the general ability of individuals or households to purchase a variety of goods and services including participation in or attendance at tennis events. Tennis participants generally have higher than average income levels. As previously mentioned, TIA reports that the majority of tennis participants in 2019 had a minimum household income of \$75,000.

Median household income within the County was \$83,429 in 2020 and is anticipated to grow by an annual rate of 1.0% to \$87,675 in 2025. Average household income in the County was \$107,462 in 2020 and is expected to grow by an annual rate of 1.8% to \$116,911 in 2025.



Source: Esri.

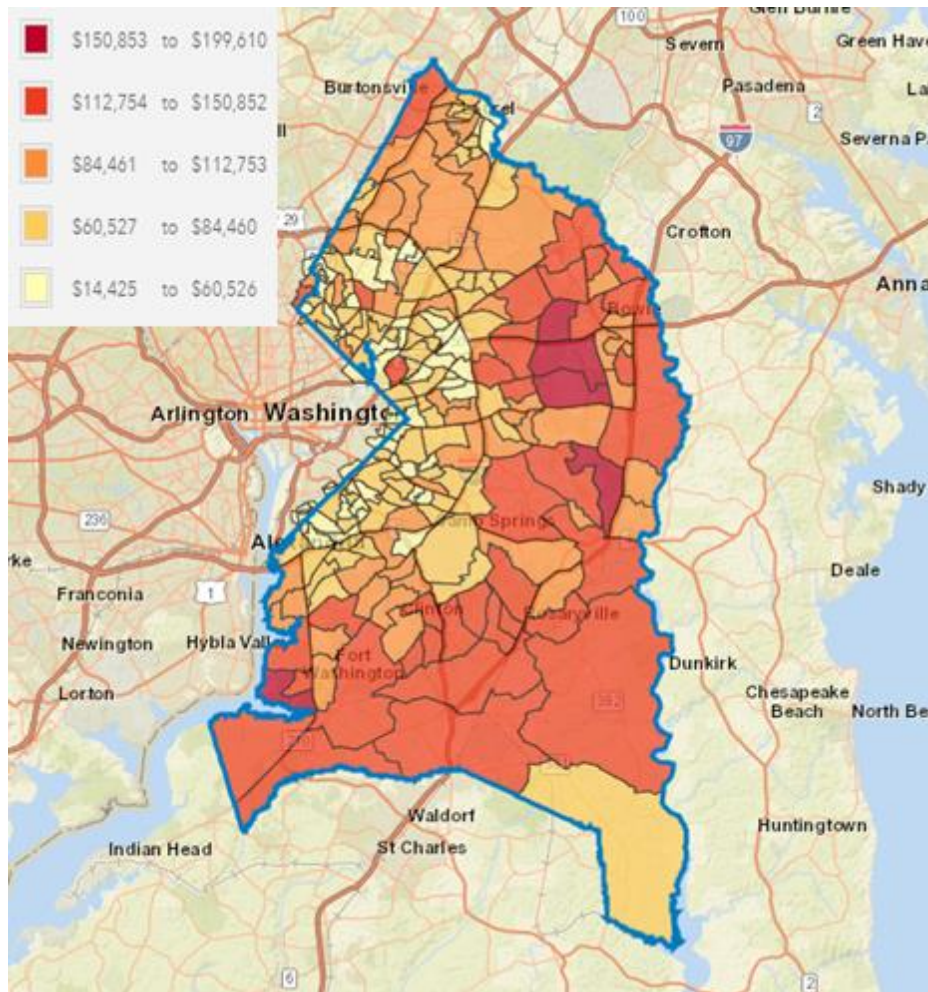
Approximately 56% of households in the County have income levels of at least \$75,000.



Source: Esri.

As depicted in the following map, households with relatively high median household incomes are spread throughout the County. The households with the highest median household income are primarily located in the central portion.

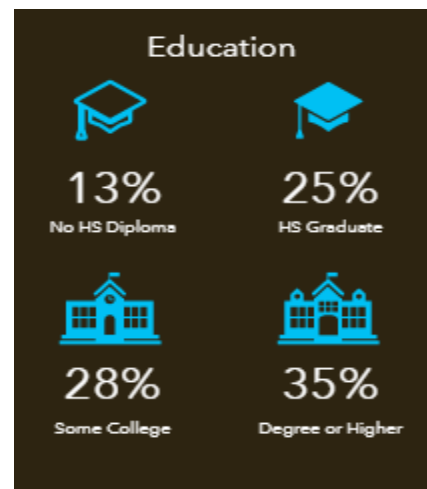
Map of Median Household Income Clusters – Prince George’s County



Source: Esri.

Education

According to TIA, approximately 66% of tennis participants aged 18 or older in 2019 completed at least one year of college. As depicted in the adjacent graphic, 63% of the County’s population has some level of college education. Those that obtained a college or post-graduate degree represent 35% of the population.

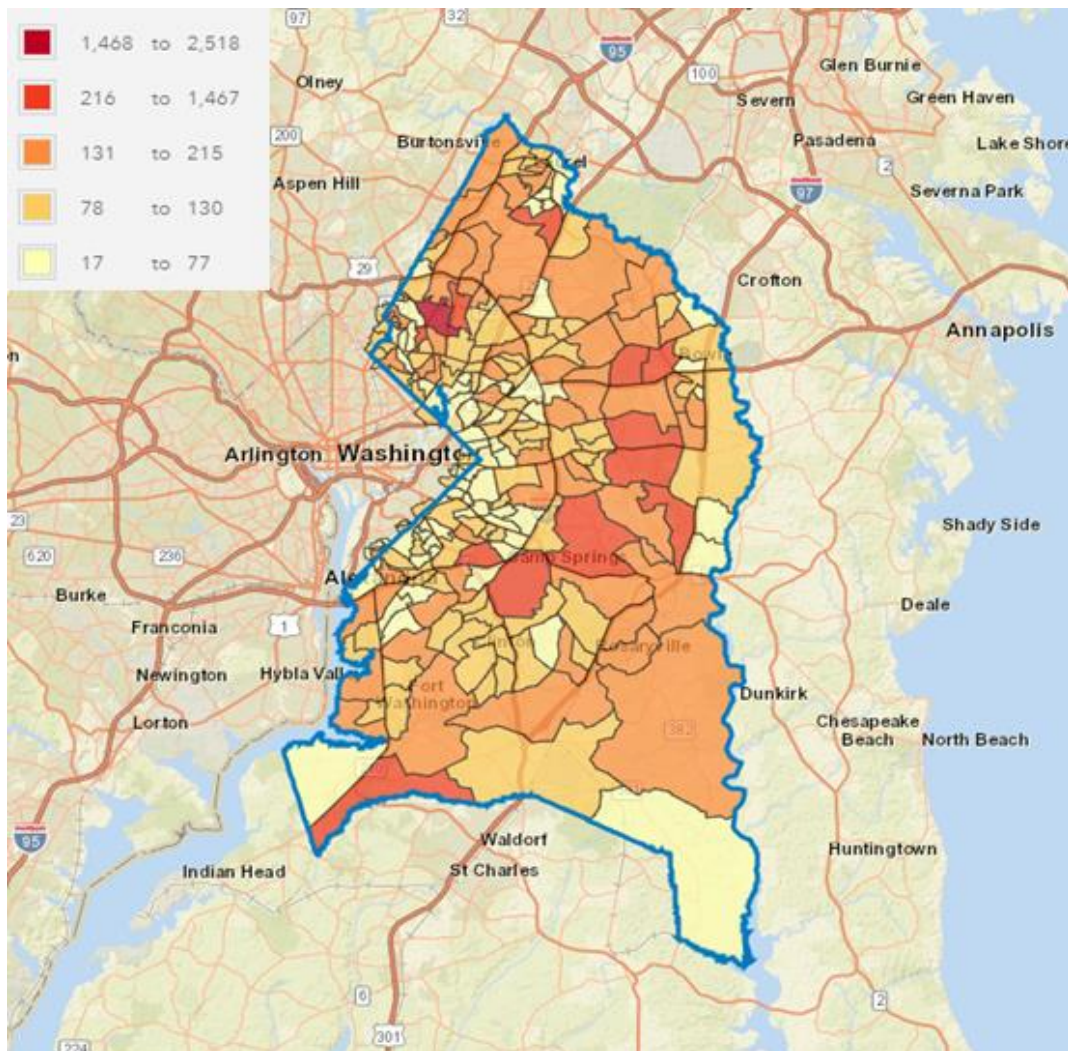


Source: Esri.

Tennis Participants

As previously mentioned, according to TIA, the South Atlantic region had the 2nd highest number of total tennis players and the highest number of core participants in 2019, which presents a strong base for programming opportunities for the proposed new tennis complex in Prince George’s County. The USTA cites that tennis facilities should be planned based on the number of players within six miles or roughly a 15 to 20-minute drive-time from the site. Based on data obtained from Esri, approximately 28,600 County residents participated in tennis in the last 12 months. The following map indicates that the majority of these residents live in the central and northern portions of the County. As previously stated, factors such as supply, quality, location and availability of existing tennis facilities in the County are also a key consideration when evaluating site locations for the proposed new tennis complex.

Map of Tennis Participants – Prince George’s County



Note: Map depicts the number of individuals that participated in tennis in the last 12 months.

Source: Esri.

TAPESTRY SEGMENTATION

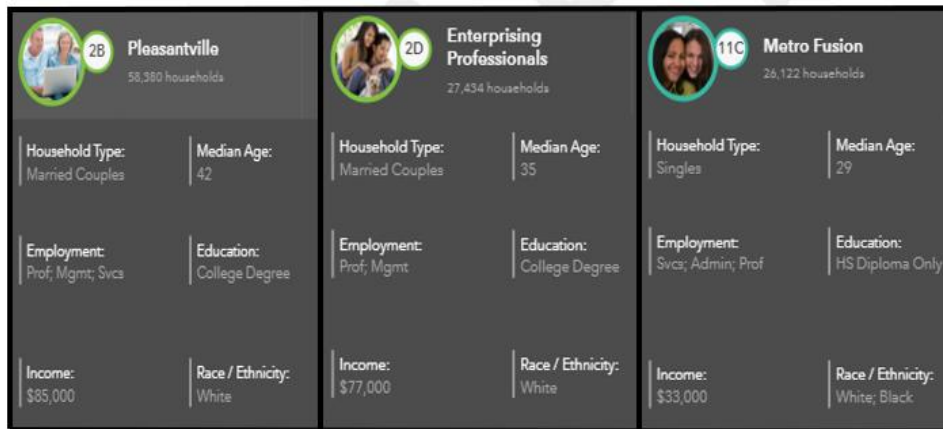
According to Esri, tapestry segmentation classifies neighborhoods into 67 segments on both demographics and socioeconomic attributes. They summarize lifestyle choices as well as what people buy and how people spend free time. The top tapestry segments within the County include Pleasantville, Enterprising Professionals and Metro Fusion. The following provides a brief description of each of these tapestry segments as defined by Esri.

1.) Pleasantville (18.4% of 2020 households): Prosperous domesticity best describes the settled denizens of Pleasantville. Situated principally in older housing in suburban areas in the Northeast (especially in New York and New Jersey) and secondarily in the West (especially in California), these slightly older couples move less than any other market. Many couples have already transitioned to empty nesters; many are still home to adult children. Families own older, single-family homes and maintain their standard of living with dual incomes. These consumers have higher incomes and home values and much higher net worth. Older homes require upkeep; home improvement and remodeling projects are a priority—preferably done by contractors. Residents spend their spare time participating in a variety of sports or watching movies. They shop online and in a variety of stores, from upscale to discount, and use the Internet largely for financial purposes.

2.) Enterprising Professionals (8.7% of 2020 households): Enterprising Professionals residents are well educated and climbing the ladder in STEM (science, technology, engineering, and mathematics) occupations. They change jobs often and therefore choose to live in condos, town homes, or apartments; many still rent their homes. The market is fast-growing, located in lower density neighborhoods of large metro areas. Enterprising Professionals residents are diverse, with Asians making up over one-fifth of the population. This young market makes over one and a half times more income than the US median, supplementing their income with high-risk investments. At home, they enjoy the Internet and TV on high-speed connections with premier channels and services.

3.) Metro Fusion (8.2% of 2020 households): Metro Fusion is a young, diverse market. Many residents do not speak English fluently and have moved into their homes recently. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children; a quarter are single-parent families. The majority of residents live in midsize apartment buildings. Metro Fusion is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives. This is particularly difficult for the single parents due to median incomes that are 36% lower than the US level.

Tapestry Segmentation Summary

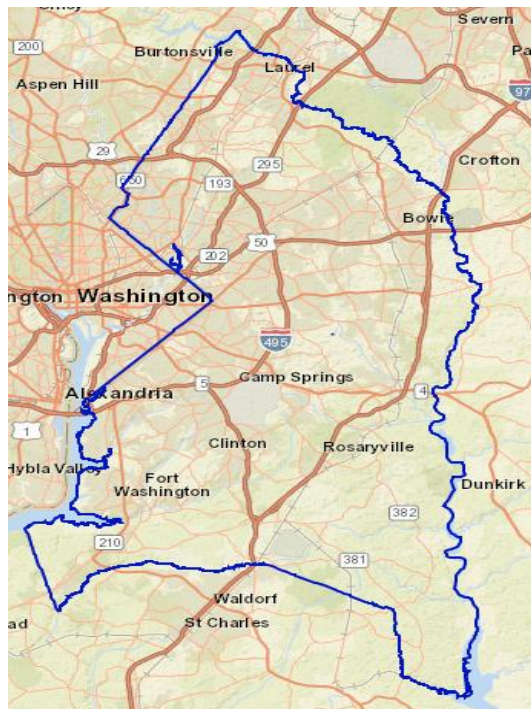


Source: Esri.

TRANSPORTATION ACCESS

The location and accessibility of a facility relative to its target market area can impact its usage. Further, the method that tennis event organizers use to select venues to host their event is partially based on ease of access to a market for attendees. As shown in the following graphic, the County has excellent accessibility to/from other State and regional locations provided primarily by Interstate 95, Interstate 495, U.S. 50, and U.S. 301. The County is proximate to Washington, D.C., Northern Virginia and Baltimore. As a point of reference, a site proximate to Interstate 95 would likely be advantageous in attracting non-local attendees.

Area Vehicular Access



Sources: Esri.

HOTEL SUPPLY

The diversity, supply and availability of hotel rooms proximate to a tennis facility can play a role in attracting tournaments/competitions and other events that draw out-of-town visitors. Research suggests that participants/spectators tend to travel further and stay longer when their choice of hotel property is readily available.

As shown in the table below, there were approximately 7,100 hotel rooms in the County as of February 2021.

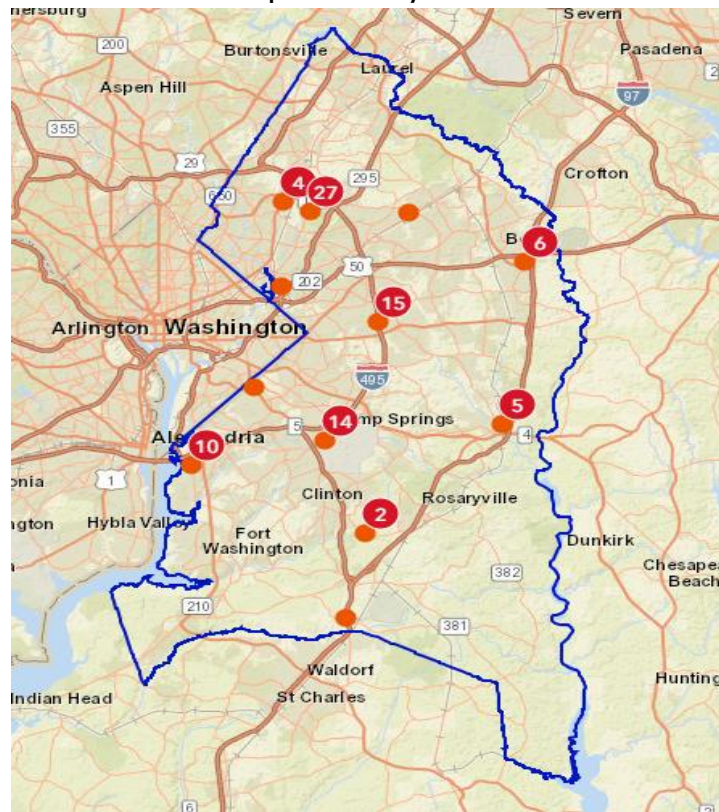
Hotel Supply in Prince George's County			
Property	Number of Rooms	Property	Number of Rooms
Gaylord National Resort & Convention Center	2,000	Wyndham Garden Washington DC North	150
MGM National Harbor	308	LaQuinta Inn and Suites DC Metro Capital Beltway	139
The Hotel at the University of Maryland	297	Holiday Inn Express & Suites College Park - University Area	125
Crowne Plaza Greenbelt - Washington DC	287	Red Roof Plus+ Oxon Hill	120
College Park Marriott Hotel and Conference Center	237	Residence Inn by Marriott Greenbelt, Maryland	120
Holiday Inn Washington - College Park (I-95)	222	Holiday Inn Express & Suites Laurel Lakes	119
DoubleTree by Hilton Laurel	208	TownePlace Suites by Marriott Clinton at Joint Base Andrews	115
Holiday Inn Greenbelt/NASA Goddard	206	Residence Inn Upper Marlboro Joint Base Andrews	112
Metro Points Hotel - Washington North	197	Fairfield Inn Laurel	109
The Westin Washington National Harbor	195	Hampton Inn & Suites Glenarden/Washington DC	106
Harborside Hotel	194	Hampton Inn Bowie	103
AC Hotel National Harbor Washington, DC Area	192	Residence Inn Largo Capital Beltway	101
Comfort Inn & Conference Center	186	Quality Inn & Suites	95
DoubleTree by Hilton Largo/Washington DC	184	Holiday Inn Express Washington DC/BW Parkway	88
Hyatt Place National Harbor	156	TownePlace Suites College Park	77
Courtyard by Marriott - Greenbelt	152	Country Inn & Suites by Radisson Washington, DC East - Capitol Heights	74
Cambria College Park	150	Total	7,124

Note: Sorted in descending order by number of rooms.

Source: Experience Prince George's.

As shown on the following page, hotels are predominantly clustered along I-95. The lower southeastern and southwestern portions of the County feature relatively few hotel properties in comparison to the rest of the County.

Map of County Hotels



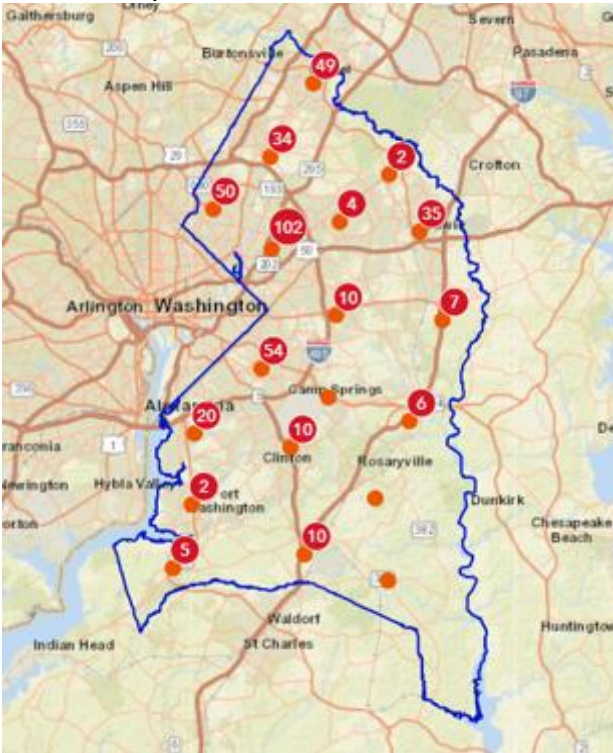
Note: Number of hotel properties shown in map may differ from those previously shown due to the inclusion of motels, bed and breakfasts, etc.
Source: Esri.

AMENITIES

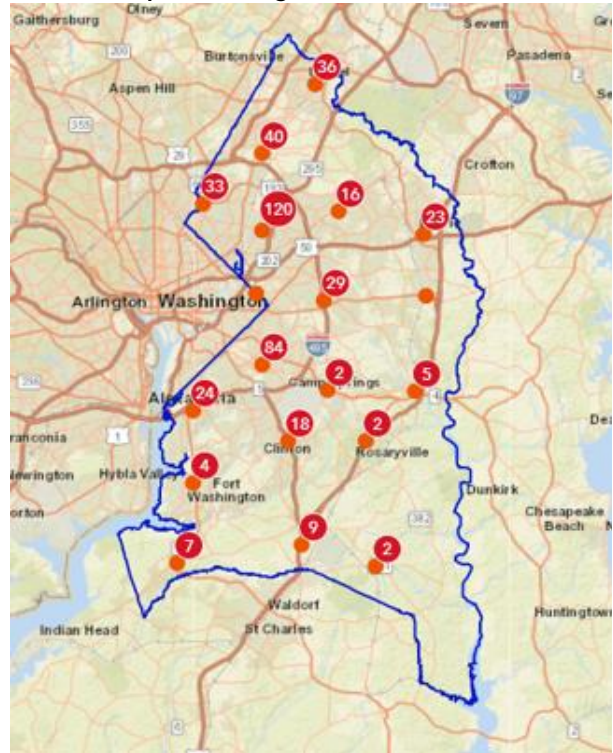
As with hotels, the supply of retail outlets, dining options and entertainment/attractions are also important factors that organizers of tournaments/competitions consider when deciding where to host an event. Many attendees seek proximate attractions during breaks and/or after event-related functions. The following illustrates the supply of retail, dining and entertainment options within Prince George's County.

As shown, retail, dining and entertainment establishments are spread throughout the County with the largest cluster located near I-95. The southern portion of the County has fewer amenities, especially entertainment options, in comparison to other parts of the County.

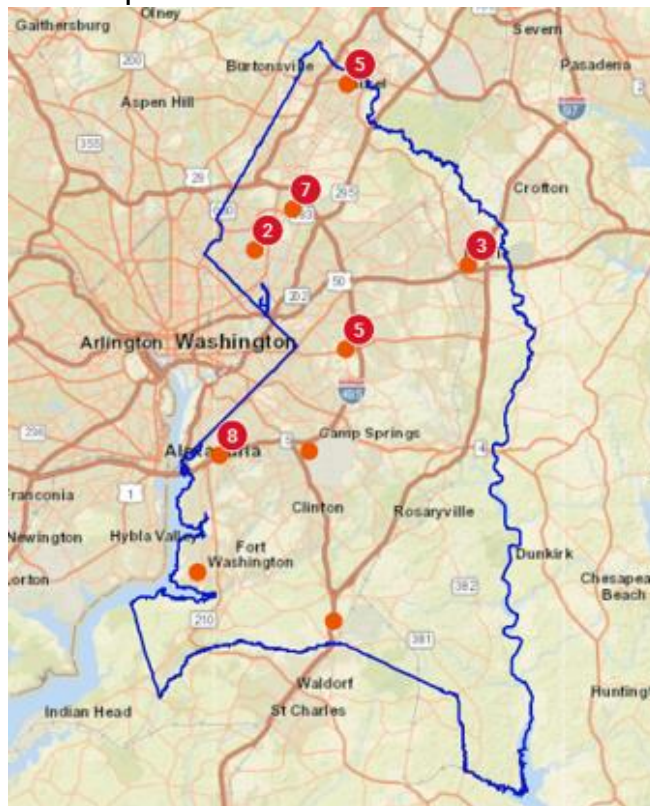
Map of Retail Establishments



Map of Dining Establishments



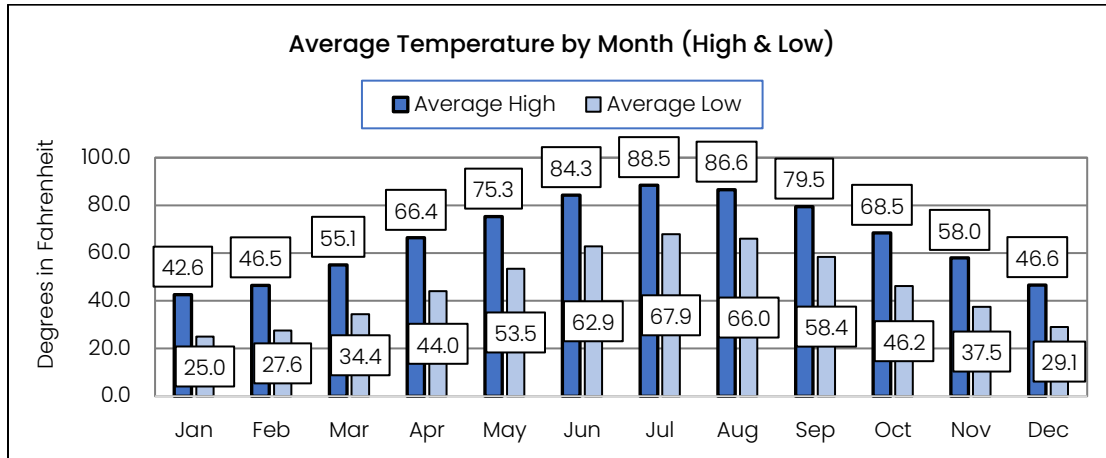
Map of Entertainment Establishments



Source: Esri.

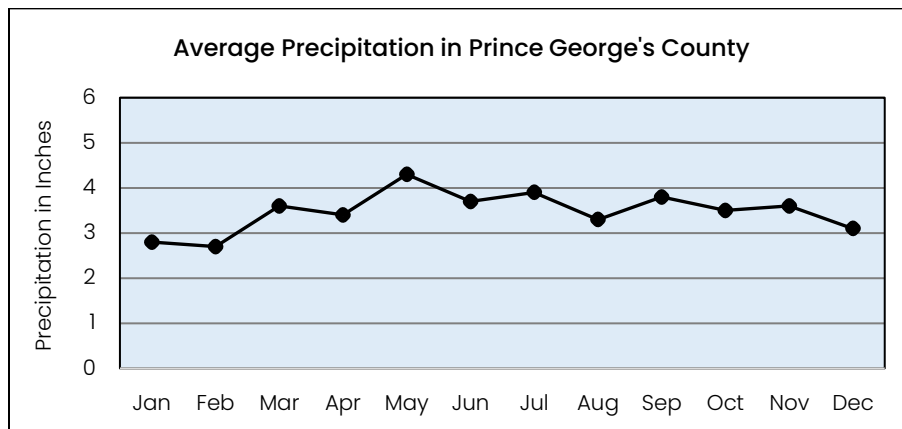
CLIMATE CHARACTERISTICS

Climate can play a factor in the marketability and usage of outdoor venues such as tennis complexes. The following chart illustrates the average high and low temperature by month in the County. As shown, the County has nine months where the average high temperature is above 50 degrees which is attractive for outdoor events. On average, the warmest months in the County are July, August and June while the coldest months are January, February and December, respectively.



Source: USA.com.

Months with high precipitation could negatively impact outdoor tennis activities. On average, precipitation in the County is the highest in the months of May, July and September, respectively. Offering indoor courts would mitigate potential inclement weather and increase the proposed new tennis complex's marketability and utilization.



Source: USA.com.

SURROUNDING AREA MARKET CONDITIONS

Depending on the site location and supply of existing facilities, the proposed new tennis complex could potentially draw attendees from outside the County.

As such, the table below profiles population, age distribution, and household income for Maryland counties bordering Prince George’s County including Anne Arundel, Calvert, Charles, Howard and Montgomery counties in Maryland.



In addition, for comparative purposes, demographic and socioeconomic data is shown for Maryland and the U.S.

Select Demographic & Socioeconomic Statistics								
Category	Prince George's County	Anne Arundel County	Calvert County	Charles County	Howard County	Montgomery County	State of Maryland	U.S.
Population Summary								
2020 Total Population	904,929	591,150	95,955	167,640	330,292	1,046,075	6,109,921	333,793,107
2025 Total Population	929,954	615,488	99,218	177,388	352,331	1,079,433	6,266,789	346,021,282
2020-2025 Annual Growth Rate (Projected)	0.55%	0.81%	0.67%	1.14%	1.30%	0.63%	0.51%	0.72%
2020 Median Age	36.7	39.7	41.2	38.3	40.0	39.8	39.3	38.5
2020 Median Household Income	\$83,429	\$100,192	\$112,034	\$94,962	\$118,638	\$109,372	\$84,280	\$62,203
2020 Average Household Income	\$107,462	\$130,805	\$138,838	\$117,833	\$162,545	\$154,230	\$115,723	\$90,054

Source: Esri.

Population

Prince George’s, Montgomery, Anne Arundel and Howard counties have a relatively large population. Population within each profiled county is expected to increase from 2020 to 2025 and at a projected annual rate higher than that of the State. Both Calvert and Charles counties have relatively small populations in comparison to the other profiled counties.

Age Distribution

The median age of Prince George’s County (36.7) was the youngest among all profiled market areas in 2020.

Household Income

Prince George’s County and its surrounding counties are affluent. Based on the income levels of households in the profiled counties, it is reasonable to assume that these households have a high level of discretionary income to spend on activities, such as those related to tennis.

Key Research Findings

The following provides key findings based on analysis of local market conditions.

- The population in Prince George's County has increased in recent years to 904,929 and is expected to experience continued growth leading up to 2025, albeit at a relatively minimal growth rate. The majority of the population is located within the central and northern portions of the County.
- The County's population is relatively high in age groups that typically participate in tennis based on industry trends.
- The County is affluent and well-educated which is favorable for tennis participation based on industry trends.
- Based on data obtained from ESRI, the majority of tennis participants in Prince George's County reside in the central and northern portions.
- The top tapestry segments within the County suggest there is a large population of individuals with high incomes and those that are dedicated to climbing the corporate ladder. The largest percentage of the population is defined as Pleasantville, which spend their spare time participating in a variety of sports, which is a favorable characteristic as it relates to community usage of the proposed new tennis complex.
- The County offers strong accessibility to/from other State and regional locations which is a strength for attracting tennis events. A site proximate to Interstate 95 would likely be advantageous in attracting non-local attendees
- Hotels rooms, retail, dining and entertainment options in the County are predominantly clustered along I-95, with fewer in the southern region.
- The climate characteristics of the County suggest there are several months that outdoor tennis courts would be unavailable due to precipitation. Offering indoor courts would mitigate potential inclement weather and increase the proposed new tennis complex's marketability.
- Counties in Maryland surrounding Prince George's County to the North (Montgomery, Howard and Anne Arundel) have relatively large populations compared to counties to the south (Charles and Calvert). A site location in Prince George's County that offers easy access to/from more populated surrounding counties would likely increase the opportunity to attract non-local attendees to the proposed tennis complex. With that said, demand from potential non-local attendees is dependent on the location of existing tennis facilities proximate to them.

4. SUPPLY OF LOCAL TENNIS FACILITIES



SUPPLY OF LOCAL TENNIS FACILITIES

The degree that existing facilities in the local area, defined as the County, meet the needs of residents and other target markets is an important consideration when evaluating the merits of a new tennis complex. An oversupply of tennis courts will likely result in less demand for the proposed new tennis complex while an undersupply would provide the opportunity for the proposed new tennis complex to better accommodate both existing players and those interested in playing but lacking the necessary facility to do so.

As previously mentioned, one tennis court generally supports tennis recreation for 10,000 residents which suggest that 90 tennis courts could be supported in the County. Other factors to consider when evaluating the feasibility of the proposed new tennis complex include the number, location and quality of existing tennis courts available to the public, the popularity of tennis in the community and the type of tennis programming planned to take place on the new courts.

According to USTA, a public or private tennis facility requires a minimum of four (4) courts for effective tennis programming. As such, the following profiles existing tennis facilities in the County with four (4) or more courts. Existing facilities were categorized into three groups based on ownership: M-NCPPC; Public Schools and Colleges/Universities; and Private/Membership-Based. While there are other tennis facilities in the County, including those publicly owned, they offer less than four courts. Further, while this section provides an overview of select tennis facilities in the County, it is not meant to be an all-inclusive inventory of facilities.

M-NCPPC

As shown in the following table, the M-NCPPC owns and operates 10 tennis facilities in the County that offer at least four (4) tennis courts. In aggregate, profiled facilities offer a total of 45 outdoor courts and 15 indoor courts. While all of the profiled facilities offer outdoor tennis courts, only three (3) of the facilities offer indoor courts.

Indoor courts are located at Fairland Regional Park in the Fairland Tennis Bubble (located within Fairland Sports and Aquatics Complex), Watkins Regional Park (Watkins Tennis Bubble) and Louise F Cosca Regional Park (Cosca Tennis Bubble). These facilities offer six (6), five (5) and four (4) indoor courts, respectively and are all a bubble structure. The largest number of outdoor courts at one facility is six (6), which is provided by Louise F Cosca Regional Park, Allentown Splash, Tennis and Fitness Park and Vera Cope Weinbach Recreation Center. Watkins Regional Park offers five (5) outdoor tennis courts.

The Tennis Center at College Park (also referred to as the Junior Tennis Champions Center) offers 15 non-lighted, outdoor tennis courts and 15 indoor courts. Although M-NCPPC owns the land, it leases it to a non-profit organization (Junior Tennis Champions Center Inc. or JTCC) that operates the center. The current lease agreement began on January 1, 2020 and is for a 20-year

period with two successive 10-year extension options. While the facility is membership-based, Prince George’s County Schools, M-NCPPC and the City of College Park can use the facility for tournaments free of charge at times and dates mutually agreed upon. For purposes of this analysis and given the facility’s operating structure, the Tennis Center at College Park is categorized as a private/membership-based facility.

Inventory of M-NCPPC Owned and Operated Tennis Facilities in Prince George's County			
Facility	Number of Courts		
	Outdoor	Indoor	Total
Watkins Regional Park*	5	5	10
Louise F Cosca Regional Park**	6	4	10
Fairland Regional Park***	2	6	8
Allentown Splash, Tennis and Fitness Park	6	0	6
Vera Cope Weinbach Recreation Center	6	0	6
Fox Hill Park	4	0	4
King's Grant Community Park	4	0	4
Tucker Road Athletic Complex	4	0	4
Holloway Estates Park	4	0	4
Summerfield Park	4	0	4
Total	45	15	60
Average	5	2	6

Notes: * includes Watkins Tennis Bubble.
 ** includes Cosca Tennis Bubble.
 *** includes Fairland Sports and Aquatics Complex/Fairland Tennis Bubble.
 Excludes facilities with less than 4 courts.
 Sorted in descending order by total number of courts.

Source: M-NCPPC.

The following provides a brief description of profiled facilities owned by the M-NCPPC that offer a minimum of six courts.



Source: M-NCPPC website; Google maps.

Watkins Regional Park in Upper Marlboro offers five indoor courts within the air-conditioned Watkins Tennis Bubble. Four lighted outdoor courts are located adjacent to the tennis bubble. There is also an outdoor practice court that is not lighted. Amenities at the Watkins Tennis Bubble include a clubhouse, exercise room, vending machines, outdoor viewing area, Wi-Fi customer lounge and multi-purpose room. The clubhouse is a “green” building meaning it is environmentally friendly and resource-efficient throughout the life of the building. According to the Maryland Sports Commission, there are 32 parking spaces available on the property.

The tennis bubble offers contract and spot time, hosts league play and provides private and group instruction for juniors, adults, and seniors. Discounts are available for both juniors and senior citizens. As of February 2021, lessons, QuickStart and beginner play ranges from \$60 to \$78, and team play ranges from \$120 to \$156. Residents can reserve individual courts for \$22/hour and non-residents can reserve individual courts for \$29/hour. While the facility has hosted tennis tournaments in the past, this has not been a focus in recent years. The facility is also available for rent for other events such as parties.



Source: Experience Prince George's County website.

Louise F Cosca Regional Park is in Clinton and offers four indoor courts for public use within the Cosca Tennis Bubble as well as six outdoor courts. Four of the outdoor courts are lighted. The Cosca Tennis Bubble includes a waiting/lounge area and air conditioning. According to the Maryland Sports Commission, the facility also includes two locker rooms, and 20 parking spaces are available. The tennis bubble offers contract and spot time, hosts league play and provides private and group instruction for juniors, adults, and seniors. Discounts are available for both junior and senior citizens. As of February 2021, classes for ages under the age of 17 range from \$48 to \$63 and from \$54 to \$71 for individuals aged 18 and up. Individual courts can be reserved at \$19/hour for residents and \$25/hour for non-residents. The indoor and outdoor courts are not utilized for tournament play. Facility rentals for non-tennis events are available.



Fairland Regional Park includes the Fairland Sports and Aquatics Complex, which consist of the Fairland Aquatics Center and the Fairland Sports Center. The Fairland Sports Center includes the Fairland Tennis Bubble, which offers six indoor tennis courts and a racquetball court as well as a shower/locker room area. The broader park offers two additional lighted outdoor tennis courts. Other recreational offerings include indoor pools, gymnastics facility, weight training center, and fitness/dance studio.



Source: Google Maps; M-NCPPC website.

The venue offers after school programs, camps, and a variety of other developmental and competitive youth tennis programs as well as league play and private/semi-private lessons for all ages. The facility can also be rented for meetings, parties, and other special events. Admission rates to the Fairland Sports Center vary based on age and length of use. As of February 2021, individual courts can be rented at \$24/hour for a resident and \$32/hour for non-residents.



Allentown Splash, Tennis and Fitness Park in Fort Washington offers six outdoor lighted courts for public use. In addition to tennis courts, the park offers basketball courts, fitness room, multi-purpose room, restrooms, locker room, pools/splash zone, and vending and picnic areas.



Source: Park Rx America website.

The park hosts a variety of camp and community tennis programs and is open for public use. USTA programs are held at the facility and typically use five of the six courts. Rental of areas are available by reservation.



Source: Park Rx America website.

Vera Cope Weinbach Recreation Center in New Carrollton offers six outdoor courts for public use and rental. Four of the six courts are lighted. Located in a neighborhood park, other basic amenities include restrooms and picnic/outdoor space.

The following summarizes historical tennis court reservations occurring at the profiled facilities in which data was available. The M-NCPPC began tracking tennis activity in the County in mid-to-late 2017. As such, the following table profiles tennis activity from 2018 to 2020. It should be noted that total tennis activity in 2020 was adversely impacted by several facility closures due to the COVID-19 pandemic. Further, certain programming during the profiled period such as private leagues and clubs may not have been booked utilizing M-NCPPC software and therefore is not included in the summary below.

As shown, the facilities with the most reservations during the profiled period were indoor courts including Watkins Tennis Bubble, Cosca Tennis Bubble and Fairland Tennis Bubble. Additional information provided by M-NCPPC related to offerings at these three facilities can be found within the appendix of this report.

Summary of Historical Tennis Activity – Prince George’s County (CY 2018 – CY 2020)						
Facility	CY 2018		CY 2019		CY 2020	
	Reservation		Reservation		Reservation	
	Count	% of Total	Count	% of Total	Count	% of Total
Watkins Tennis Bubble	4,004	34%	5,238	42%	3,465	40%
Cosca Tennis Bubble	3,792	32%	3,712	29%	2,054	24%
Fairland Tennis Bubble	2,104	18%	2,141	17%	2,254	26%
Vera Cope Weinbach Recreation Center	381	3%	430	3%	74	1%
Allentown Splash, Tennis & Fitness Park	799	7%	399	3%	265	3%
Cosca Regional Park	380	3%	364	3%	365	4%
Watkins Regional Park	30	0%	90	1%	3	0%
Tucker Road Athletic Complex	186	2%	75	1%	9	0%
King’s Grant Neighborhood Park	102	1%	72	1%	60	1%
Foxhill Park	45	0%	36	0%	162	2%
Holloway Estates Park	27	0%	27	0%	24	0%
Total	11,850	100%	12,584	100%	8,735	100%

Notes: Several facilities were closed in CY 2020 due to the COVID-19 pandemic.

Sorted in descending order by CY 2019 reservation count.

Source: M-NCPPC.

With the inclusion of facilities that offer less than four (4) tennis courts, the County offers a total of 286 M-NCPPC-owned and operated courts, of which 15 are indoor and 271 are outdoor. All the indoor courts are lighted, while only 65 (23%) of the outdoor courts are lighted. The following table categorizes these courts into M-NCPPC defined service areas. The central portion of the County accounts for 44% of total court supply, followed by the southern area (29%) and the northern area (27%).

Indoor courts are distributed relatively equal among the north, central and south areas of the County. The central area of the County has the highest supply of outdoor courts, while the northern area has the least. Each service area has a relatively limited number of lighted outdoor courts; the southern area offers the fewest number of lighted outdoor courts.

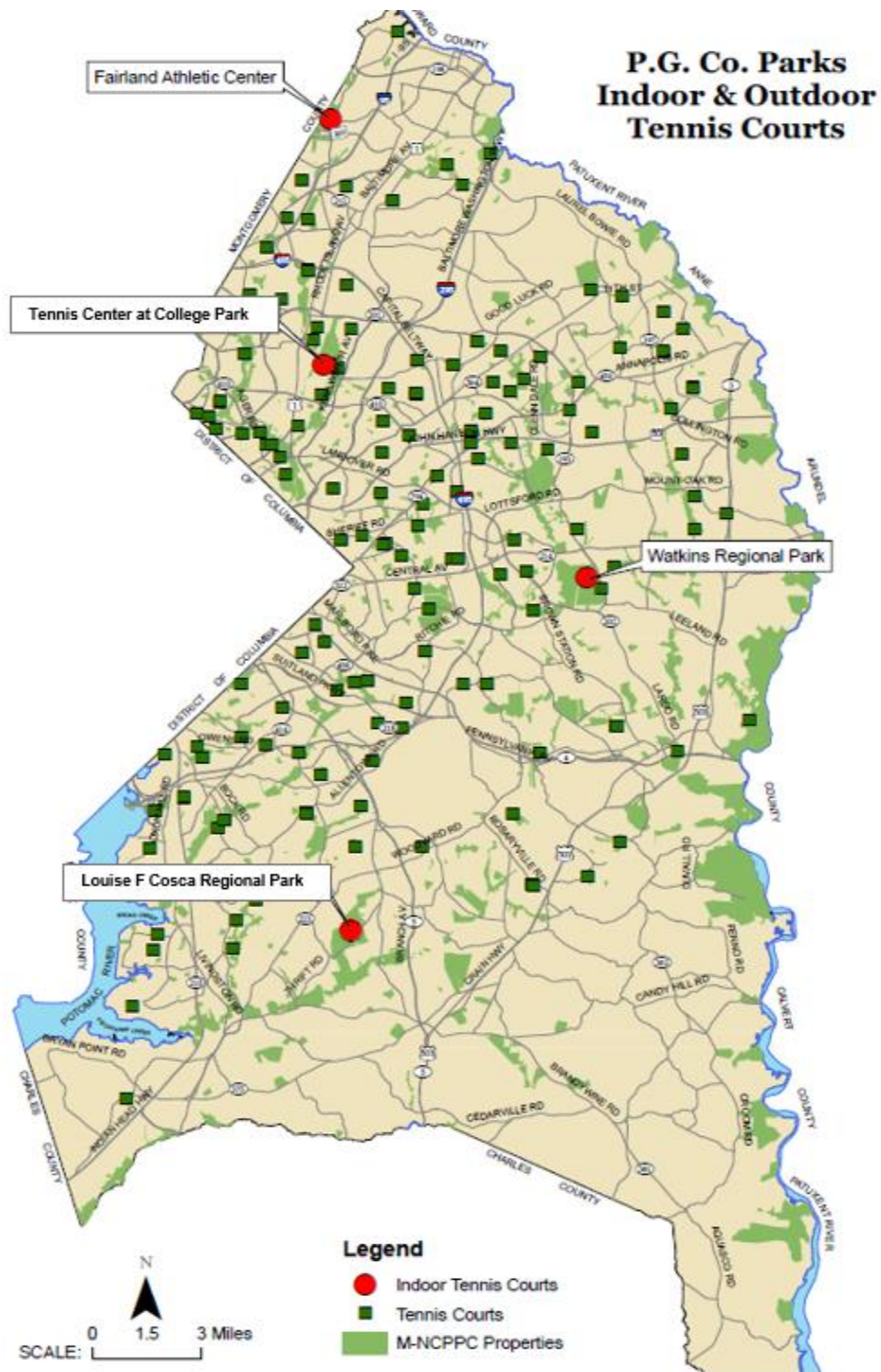
Inventory of M-NCPPC Owned Tennis Facilities in Prince George's County					
Service Area	Indoor Courts	Outdoor Courts	Lighted Outdoor Courts	Total Courts	% Total
North Prince George's County	6	71	28	77	27%
Central Prince George's County	5	121	24	126	44%
South Prince George's County	4	79	13	83	29%
Total	15	271	65	286	100%

Note: Excludes the Tennis Center at College Park (also referred to as JTCC).

Source: M-NCPPC.

The M-NCPPC partners with the Tennis Center at College Park to coordinate a junior instructional program. As such, the M-NCPPC accounts for this facility in its tracking of tennis court supply. With the inclusion of the Tennis Center at College Park, the northern area of the County offers more than three times the number of indoor tennis courts than the other areas and offers the second largest total supply only behind that of the central area.

The map on the next page depicts the location of M-NCPPC tennis courts in the County, as well as the Tennis Center at College Park .



Note: Although M-NCPPC owns the Tennis Center at College Park, it leases it to a non-profit organization that operates the facility.

Source: M-NCPPC.

Public Schools and Colleges/Universities

There are 49 total courts in the County associated with nine public schools and/or colleges and universities. The number of courts range from four (4) at Eleanor Roosevelt High School, Gwynn Park High School, Dr. Henry A. Wise Jr. High School, and Charles H. Flowers High School to eight (8) at Eppley Tennis Courts at the University of Maryland. The profiled facilities average five (5) outdoor courts. None of the facilities offer indoor courts. These facilities are primarily reserved for the use by the schools.

Inventory of School Tennis Facilities in Prince George's County			
Facility	Number of Courts		
	Outdoor	Indoor	Total
University of Maryland - Eppley Tennis Courts	8	0	8
Prince George's Community College- Athletic Complex	7	0	7
Bowie State University- Tennis Facility	6	0	6
Northwestern High School Tennis Courts	6	0	6
Friendly High School	6	0	6
Charles H. Flowers High School Tennis Courts	4	0	4
Dr. Henry A. Wise Jr. High School Tennis Courts	4	0	4
Gwynn Park High School	4	0	4
Eleanor Roosevelt High School Tennis Courts	4	0	4
Total	49	0	49
Average	5	0	5

Notes: Excludes private schools and all facilities with less than 4 courts.

The following provides a brief description of profiled public schools and colleges/universities facilities that offer a minimum of six courts.



Source: Facility website.

University of Maryland – Eppley Tennis Courts

in College Park offers eight outdoor lighted courts. The courts are primarily available for university students as well as University of Maryland affiliates, which receive free usage. Tennis lessons are offered year-round to students, staff, faculty and the public. The courts are also available to be rented for events and tournaments.



Source: Google Maps.

Prince George's Community College - Athletic Complex

in Largo offers seven outdoor lighted tennis courts. The facilities are available for use by the college's students and host a variety of student/faculty intramural programs and events.



Source: Google Maps.



Source: Google Maps.



Source: Google Maps.

Bowie State University – Tennis Facility offers six outdoor lighted courts. The venue is home to the Bowie State University Women’s Tennis team and is primarily available for use by university students and faculty.

Northwestern High School in Hyattsville offers six outdoor, non-lighted tennis courts. The courts are primarily used for the school’s tennis programs.

Friendly High School in Fort Washington offers six outdoor, non-lighted tennis courts that are primarily used for the school’s tennis programs.

Private/Membership-Based Facilities

The following summarizes the inventory of tennis courts at select private/membership-based facilities in the County. As shown, most private facilities in the County offer six (6) or less total tennis courts. As previously mentioned, the Tennis Center at College Park offers 15 outdoor tennis courts and 15 indoor courts and partners with the M-NCPPC to coordinate a junior instructional program. Goddard Tennis Facility, Sport Fit Bowie and Braden Field Tennis Courts offer 10, nine (9) and eight (8) courts, respectively. Sport Fit Bowie features three (3) outdoor courts and is the only other private facility to offer indoor courts (6).

Inventory of Private/Membership Tennis Facilities in Prince George's County			
Facility	Number of Courts		
	Outdoor	Indoor	Total
Tennis Center at College Park*	15	15	30
Goddard Tennis Facility	10	0	10
Sport Fit Bowie	3	6	9
Braden Field Tennis Courts	8	0	8
Belair Bath & Tennis Club	6	0	6
Belair Swim & Racquet Club	6	0	6
Country Club at Woodmore	6	0	6
Whitehall Pool & Tennis Club	6	0	6
Lake Arbor Foundation Center	4	0	4
Pointer Ridge Swim & Racquet Club	4	0	4
Total	68	21	89
Average	7	2	9

Notes: *also referred to as the Junior Tennis Champions Center or JTCC.

Excludes facilities with less than 4 courts.

Sorted in descending order by total number of courts.

Sources: M-NCPPC; Maryland Sports Commission; Global Tennis Network; Facility Websites; Secondary research.

The following provides a brief description of profiled private facilities that offer a minimum of six courts.



Source: Facility website.

Tennis Center at College Park, home to the University of Maryland's Women's Tennis team, offers 15 indoor courts and 15 outdoor, non-lighted courts (excluding the two junior tennis courts). The facility offers a variety of different playing surfaces. Other amenities include fitness/weight training facilities, a pro shop, and a clubhouse. The facility was selected by USTA as the first regional training center for its high-performance program.

Facility management has a goal of providing grassroots programming and developing players with the objective of achieving college scholarship and/or playing at the professional level. The facility has two advanced, invite-only programs. The Junior Champions Program is for ages eight (8) to 12 and introduces players to high performance training and techniques. The Champion's Program is for those aged 10 to 18 and includes full or part-time training and an accredited academic program on-site.

The facility offers memberships to the public and numerous clinics, lessons and training programs for all ages and skill levels, and also hosts a variety of youth and adult tournaments. Youth and adult lessons range from \$80 to \$165 depending on membership and the experience of the teaching professional. Junior development programs generally range from \$120 to \$520 per person depending on age and skill level. Adult leagues are available for \$155 and adult programs such as Discover Tennis and clinics generally cost \$360. The facility also hosts free community tennis festivals.

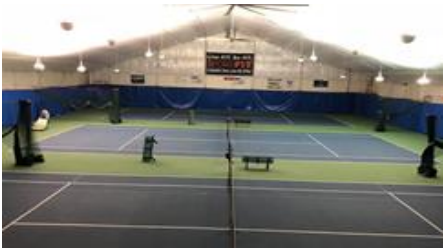
According to facility management, the majority of the facility's revenue has been historically generated from tuition and membership fees. Management also indicated they are considering expanding the facility.



Source: Facility website.

Goddard Tennis Facility in Greenbelt offers ten outdoor courts, two of which are lighted. Eight of the courts are Har-Tru and two are hard courts. The Har-Tru courts are only available from April to October due to weather. In addition to courts, the facility offers a practice wall, ball machine, vending machines, restrooms and a courtside socialization area which consists of picnic tables.

The members-only facility hosts tournaments, lessons and casual play as well as social events/gatherings. Construction and maintenance are primarily funded through a \$60 annual membership fee and vending machine fees. In addition, members volunteer to maintain the facility.



Source: Facility website.

Sport Fit Bowie offers six indoor and three outdoor tennis courts. Other club amenities include locker rooms, restrooms, a pro shop, vending machines, swimming pools, a fitness center/gym, a basketball court and a racquetball court.

The club offers a variety of adult and junior tennis clinics and programs. Adult programs offered include beginner/intermediate clinics, Cardio Tennis and doubles play. Junior programs include QuickStart, player introduction and development (ages 11 to 14) and custom programs for individuals aged six (6) to 16 classified as high performers. Pickleball and racquetball leagues are also offered.

In addition to racquet sports, the health club offers personal training, group fitness, spin classes, various programs in aquatics and a summer camp, among other programming. The annual membership fee is \$660.



Source: Meetup.

Braden Fields Tennis Courts in Greenbelt offers eight outdoor lighted courts. The members-only facility hosts leagues, drop-in play, tournaments and other social events.



Source: Facility website.

Belair Bath and Tennis Club in Bowie offers six outdoor tennis courts, four of which are lighted. Other amenities at the members-only club include a swimming pool and basketball/volleyball courts.

The facility offers tennis lessons (youth and adult) for varying skill levels free to its members and hosts a variety of member social events and tournaments. In addition, one of the tennis courts is lined for pickleball play during the summer and members can participate in pickleball clinics and instructor-led game play at a minimal fee.



Source: Facility website.

Belair Swim and Racquet Club in Bowie offers six outdoor lighted courts. Other club amenities include a swimming pool, bocce courts, and basketball/volleyball courts. The facility is member-owned and not for profit. Both annual and seasonal memberships are available, and members are also part-owners of the club. The club offers private lessons and hosts a variety of member events.



Source: Facility website.

The Country Club at Woodmore in Mitchellville offers six outdoor lighted courts. Other amenities include a pro-shop, a top-rated golf course, a golf simulator room, dining, and swimming complex.

This private club holds various instructional clinics and offers private lessons.



Source: Facility website.

Whitehall Pool and Tennis Club in Bowie offers six outdoor lighted tennis courts. Other amenities at the members-only club include four pickleball courts, volleyball/basketball courts, a swimming pool and a snack bar.

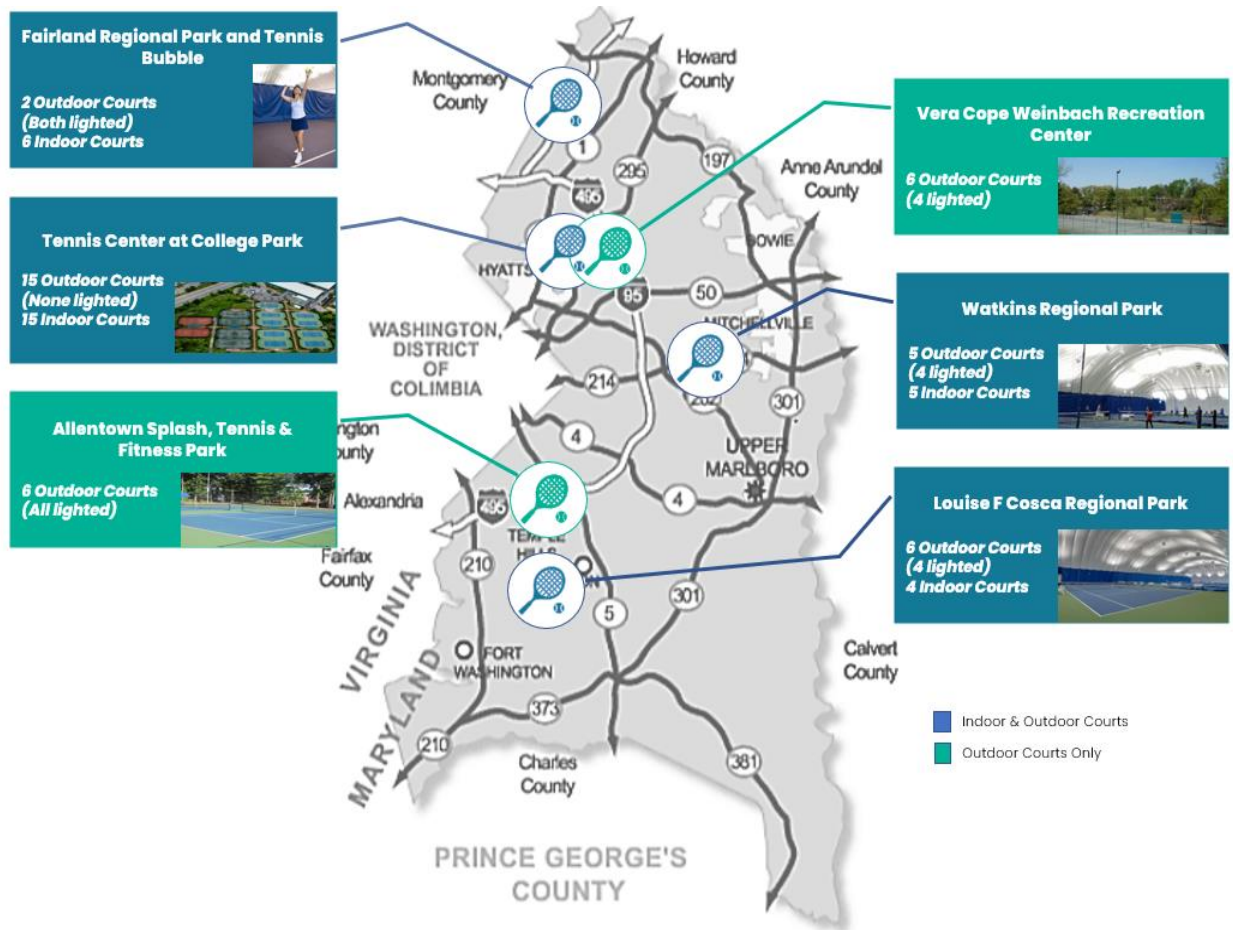
The facility offers youth/beginner clinics, private lessons for all ages, and hosts a variety of junior/adult tournaments and social events. The tennis courts are available year-round for members.

Key Research Findings

The supply of tennis courts available to the public is one factor impacting demand for a new tennis complex in the County. While private tennis clubs/facilities service a portion of local demand, they are generally not open for the public and the cost of membership prevents many tennis participants from utilizing these facilities. In addition, school facilities typically provide limited availability for the public, as usage is generally focused on meeting their internal programming needs. In terms of public courts, there are nearly 290 total tennis courts owned by the M-NCPPC in the County, of which approximately 95% are outdoor courts. Only 23% of the outdoor courts are lighted.

As previously mentioned, USTA reports that a public or private tennis facility requires a minimum of four (4) courts for effective tennis programming. While public facilities with less than four courts can service a portion of local demand, they are limited in the amount and type of programming that they offer. In aggregate, M-NCPPC-owned and operated, public schools and colleges/universities and private/membership-based tennis facilities in the County with at least four (4) courts comprise a total of 162 outdoor courts and 36 indoor courts (198 total). Private/membership-based courts, including the Tennis Center at College Park, comprise the largest percent of the total supply in the County (45%), followed by M-NCPPC-owned and operated (30%) and public schools and colleges/universities (25%).

The following graphic illustrates the five M-NCPPC-owned and operated tennis facilities that have historically recorded a significant number of reservations based on information provided by management along with the Tennis Center at College Park which has the most total tennis courts in the County. Each of these profiled facilities has a minimum of six courts in one location. In aggregate, these facilities offer 40 outdoor courts (20 lighted) and 30 indoor courts.



Transportation access to these facilities can impact demand. The southeastern portion of the County has less favorable vehicular accessibility to/from facilities in comparison to the rest of the County. With that said, this area is one of the less populated areas in the County.

All the profiled facilities offer outdoor tennis courts, most of which are lighted. Other than the Tennis Center at College Park, the indoor courts profiled above are in tennis bubbles; not permanent structures. Management indicated that one drawback of the existing tennis bubbles is that they can be negatively impacted by inclement weather such as snow, ice and/or strong winds.

Given the geographic layout of the County and the location, supply and historical usage of existing courts, it is possible that some residents face challenges finding available court time, particularly indoors, and may be traveling far distances within or outside the County to play tennis.

5. SUPPLY OF AREA TENNIS FACILITIES



SUPPLY OF AREA TENNIS FACILITIES

Although a primary purpose of potentially developing the proposed new tennis complex is to accommodate the County's recreational tennis needs, it is envisioned that the proposed new tennis complex will also draw attendees from outside the County. As such, it is important to understand the supply of existing tennis facilities in counties surrounding Prince George's County in terms of building program elements and market niche.

Supply of Area Tennis Facilities in Maryland

The following profiles tennis facilities in Montgomery, Anne Arundel, Howard, Charles and Calvert counties with four (4) or more courts. Existing facilities were categorized into three groups based on ownership: Public Schools and Colleges/Universities; Private; and Parks and Recreation.

Montgomery County

As shown on the following page, Montgomery County has a relatively high number of total tennis facilities with at least four (4) courts. In aggregate, the profiled facilities offer 460 outdoor courts and 64 indoor courts (524 total). Private/membership-based facilities and public schools and colleges/universities each account for 44% of total court supply, while Montgomery County Parks account for approximately 12%. More than 80% of the indoor courts in the county are private. The remaining indoor courts are owned by M-NCPPC under the Montgomery County Parks Department. M-NCPPC owned indoor courts are throughout two facilities. Wheaton Indoor Tennis and Pauline Betz Addie Tennis Center both offer six (6) indoor courts. The largest tennis facility in the county, Aspen Hill Club, is private and offers 23 total courts of which 13 are indoor and 10 are outdoor.

Inventory of Existing Tennis Facilities in Montgomery County											
Montgomery County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Montgomery Parks and Rec	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
James Hubert Blake High School	8	0	8	Aspen Hill Club	10	13	23	Olney Manor Recreation Park	18	0	18
Montgomery Blair High School	8	0	8	Woodmont Country Club	16	6	22	Wheaton Indoor Tennis	6	6	12
Northwest High School	8	0	8	Congressional Country Club	15	6	21	Pauline Betz Addie Tennis Center	3	6	9
Quince Orchard High School	8	0	8	Kenwood Golf and Country Club	16	4	20	Norwood Local Park	5	0	5
Richard Montgomery High School	8	0	8	Chevy Chase Country Club	14	0	14	Dewey Local Park	4	0	4
Walter Johnson High School	8	0	8	Manor Country Club	10	4	14	North Creek Community Center	4	0	4
Albert Einstein High School	7	0	7	Montgomery Tennisplex	4	8	12	Whetstone Community Center	4	0	4
Briggs Chaney Middle School	6	0	6	Norbeck Country Club	9	3	12	Meadowbrook Local Park	4	0	4
Clarksburg High School	6	0	6	Columbia Country Club	11	0	11	Woodley Gardens	4	0	4
Forest Oak Middle School	6	0	6	Bethesda Country Club	8	2	10				
Herbert Hoover Middle School	6	0	6	Lakewood Country Club	6	4	10				
John F. Kennedy High School	6	0	6	The Edgemoor Club	8	0	8				
Kingsview Middle School	6	0	6	Promenade Tennis Club	7	0	7				
Lakeland Park Middle School	6	0	6	Bethesda Sport and Health	4	2	6				
Martin Luther King Middle School	6	0	6	Carderock Springs Swim and Tennis Club	5	0	5				
Montgomery College - Germantown Campus	6	0	6	YMCA Bethesda - Chevy Chase	5	0	5				
Montgomery College - Rockville Campus	6	0	6	Belpre Recreation	4	0	4				
Montgomery Village Middle School	6	0	6	Chevy Chase Recreation Association	4	0	4				
Roberto Clemente Middle School	6	0	6	Kentlands Citizens Assembly	4	0	4				
Shady Grove Middle School	6	0	6	Leisure World of Maryland	4	0	4				
Springbrook High School	6	0	6	National Naval Medical Center	4	0	4				
Watkins Mill High School	6	0	6	Quince Orchard Swim and Tennis Club	4	0	4				
Winston Churchill High School	6	0	6	Westleigh Recreation Club	4	0	4				
Chevy Chase High School	5	0	5	YMCA Silver Spring	4	0	4				
Cabin John Middle School	4	0	4								
Colonel E. Brooke Lee Middle School	4	0	4								
Gaithersburg High School	4	0	4								
Gaithersburg Middle School	4	0	4								
Julius West Middle School	4	0	4								
Neelsville Middle School	4	0	4								
Northwood High School	4	0	4								
Redland Middle School	4	0	4								
Ridgeview Middle School	4	0	4								
Seneca Valley High School	4	0	4								
Sligo Middle School	4	0	4								
Takoma Park Middle School	4	0	4								
Thomas W. Pyle Middle School	4	0	4								
Thomas Wootton High School	4	0	4								
Tilden Middle School	4	0	4								
Westland Middle School	4	0	4								
Wheaton High School	4	0	4								
White Oak Middle School	4	0	4								
Total	228	0	228	Total	180	52	232	Total	52	12	64
Average	5	0	5	Average	8	2	10	Average	6	1	7

Notes: Excludes private schools and all facilities with less than 4 courts.

Sorted in descending order by total number of courts.

Sources: M-NCPPC; Maryland Sports Commission; Global Tennis Network; Facility Websites/Secondary research.

Anne Arundel County

The profiled facilities shown in the following table are located in Anne Arundel County and have a total of 232 tennis courts, of which 222 are outdoor and 10 are indoor. The majority (53%) of courts are associated with public schools/universities while approximately 36% are private/membership based and 11% are owned/operated by Anne Arundel Department of Recreation and Parks. Of the 10 total indoor courts, six (6) are at Tose Family Tennis Center, three (3) are at Chartwell Golf and Country Club and one (1) is at Athletic Performance, Inc. Each of these facilities are private/membership based. The Tose Family Tennis Center was opened by the U.S. Naval Academy and is home to both Navy Men's and Women's tennis teams.

Inventory of Existing Tennis Facilities in Anne Arundel County											
Anne Arundel County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Anne Arundel/Annapolis Parks and Rec	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
Annapolis High School	12	0	12	Tose Family Tennis Center	6	6	12	Truxtun Park	12	0	12
Chesapeake High School	12	0	12	Chartwell Golf & Country Club	7	3	10	Sawmill Creek Park	6	0	6
Broadneck High School	8	0	8	Heritage Harbour	9	0	9	Barrett Park	4	0	4
North County High School	8	0	8	Crofton Swim and Tennis Club	8	0	8	Lake Waterford Park	4	0	4
Severna Park High School	8	0	8	Andover Recreation	6	0	6				
South River High School	8	0	8	Gibson Island Club	6	0	6				
Southern High School	8	0	8	Mears Marina Annapolis Swim and Tennis Club	6	0	6				
Indian Creek Upper School	6	0	6	Sherwood Forest Club	6	0	6				
Northeast Senior High School	6	0	6	Athletic Performance Inc.	3	1	4				
Old Mille Middle School	6	0	6	Shipley's Choice Swim & Tennis Club	4	0	4				
Southern High School	6	0	6	St. Andrews Swim and Tennis Club	4	0	4				
Anne Arundel High School	5	0	5	The Cannon Club	4	0	4				
Glen Burnie High School	5	0	5	Ulmstead Swim Club	4	0	4				
Meade Senior High School	5	0	5								
Brooklyn Park Middle School	4	0	4								
Crofton Middle School	4	0	4								
Lansdowne High School	4	0	4								
Lindale Middle School	4	0	4								
Magothy River Middle School	4	0	4								
Total	123	0	123	Total	73	10	83	Total	26	0	26
Average	6	0	6	Average	6	1	6	Average	7	0	7

Notes: Excludes private schools and all facilities with less than 4 courts.
Sorted in descending order by total number of courts.

Sources: Anne Arundel County Parks Division; Annapolis Recreation and Parks Department; Maryland Sports Commission; Global Tennis Network; Facility Websites/Secondary research.

In addition to these profiled facilities, Anne Arundel County, in cooperation with the Tennis Alliance of Anne Arundel County, completed a feasibility study in 2016 that assessed the merits of developing a new community tennis center at Millersville Park. At the time of the study, recommendations for the tennis center included eight (8) indoor hard courts and 16 outdoor lighted courts as well as supporting amenities. The planned number of courts was later reduced to eight (8) outdoor and eight (8) indoor courts. According to the County, as of February 2022, a third-party has been engaged to design/construct the facility.

Howard County

Profiled facilities in Howard County have a total of 178 courts, most of which are private or associated with schools. None of the profiled indoor facilities are operated by Howard County. The largest public tennis facility is Centennial Park, which offers nine (9) outdoor courts.

Inventory of Existing Tennis Facilities in Howard County											
Howard County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Howard County Rec and Parks	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
River Hill High School	8	0	8	Owen Brown Tennis Club	7	5	12	Centennial Park	9	0	9
Howard High School	7	0	7	Wilde Lakes Tennis Club	11	0	11	Blandair Regional Park	5	0	5
Marriotts Ridge High School	6	0	6	Circle D Tennis Club	6	4	10	Cedar Lane Park	4	0	4
Reservoir High School	6	0	6	Forest Hill Swim & Tennis Club	10	0	10	Hammond Park	4	0	4
Atholton High School	5	0	5	Cattail Creek Country Club	7	0	7	Rockburn Branch Park	4	0	4
Glennelg High School	5	0	5	Hobbit's Glen Golf Club	6	0	6	Sanner Rd Park	4	0	4
Harpers Choice Middle School	5	0	5	Long Reach Tennis Club	0	6	6	Savage Park	4	0	4
Centennial High School	4	0	4	Columbia Athletic Club	0	4	4	Schooley Mill Park	4	0	4
Hammond High School	4	0	4	North St. Johns Swim & Tennis Club	4	0	4	Western Regional Park	4	0	4
Long Reach High School	4	0	4								
Mt. Hebron High School	4	0	4								
Oakland Mills High School	4	0	4								
Wilde Lake High School	4	0	4								
Total	66	0	66	Total	51	19	70	Total	42	0	42
Average	5	0	5	Average	6	2	8	Average	5	0	5

Notes: Excludes private schools and all facilities with less than 4 courts.
Sorted in descending order by total number of courts.

Sources: Howard County Recreation and Parks Department; Maryland Sports Commission; Global Tennis Network; Facility Websites/Secondary research.

Charles County

Most profiled facilities in Charles County are associated with schools. White Plains Regional Park offers six (6) outdoor courts and is the only public facility in the County. None of the profiled facilities have indoor tennis courts.

Inventory of Existing Tennis Facilities in Charles County											
Charles County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Charles County Parks and Rec	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
North Point High School	12	0	12	Hawthorne Country Club	4	0	4	White Plains Regional Park	6	0	6
St. Charles High School	8	0	8								
College of Southern Maryland	6	0	6								
Thomas Stone High School	6	0	6								
Westlake High School	6	0	6								
John Hanson Middle School	4	0	4								
La Plata High School	4	0	4								
Lackey High School	4	0	4								
M.J. McDonough High School	4	0	4								
Mattawoman Middle School	4	0	4								
Milton M. Sommers Middle School	4	0	4								
Piccowaxen Middle School	4	0	4								
Sommers Middle School	4	0	4								
Total	70	0	70	Total	4	0	4	Total	6	0	6
Average	5	0	5	Average	4	0	4	Average	6	0	6

Notes: Excludes private schools and all facilities with less than 4 courts.

Sorted in descending order by total number of courts.

Sources: Charles County Recreation and Parks Department; Maryland Sports Commission; Global Tennis Network; Facility Websites/Secondary research.

Calvert County

Similar to Charles County, none of the profiled facilities in Calvert County offer indoor tennis courts. There are three (3) public facilities each offering a total of four (4) outdoor courts. Calvert County recently completed a master plan for Cove Point Park as well as Dominion Energy Regional Park. The master plan calls for an additional tennis court and seven (7) dedicated pickleball courts at Cove Point to expand the existing supply. In addition, the plan suggests a court layout that provides the opportunity to incorporate a bubble structure over three (3) of the courts. While there are no existing tennis courts at Dominion Energy Regional Park, the master plan includes a tennis complex with four (4) tennis courts and six (6) dedicated pickleball courts. Other amenities outlined in the master plan for these two parks include an indoor recreation center, athletic fields, parking, trails, etc. According to secondary sources, construction may begin in 2022.

Inventory of Existing Tennis Facilities in Calvert County											
Calvert County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Calvert County Parks and Rec	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
Huntington High School	8	0	8	Navy Recreation Center	4	0	4	Cove Point Park	4	0	4
Calvert High School	4	0	4					Dunkirk District Park	4	0	4
Northern High School	4	0	4					Hallowing Point Park	4	0	4
Patuxent High School	4	0	4								
Total	20	0	20	Total	4	0	4	Total	12	0	12
Average	5	0	5	Average	4	0	4	Average	4	0	4

Notes: Excludes private schools and all facilities with less than 4 courts.

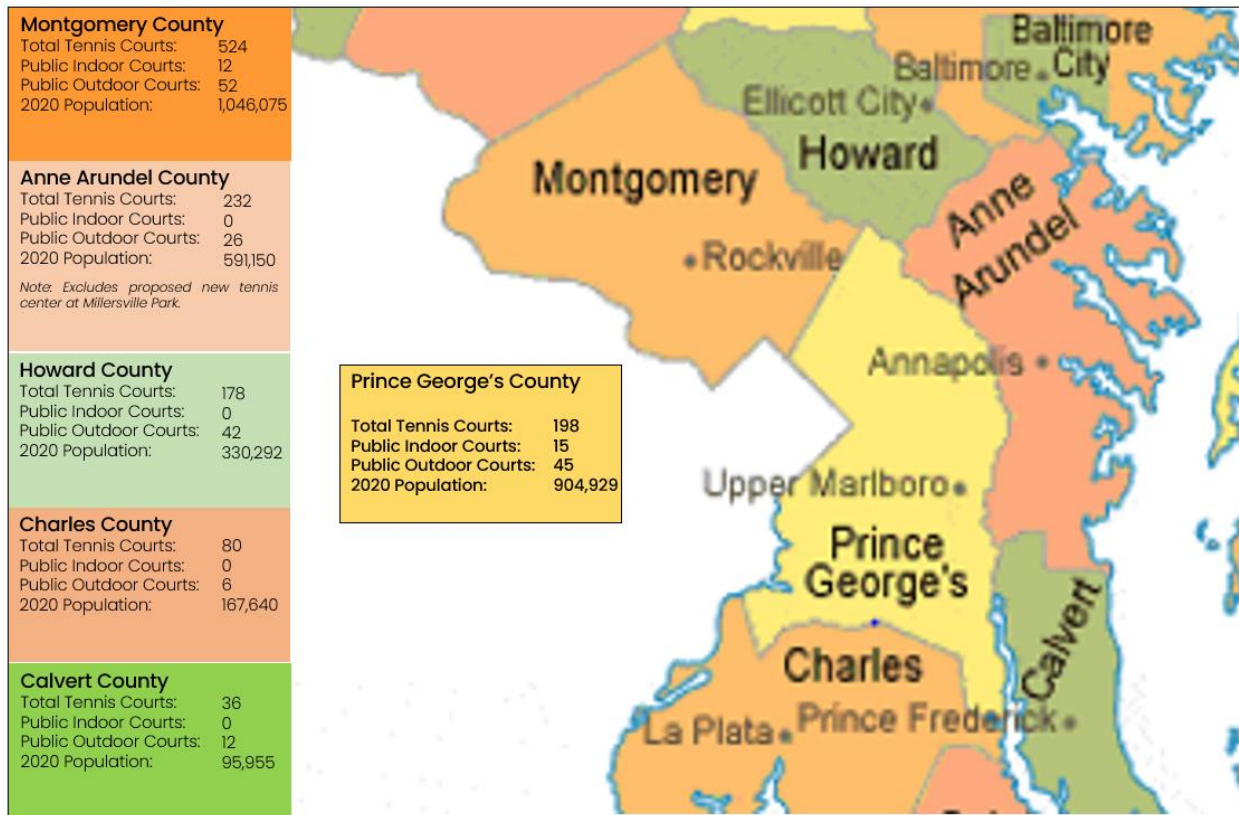
Sorted in descending order by total number of courts.

Sources: Calvert County Parks and Recreation Department; Maryland Sports Commission; Global Tennis Network; Facility Websites/Secondary research.

Summary

The following graphic depicts the total number of courts, number of public indoor and outdoor courts and 2020 population in each of the area counties in comparison to that of Prince George’s County. It should be noted that the number of courts does not represent the total inventory of courts in each county but rather the aggregate number of courts at facilities with a minimum of four (4) courts.

Although not included in the graphic, the proposed new tennis center at Millersville Park (located in the northern portion of Anne Arundel County) would add to the supply of courts in Anne Arundel County, if built.

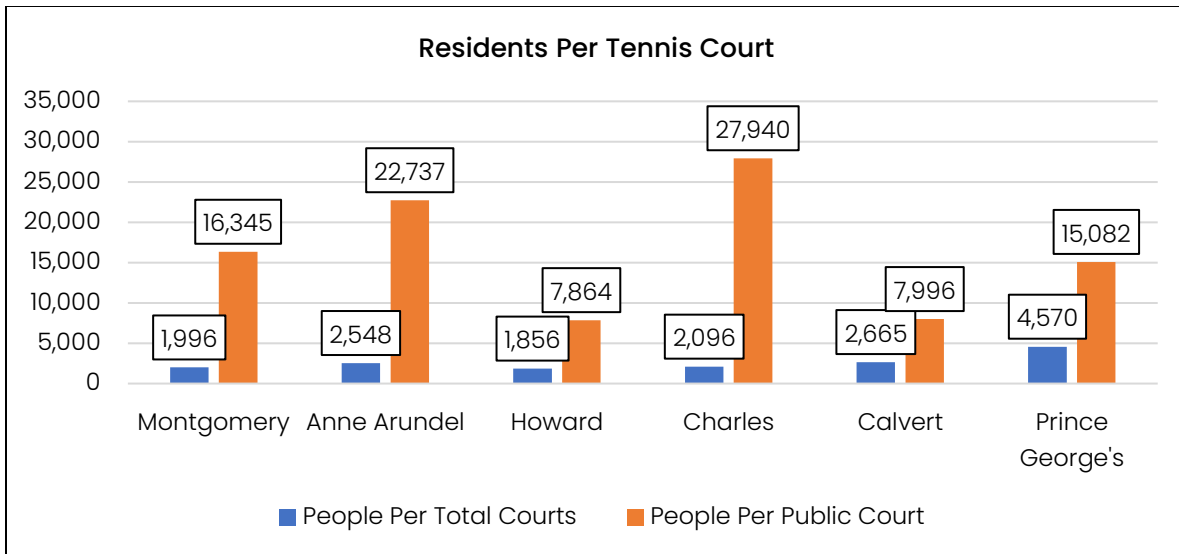


Note: Number of tennis courts represents the aggregate number of courts at facilities with a minimum of four (4) courts.

As shown above, Montgomery and Prince George’s counties have the two largest populations among the profiled counties, respectively. Consistent with population, of those tennis facilities with a minimum of four tennis courts, Montgomery County offers a significantly higher number of total courts than the other profiled counties. Prince George’s County has the second highest number of total courts.

Prince George’s County has the highest number of public indoor courts (15), followed by Montgomery County (12). There are currently no public indoor tennis courts at facilities with a minimum of four courts in Anne Arundel, Howard, Charles or Calvert counties. Montgomery County has the highest number of public outdoor courts (52), followed by Prince George’s County (45).

As shown below, Prince George’s County has the highest number of people per total courts (4,570). In terms of strictly public courts, Prince George’s County features 15,082 people per court, which is lower than Anne Arundel and Charles Counties, higher than Howard and Calvert Counties and closest to that of Montgomery County. As previously mentioned, a general rule of thumb is that one tennis court can support recreation for 10,000 residents. While facilities with less than four tennis courts can accommodate some degree of resident needs, these facilities generally cannot offer effective programming according to USTA. Based on this rule of thumb, additional courts could be supported in the County and there may be demand from residents outside of the County.



Note: People per court calculation only accounts for facilities with four or more courts.

Supply of Area Tennis Facilities Outside of Maryland

Given Prince George’s County’s geographic location, which is proximate to the Washington, D.C. area and parts of Virginia, it is likely that a new tennis complex could attract visitors from outside of the State. As such, the following profiles tennis facilities with four (4) or more tennis courts in Fairfax County, Virginia and Washington, D.C. that are within a 45-minute drive time of the western border of Prince George’s County.

Fairfax County

As shown in the following table, most of the profiled tennis facilities in Fairfax County, Virginia are private/membership based. Wakefield Park offers the largest quantity of public tennis courts with 11 outdoor courts. Brady Park is the only profiled public facility that offers indoor courts (3). The Park also offers six outdoor courts.

Inventory of Existing Tennis Facilities in Fairfax County, VA											
Fairfax County Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			Fairfax County Parks and Rec / Public	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
George Mason University	8	0	8	North Hills Club	22	0	22	Wakefield Park	11	0	11
Mount Vernon High School	7	0	7	McLean (Regency) Sport & Health Club	10	8	18	Brady Park	6	3	9
W.T. Woodson High School	7	0	7	Belle Haven Country Club	8	5	13	Jefferson District Park	8	0	8
Annanandale High School	6	0	6	Fairfax Racquet Club	0	12	12	Lewinsville Park	6	0	6
Carl Sandburg Middle School	6	0	6	Country Club of Fairfax	8	3	11	Mason District Park	6	0	6
Centreville High School	6	0	6	River Bend Club	6	5	11	Nottoway Park	6	0	6
Chantilly High School	6	0	6	Westwood Country Club	4	6	10	Chandon Park	4	0	4
Edison High School	6	0	6	Great Falls Swim and Tennis Club	6	3	9	Hoopes Road Park	4	0	4
Fairfax High School	6	0	6	Sleepy Hollow Bath & Racquet Club	9	0	9	Justice/ JEB Stuart Park	4	0	4
Falls Church High School	6	0	6	Springfield Country Club	6	3	9	Lee District Rec Center	4	0	4
Hayfield Secondary School	6	0	6	International Country Club	4	4	8	South Lakes Village Park	4	0	4
Holmes Middle School	6	0	6	Cardinal Hill Swim and Racquet Club	7	0	7	Van Dyck Park	4	0	4
James W Robinson, Jr. Secondary School	6	0	6	Oakton Swim and Racquet Club	7	0	7				
John R. Lewis High School	6	0	6	Fort Belvoir Graves Fitness Center	6	0	6				
Lake Braddock Secondary School	6	0	6	Hidden Creek Country Club	4	2	6				
Langley High School	6	0	6	Lake Newport Community (Private Homeowners)	6	0	6				
Marshall High School	6	0	6	North Shore (Private Homeowners)	6	0	6				
Oakton High School	6	0	6	Tuckahoe Recreation Club	6	0	6				
South County High School	6	0	6	Burke Racquet & Swim Club	0	5	5				
South Lakes High School	6	0	6	Chesterbrook Swim & Tennis Club	5	0	5				
Thomas Jefferson High School	6	0	6	Fox Hunt Swim and Tennis Club	5	0	5				
West Potomac High School	6	0	6	Hamlet Tennis Club	5	0	5				
West Springfield High School	6	0	6	Hollin Meadows Swim and Tennis Club	5	0	5				
Westfield High School	6	0	6	McLean Racquet & Health Club	0	5	5				
Madison High School	5	0	5	Sleepy Hollow Recreation Association	5	0	5				
McLean High School	5	0	5	Vienna Woods Swim & Tennis Club	5	0	5				
George Mason High School	4	0	4	The Woods Community (Private Homeowners)	4	0	4				
Klimer Middle School	4	0	4	Autumn Woods (Private Homeowners)	4	0	4				
Longfellow Middle School	4	0	4	Burke Cove Condominium (Private Homeowners)	4	0	4				
Ormond Stone Middle School	4	0	4	Crosspointe Community (Private Homeowners)	4	0	4				
Riverside Elementary School	4	0	4	Fox Mill Woods Swim & Tennis Club	4	0	4				
Rocky Run Middle School	4	0	4	Glade Recreation Club	4	0	4				
				Hollin Hills Community (Private Homeowners)	4	0	4				
				Hook Rd (Private Homeowners)	4	0	4				
				Idylwood Towers	4	0	4				
				Lincolnia Park Recreational Club	4	0	4				
				Little Hunting Park Club Swim and Tennis Club	4	0	4				
				Manchester Lakes (Private Homeowners)	4	0	4				
				Mantua Swim and Tennis Club	4	0	4				
				McDonnel Rec Center (Private Homeowners)	4	0	4				
				Newbridge Community (Private Homeowners)	4	0	4				
				Newington Forest (Private Homeowners)	4	0	4				
				North Hill Community (Private Homeowners)	4	0	4				
				Poplar Heights Recreation Club	4	0	4				
				Post Tysons Corner Apts (Private Homeowners)	4	0	4				
				Rotonda Condominiums (Private Homeowners)	4	0	4				
				Shadowood Community (Private Homeowners)	4	0	4				
				Shenandoah Crossing Apts. (Private Homeowners)	4	0	4				
				Skyline Sport & Health Club	0	4	4				
				Sully Station II Community (Private Homeowners)	4	0	4				
				Truro (Private Homeowners)	4	0	4				
				Uplands Community (Private Homeowners)	4	0	4				
				Upper Lakes Community (Private Homeowners)	4	0	4				
				Watergate at Landmark (Private Homeowners)	4	0	4				
Total	182	0	182	Total	263	65	328	Total	67	3	70
Average	6	0	6	Average	5	1	6	Average	6	0	6

Notes: Excludes private schools, hotels, and all facilities with less than 4 courts.

Sorted in descending order by total number of courts.

Sources: Fairfax County Park Authority; Global Tennis Network; Facility Websites/Secondary research.

Washington, D.C.

Many of the profiled tennis facilities in the Washington, D.C. area are public. The Washington Tennis and Education Foundation (East Capitol Campus) offers the largest supply of tennis courts with nine (9) outdoor courts and six (6) indoor courts. Southeast Tennis and Learning Center is the second largest tennis facility in the area with seven (7) outdoor courts and six (6) indoor courts. Each of these facilities are profiled in greater detail later in this report.

Inventory of Existing Tennis Facilities in D.C.											
DC Public Schools and Colleges/Universities	Number of Courts			Private/Membership	Number of Courts			DC Parks and Rec/Public	Number of Courts		
	Outdoor	Indoor	Total		Outdoor	Indoor	Total		Outdoor	Indoor	Total
Georgetown University	8	6	14	Rock Creek Tennis Center	25	5	30	Washington Tennis and Education Foundation	9	6	15
George Washington University	11	0	11	East Potomac Tennis Center	19	5	24	Southeast Tennis & Learning Center	7	6	13
American University	6	0	6					Anacostia Recreation Center	9	0	9
Catholic University	6	0	6					Banneker Recreation Center	8	0	8
Trinity Washington College	6	0	6					Fort Lincoln Park	8	0	8
University of DC	5	0	5					Turkey Thicket Recreation Center	8	0	8
Gallaudet University	4	0	4					Takoma Recreation Center	6	0	6
HD Woodson High School	4	0	4					Taft Recreation Center	5	0	5
Jahn Hayden Johnson Middle School	4	0	4					Fort Stevens Recreation Center	4	0	4
Kimball Elementary School	4	0	4					Hillcrest Recreation Center	4	0	4
School Without Walls at Francis-Stevens	4	0	4					Kenilworth-Parkside Recreation Center	4	0	4
								Lafayette Recreation Center	4	0	4
								Langdon Park	4	0	4
								Montrose Park	4	0	4
Total	62	6	68	Total	44	10	54	Total	84	12	96
Average	6	1	6	Average	22	5	27	Average	6	1	7

Notes: Excludes private schools and all facilities with less than 4 courts.
Sorted in descending order by total number of courts.

Sources: DC DPR; Global Tennis Network; Facility Websites/Secondary research.

Key Research Findings

Based on the supply of existing tennis courts in the County and surrounding counties in Maryland, it appears that additional courts could be supported in the County and that there may be demand from residents outside of the County. Of those facilities with a minimum of four courts, Prince George's County offers one public court per 15,082 people, which is higher than the general industry rule of thumb.

As it relates to potential sites for the proposed tennis complex in the County, the existing supply of facilities in Montgomery County and the planned tennis center in northern Anne Arundel County at Millersville Park suggests a site location in the northern portion of the County would face competition in terms of attracting non-local attendees. Further, based on geographic location, Howard County residents may be more likely to travel to Montgomery and/or Anne Arundel County to meet any tennis needs currently not satisfied within Howard County.

Given the relatively limited supply of tennis courts in Charles and Calvert counties, particularly indoor courts, locating the proposed new tennis complex in the central or southern portion of Prince George's County may provide an opportunity to attract residents from these counties; however, the population in each of these counties is relatively small.

A more central location could provide the opportunity to attract participants from Charles County and Calvert County as well as more populated areas such as southern Anne Arundel County and eastern Virginia. A central location could also attract visitors from the Washington, D.C. area; however, there are multiple large existing facilities in this area that offer both indoor and outdoor courts and are focused on serving the public.

6. POTENTIAL DEMAND GENERATORS



POTENTIAL TENNIS PROGRAMMING OPPORTUNITIES

The following provides a brief overview of types of tennis programming that could potentially be held at the proposed new tennis complex in the County and is followed by a summary of input obtained through surveys conducted with the community as well as interviews with organizations that program tennis events throughout the County.

USTA Programs

The USTA is the primary entity that organizes youth and adult tennis programs in the United States. Below is a description of these programs:

Youth Tennis: The USTA tennis programming for kids is designed for all ages and abilities with a wide range of programs that include the following:

- *USTA Tournaments* – A competitive setting for players of similar age and ability for entry-level, intermediate and advanced junior players in yellow and green-ball categories.
- *USTA Junior Programs* – Provide fun and developmentally appropriate activities including Team Challenges, Junior Team Tennis and Junior Circuit play.
- *Tennis in Schools* – Includes exposure to tennis within a school for kids aged 5-18 with the USTA Net Generation providing tools and education to schools.
- *National Junior Tennis and Learning* – Reaches nearly 180,000 youth annually in the 50 largest U.S. markets and provides free or low-cost tennis and education programming.
- *Wheelchair* – Young wheelchair players have access to programming and development opportunity to learn the sport of tennis and continue through college and beyond.
- *Adaptive* – Tennis can be adapted so everyone can participate and the USTA provides programming opportunities for youth with cognitive and physical disabilities.
- *American Development Model* – This program applies long-term athletic development principles to guide parents and coaches as players develop and mature.

College Tennis: USTA programs continue after youth and high school through support of varsity programs, the Tennis on Campus program or by supporting a framework that allows creation of intramural teams at colleges around the U.S.

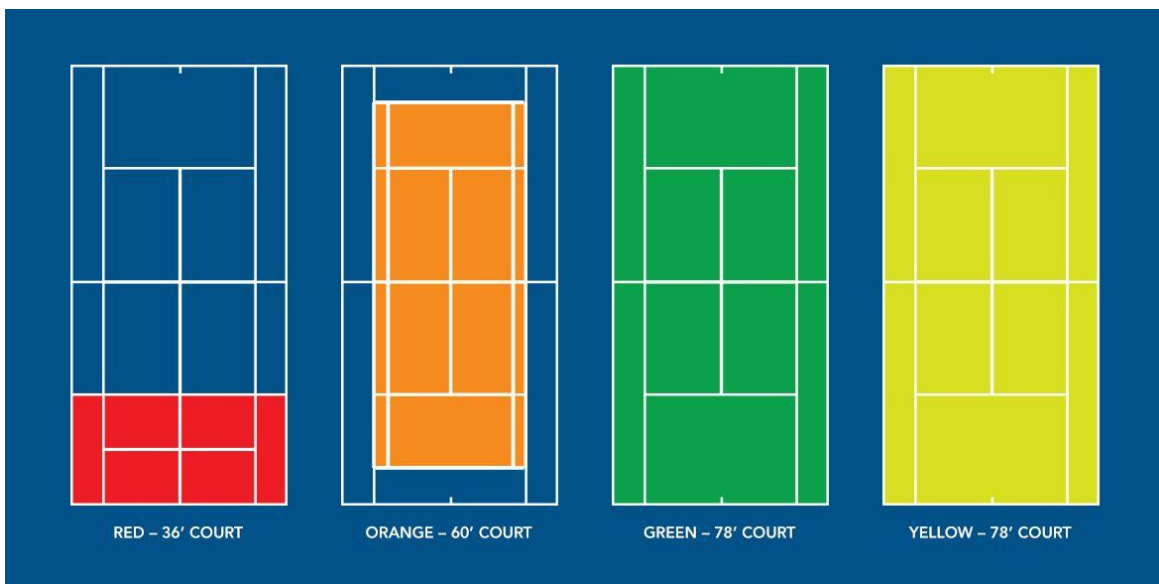
Adult Tennis: From competitive programs such as USTA Leagues and Tournaments to casual and social play there are Adult Tennis programs for all skill levels ages 18 and over.

- *USTA League* – The largest 18-and-over competitive tennis league with more than 300,000 players taking part annually on a local basis based on skill and age.

- *USTA Tournaments* – Offered for adults 18-and-over in every skill level in local communities and nationally taking place on clay, grass and hard-court surfaces.
- *Social Play* – The USTA offers the Adult Social Leagues and Team Up events that include local multi-week programs and single day tournaments.
- *Wheelchair* – Includes 17 sections as of January 2021 which introduced new levels ranging from Level 5 all the way to the National Championships at Level 1.

In determining tennis levels appropriate for players, the USTA utilizes a color-coded system known as ROGY which denotes the color of ball being utilized for play (Red, Orange, Green, and Yellow) as well as the recommended court sizing. This system is designed to allow players to grow their game and progress to different levels utilizing different colored balls and courts. The different levels of tennis currently available are:

- *Red* – Red tennis balls are made of foam or felt and bounce lower and more slowly which gives beginner players more time to set up and swing at the ball.
- *Orange* – Red players graduate to orange balls which bounce higher and move faster and are a step towards the traditional yellow ball but still fun and manageable for players learning the game.
- *Green* – The green ball is very similar to the traditional yellow ball but with a slightly lower compression, so it bounces lower off the court.
- *Yellow* – The yellow level uses a yellow ball which is what most players know as the traditional tennis ball and are used in the majority of adult matches and at the professional level.



Source: USTA.

Clinics and Camps

Tennis clinics and camps are organized by different entities such as the USTA, colleges and universities, public and private clubs, teaching professionals and others. Clinics and camps are designed for coaches to teach and improve skills and strategy and are typically organized by age groups and skill level with content that may include drills to improve specific skills, fitness training, strategy and mental approach and competitive play.

Leagues/Tournaments

In addition to USTA, leagues can be created internally or by local tennis organizations. Leagues typically last for 10 to 12 weeks and provide a popular means for players to compete. In addition, various other state, regional and national tennis organizations host annual tournaments that could provide an opportunity for programming at the proposed new tennis complex in the County.

Tennis Drill Programs

Many tennis clubs offer tennis drill programs which provides players with a simulation of situations that may occur during a match. These drills provide experiences to players in addressing these specific situations and how to react during play.

Cardio Tennis

Cardio Tennis was started in 2005 by the TIA, in conjunction with the U.S. Tennis Association and is now offered in more than 2,000 facilities. With 2.2 million participants in the U.S., Cardio Tennis is a social activity for all ages, ability and fitness levels. Cardio Tennis is more focused on fitness than competition and provides a way for non-tennis players to get involved in the sport as well as for players to enhance their fitness levels.

Instruction

Instruction usually involves individual and group classes to help players develop their skills. Instruction can be provided by contracted coaches or internal staff.

Recreational

Recreational tennis play may include that of residents and visitors in an unstructured format. Open play is typically available on a first-come, first-served basis, while reserved play allows players to reserve court time in advance.

COMMUNITY SURVEY

Crossroads Consulting, in partnership with both the MSA and the M-NCPPC, tasked Maryland Marketing Source, Inc. (MMS), a local market research firm, with conducting a community survey to gauge interest in a potential new tennis complex in Prince George’s County, Maryland. This section includes the aggregated results of the survey. At the time of this survey effort, a site had not been selected for the proposed new tennis complex.

The following provides an overview of survey methodology and key highlights. More detailed survey results can be found within the appendix of this study.

Methodology

MMS conducted an online survey to gather the required data. Participants were sourced through several outlets, including panel provided by MMS, the M-NCPPC, USTA and Prince George’s Tennis and Education Foundation. The survey was live between December 14th, 2020 and February 3rd, 2021.

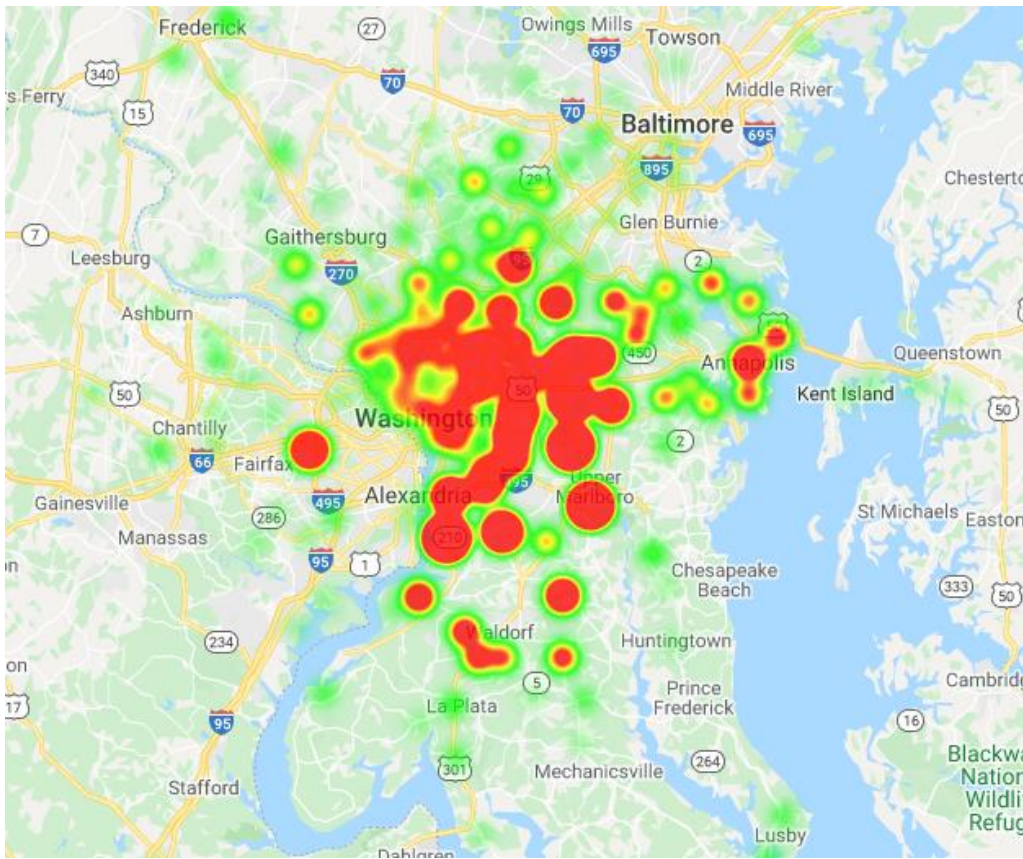
The primary audience targeted for this study included residents of Prince George’s County. A significant number of respondents also self-selected their county of residence as being within Anne Arundel, Montgomery, Charles, and Howard counties in Maryland as well as from within Washington, D.C. and Fairfax County, VA. Although not shown below, other counties selected by respondents included Calvert, St. Mary’s, Baltimore, Frederick, Harford and Queen Anne’s counties.

In which of the following areas do you live?

Prince George’s County	Anne Arundel County	Montgomery County	Charles County	Howard County	Washington, D.C.	Fairfax County, VA	Total
1,064	120	114	63	49	74	34	1,518

The following provides a map of all study participants.

Map of Overall Study Participants



As Prince George’s County is the proposed market for the potential tennis complex, it represents the bulk of survey participants and, along with reporting overall results, it is to Prince George’s County that the aggregate totals of all other regional responses will be compared within this report. Where appropriate, comparisons between these markets will also be segmented by respondents who stated they are interested in a new tennis complex **and** that they play tennis 1-3 times or more per week. These respondents are referred to as potential frequent users.

In which of the following areas do you live?

Participation	Overall		Potential Frequent Users	
Prince George’s County	1,064	68%	686	44%
Other Counties	501	32%	293	19%
Number of Responses	1,565	100%	979	63%

Community Survey Highlights

The following provides a summary of key findings.

- More than two thirds of survey participants report that they themselves play tennis.
 - More than half of Prince George’s County residents also stated that they play tennis.
 - One third of Prince George’s County respondents also report that someone else in their household plays tennis as well.
- The majority of all study participants, including participants who live in Prince George’s County, state that either they or someone in their household would be interested in playing tennis in a new, local, tennis complex.
- Just over half of Prince George’s County residents, as well as residents of other counties, would anticipate using the new Tennis Complex in Prince George’s County 1-3 times per week.
- Almost nine out of ten respondents overall report that the interested tennis players in their households would want to play on both indoor and outdoor courts.
- Overall, the sports that participants anticipate playing are tennis, followed by pickleball.
- While respondents who are interested in playing tennis are mostly between 18 to 54 years old, more of the players who are younger than 18 live in Prince George’s County, and more residents who are 55 + live in the other counties.
- Respondents would be willing to travel for:
 - Recreational play purposes:
 - More than half of Prince George’s County residents would be willing to travel 15-30 minutes maximum.
 - The majority of those in other counties would travel 30-45 minutes.
 - Classes/clinics:
 - Just under half of Prince George’s County residents would travel 15-30 minutes, and one quarter would travel 30-45 minutes.
 - Most in other counties would travel 30-45 minutes maximum.
 - League play:
 - Prince George’s County residents would mostly be willing to travel between 15 and 45 minutes.
 - The majority of those in other counties would travel 30-45 minutes.

- Tournaments:
 - Overall, more respondents in all counties are willing to travel longer distances for tournaments than they are for other events.
- The majority of respondents anticipate that they would use the new tennis complex year-round.
- Prince George’s County residents are mostly interested in recreational play, whereas more residents of other counties anticipate playing more competitively.
- Importance of Facility Attributes:
 - Overall quality of the facility: Residents who are interested in the new tennis complex agree that the overall quality of the facility is the most important attribute.
 - Price: More Prince George’s County respondents rated price as very important than did residents of other counties.
 - Quality of programming opportunities: More than half of Prince George’s County respondents rated this as very important.
 - Proximity to their residence: The proximity is less important to respondents from other counties than it is for Prince George’s County residents.
 - Number of courts: More than half of all respondents rated the number of courts as very important and eight out of ten participants overall rated as a 4 or 5 on the 5-point scale.
- The top two amenities preferred overall include having access to organized tennis programs and also having access to a local teaching professional.

SURVEY OF POTENTIAL USERS

In addition to the community survey, input was obtained from a select number of organizations that program various levels and types of tennis events to identify potential demand opportunities and facility requirements. The following summarizes their feedback.

Prince George’s County Tennis Association

Prince George’s County Tennis Association operates with a mission of growing and developing tennis by providing year-round play opportunities to players of all skill levels and by making the sport reflective of the diversity and demographics of the community. PGCTA cited that existing courts in the County lack public availability and the County is underserved in terms of tennis court supply, particularly in the southern region. PGCTA also noted that many residents are driving to the D.C. area to play tennis due to the limited availability of tennis courts in the County. The PGCTA has historically expressed the need for a new tennis complex in the County consisting of at least 12 indoor and 12 outdoor courts as well as pickleball courts, multi-purpose space, classrooms/learning center, locker rooms, food and beverage capabilities, a pro shop

and other amenities. The PGCTA indicated that a potential new tennis complex would satisfy unmet demand as well as increase grassroots tennis participation in the County. PGCTA stated a new tennis complex could accommodate various programming year-round including tournaments, leagues, camps, clinics, public play, instruction, after school programs, etc.

USTA

As previously mentioned, the USTA is the official governing body for tennis in the U.S. and is responsible for promoting and developing the sport's growth at every level. The USTA features 17 geographical sections, more than 700,000 individual members and more than 7,000 organization members.

The USTA hosts numerous adult and junior leagues/tournaments across the country and also manages a tennis pathway for junior development directed towards developing tennis professionals. According to USTA, recent trends in tennis indicate approximately 70% of tennis is being played in public parks. Tennis complexes with multiple courts are being built in a single location, rather than having courts scattered throughout a community. In order to maximize the benefits of their investment in tennis facilities, it is important that facilities have continuous programming; leaving courts open or unscheduled for walk-on play is becoming less common. Further, USTA cites that after-school programs are a key part of developing future tennis players and also serve as an important resource for youth. In addition to keeping youth safe, after-school programs also have academic benefits, engaging children by offering a range of creative, hands-on learning and enrichment activities.

The USTA Mid-Atlantic section has over 28,000 members in Washington, D.C., Maryland, Virginia and eastern and southern West Virginia. According to the USTA Mid-Atlantic's 2019 annual report, the region has had over 70,770 new or returning tennis players since 2015 and more than 15,370 individuals registered in youth after school and summer tennis camps since 2016. In 2019, 60,474 adults participated in USTA leagues and tournaments. According to USTA, the Mid-Atlantic region has historically had a higher participation rate than the nation. Based on a survey conducted in 2019 of 15 different USTA sections, the Mid-Atlantic section had the 7th most tennis players and ranked 1st in terms of percentage of tennis players per population. The USTA has utilized multiple facilities in the region to host tournaments including, but not limited to, Tennis Center at College Park, Montgomery TennisPlex, Virginia Beach Tennis and County Club, Winchester County Club, and Washington Tennis and Education Foundation East Capital Campus.

The USTA indicated that Prince George's County is a primary focus for them and expressed a strong interest in providing programming at a new or expanded facility in the County. Further, the USTA would strongly consider a potential partnership with M-NCPPC for facility management and co-branding. The USTA has multiple events that represent possible programming opportunities for the proposed new tennis complex in Prince George's County. USTA

programming could include junior and adult leagues, tournaments, developmental play, camps, and other activity. USTA would help foster participation in the County at the grassroots level and develop players through all levels of the sport.

Depending on the event and weather, these USTA activities utilize both indoor and outdoor courts. While court requirements vary based on the event, USTA indicated that a minimum of 16 courts are needed in order to host certain large tournaments while smaller tournaments require less depending on the number of players. USTA leagues generally require five courts. In the past, USTA has utilized multiple facilities in close proximity to reach their court requirement. While outdoor courts are preferred, there is a need for indoor courts that can be used as an alternative. While the USTA considers a bubble structure viable, a permanent indoor facility is recommended.

In addition to programming, the USTA expressed interest in providing assistance in the pre-construction process which could include business and technical services related to facility concept design, review of construction documents and recommendations for cost saving methods, business plan preparation, recommendations for operations and staffing, etc.

Intercollegiate Tennis Association (ITA)

The Intercollegiate Tennis Association was founded in 1956 and is the governing body of collegiate tennis in the U.S., overseeing men's and women's varsity tennis at all levels. The ITA is comprised of approximately 1,250 men's and women's head coaches representing over 1,700 teams across the country from all three NCAA division, the NAIA Junior and Community Colleges, as well as nearly 1,400 tennis officials. The ITA oversees activities involving nearly 20,000 varsity student-athletes. The ITA expressed interest in hosting their Fall National Championships at a new tennis complex in Prince George's County. ITA indicated that they require a minimum of 12 indoor tennis courts located in a permanent indoor facility. A tennis bubble was not considered a viable option as ITA requires significant viewing capabilities. Other amenities required by ITA include athletic training rooms and locker rooms. Further, representatives of ITA indicated that it is important for any new tennis facility to be located within 20 minutes of amenities such as hotels, dining and entertainment.

Maryland Public Secondary Schools Athletic Association (MPSSAA)

The Maryland Public Secondary Schools Athletic Association operates in conjunction with the Maryland State Department of Education (MSDE) and the 24 local school systems to provide interscholastic participation opportunities to more than 111,000 student-athletes at 199 public high schools. The MPSSAA expressed interest in hosting its regional tournaments and other events at the proposed new tennis complex citing the County's centralized location and membership base of the area as strengths. The MPSSAA indicated that they require a minimum of 15 hard-court, outdoor tennis courts for their event(s) but 20 courts are preferred. Indoor or bubble facilities are considered to be viable backup options for MPSSAA events. The MPSSAA

does not consider utilizing multiple facilities in close proximity as an option for their event(s). Other important factors in terms of hosting MPSSAA events include bleacher seating, a minimum of 300 parking spaces, and several multi-purpose rooms. Although MPSSAA indicated that they prefer amenities such as dining and entertainment to be within walking distance of a tennis facility, a 20-minute drive is considered acceptable.

Maryland Interscholastic Athletic Association (MIAA)

The MIAA is an independent organization comprised of 29 private high schools located in and around the Baltimore Metro area. MIAA schools have a combined enrollment of over 17,000 students. More than 60% of these students participate in at least one MIAA sanctioned sport. Based on conversations with MIAA representatives, the organization is unlikely to utilize a new tennis complex in Prince George's County as the MIAA tennis program utilizes various high school tennis courts for events.

Prince George's County Tennis and Education Foundation (PGTEF)

Prince George's County Tennis and Education Foundation is a registered USTA Community Tennis Association that provides opportunities for youth to excel academically, athletically and socially through tennis. PGTEF programs include tennis instruction, competition, mentoring, educational assistance and scholarships. PGTEF currently utilizes multiple tennis facilities in the County including, but not limited to, Watkins Tennis Bubble, Cosca Tennis Bubble and Prince George's Community College. Further, PGTEF teaches tennis to kids for free at various schools in the County.

PGTEF indicated that they face challenges finding court time in the County and there is a need for a new tennis complex. According to PGTEF, a new tennis complex with a minimum of 10 indoor and eight (8) outdoor courts would allow the organization to expand their programming and participation. Potential programming could include youth instruction, college competition preparation, and other tennis activity that promotes youth tennis participation. The organization also has a need for classroom space to accommodate after school programs and other educational activities. The PGTEF noted that pickleball courts would be a nice amenity to have, given the increase in the sport's popularity in recent years. A pro shop was also considered a nice amenity, but it was noted that it would likely not be profitable at a new tennis complex.

M-NCPPC/JTCC

As mentioned previously, M-NCPPC owns and operates multiple tennis facilities in the County including Fairland Sports Center, Watkins Tennis Bubble and Cosca Tennis Bubble, which M-NCPPC actively programs with tennis classes, lessons, camps, clinics, and other activities. Detailed information related to M-NCPPC programming is shown in the Appendix.

Although owned by M-NCPPC, Tennis Center at College Park is managed by a separate non-profit entity. M-NCPPC partners with management at this facility to provide instructional programs, clinics and other youth activities. As such, input was obtained from both of these organizations regarding their perspective on potential market opportunities for the proposed new tennis complex.

Management at these facilities noted that the tennis community within the County is very active. As a result of high demand, there is limited court availability during peak times, causing people to leave the County to find available court time. Further, no public high schools in the County have indoor tennis courts. Other than Tennis Center at College Park, the facilities do not host tournament activity for several reasons including number of courts, lack of spectator seating, focus of serving the community, etc. and many residents travel to West Virginia for this activity. In terms of building program, management at Fairland Sports Center, Watkins Tennis Bubble and Cosca Tennis Bubble agreed that a facility with eight indoor courts and 12 outdoor courts is needed. Other amenities suggested included portable seating, a clubhouse, fitness room and classrooms. Management of the Tennis Center at College Park indicated they are considering expanding the facility and would be interested in potentially partnering to develop and/or operate a new tennis facility in the County.

Key Research Findings

The following provides key findings related to potential demand generators.

- There is demand for additional tennis courts to increase programming for both recreational programming and tournaments that draw non-local attendees.
- The USTA specializes in the programming and management of tennis facilities and is recognized as a leader in the development of tennis from the grassroots to professional levels. Representatives from the USTA indicated that Prince George's County is a primary focus for them and expressed a strong interest in providing programming at a new or expanded facility in the County. Further, they would strongly consider a potential partnership with M-NCPPC for facility management and co-branding. A potential partnership with the USTA would help foster participation in the County at the grassroots level and develop players through all levels of the sport.
- Tennis programming could include recreation, leagues, camps, instructional/lessons, tournaments, etc. Residents would likely also use courts for pickleball. In addition to tennis activity, input from local tennis organizations indicates that a new tennis complex with multi-purpose indoor space could potentially accommodate after school programs and other community-based, non-tennis activities.
- Proximity to amenities such as hotels, restaurants and entertainment is important when selecting a site location for competitive tennis events.

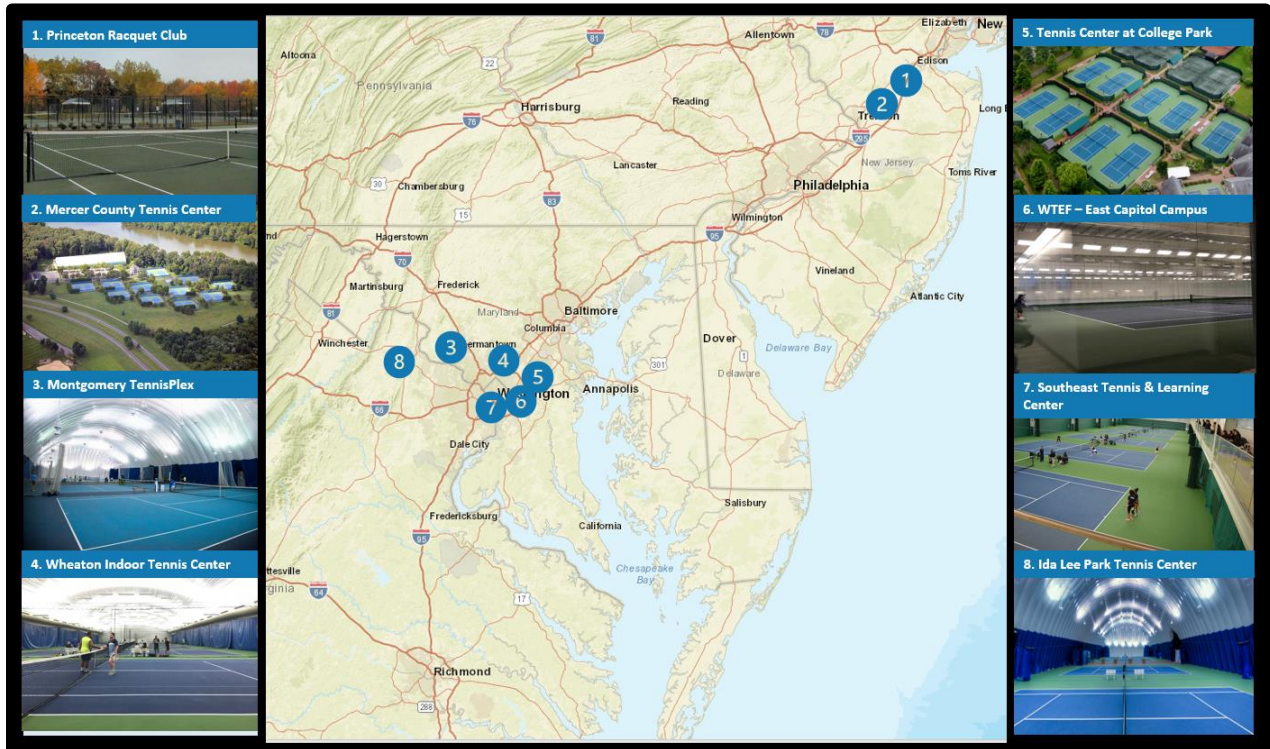
7. CASE STUDIES



OVERVIEW

As part of the market analysis, data from select peer facilities was analyzed to provide a frame of reference to assist the M-NCPPC in drawing conclusions regarding the proposed new tennis complex in Prince George’s County. The following facilities were selected to profile as part of this analysis based on similarities in terms of geographic location, building program elements, and/or market focus.

Map of Peer Facilities



Sources: Esri; Individual facilities.

Although not considered a peer facility due to its geographic location and market in which it operates, XS Tennis Village in Chicago, Illinois was also selected as an additional facility to profile based on its building program, market focus and mission.



The following table summarizes the owner and operator at the profiled facilities. As shown, three facilities are owned and operated by a governmental entity, two by a non-profit and two privately. The Tennis Center at College Park is owned by the M-NCPPC and operated by a non-profit. The Southeast Tennis and Learning Center was developed through a partnership between D.C. Department of Parks and Recreation and the Recreation Wish List Committee and both entities work together to operate the facility.

Summary of Owner and Operator – Peer Facilities		
Facility	Owner	Operator
Princeton Racquet Club	Private	Private
Mercer County Tennis Center	Mercer County Park Commission	Mercer County Park Commission
Montgomery TennisPlex	Private	Private
Wheaton Indoor Tennis Center	M-NCPPC	M-NCPPC
Tennis Center at College Park	M-NCPPC	Non-Profit
WTEF – East Capitol Campus	Non-Profit	Non-Profit
Southeast Tennis & Learning Center	Non-Profit/Department of Parks & Rec	Non-Profit/Department of Parks & Rec
Ida Lee Park Tennis Center	Leesburg Parks and Recreation	Leesburg Parks and Recreation
XS Tennis Village	Non-Profit	Non-Profit

The table below summarizes the number of tennis courts at each of the profiled facilities. Tennis Center at College Park offers the highest number of courts (30), followed by Mercer County Tennis Center (28) and XS Tennis Village (27). Tennis Center at College Park offers the most indoor courts while Mercer County Tennis Center has the most outdoor courts. The profiled facilities average eight (8) indoor courts and 11 outdoor courts.

Summary of Court Inventory – Peer Facilities			
Facility	Indoor Courts	Outdoor Courts	Total Courts
Princeton Racquet Club	6	10	16
Mercer County Tennis Center	6	22	28
Montgomery TennisPlex	8	4	12
Wheaton Indoor Tennis Center	6	6	12
Tennis Center at College Park	15	15	30
WTEF – East Capitol Campus	6	9	15
Southeast Tennis & Learning Center	6	7	13
Ida Lee Park Tennis Center	4	7	11
XS Tennis Village	12	15	27
Average	8	11	18
High	15	22	30
Low	4	4	11

Source: Facility websites.

The following provides a brief description of each of the profiled facilities. The data shown is based on available information for each of the profiled facilities; information for some facilities was not available.

Princeton Racquet Club



Source: Facility website.

City, State: Princeton, NJ

Owner: Private

Operator: Private

Facility Type: Indoor (permanent) & Outdoor

Building Program Elements:

Total Number of Courts: 16

Number of Indoor Courts: 6

Number of Outdoor Courts: 10

Court Rental Rates:

Indoor: \$32 - \$57/hr

Outdoor: \$14 - \$19/hr

Hours of Operation

Weekday: Mon – Fri: 6:30am to 11:00pm

Weekend: Sat – Sun: 6:30am – 10:30pm

Other Amenities: Office, pro shop, upper lobby area, outdoor seating

Other Relevant Information: Four (4) of the outdoor courts are hard courts and six (6) are clay hydro courts. All of the indoor courts are turf hard courts. One of the indoor courts can be used as two (2) pickleball courts. Programming includes junior programs, summer tennis camp, junior tournaments, adult programs and USTA leagues. Open times (unreserved court time) can be reserved by players up to seven days in advance, or five days if the player is a member. The membership cost is \$45/year.

Mercer County Tennis Center



Source: Google maps.

City, State: West Windsor Township, NJ

Owner: Mercer County Park Commission (MCPC)

Operator: Mercer County Park Commission (MCPC)

Facility Type: Indoor (Permanent) & Outdoor

Building Program Elements:

Total Number of Courts: 28

Number of Indoor Courts: 6

Number of Outdoor Courts: 22

Court Rental Rates:

Indoor: \$40 - \$60/hr

Outdoor: \$5 - \$10/hr

Hours of Operation

Weekday: Mon–Thurs: 7:30am to 10:30pm, Fri: 7:30am to 9:30pm

Weekend: Sat – Sun: 7:30am to 7:30pm

Other Amenities: Locker rooms, viewing areas

Other Relevant Information: In addition to public play, the facility hosts multiple leagues and tournaments annually. In 2019, lesson programs had over 2,980 spots filled and there were an additional 362 individuals that were waitlisted. The Summer Tennis League is comprised of 36 divisions and is played over 10 weeks and ends with a tournament. In 2019, the league had over 650 participants and generated more than \$15,000 in revenue. The Fall Tennis League is comprised of 28 divisions and is played over an eight (8) week period, ending with a tournament. In 2019, the Fall league had over 470 participants and generated over \$10,900 in revenue. Memberships are also sold that allow Mercer County residents to reserve indoor courts during a 24-week period. In 2019, over 940 membership cards were sold representing nearly \$60,000. During the 2019 season, 114 courts were reserved by members generating over \$123,200 in revenue. In 2020, over 1,000 membership cards were sold, representing a 6% increase from 2019. The facility hosted approximately 35 tournaments/special events in 2019 including those organized by the MCPC.

The facility is staffed with six (6) full-time employees including a director of operations, association director of operations, assistant director of operations, two park managers and a maintenance position. There are approximately 15 seasonal staff.

Montgomery TennisPlex



Source: Google maps.

City, State: Boyds, MD

Owner: Private

Operator: Private

Facility Type: Indoor (Bubble) & Outdoor

Building Program Elements:

Total Number of Courts: 12

Number of Indoor Courts: 8

Number of Outdoor Courts: 4

Court Rental Rates:

Indoor: \$26 - \$45/hr

Outdoor: \$14 - \$20/hr

Hours of Operation

Weekday: Mon – Fri: 7:00am to 11:00pm

Weekend: Sat – Sun: 7:00am to 11:00pm

Other Amenities: Clubhouse, Pro shop

Other Relevant Information: The Montgomery TennisPlex is part of a larger sports complex that includes soccer/baseball fields a swim center and an indoor fieldhouse. The Montgomery TennisPlex has no membership or guest fees. Court rentals are per hour, however, starting in 2021 the facility also offers unlimited play/reservation options for 20 weeks for a one-time, fixed fee of \$295 per person. All of the outdoor courts are lighted. Programming at the facility includes open play, training/lessons, leagues and camps. The facility is staffed with four (4) full-time positions and approximately 16 seasonal staff members.

Wheaton Indoor Tennis Center



Source: Google maps.

City, State: Wheaton, MD

Owner: M-NCPPC (Montgomery Parks)

Operator: M-NCPPC (Montgomery Parks)

Facility Type: Indoor (Bubble) & Outdoor

Building Program Elements:

Total Number of Courts: 12

Number of Indoor Courts: 6

Number of Outdoor Courts: 6

Court Rental Rates:

Indoor: \$20 - \$37/hr

Outdoor: Free use on first-come, first-served basis

Hours of Operation

Weekday: Sun – Thurs: 9:00am to 9:00pm

Weekend: Fri – Sat: 9:00am to 6:00pm

Other Amenities: Party room, changing rooms with lockers and showers

Other Relevant Information: Wheaton Indoor Tennis Center is part of a larger regional park which also includes baseball fields and an ice arena. Programming at the tennis center primarily consist of lessons, camps and spot time. Hourly court rentals may be booked up to eight days in advance. Courts can be reserved for up to two hours per day and there is a maximum of four people per court. All the outdoor courts are lighted.

Tennis Center at College Park



Source: Google maps.

City, State: College Park, MD

Owner: M-NCPPC

Operator: Non-Profit

Facility Type: Indoor (Permanent) & Outdoor

Building Program Elements:

Total Number of Courts: 30

Number of Indoor Courts: 15

Number of Outdoor Courts: 15

Hours of Operation

Weekday: Mon – Fri: 7:00am to 11:00pm

Weekend: Sat – Sun: 7:00am to 10:00pm

Other Amenities: Pro shop, fitness center, yoga studio, vending machines

Other Relevant Information: Tennis Center at College Park was founded in 1999. The land is owned by the M-NCPPC and leased to a non-profit organization (Junior Tennis Champions Center, Inc.) to operate the Tennis Center at College Park.

The tennis facility operates with a mission of transforming people’s lives through tennis. The facility hosts tournaments, championships, private lessons, community events, introductory programs, development programs and camps. In addition, the facility is home to the University of Maryland’s Women’s Tennis Team. Tennis Center at College Park was named the USTA Junior Development Program of the Year in 2013 and 2017.

WTEF – East Capitol Campus



Source: Google Maps.

City, State: Washington, D.C.

Owner: Non-Profit

Operator: Non-Profit

Facility Type: Indoor (Permanent) & Outdoor

Building Program Elements:

Total Number of Courts: 15

Number of Indoor Courts: 6

Number of Outdoor Courts: 9

Court Rental Rates:

Indoor: Free for Residents; \$35/hr for Non-Residents

Outdoor: Free for Residents; \$35/hr for Non-Residents

Hours of Operation

Weekday: Mon – Fri: 9:00am to 7:00pm

Weekend: Sat: 9:00am to 2:00pm (Closed Sunday)

Other Amenities: Classrooms, community/multi-purpose space, computer lab, fitness room

Other Relevant Information: The WTEF – East Capitol Campus serves underserved children by providing instruction, resources and mentorship. After school programs are offered for free and include academic studies and tennis instruction and play. The facility is also home to the Howard University men’s and women’s tennis teams.

South East Tennis and Learning Center



Source: Google maps.

City, State: Washington, D.C.

Owner: Non-Profit/Department of Parks & Recreation

Operator: Non-Profit/Department of Parks & Recreation

Facility Type: Indoor (Bubble) & Outdoor

Building Program Elements:

Total Number of Courts: 13

Number of Indoor Courts: 6

Number of Outdoor Courts: 7

Hours of Operation

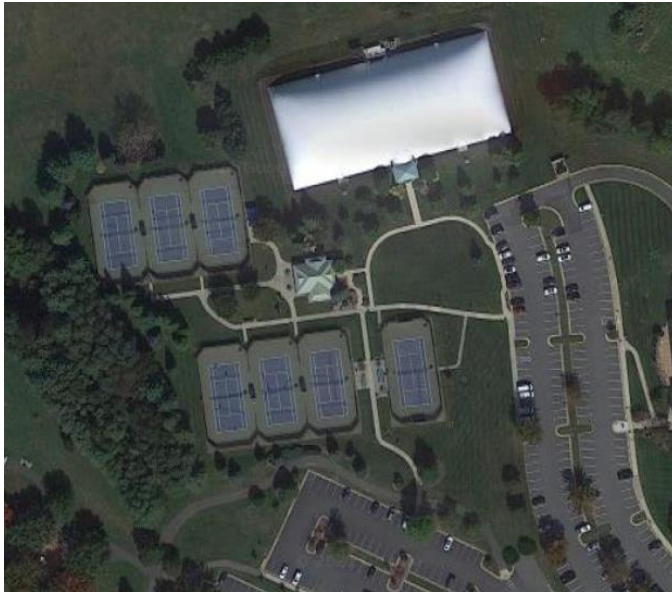
Weekday: Mon – Fri: 9:00am to 5:00pm

Weekend: Sat: 9:00am to 1:00pm (closed Sunday)

Other Amenities: Mezzanine spectator seating, classrooms, community/multi-purpose space, computer room, sewing room, engineering room, kitchen, library, tennis-themed playground

Other Relevant Information: The South East Tennis and Learning Center (SETLC) was developed through a public/private partnership and has provided tennis instruction, tutoring, life skills, developmental chess, a computer room, a library, educational and personal reinforcements to the District's youth since 2001. In addition, the facility is home to the George Washington University Men's and Women's Tennis team. SETLC hosts 20 USTA sanctioned tournaments a year and USTA Adult Winter Leagues. SETLC features a Tennis Wing and an Education Wing and underwent \$18 million worth of renovations that were completed in 2015. Both Venus and Serena Williams are known supporters of the facility.

Ida Lee Park Tennis Center



Source: Google maps.

City, State: Leesburg, VA

Owner: Leesburg Parks and Recreation

Operator: Leesburg Parks and Recreation

Facility Type: Indoor (Bubble) & Outdoor

Building Program Elements:

Total Number of Courts: 11

Number of Indoor Courts: 4

Number of Outdoor Courts: 7

Court Rental Rates:

Indoor: \$24 - \$36/hr

Outdoor: \$10 - \$14/hr

Hours of Operation

Weekday: Mon – Sat: 7:00am to 10:00pm

Weekend: Sun: 8:00am to 8:00pm

Other Amenities: Pavilion, outdoor seating

Other Relevant Information: Ida Lee Park Tennis Center is part of a broader park including a recreation center and an aquatics center. All of the outdoor tennis courts are lighted. Programming primarily consists of public rental, leagues, classes and other programs. The County's FY 2021 Budget includes plans for three (3) of the outdoor courts to be covered with a seasonal air structure with storage and entrance structures. According to the County, the project is anticipated to generate an additional \$35,000 in net revenue. Further, there are plans for the development of three regulation size pickleball courts.

XS Tennis Village



Source: Google maps.

City, State: Chicago, IL

Owner: Non-Profit

Operator: Non-Profit

Facility Type: Indoor (Permanent) & Outdoor

Building Program Elements:

Total Number of Courts: 27

Number of Indoor Courts: 12

Number of Outdoor Courts: 15

Court Rental Rates:

Indoor: \$30 - \$36/hr

Outdoor: \$16 - \$24/hr

Hours of Operation

Weekday: Mon – Fri: 8:00am to 8:00pm

Weekend: Sat – Sun: 8:00am to 2:00pm

Other Amenities: Fitness center, classrooms

Other Relevant Information: XS Tennis Village was developed in 2018 at a cost of \$16+ million. The facility features 12 indoor tennis courts and 15 outdoor tennis courts, including four (4) clay courts. The facility is operated by the XS Tennis and Education Foundation (XSTEF), which has a mission of providing Chicago’s underserved youth with a positive pathway to college through a community-based tennis and academic enrichment program. XSTEF has sent approximately 50 youth to Division 1 schools with tennis scholarships. Through its in-school program, XSTEF brings tennis into Chicago public elementary schools in at-risk communities, introducing a pathway that continues through the XSTEF after-school and summer camp programs. The facility also offers tennis instruction based on a sliding-scale income.

Primary revenue streams for the facility include memberships, private and group lessons, one-time court rentals, tournaments and philanthropic donations. In addition, the facility receives revenue from the rental of indoor spaces for meetings and other non-tennis events. Memberships are available for children, adults and families at \$25, \$45 and \$85 per month, respectively.

Key Research Findings

The following summarizes key findings based on review of peer facilities.

- The profiled facilities have various ownership structures and operating models. Three of the facilities are publicly owned and operated, two are owned and operated by a non-profit and two are privately owned and operated. The Tennis Center at College Park is owned by the M-NCPPC and operated by a non-profit. The Southeast Tennis and Learning Center was developed through a partnership between D.C. Department of Parks and Recreation and the Recreation Wish List Committee and both entities work together to operate the facility.
- The total number of indoor tennis courts at the profiled facilities ranges from four (4) to 15 and averages eight (8). Nearly half of the profiled facilities feature a bubble structure and half a permanent structure.
- The total number of outdoor tennis courts at the profiled facilities ranges from four (4) to 22 and averages 11.
- The total number of tennis courts at the profiled facilities ranges from 11 to 30 and averages 18.
- The profiled facilities have diverse programming that includes open play, reserved/contract play, leagues, lessons, camps, clinics, tournaments, etc. Many of the facilities such as Ida Lee Park Tennis Center and Montgomery TennisPlex partner with USTA and host related leagues, tournaments, etc. Tournaments typically account for a small percentage of total facility usage in comparison to other types of tennis play. Further, tournaments are generally not a primary source of revenue.
- Many of the profiled facilities offer other amenities in addition to tennis courts including designated pickleball courts, classrooms, multi-purpose indoor space, seating/viewing areas, pro shops, food and beverage and fitness rooms. Based on industry research, while some tennis facilities offer pro shops, this service is generally not profitable.
- A common issue of similar tennis facilities is how to fill unused court times. Industry research suggest the most difficult time to fill is generally 12:00 p.m. to 3:00 p.m. when adults are working, and youth is in school. Many facilities offer reduced rates during non-peak hours. It is also common for facilities to offer programs such as Cardio Tennis during these slower times.
- Operating deficits are common among similar tennis facilities. Many are developed to grow the game of tennis, serve a community need, generate economic benefits, etc. and receive operating subsidies.

8. MARKET FINDINGS AND PROGRAM RECOMMENDATIONS



MARKET FINDINGS AND PROGRAM RECOMMENDATIONS

This section summarizes relative market strengths, weaknesses, opportunities and threats (SWOT) and preliminary building program recommendations for the proposed new tennis complex in Prince George's County based on the research conducted as part of this study effort.

SWOT Analysis

Relative Market Strengths & Opportunities

- M-NCPPC owns land in the County that can accommodate a new tennis complex
- USTA expressed strong interest in partnering with M-NCPPC
- Residents of Prince George's County and surrounding counties as well as organizations that program various tennis events indicated demand for a new tennis complex
- Population, education levels and household income characteristics within the County are favorable for tennis participation based on industry trends
- County has strong accessibility to/from other State and regional locations
- Opportunity to attract non-local attendees that generate economic and fiscal impacts
- Potential for existing tennis facilities in the County to support the proposed new tennis complex and accommodate events requiring a large quantity of courts
- Total tennis participation in the U.S. has remained stable in recent years and the Maryland region has a strong base of tennis players
- The number of non-tennis players interested in playing tennis has increased in recent years
- Tennis fared well during COVID-19 in comparison to other sports due to the natural social distancing of the sport and the ability to play outside
- The increasing popularity of pickleball provides an opportunity for additional programming
- Opportunity to serve non-tennis needs of the community by offering multi-purpose indoor space

Relative Market Weaknesses & Threats

- Current availability of courts in the County is limited, particularly for indoor courts
- Most tennis facilities in the County offer less than four (4) courts, which USTA cites as the minimum for effective programming
- The County has historically hosted limited tennis tournament activity
- If built, the proposed new tennis center in Anne Arundel County at Millersville Park would present competition for the proposed new tennis complex in Prince George's County
- The number of core tennis players and associated play occasions in the U.S. has declined in recent years
- Climate characteristics of the County suggest usage of outdoor tennis courts could be adversely impacted in certain months
- Operating deficits are common among similar tennis facilities
- Potential changes in general macro-economic conditions

Recommended Building Program

With respect to the potential building program of the proposed new tennis complex, it is important to consider the market-supportable programming opportunities and their facility requirements. Based on the market research conducted as part of this study effort, potential sports-related activities that could be hosted include, but are not limited to, the following.

- League play (USTA and local)
- Instruction
- Tournaments
- Camps
- Clinics
- Programs (e.g. Adaptive Tennis, Cardio Tennis, etc.)
- Contract/Reserved Use
- Open court time
- Pickleball

Further, the proposed new tennis complex in Prince George's County could accommodate other community-based, non-tennis events including, but not limited to, the following.

- Meetings
- Banquets
- Receptions
- Graduations
- After school programs
- Holiday-related events
- Educational events
- Social events
- Other private parties

Based on these potential programming opportunities and the objectives of the proposed new tennis complex, the following outlines program elements, patron amenities and other related supporting infrastructure that M-NCPPC should consider based on our market research. It should be noted that these building program recommendations could be achieved through construction of a new complex or expansion of an existing tennis facility.

Indoor Component

- Permanent indoor structure with eight (8) hard courts
- Portable spectator seating
- Two multi-purpose rooms of 1,500 SF each that can be utilized as classrooms, meeting rooms, banquet space, etc.
- Administrative offices
- Lobby area and gathering space
- Restrooms and locker rooms
- Café with area for seating
- Storage space

Outdoor Component

- 12 outdoor hard courts with lights
- Portable spectator seating
- Shaded areas for spectators
- Restrooms
- Sufficient and convenient on-site parking

Other potential facilities that could be incorporated into the building program include a pro shop, a fitness/training room and pickleball courts. The community survey conducted for this study effort indicated that Prince George's County residents would like to have all of these amenities at a potential new tennis complex. With that said, market research indicates that none of these amenities are primary revenue generators and pro shops in particular typically have a negative impact on a facility's bottom line. As it relates to pickleball, indoor and outdoor tennis courts can be taped and feature movable nets to accommodate play, which is consistent with many other tennis facilities.

Strictly in terms of accommodating community needs, a fitness area and stand-alone outdoor pickleball courts should be given consideration when a site has been selected and available funding sources have been identified.

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9. SITE FIT ANALYSIS



SITE FIT ANALYSIS

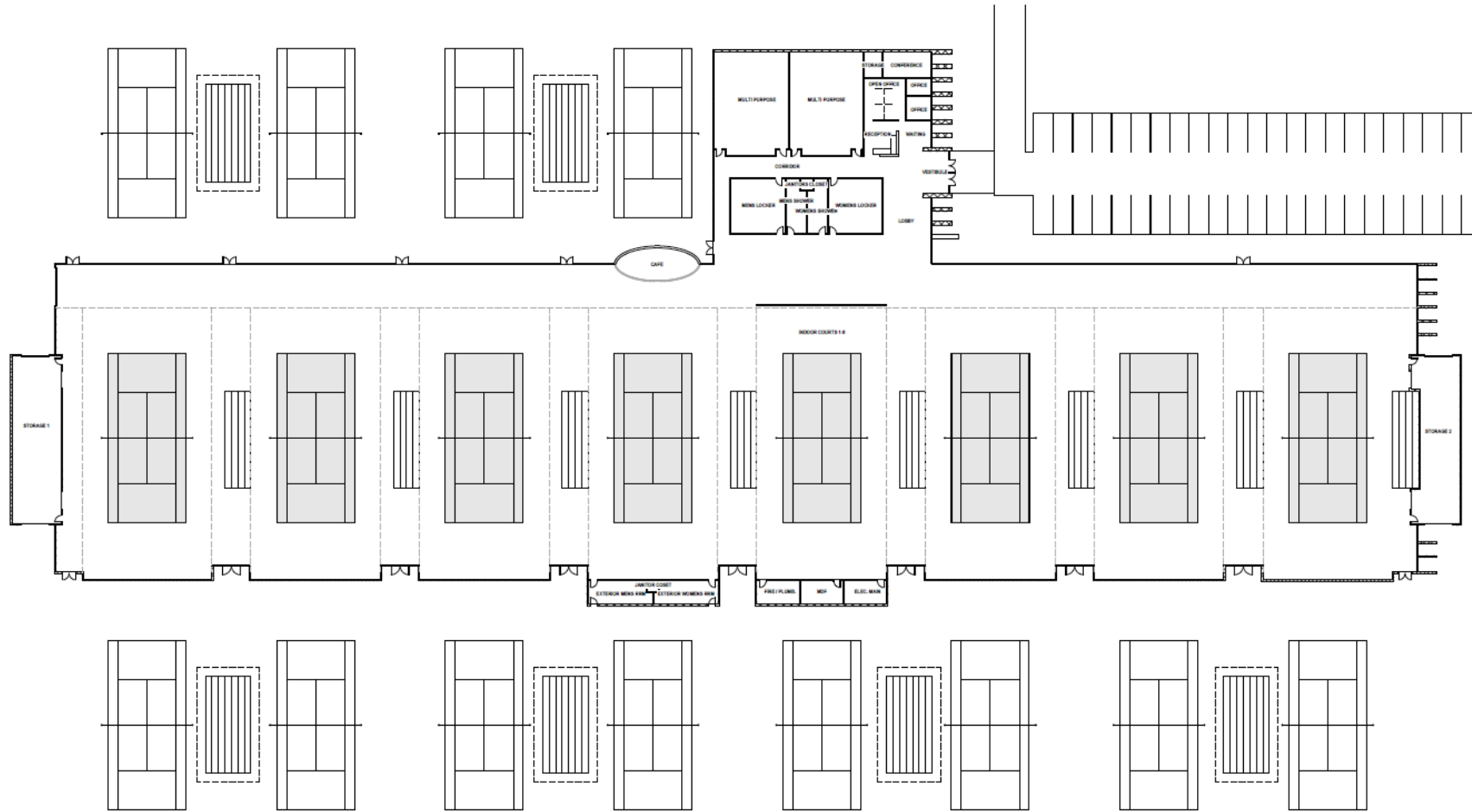
Based on the market research conducted and recommended building program, Populous, a global architectural design firm, was tasked with developing a high-level preliminary program that outlines facility requirements as well as a conceptual layout. In addition, although this study is non-site specific, Populous was charged with evaluating up to three (3) potential sites identified by the M-NCPPC within Prince George's County.

Facility Program

The proposed new tennis complex is envisioned to complement the existing recreational facilities available in the County and potentially become an economic driver by hosting tournaments and other special events that draw attendance from outside the County. The program is envisioned to include eight (8) indoor tennis courts and 12 outdoor tennis courts. In addition, the program includes multi-purpose space, offices, locker rooms, a café and other required support spaces.

The graphic on the following page depicts a preliminary conceptual layout envisioned for the new tennis complex in Prince George's County. It should be noted that the actual configuration will be dependent on multiple factors such as attributes of the selected site and should continue to be refined as decisions related to the building program, site and other operating characteristics evolve. Further, detailed programmatic elements such as individual court sizes, lining, etc. should be developed once a site has been selected and operating objectives of the complex have been defined. At the appropriate time, the M-NCPPC should strongly consider collaborating with USTA to further refine programmatic elements of the proposed new tennis complex.

Preliminary Tennis Complex Conceptual Layout



Source: Populous.

The following provides a brief description of the primary spaces in the depiction previously shown.

Vestibule / Lobby / Reception / Waiting Areas: These areas would make up the entry sequence into the facility. The vestibule will give relief to the constant opening and closing of doors from people coming and going. The Lobby, Reception and Waiting Areas will give users a place to check in, conduct business and wait on others as they visit. Ideally this space would be central to the interior courts so that visitors do not have to walk long distances to get to any one court. The lobby should also be large enough to host events.

Office 1 / Office 2 / Open Office Area / Conference Room / Office Storage Areas: Offices are needed to run and maintain the facility's business. The offices along with an open office for cubicles and a conference room provide workspace for managing staff.

Multi-Purpose Room 1 / Multi-Purpose Room 2 / Corridor - Circulation Areas: Multi-purpose rooms would be used for event space. They can be used separately by means of a partition wall or combined making one larger space. Large and small events can take place here for both tennis-related and non-tennis events such as private parties, gatherings, etc. These rooms could also be used as classrooms.

Men's Locker / Men's Shower / Janitors Closet / Women's Locker / Women's Shower Areas: There should be locker and shower facilities for both men and women. This will give participants a place to shower and change clothing.

Indoor Courts 1-8 with Spectator Seating: The indoor tennis courts are envisioned to be located within a permanent structure. Each court would have a space allocation of 120' x 60' which includes the court (78' x 36') and support space. Tennis courts stacked side-by-side is an ideal way to layout courts for an interior facility. This provides space for spectator seating to the side or at the ends of each court. Stacking the courts side by side also reduces the potential for other players being struck by balls being missed at an abutted end court.

Café: The café will be an area to buy food and beverage. There should be a display of goods, storage of goods and points of sale for patrons to order and pay for such goods. Proper placement of this should also be central to the facility and potentially allow for transactions to both inside and outside users.

Storage 1 / Storage 2 Areas: There should be adequate storage for such a facility with indoor and outdoor tennis courts. Ideally, storage should be broken up or located so that staff does not have to walk long distances. Breaking the storage up into multiple spaces is ideal as these types of facilities can become long spaces from one end to the other.

Fire and Plumbing / Main Frame Distribution (MDF) / Electrical Main Areas: These are typical back of house mechanical, electrical and plumbing (MEP) spaces required for any new construction. The space allocation will be dependent on final engineering needs and code requirements.

Exterior Courts: Ideally, 12 outdoor courts would be provided. Each court would have a space allocation of 120' x 60' which includes the court (78' x 36') and support space. A north and south orientation is preferred so that throughout the day the sun is predominantly on the east and west sides of each court. These courts again should be side-by-side reducing the potential for other players being struck by balls being missed at an abutted end court. Spectator seating can be shared between courts as needed and there will a need for exterior sidewalks connecting each court back to the building and or parking areas.

Exterior Men's Restroom / Exterior Women's Restroom / Janitor Closet: Exterior men's and women's restrooms should be provided so that visitors using the exterior courts won't have to traverse long distances back to the locker rooms. They may quickly use the restrooms provided nearby and then return to the court. A janitor's closet should be associated near this as well for maintenance of the facilities.

Based on these facility requirements, it is estimated that the indoor facility will require approximately 97,000 SF while the outdoor courts and exterior support spaces will require 91,100 SF. It is estimated that the proposed tennis complex will require a minimum of 10 acres which includes parking, stormwater management areas (if required), perimeter space, etc.

ROOM NAME	AREA SF
VESTIBULE	236 SF
LOBBY	4,291 SF
RECEPTION	218 SF
WAITING	207 SF
OPEN OFFICE AREA	373 SF
OFFICE 1	95 SF
OFFICE 2	128 SF
CONFERENCE	266 SF
OFFICE STORAGE	94 SF
MULTI-PURPOSE ROOM 1	1,607 SF
MULTI-PURPOSE ROOM 2	1,607 SF
CORRIDOR - CIRCULATION	949 SF
MEN'S LOCKER	625 SF
MEN'S SHOWER	216 SF
JANITOR CLOSET	26 SF
WOMEN'S LOCKER	625 SF
WOMEN'S SHOWER	216 SF
INDOOR COURTS 1-8 WITH SEATING	80,554 SF
CAFE	456 SF
STORAGE 1	1,791 SF
STORAGE 2	1,579 SF
FIRE / PLUMBING	226 SF
MDF	226 SF
ELECTRICAL MAIN	226 SF
EXTERIOR COURTS 1-12 COURT AREA ONLY	90,458 SF
EXTERIOR MEN'S RESTROOM	327 SF
JANITOR CLOSET	26 SF
EXTERIOR WOMEN'S RESTROOM	327 SF
TOTAL	187,975 SF

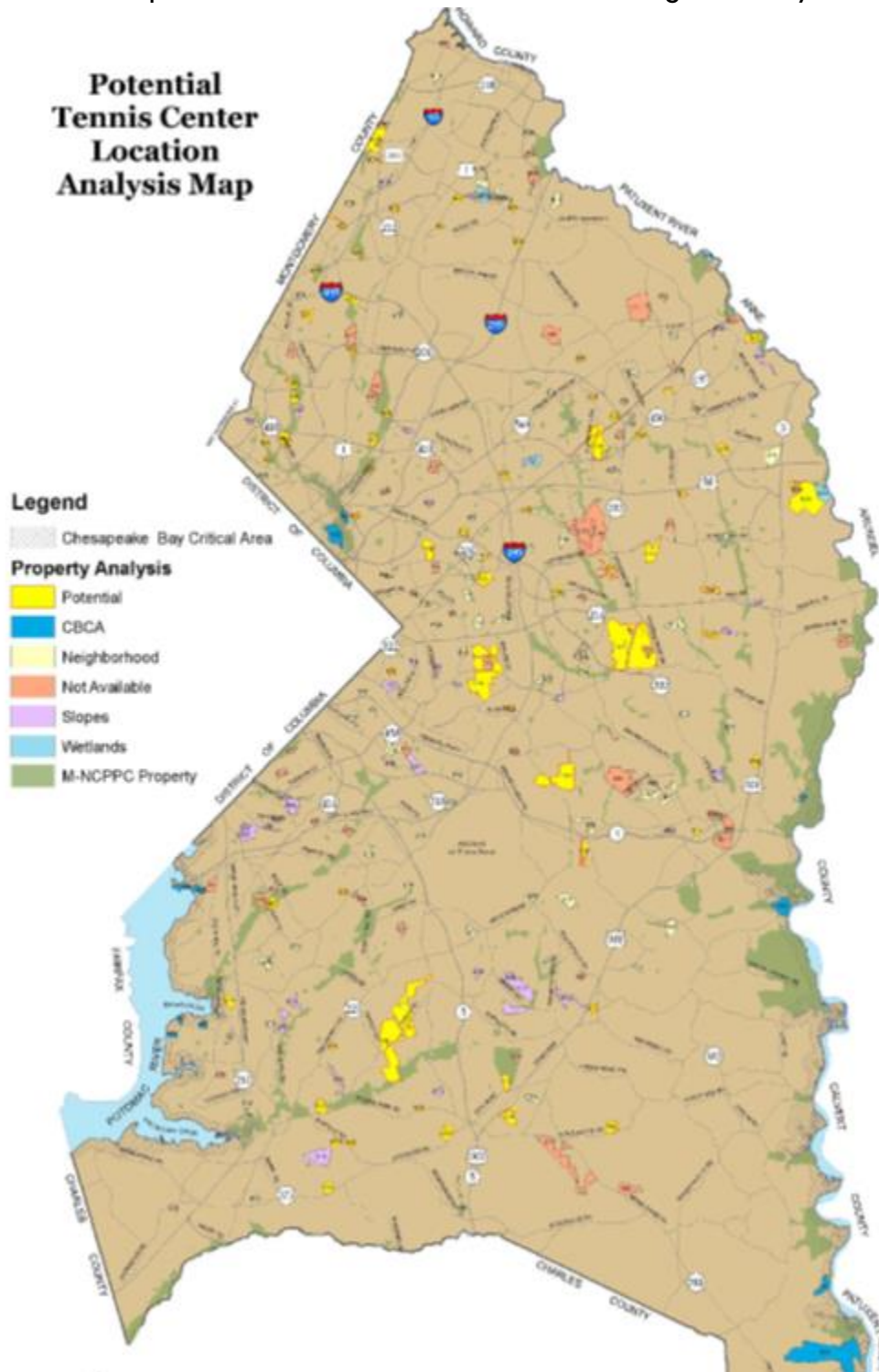
Site Considerations

As previously mentioned, Populous was tasked with evaluating up to three (3) potential sites for the proposed tennis complex within Prince George's County that were identified by M-NCPPC. M-NCPPC considered the following key factors in its decision-making progress.

- Land ownership – land must be owned by the M-NCPPC
- Travel time to access the venue from major highways
- Proximity to public transportation
- Ample space for parking and facility requirements
- Topographical strengths and challenges
- Supply of existing tennis facilities nearby
- Proximity to other large institutions, businesses, churches that could draw individuals to the proposed tennis complex

Consistent with the criteria above, the first step in M-NCPPC's decision-making process was to identify M-NCPPC-owned land in Prince George's County that could potentially accommodate the recommended program for a new tennis complex. These M-NCPPC-owned parcels are identified on the map that follows as "potential" sites and shown in yellow. Potential sites included land occupied by existing tennis facilities as well as undeveloped land.

Map of M-NCPPC-Owned Land in Prince George's County

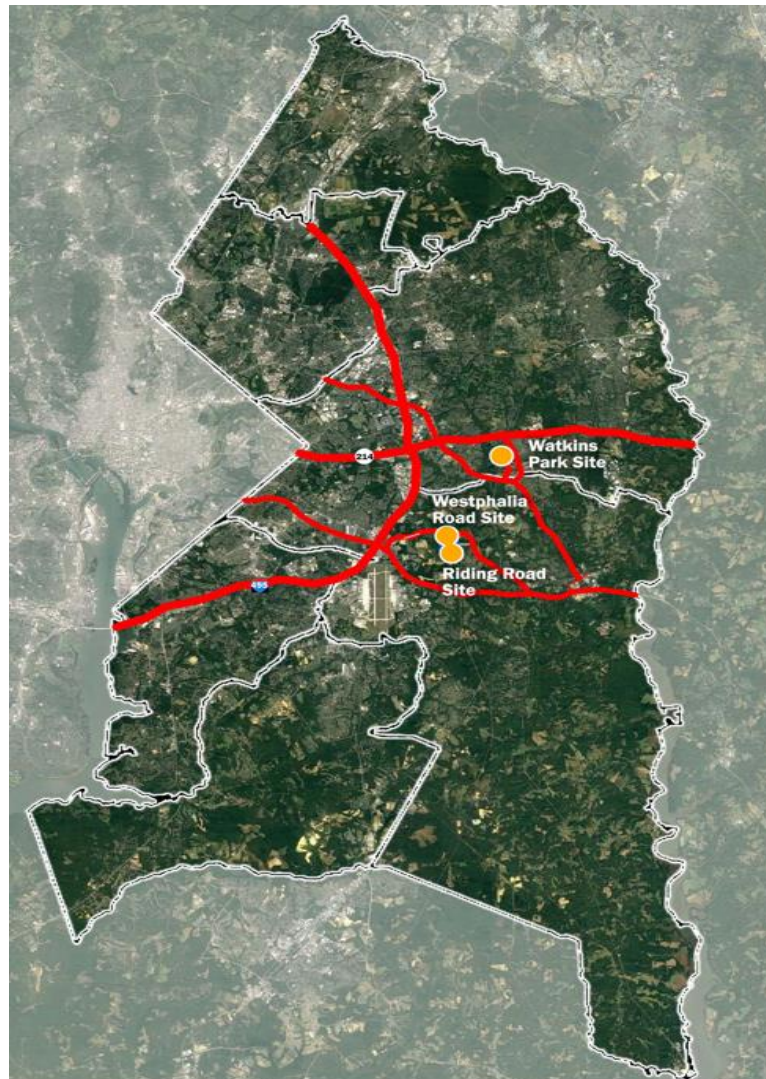


Source: M-NCPPC.

M-NCPPC considered factors such as size requirements, accessibility, topographical strengths and challenges and proximity to other tennis facilities and businesses. This process resulted in the identification of the following three sites for further evaluation by Populous. It should be noted that the potential development of the proposed tennis complex is not limited to these sites and other locations could be considered by M-NCPPC should they decide to move forward with the project.

Map of Potential Sites Identified by M-NCPPC

1. Riding Road Site
2. Westphalia Road Site
3. Watkins Park Site



The following summarizes the relative strengths and weaknesses of each of the identified sites. In addition, an overlay of the proposed program for the tennis complex is provided for each potential site.

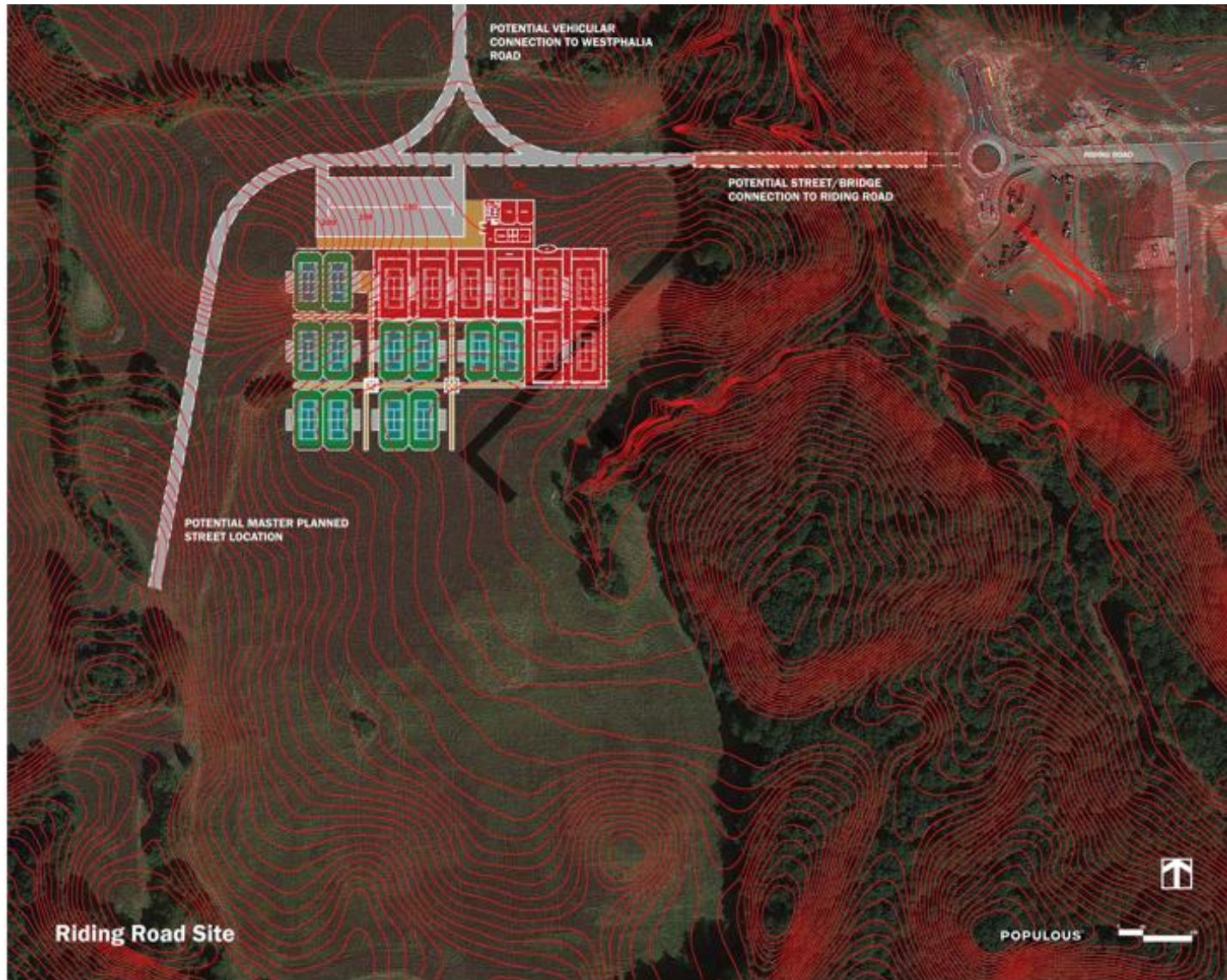
Riding Road Site

The Riding Road Site is located approximately 2.5 miles due east of the I-495/Maryland Route 4 interchange. The site is currently undeveloped, and part of a larger master planned development. Although not specifically defined, the site study area is approximately 20 acres in size. Although there is a master planned collector road anticipated for the site, there is currently no vehicular access. A potential street connection is possible, which would extend from the study area to Westphalia Road approximately 0.8 Miles to the north. A second vehicular connection could occur at the western terminus of Riding Road approximately 0.2 miles to the east. However, the Riding Road connection would likely require a bridge to traverse an existing wooded drainage way. The site should easily accommodate parking for 100 cars+/- as currently depicted.

The site's existing topography is rolling in nature, with approximately 50' of elevational difference across the breadth of the proposed tennis complex as depicted on the page that follows. The relatively unconstrained perimeter of the site should make mass grading for the project manageable. No geotechnical information is currently available, but shallow bedrock could make this an extremely expensive site to develop if it were found to occur. Existing utilities are more than likely very remote to this site, and there is a strong likelihood that there would be significant expense involved to bring utilities to the site. Based upon the concept-level findings for this report, it appears that this site would be difficult to develop for a new tennis complex as currently programmed and envisioned, primarily due to the lack of vehicular access and utility infrastructure.

An illustration of the proposed tennis complex program overlaid on the Riding Road Site is provided on the next page.

Riding Road Concept



Westphalia Road Site

The Westphalia Road site is located just south of Westphalia Road, approximately 2.5 miles east of the I-495/Maryland Route 4 Interchange. The site's sole vehicular access opportunity occurs from Westphalia Road, directly adjacent to the site at its northern edge. The site is approximately 11.4 acres in size. However, a Washington Gas Light Company (WGLC) easement occurs along the entire eastern edge of the site, occupying approximately 2.10 Acres. It is assumed that no improvements are allowed within the WGLC easement. The site's existing topography is fairly pronounced, with the high point of the site occurring at its northern end adjacent to Westphalia Road at Elevation 230. The site's low point occurs at its southern edge at Elevation 170, resulting in a 60' +/- elevational difference across the site from north to south. Geotechnical characteristics of the site are unknown at this time, as is the availability of existing utilities.

The site is reasonably accessed from Westphalia Road via vehicle or bicycle. However, due to the site's remote location, it would not be easily accessible for pedestrians, mass transit, or other alternative forms of transportation. The site should be able to accommodate parking for 100 cars +/- . The tennis complex appears to fit on the site as currently programmed, however, due to the site's limited width, the complex would need to be configured in such a way that may not be ideal for its use and operation. The biggest potential challenge presented by this site involves the extreme existing topography. To accommodate the tennis complex as currently configured, a large number of retaining walls, stairs and ramps would need to be incorporated into the project, resulting in a terraced set of courts that would need to step down the hill north-to-south. The additional costs associated with this terraced court strategy would be significant. If it were discovered that shallow bedrock was inherent throughout the site, these costs could go up exponentially. Based upon the concept-level findings for this report, it appears that this site would be difficult to develop as a new tennis complex as currently programmed and envisioned, primarily due to the pronounced topography and the size and configuration of the site.

An illustration of the proposed tennis complex program overlaid on the Westphalia Road Site is provided on the next page.

Westphalia Road Concept



Watkins Park Site

The Watkins Park Site is located approximately three (3) miles east of the I-495/Maryland Route 214 interchange, and approximately 1 mile south of the Maryland Route 214/Route 193 Interchange. The site is part of the Watkins Regional Park and is currently occupied by five (5) outdoor tennis courts (one of which is a practice court), an inflatable tennis dome, and a natural turf recreation field. Although not specifically defined, the site appears to be approximately 12 acres in size. Vehicular access to the site currently occurs from the Route 193 park entrance to the east and the Route 202 Park Entrance to the south. The site is well-connected for pedestrians and bicycles to the surrounding residential neighborhoods via an established trail system. The site's existing topography is fairly flat and would be conducive to the development of a project of this type. Further, the development of a new tennis complex on this site would be consistent with the existing land use. Geotechnical characteristics of the site are unknown at this time, as is availability of existing utilities. A significant amount of existing surface parking is currently available directly adjacent to the site, possibly negating the need to construct new parking. Depending on the final layout and design, it may be possible to salvage and renovate the existing outdoor courts and integrate them into the new tennis complex. Based upon the concept-level findings for this report, it appears that this site would be conducive to the design and development of a new tennis complex as currently programmed and envisioned. In addition, given the site's current use, the development of a new tennis complex on this site would provide the opportunity for operating efficiencies such as shared staffing and resources.

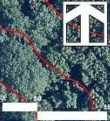
An illustration of the proposed tennis complex program overlaid on the Watkins Park Site is provided on the next page.

Watkins Park Concept



Watkins Park Site

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Summary

The three potential sites identified by M-NCPPC were evaluated by Populous using a site evaluation matrix, which is shown below. The matrix contains a collection of site selection criteria typical for a project of this type. An initial or raw score was assigned to each factor based on the evaluation of each site. The raw scores are based on the following scale:

- 5 – Excellent
- 4 – Good
- 3 – Average
- 2 – Below Average
- 1 – Poor

A weight factor was applied to each raw score to calculate the weighted score. The weight factors are based on a scale of relative importance as follows:

- 4 – Critical
- 3 – Important But Not Critical
- 2 – Mildly Important
- 1 – Unimportant / Non-issue

Proposed New Tennis Complex in Prince George's County, Maryland							
Site Evaluation Matrix							
	Raw Scores			Weight Factor	Weighted Scores		
	Watkins Park Site	Westphalia Road Site	Riding Road Site		Watkins Park Site	Westphalia Road Site	Riding Road Site
Criteria - Physical Site Factors							
Project Fit	3	2	5	4	12	8	20
Potential For Future Expansion	4	1	5	2	8	2	10
Disruption/Conflicts With Existing Utility Infrastructure (Streets, Utilities, etc.)	2	5	5	3	6	15	15
Adequacy/Availability of Existing Utility Infrastructure	4	2	1	4	16	8	4
Vehicular Access	4	3	1	4	16	12	4
Alternate Transportation Access	4	2	1	3	12	6	3
Pedestrian Access	4	1	1	3	12	3	3
Independence From Additional Off-Site Infrastructure Improvements	4	3	1	4	16	12	4
Topographic Considerations	4	1	2	3	12	3	6
Subtotal Physical Site Factors	33	20	22		110	69	69

Based on the completed site evaluation matrix, the Watkins Park Site scored the highest (110) of the three sites evaluated and appears to be the best candidate for the development of a tennis complex of this type. Building a new complex on this site would require the dismantling of the tennis bubble and may require dismantling of some or all of the existing courts. As such, tennis play would be disrupted at this location during the construction period. In addition, new construction would impose on the existing recreation field. With that said, the Watkins Park Site has adequate access for vehicles, alternative forms of transportation and pedestrians. Further, the site is not limited by topography or size, and has an abundance of existing parking. From an operational perspective, development of a new tennis complex on the Watkins Park Site differs from the other evaluated sites in that it would also create the opportunity for operating efficiencies such as shared staffing and resources given the site's current use as a tennis complex.

The Westphalia Road Site appears to be barely large enough for the tennis complex as currently programmed and would offer no opportunity for future expansion of the project. Although the site can be vehicularly accessed by Westphalia Road, there are no existing pedestrian or alternative transportation networks proximal to the site. The primary limitations of the Westphalia Road Site involve the extreme existing topography coupled with the size and configuration of the site, which would potentially result in extremely high development costs for a project of this type.

Similarly, the Riding Road Site would likely be very expensive to develop for a project of this type due to the need for extensive off-site infrastructure improvements (primarily utilities and roadways) that would be necessary to make the site viable.

As previously mentioned, the potential development of the proposed tennis complex is not limited to the three evaluated sites and other locations could be considered by M-NCPPC should they decide to move forward with the project.

10. ECONOMIC ANALYSIS



OVERVIEW

Financial considerations often dictate whether a particular project is deemed viable. One of the primary reasons that some communities develop these types of facilities is the economic activity that they can generate in terms of spending, employment and earnings, as well as tax revenues to local and state governments. Tennis facilities can attract patrons from outside of the immediate market area who spend money on hotels, restaurants, retail, transportation and other related services. Consequently, when evaluating the merits of these types of projects, all aspects of the costs and benefits including operating requirements, debt service and economic and fiscal benefits should be considered.

Crossroads Consulting assisted M-NCPPC in developing a hypothetical, order-of-magnitude estimate of operating revenues and operating expenses before a capital reserve fund, depreciation and debt service for a proposed new tennis complex for a stabilized year of operations. This analysis is based on certain hypothetical assumptions pertaining to the building program, ownership/operating structure, usage levels and other related operating strategies. The accompanying analysis was prepared for internal use by M-NCPPC for its consideration of plans for a proposed new tennis complex and should not be used or relied upon for any other purpose including financing of the project. An estimate of the potential economic and fiscal benefits associated with ongoing operations of the proposed new tennis complex is also provided in this section of the report. It is important to note that estimates shown in this section do not reflect short- or long-term implications in the tennis industry because of the COVID-19 pandemic.

FINANCIAL PROFORMA

The following table summarizes the estimated annual financial operations for the proposed tennis complex in a stabilized year. The estimate is based on the assumptions outlined in this report as well as general market data; existing and planned facilities in the area; input from area stakeholders and potential users; industry trends; the building program described in the previous section; information on peer facilities; and other research. This analysis represents a net revenue and expense assessment and is subject to change depending on the actual building program, site location, contractual agreements with service providers, and further refinements regarding operating strategies for the proposed new tennis complex.

As shown in the following table, it is estimated that the proposed new tennis complex will operate at a deficit before a capital reserve fund, debt service and depreciation in a stabilized year. Many similar tennis facilities realize an operating deficit but are developed to benefit area residents as well as attract visitors which generate economic impacts.

Proposed New Tennis Complex in Prince George's County, Maryland	
Estimate of Annual Financial Operations (Stabilized Year)	
Net Operating Revenues	\$940,000
Net Operating Expenses	\$1,062,000
Operating Loss Before Capital Reserve, Debt Service and Depreciation	(\$122,000)

Notes: Excludes potential non-operating revenues and expenses.

Excludes potential cost savings associated with development on an existing tennis site.

The proposed new tennis complex could potentially generate revenues from other sources such as advertising and sponsorship that would positively impact the bottom line. Further, there may be opportunities to obtain grant money to assist with various programming opportunities. For instance, the County could become a formal chapter of the National Junior Tennis League, which is supported by the USTA Foundation and offers unique grant opportunities to eligible chapters. These potential revenue sources are not included in this analysis given the preliminary planning stage of the project.

General Assumptions

Based on input from County representatives, several assumptions were used to develop estimates of event activity, financial operations and economic and fiscal impacts for the proposed new tennis complex. It should be noted that these assumptions are preliminary and should continue to be refined as decisions related to the building program and other operating characteristics evolve.

- The recommended building program previously outlined is constructed at a site in Prince George's County in or near densely populated areas, with good vehicular access, and proximity to supporting amenities such as hotels, restaurants, entertainment, etc.
- The proposed new tennis complex will be owned by M-NCPPC and operated through a partnership with a third party such as USTA that specializes in programming, marketing and managing similar facilities.
- The proposed new tennis complex is designed and constructed to be a high-quality facility that is focused on hosting activities that generate economic impact to the County as well as those that serve the broader needs of the community.
- Introductory tennis classes will be provided to foster tennis play at the grassroots level.
- Given the assumed ownership, the complex will be exempt from property taxes.
- The complex's core staff will be supplemented by existing M-NCPPC Department of Parks and Recreation staff.
- Cooperative coordination will occur amongst facility management and tourism/hospitality stakeholders such as Experience Prince George's County particularly in terms of sales and marketing efforts.

- Hotels will actively support sports tourism initiatives.
- A high-level of customer service will be provided.
- Non-tennis community activities are assumed to be revenue-neutral and are therefore excluded.
- With exception to the facilities profiled in this report, no other similar competitive facilities are built or expanded in the region.
- No major economic fluctuations, acts of nature, or cataclysmic events such as an epidemic occur that could adversely impact the dynamics of the project.
- Estimates do not reflect short- or long-term implications in the tennis industry due to the COVID-19 pandemic.
- This analysis does not include an estimate for a capital reserve fund, debt service or depreciation.
- Amounts are presented in 2021 dollars and reflect a stabilized year of operations.

Usage Assumptions

Event activity at new facilities typically experiences a “ramp up” period to a stabilized level of activity which occurs for several reasons. For instance, tournaments that book their event years in advance may not want to risk that a facility’s construction is delayed and not completed in time for their event. In addition, some groups may choose to let management “fine tune” its operations before hosting an event at the proposed new tennis complex. The length of time for new venues to reach stabilized operations varies but typically occurs in or around year three.

Overall utilization at any facility is typically dependent on several factors (e.g. market size; accessibility; nearby amenities; size, configuration and quality of the facilities offered; effectiveness of the management team in booking the facility; date availability; cost, etc.) and is rarely consistent. As such, estimated utilization represents a stabilized year of operations.

The following describes event types used in this analysis:

- *Tournaments* include multi-day youth and adult competitions. These events may include participants from throughout the State, the surrounding region and/or national level competitions.
- *Leagues* generally occur during the weekdays and provide an organized means for both youth and adult groups to compete against one another.
- *Instructional/Programs* include private, semi-private and group classes/lessons, clinics/camps, drill programs, and other programs such as Cardio Tennis, adaptive tennis, senior tennis, etc.
- *Reserved/Open Play* includes players that reserve court time in advance on a weekly or monthly basis as well as those that rent same-day court time.

The following summarizes the estimated annual usage for the proposed new tennis complex in terms of court hours in a stabilized year. Two common usage measures at tennis facilities are the number of court usage hours and the overall occupancy rate. Court hours are calculated by multiplying the length of usage of an activity by the number of courts utilized. Assuming the proposed new tennis complex is open for 13 hours per day with the exception of major holidays, the total number of court hours available is estimated to be approximately 93,300. As shown below, it is estimated that tennis/pickleball activity at the proposed new tennis complex will account for 58,566 hours which yields an overall occupancy rate of 63%. The occupancy rate at the indoor tennis facility and outdoor courts is estimated to be 74% and 55%, respectively. The occupancy rate at the outdoor courts is negatively impacted by adverse weather conditions in the winter months. Further, the occupancy rate at the indoor facility is anticipated to be the lowest during the summer months, when tennis participants prefer to play outdoors.

Although not quantified in this analysis, it is anticipated that the proposed new tennis complex will also host non-tennis activities such as after-school programs and other community-oriented programming.

Proposed New Tennis Complex in Prince George's County, Maryland				
Estimate of Annual Usage in Court Hours (Stabilized Year)				
Activity Type	Indoor Court Hours	Outdoor Court Hours	Total Court Hours	% of Total
Tournaments	2,400	4,200	6,600	11%
Leagues	5,600	5,600	11,200	19%
Instructional/Program	7,593	5,736	13,329	23%
Reserved	7,356	9,446	16,802	29%
Open Play	4,765	5,870	10,635	18%
Total Court Hours Used	27,714	30,852	58,566	100%
Total Court Hours Available	37,335	56,004	93,339	
Occupancy Rate	74%	55%	63%	

This analysis estimates that the proposed new tennis complex will host 26 tournaments that generate approximately 33,100 attendee days annually. For tournament activity, an attendee day is defined as total attendance, which includes participants and spectators, multiplied by the event length. For example, a two-day tournament with 200 attendees equates to 400 attendee days which reflects that the same attendees return to the event each of the two days. It should be noted that the size and scope of tournament activity at the proposed new tennis complex could vary depending on the operating objectives of M-NCPPC, the facility operator and the actual site.

Based on market research, it is estimated that 90% of tournament activity would be new to the County while approximately 56% of tournament activity would be new to the State. This calculation of incremental new activity accounts for the fact that some attendees would be local and certain tournament activity anticipated to be hosted at the proposed new tennis complex is currently occurring at existing facilities in the market. It is also likely that a relatively

small percentage of non-tournament participants at the proposed new tennis complex would be new to the County and State. The estimate of economic and fiscal impacts associated with the ongoing operations of the proposed tennis complex is based on the incremental new activity, not the total activity previously shown.

Net Operating Revenue Assumptions

The following table shows the estimated annual net operating revenue for the proposed tennis complex in a stabilized year.

Proposed New Tennis Complex in Prince George's County, Maryland	
Estimate of Annual Net Operating Revenue (Stabilized Year)	
Facility Rental	\$864,000
Food & Beverage	66,000
Other	10,000
Total Net Operating Revenue	\$940,000

The following provides a description of the revenue line items.

Facility Rental – Facility rental includes revenues related to tournaments, leagues, instruction/programs and reserved/open court rentals and is largely dependent on the number of programs, participants, available hours as well as rental rates charged per court/hour. As it relates to tournaments, facility management will likely negotiate rental terms for these events based on factors such as potential economic impact and/or the ability to execute multi-year contracts. League and instructional/program revenue is typically derived from a per participant fee while revenues related to reserved/open court play are generally derived from a fee per court hour. The facility rental shown in this analysis includes tournament league entry fees, instruction/program fees and reserved/open court rental and nets out certain costs associated with running these events.

Food & Beverage – Food/beverage revenue is generated by sales from concessions, catering and vending. Based on experience at comparable tennis complexes, food/beverage revenue potential for many event types is relatively limited given the nature of event activity, relatively low margin food/beverage sales and the common practice/desire of attendees to bring their own food and beverages. Per capita spending for tournaments can be more significant but is dependent on the financial terms of the deal with the event promoter. Given the relatively low potential profit margin, it is recommended that food and beverage operations aim to minimize cost, particularly those related to labor. One potential option is to offer a self-service café and/or vending machines.

Other Revenue – Other revenue represents the rental of equipment such as tennis ball machines at the proposed tennis complex.

Other Potential Revenue Sources

Although not included in the estimate of operating revenue previously shown due to the preliminary stage of this project, there are multiple other potential revenue sources that could be considered to help reduce the estimated operating loss. As the project development plan continues to evolve, other potential revenues could include, but are not limited to, the following:

Memberships – Membership sales can provide a reliable source of revenue for a tennis facility and can create a core group of users that support the facility. With that said, membership fees can be a deterrent to residents depending on multiple factors related to cost and benefits provided. Given an objective of the project is to accommodate the County’s recreational needs, no membership sales revenue is assumed in this analysis.

Parking – Some peer facilities charge a parking fee for large tournaments; however, market research indicates relatively few attendees are accustomed to paying for parking. As such, no parking revenue is assumed in this analysis.

Advertising & Sponsorship – Advertising and sponsorship opportunities are diverse and can range from temporary signage at a single event; permanent signage or billboards located throughout the complex; advertising in a program; or sponsoring an entire event/tournament. Events sponsored by outside organizations do not typically share revenues with the facility owner/operator. However, advertising and sponsorship revenue generated from events that are organized/sponsored by the facility operator is usually retained by the facility and is a function of the number and type of events held, total attendees and the aggressiveness of the approach taken by ownership and management in terms of the amount and type of advertising and sponsorships sold.

Naming Rights – Through a combination of naming rights, preferential advertising treatment and event sponsorship inducements, one or more private parties may be solicited for up-front or recurring annual commitments. However, as with advertising and sponsorship, the revenue generated from naming rights is generally based on several factors, including but not limited to, the site location, the amount and type of event activity (e.g. regional/national/international tournaments), the local corporate base, and ownership/management’s philosophy on the amount and type of naming rights sold. Naming rights deals are not as common among tennis facilities and, as such, financial information is difficult to obtain. Given these and other factors, naming rights revenue is excluded from this financial estimate. However, as the development planning process for the facility continues and program elements are finalized, this is a potential revenue opportunity that could be considered. Conducting focus groups is one approach to assess the potential revenue that could be generated from naming rights.

Net Operating Expense Assumptions

The following table shows the estimated annual net operating expenses for the proposed new tennis complex in a stabilized year.

Proposed New Tennis Complex in Prince George's County, Maryland	
Estimate of Annual Net Operating Expenses (Stabilized Year)	
Personnel Costs	\$696,000
Utilities	143,000
Operations	135,000
Repairs & Maintenance	88,000
Total Net Operating Expenses	\$1,062,000

Note: Excludes potential cost savings associated with development on an existing tennis site.

The following provides a description of the operating expense line items.

Personnel Costs – Staffing requirements and subsequent personnel costs can represent a significant expense and permanent full-time staffing plans can vary. This variance in staffing levels is generally attributed to multiple factors. One factor relates to the management philosophy of maintaining event-related personnel as full-time or part-time staff. Another factor relates to the management and physical relationship the facility might have to other facilities. Ownership/management structure also plays a role in the staffing plan where a facility operated by the local parks and recreation department can often share administrative and maintenance costs within the broader department. The number of courts, the overall mission of the facility, the level of competition and primary uses can also impact staffing levels. In addition, the extent that contracted services and/or organized labor are used also impacts staffing. For example, many facilities contract independent coaches/instructors and share profits while others have salaried coaches/instructors in-house. For purposes of this analysis, it is assumed that the proposed new tennis complex is staffed with nine full-time equivalent (FTE) employees, which excludes use of any existing Department of Parks and Recreation staff. The estimate of personnel cost includes a tennis director and manager as well as event coordination, operations, and other support personnel. For purposes of this analysis, it is assumed that tennis coaches/instructors operate as independent contractors.

It is important to employ personnel that specializes in programming, marketing and managing similar tennis facilities. While this analysis assumes staffing levels independent of existing County positions, it is likely that the M-NCPPC Recreation and Parks Department can provide supplemental labor and share administrative and maintenance costs with the broader department.

Third-party companies that manage other similar facilities typically receive a management fee. These fees are generally dependent on the agreed upon objectives of the management company, negotiated terms and other factors. As such, and given the preliminary stage of this project, no management fee is included as part of the operating expense estimate.

Utilities – This line item, which includes water, gas, sewer and electric, can vary depending upon the level of utilization, the type of facilities, number of lighted courts, the climate and decisions concerning energy systems and management.

General Operations – This line item includes various general expenses used in the day-to-day management of the proposed new tennis complex that may include office supplies, travel, communications, technology, postage, membership dues, etc. This line item also includes programming and sales/marketing/promotion expenses. While other marketing agencies at the local and State level are assumed to assist in sales/marketing/promotion efforts, the proposed new tennis complex should have its own dedicated resources that serve this function. This analysis assumes that property, casualty and liability insurance needs associated with the proposed new tennis complex will be covered under the umbrella insurance policy, so no dollar amount is estimated.

Repairs & Maintenance – This line item includes labor, equipment and materials associated with maintaining the proposed new tennis complex and the general grounds. Appropriate funding for this line item is critical to maintain quality courts and be marketable for regional/national tournament level play.

Other Potential Expenses

Capital Reserve – Although no dollar amount is included in this analysis, it is recommended that M-NCPPC plan for an annual payment specifically designated as a reserve for replacement fund to safeguard this investment. This fund is intended to cover any extraordinary annual/future capital repairs or improvements to the proposed tennis complex. The M-NCPPC should continue its proactive approach to capital planning and, at a minimum, seek to replace courts and other amenities at the end of their useful life.

Debt Service and Depreciation – This analysis does not estimate operating expenses related to debt service or depreciation.

Pre-Opening Expenses – Expenses associated with staffing and sales/marketing/promotion efforts prior to opening the proposed tennis complex are not included in this analysis. These may include hiring staff prior to opening, attending trade conferences/conventions as well as major tennis events to foster business contacts and bid for future year competitions. Marketing expenses associated with the proposed tennis complex's pre-opening could be a key factor in its ability to attract high caliber tournament activity. With that said, the level of marketing pre-open and associated expenses is dependent on the facility operator.

Sensitivity Analysis

Given the preliminary nature of this project, the following table provides a sensitivity analysis to reflect the impact of individual assumptions on financial operations. Multiple variations can be combined to show the overall impact of different scenarios. For instance, a 10% decrease in non-tournament rental revenue would have a net impact of (\$75,000) and a 10% increase in operating expenses would have a net impact of (\$106,000). In aggregate, this scenario would result in an increased operating loss of \$181,000.

Proposed New Tennis Complex in Prince George's County, Maryland			
Sensitivity Analysis - Net Operating Income/Loss			
Baseline Estimate - Net Operating Loss			(\$122,000)
Assumption	Adjustment	Net Impact	Adjusted Cash Flow
Tournament Rental Revenue			
Increase	10%	\$12,000	(\$110,000)
Decrease	-10%	(\$12,000)	(\$134,000)
Non-Tournament Rental Revenue			
Increase	10%	\$75,000	(\$47,000)
Decrease	-10%	(\$75,000)	(\$197,000)
Food & Beverage Revenue			
Increase	10%	\$7,000	(\$115,000)
Decrease	-10%	(\$7,000)	(\$129,000)
Operating Expenses			
Increase	10%	(\$106,000)	(\$228,000)
Decrease	-10%	\$106,000	(\$16,000)

ECONOMIC AND FISCAL IMPACT ANALYSIS

This section of the report estimates the economic and fiscal benefits associated with the proposed new tennis complex. If built, the local and State economies could benefit from ongoing operations of the proposed new tennis complex in several ways, including the following tangible and intangible benefits.

- Enhancing the overall quality of life and livability of the area
- Attracting a critical mass of visitors annually to help support area businesses
- Increasing the development of tennis participants in the area
- Offering an attractive venue to residents and visitors that has multiple uses
- Broadening market reach to new visitors
- Receiving increased media exposure
- Producing economic and fiscal impacts
- Generating private sector development and/or funding

Each of these benefits is important in assessing the impacts that the proposed new tennis complex may have on the area. While the value of many of these benefits is difficult to measure, the economic activity generated can be quantified. This analysis estimates the direct, indirect and induced benefits associated with the ongoing operations of the proposed new tennis complex, including the associated tax revenues. This economic and fiscal impact analysis reflects the competitive landscape as it is known today. In addition, while this analysis is non-site specific (other than being located in Prince George's County), it is assumed that the proposed tennis complex would be located proximate to amenities in the County such as hotels, restaurants, retail, etc. Therefore, it should be noted that a site location differing from this assumption could adversely impact the estimates of economic and fiscal impacts outlined in this report.

General Methodology

This analysis estimates the incremental new economic and fiscal impacts that could potentially be generated from the proposed tennis complex in Prince George's County. Regional input-output models are typically used by economists as a tool to understand the flow of goods and services among regions and measure the complex interactions among them given an initial spending estimate.

Annual impacts start with the initial direct spending on facility operations as well as spending by attendees outside of the tennis complex on items such as lodging, restaurants, retail, entertainment and transportation. For instance, an out-of-town attendee spends money staying at a local hotel and eating at a local restaurant.

Once the amount for direct spending is quantified, a calculated multiplier is applied to generate the indirect and induced effects. The sum of direct, indirect and induced effects equals total economic impact, which is expressed in terms of total output, employment (jobs) and earnings. This analysis also estimates the tax revenues generated from ongoing operations of the proposed new tennis complex.

The amount and type of activity, origin of attendees, facility financial operations, industry trends, economic conditions, spending estimates, distribution of spending, multipliers and specific taxes quantified are variables that influence the economic and fiscal impact estimates.

Although not quantified in this analysis, construction costs associated with development of a new tennis complex would provide additional economic and fiscal impacts to the local area and the State during the construction period. These benefits would include the creation of jobs which produce earnings for area residents as well as increased tax revenues from the purchase of materials and supplies.

Direct Spending

Estimating direct spending is the first step in calculating economic impact. Direct spending represents the initial change in spending that occurs as a direct result of ongoing operations of the proposed new tennis complex. Direct spending occurs from facility operations as well as from attendee spending before and after events. Based on the estimated mix of event activity, attendees were categorized as either day-trippers who travel to and from the County on the same day or overnight attendees who generate room nights. Each group was assigned different per capita spending amounts based on data provided by stakeholders and other secondary industry research. In order to estimate the net new economic impact to the area, adjustments were made to gross direct spending to account for displacement (i.e. spending that would likely have occurred elsewhere in the economy without the presence of the proposed new tennis complex) and leakage (i.e. spending that occurs outside of the area). The economic impacts shown in this section reflect the estimated net new impacts associated with the proposed new tennis complex.

Multiplier Effect

Additional economic impacts are produced through the re-spending of net new direct spending. To quantify the inputs needed to produce the total output, economists have developed multiplier models. The estimation of multipliers relies on input-output models, a technique for quantifying interactions between firms, industries and social institutions within a local economy. This analysis uses IMPLAN software and databases developed under exclusive rights by IMPLAN Group LLC. IMPLAN, which stands for Impact Analysis for Planning, is a computer software package that consists of procedures for estimating local input-output models and associated databases. The IMPLAN software package allows the estimation of the multiplier effects of changes in final demand for one industry on all other industries within a defined economic area. Its proprietary methodology includes a matrix of production and distribution data among all counties in the U.S. As such, the advantages of this model are that it is sensitive to both location and type of spending and can provide indirect and induced spending, employment and earnings information by specific industry category while considering the leakages associated with the purchase of certain goods and services outside the economy under consideration.

Once the direct spending amounts are assigned to an appropriate industry category, the IMPLAN model estimates the economic multiplier effects for each type of direct new spending attracted to or retained in the area resulting from ongoing operations of the proposed new tennis complex in Prince George's County. The total output multiplier is used to estimate the aggregate total spending that occurs beginning with direct spending and continuing through successive rounds of re-spending which are generally referred to as indirect and induced effects on the area economy.

Indirect and Induced Impacts

Indirect impacts reflect the re-spending of the initial or direct expenditures, or the business-to-business transactions required to satisfy the direct effect (e.g. impacts from non-wage expenditures). For example, an attendee's direct expenditures at a restaurant require the restaurant owner to purchase food and items from suppliers. The portion of these restaurant purchases that are spent within the area economy are indirect impacts.

Induced impacts reflect changes in local spending by households on goods and services that result from income changes in the directly and indirectly affected industry sectors (e.g. impacts from wage expenditures). For instance, a server at a restaurant could have more personal income due to an attendee's visit to the restaurant. The amount of increased income that the employee spends in the community is an induced impact.

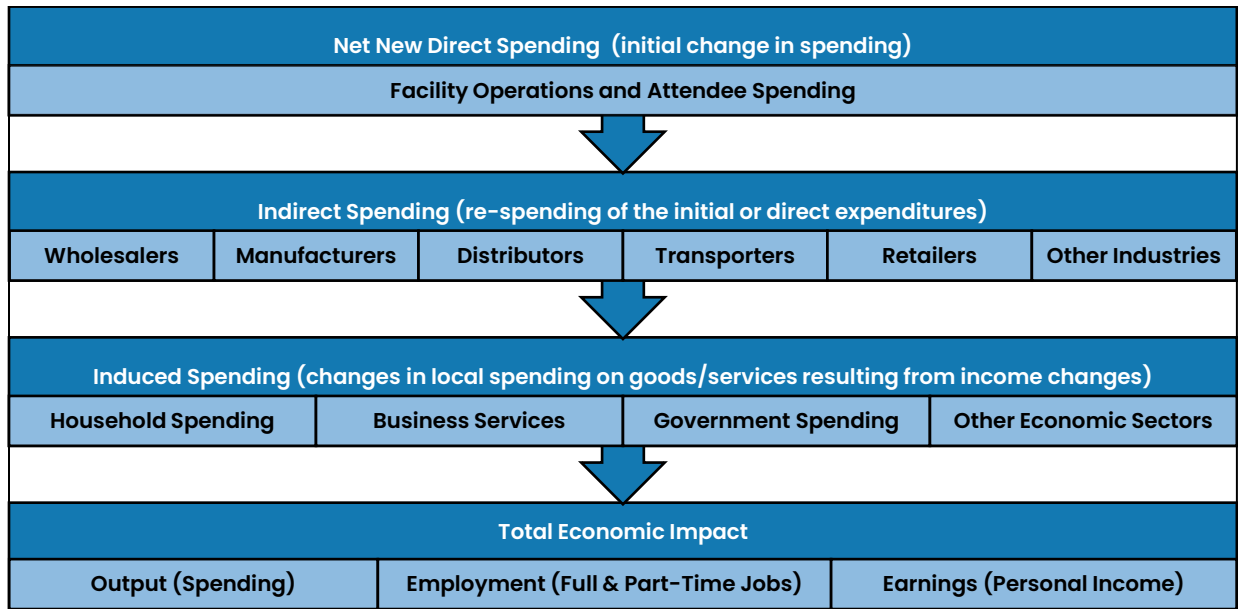
The model generates estimates of these impacts through a series of relationships using average wages, prices and transportation data, considering commute patterns and the relative interdependence of the economy on outside regions for goods and services.

Total Economic Impact

The calculated multiplier effect is then added to the direct impact to quantify the total economic impact in terms of total output, employment and earnings, which are defined below.

- *Total Output* represents the sum of direct, indirect and induced spending effects generated from operations of the proposed new tennis complex. This calculation measures the total dollar change in output that occurs in the local economy for each dollar of output delivered to final demand.
- *Employment (Jobs)* represents the number of full-time and part-time jobs supported by operations of the proposed new tennis complex. The employment multiplier measures the total change in the number of jobs supported in the local economy for each additional \$1.0 million of output delivered to final demand. It should be noted that a person can hold more than one job, so total jobs are not necessarily the same as the count of employed persons. Further, the total number of jobs does not only reflect employees working at the tennis complex but rather the total number of jobs that are directly and indirectly supported on an annual basis in multiple sectors of the economy due to the ongoing operations of the proposed tennis complex.
- *Earnings (Personal Income)* represent the wages and salaries earned by employees of businesses associated with or impacted by operations of the proposed new tennis complex. In other words, the multiplier measures the total dollar change in earnings of households employed by the affected industries for each additional dollar of output delivered to final demand.

The following graphic illustrates the multiplier effects for calculating total economic impact.



Tax Revenues

The estimated spending generated from ongoing operations of the proposed new tennis complex also creates tax revenues for the local and State economies. Experience in other markets suggests that while a significant portion of the direct spending likely occurs near the facility, additional spending occurs in other surrounding economies. Major tax sources impacted by the proposed tennis complex were identified, and taxable amounts were estimated to apply to each respective tax rate. This analysis estimates the revenues generated from hotel/motel tax; admissions and amusement tax; and personal income tax at the local level as well as sales and use tax; personal income tax; corporate income tax; and motor vehicle rental tax at the State level. While other taxes may be positively impacted by operations of the proposed new tennis complex, they are not quantified in this analysis.

The following provides a description of the taxes estimated in this analysis.

Local Taxes

Hotel/Motel Occupancy Tax – Prince George’s County imposes a tax on accommodations at a rate of 7.0% which was applied to the estimated direct hotel spending at the local level.

Admissions and Amusement Tax – The admissions and amusement tax is a local tax collected by the Comptroller’s Office for Maryland’s counties and Baltimore City, incorporated cities and towns and the MSA. The tax is imposed on the gross receipts from admissions, the use or rental of recreational or sports equipment and the sale of merchandise, refreshments or services at a nightclub or similar place where entertainment is provided. The admissions and amusement tax rate varies by locality and by activity. Currently, the admissions and amusement tax rate is

10% in Prince George's County area, with the exception of coin-operated amusement devices and certain golf fees which are taxed at a rate of 5%. For purposes of this analysis, the County tax rate of 10% was applied to the estimated direct spending on entertainment as well as estimated facility rental revenue.

Local Personal Income Tax – Prince George's County imposes a personal income tax of 3.20% which is calculated as a percentage of taxable income. For purposes of this analysis and based on information obtained online from the Comptroller of Maryland's office, an effective tax rate was calculated. Local income tax is based on where a person lives, not where they work, only a portion of personal income taxes generated from the operations of the proposed new tennis complex occurs in the County.

State of Maryland Taxes

In general terms, all State tax proceeds are collected in the State's General Fund and then allocated to a variety of program areas, such as education, transportation and public safety, among others. As such, individual revenue sources such as the sales and use tax, are not designated to fund specific programs. As a result of this process, municipalities and counties may benefit from a variety of State and locally administered programs. For purposes of this analysis, only collections have been quantified, without regard as to how these funds are ultimately spent through the individual State departments/funds. The following describes the State-level taxes quantified in this analysis.

Sales and Use Tax – The State of Maryland collects 6% sales and use tax from sales and leases of tangible personal property and services throughout the State and a 9% tax on alcoholic beverages. For purposes of this analysis, the 6% tax rate is applied to estimated taxable spending at the State level generated by operations of the proposed tennis complex which represents a conservative estimate relative to the sale of alcoholic beverages.

Corporate Income Tax – A corporate income tax of 8.25% of corporate federal taxable income adjusted by State modifications is also levied by the State of Maryland on corporations. For purposes of this analysis and based on information obtained online from the Comptroller of Maryland's office, an effective tax rate was calculated and applied to a portion of the estimated total output at the State level.

Personal Income Tax – The State of Maryland imposes a personal income tax assessed against personal income earned in the State. The State income tax is a graduated rate ranging from 2.0% to 5.75% of taxable income. Nonresidents are subject to a special nonresident tax rate of 2.25% in addition to the State income tax rate. For purposes of this analysis and based on information obtained online from the Comptroller of Maryland's office, an effective tax rate was calculated and applied to a portion of estimated State-level earnings.

Motor Vehicle Rental Tax – The State imposes an 11.5% tax on short-term passenger car and recreational vehicle rentals. This tax was applied to a portion of estimated direct transportation at the State level.

Economic and Fiscal Impacts

Based on the previously outlined general methodology and key assumptions, the following shows the estimated economic and fiscal impacts from ongoing operations of the proposed new tennis complex.

Estimated Annual New Economic Impacts

The table below summarizes the estimated annual new economic impacts generated from ongoing operations of the proposed new tennis complex in a stabilized year in terms of output (i.e. direct, indirect and induced spending), total jobs and total earnings.

Proposed Tennis Complex in Prince George's County, Maryland		
Estimate of Annual New Economic Impacts from Ongoing Operations (Stabilized Year)		
Category	Prince George's County	State of Maryland
Output		
Direct Spending	\$2,502,000	\$1,741,000
Indirect & Induced Spending	897,000	1,252,000
Total Output	\$3,399,000	\$2,993,000
Total Jobs (Full-Time & Part-Time)	40	30
Total Earnings	\$1,162,000	\$1,161,000

Note: Local and State amounts are not additive.

Net new direct spending associated with ongoing operations of the proposed new tennis complex is estimated to be \$2.5 million annually in Prince George's County and \$1.7 million in the State. Total output (i.e. direct, indirect and induced spending) is estimated to be \$3.4 million annually in Prince George's County and \$3.0 million in the State.

Outputs from the IMPLAN model indicate that this new spending is estimated to support a total of 40 full- and part-time jobs and \$1.2 million in earnings annually in Prince George's County and 30 full and part-time jobs and \$1.2 million in earnings annually in the State. It should be noted that a person can hold more than one job, so total jobs is not necessarily the same as the count of employed persons.

This analysis takes into account that some of the events estimated to be programmed at the proposed new tennis complex are currently occurring elsewhere in the State. As such, these events have a greater economic impact to the County than the State.

Estimated Annual New Tax Revenues

Annual new tax revenues generated from ongoing operations of the proposed new tennis complex are estimated to be \$95,000 at the County level and \$185,000 at the State level in a stabilized year.

Proposed Tennis Complex in Prince George's County, Maryland	
Estimate of Annual New Tax Revenues from Ongoing Operations (Stabilized Year)	
Entity	
Prince George's County	\$95,000
State of Maryland	\$185,000
Grand Total	\$280,000

POTENTIAL NEXT STEPS

If the M-NCPPC chooses to move forward with development of a new tennis complex in Prince George's County, potential next steps would include further evaluating and selecting a site that can accommodate the required programmatic elements, preparing development cost and schedules based on the selected site, finalizing an operating strategy, developing a sustainable financial plan, and creating a funding plan for development costs that may include public and private sector partners.

11. APPENDIX

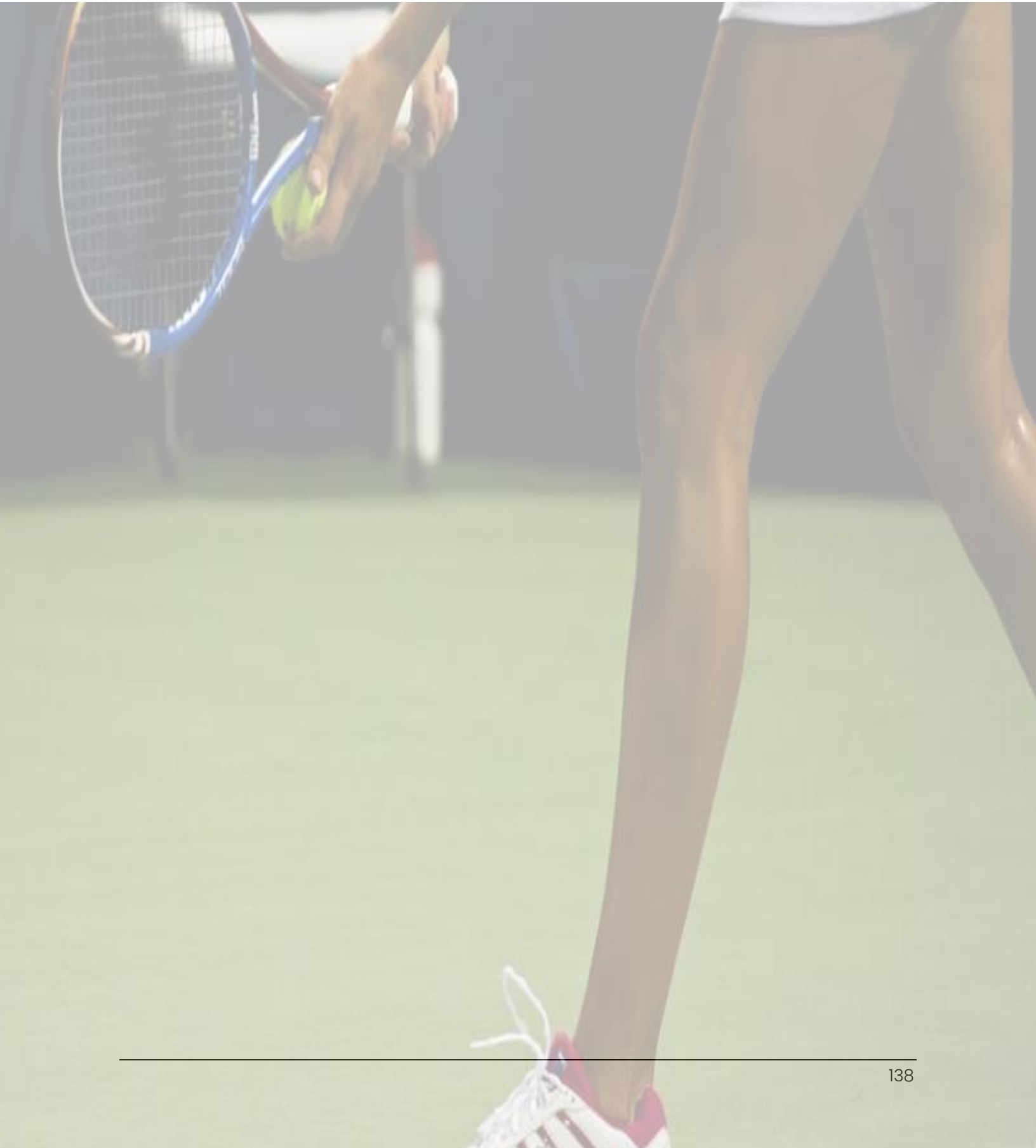
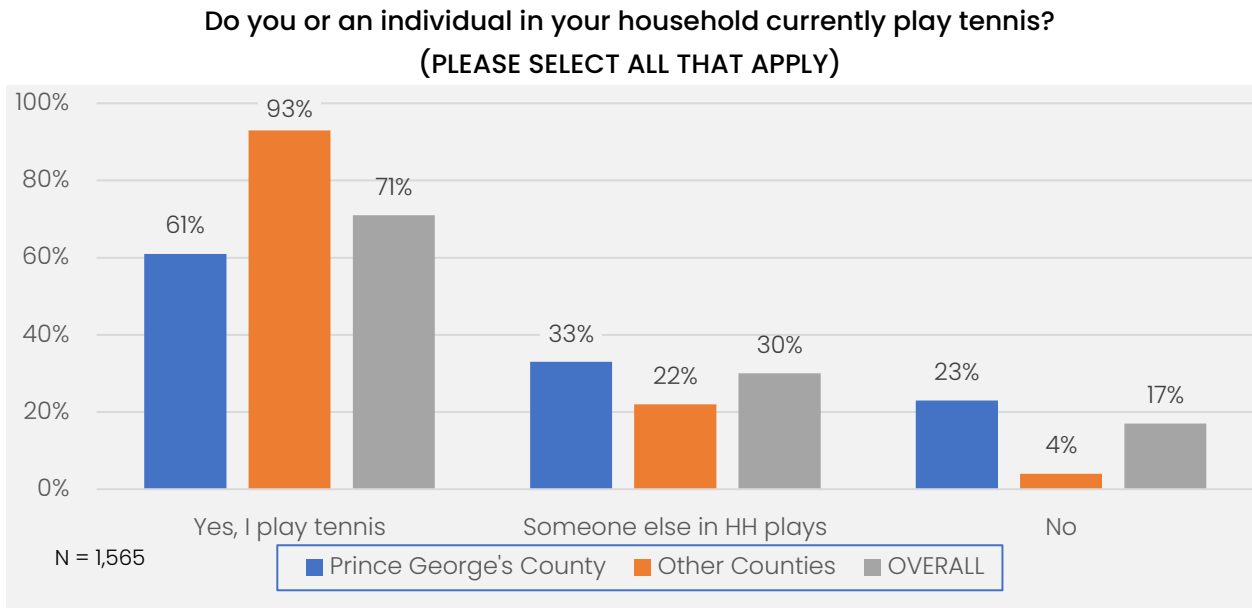


EXHIBIT 1 – DETAILED COMMUNITY SURVEY RESULTS

The following pages provide an in-depth analysis of community survey responses.

Tennis Players at Home

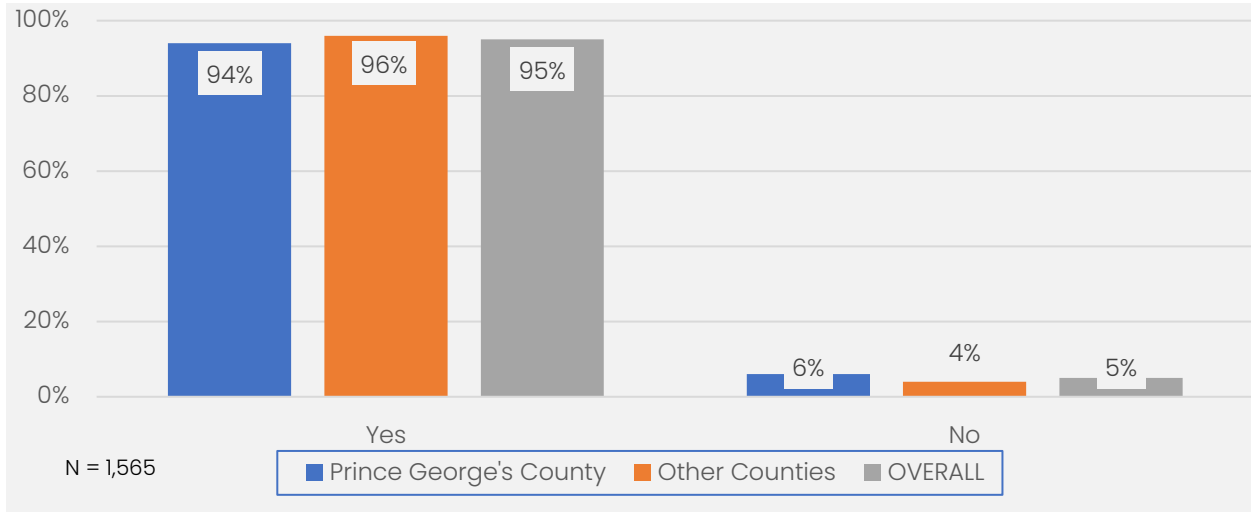
- Overall, more than two thirds of survey participants (71%) reported that they themselves *play tennis*.
- More than half of Prince George’s County residents, 61%, stated that they *play tennis* as well. One third (33%) of Prince George’s County respondents also reported that someone else in their household plays tennis.



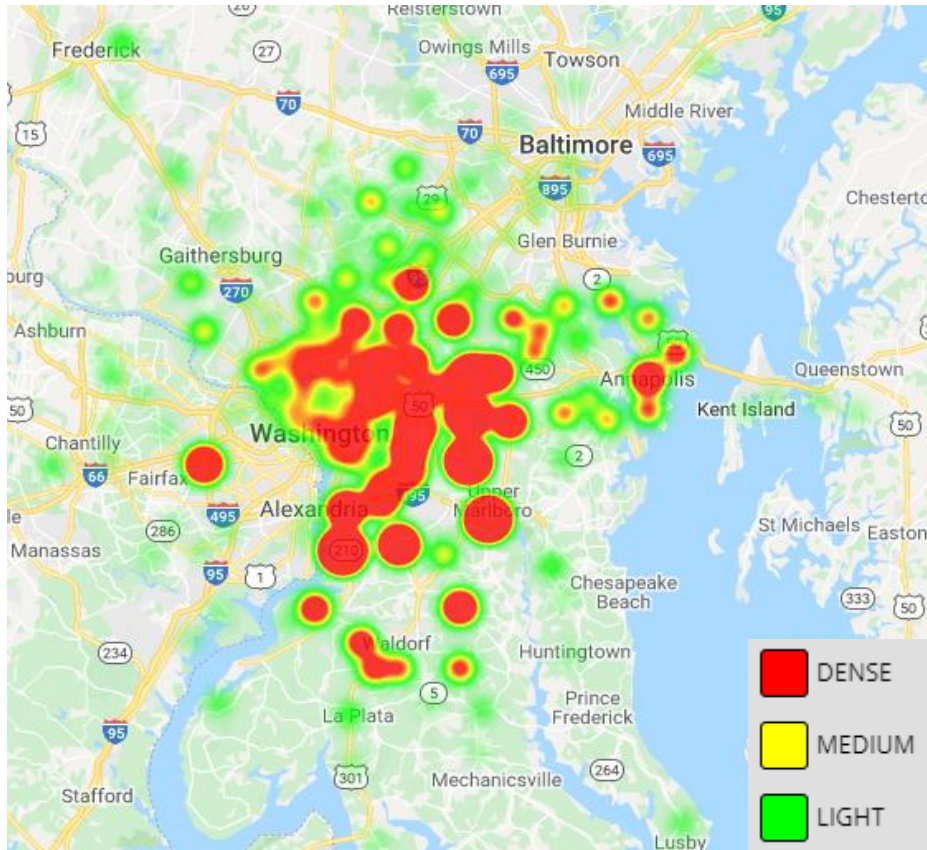
High Interest in New Tennis Complex

- The vast majority of all study participants (95%), including participants who live in Prince George’s County (94%), state that either they or someone in their household would have an interest in playing tennis in the future at a new complex if it is built within Prince George’s county and is within an acceptable drive-time of their residence.

Do you or an individual in your household have an interest in playing tennis in the future at a new Tennis Complex if it is built in Prince George's County within an acceptable drive-time of your residence?



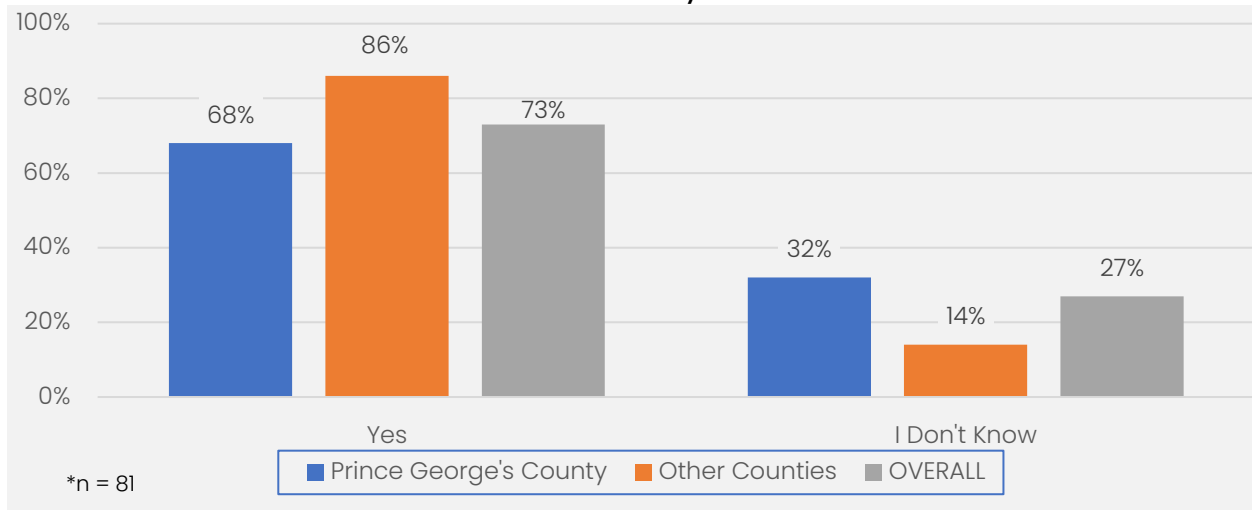
Map of Study Participants Who Stated Interest



Benefit of a New Tennis Complex

- Among the small percentage of respondents who are not interested in a new tennis complex within Prince George’s County (5%), overall, 73% do believe it would be beneficial (among which 68% are residents of Prince George’s County and 86% live in other counties).

Do you think a new Tennis Complex in Prince George’s County would be beneficial in meeting future community needs?

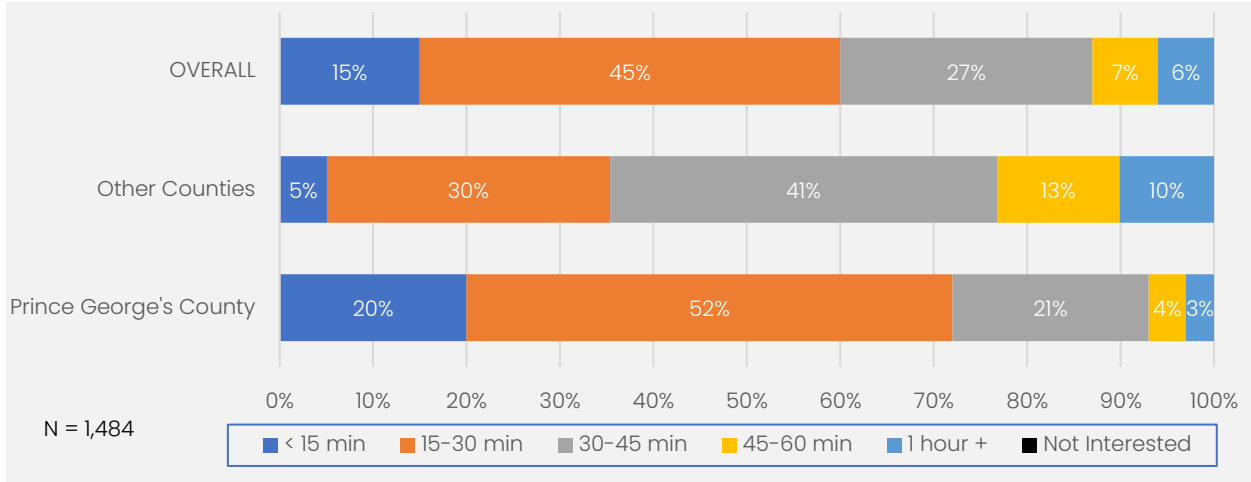


Note: * Please note the small base size when considering the responses to this question.

Distance Willing to Travel: Recreational Play

- For recreational play purposes, more than half of Prince George’s County residents interviewed, 52%, would be willing to travel 15-30 minutes maximum.
- The majority of those in other counties (41%) would travel 30-45 minutes maximum for recreational play. More than one-quarter (30%) would travel 15-30 minutes maximum.

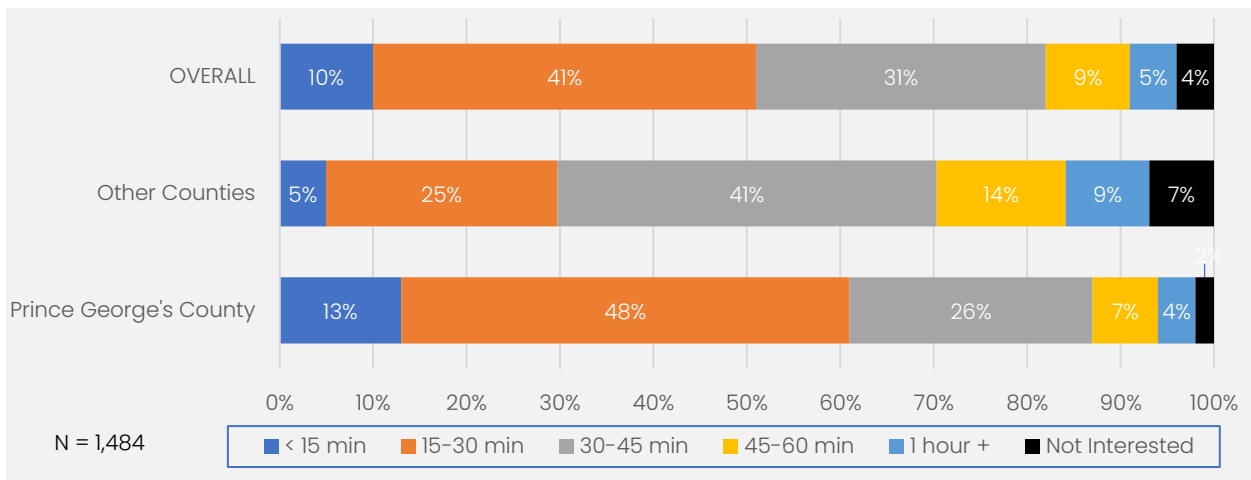
What is the maximum distance the participant would be willing to drive to participate in recreational play?



Distance Willing to Travel: Classes/Clinics

- Just under half of Prince George's County residents (48%) would travel 15-30 minutes to reach classes/clinics, and one quarter would (26%) travel 30-45 minutes maximum to do so.
- The majority of those in other counties (41%) would travel 30-45 minutes maximum for classes/clinics. One quarter, 25%, would travel 15-30 minutes maximum.

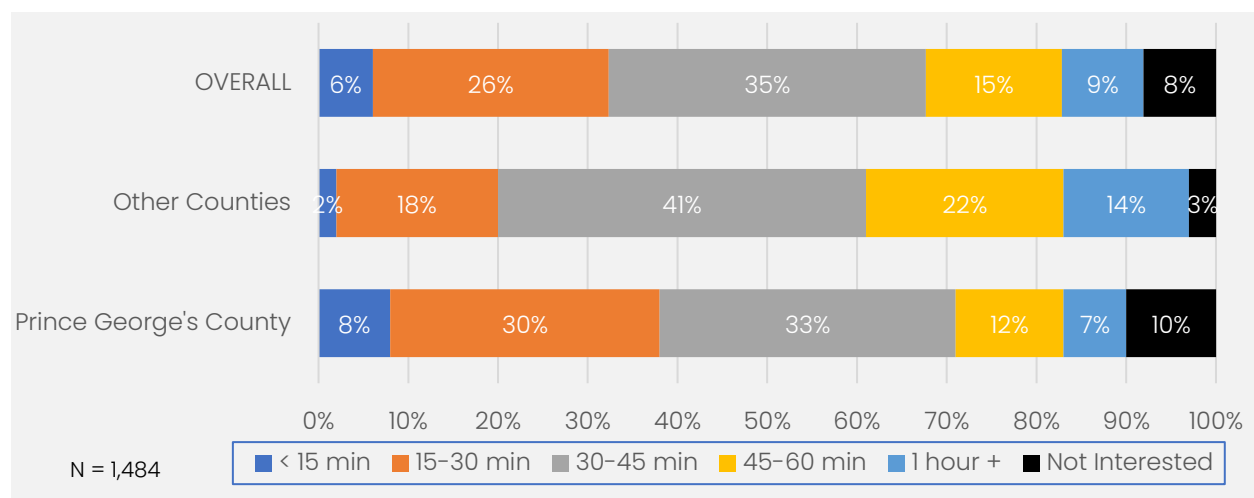
What is the maximum distance the participant would be willing to drive to participate in classes/clinics?



Distance Willing to Travel: League Play

- Prince George’s County residents would mostly be willing to travel between 15 and 45 minutes for league play, (30% willing to travel 15-30 minutes and 33% willing to travel 30-45 minutes).
- The majority of those in other counties (41%) would travel 30-45 minutes maximum for league play. Slightly fewer than one quarter of these respondents would travel 45-60 minutes maximum (22%).

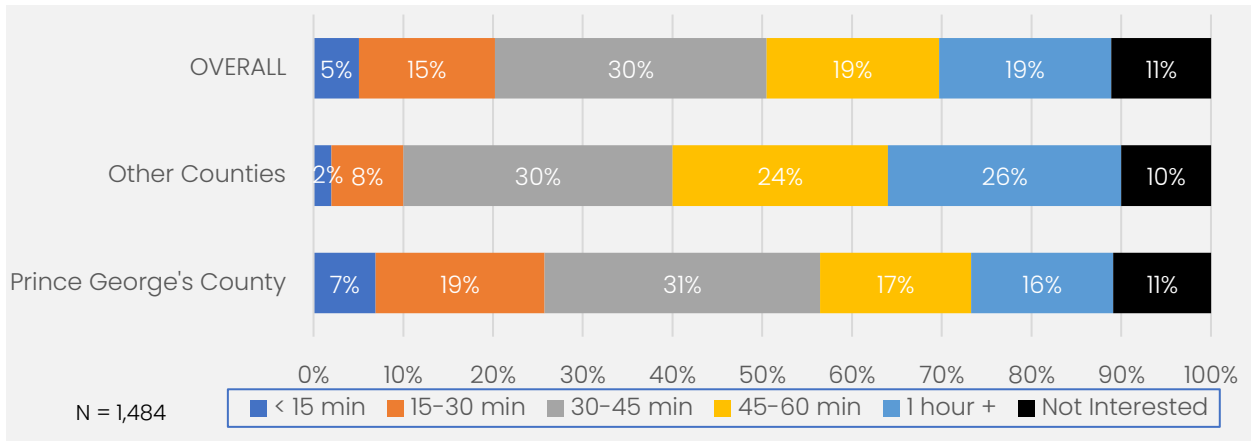
What is the maximum distance the participant would be willing to drive to participate in league play?



Distance Willing to Travel: Tournaments

- Overall, more respondents in all counties are willing to travel longer distances for tournaments than they are for other events (30% 30-45 minutes, 19% 45-60 minutes, and 19% over one hour).
- In Prince George’s County, 31% of residents would travel 30-45 minutes, 17% would travel 45-60 minutes, and 16% would travel over one hour to reach a tournament.

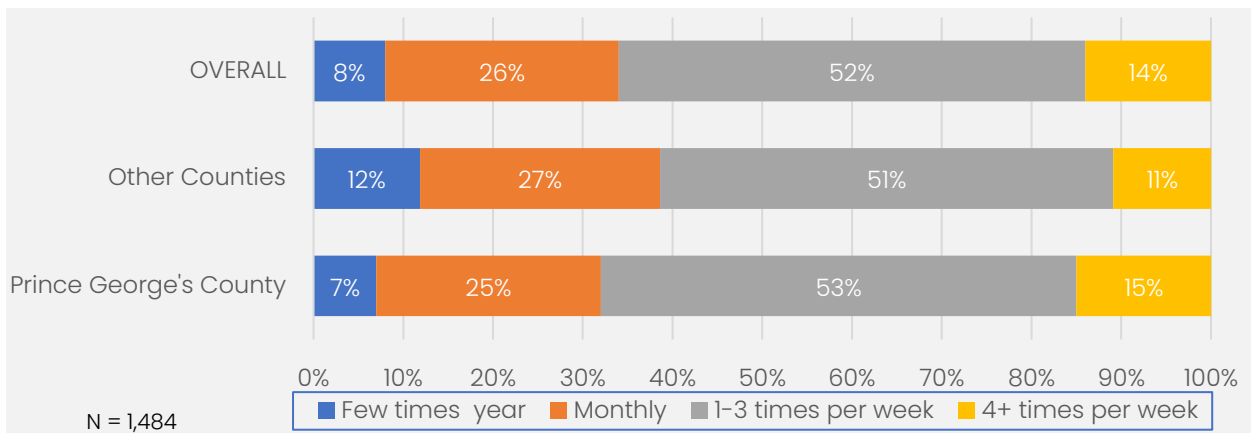
What is the maximum distance the participant would be willing to drive to participate in tournaments?



Frequent Use of Complex

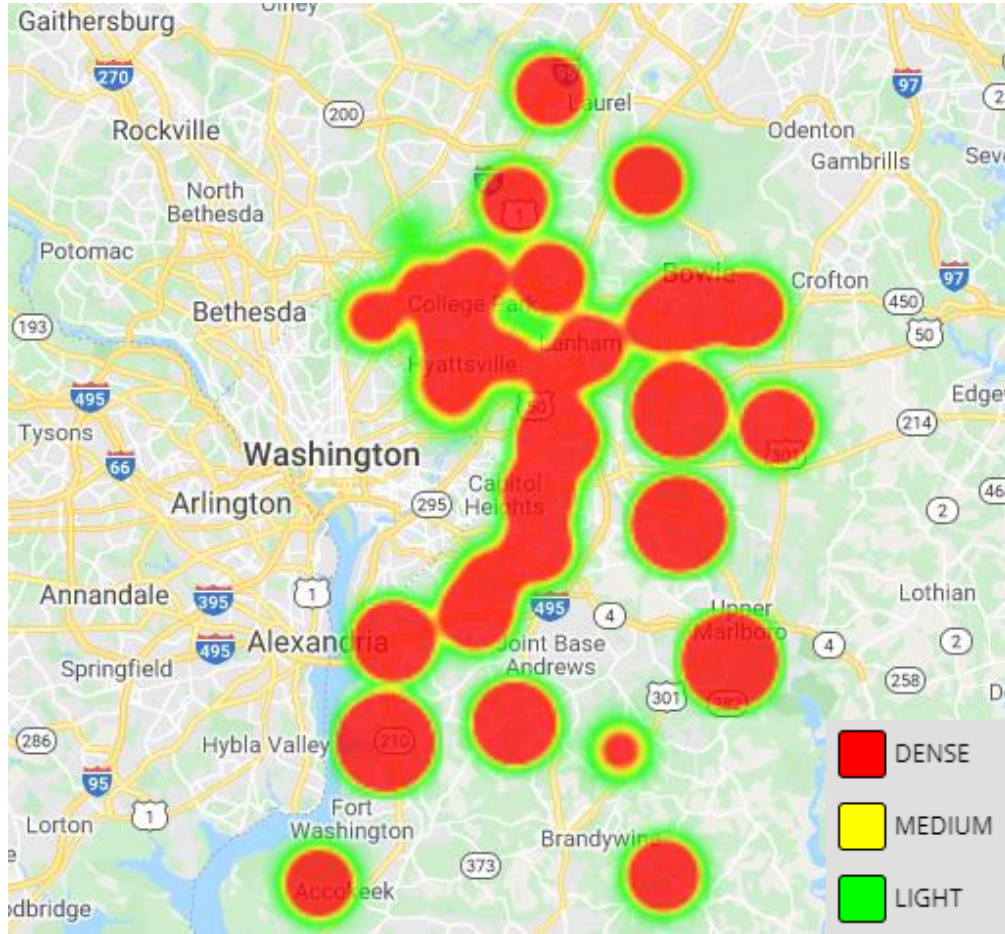
- Just over half of Prince George's County residents, 53%, as well as residents of other counties, 51%, would anticipate using the new Tennis Complex in Prince George's County 1-3 times per week.
- One quarter of overall participants anticipate that they would use it monthly (26%).
- Further, among those respondents who are classified as potential frequent users (n=979) 78% of Prince George's County residents and 83% of residents in other counties, would play 1-3 times per week.

How frequently would you anticipate the interested tennis participant(s) using the new Tennis Complex in Prince George's County?



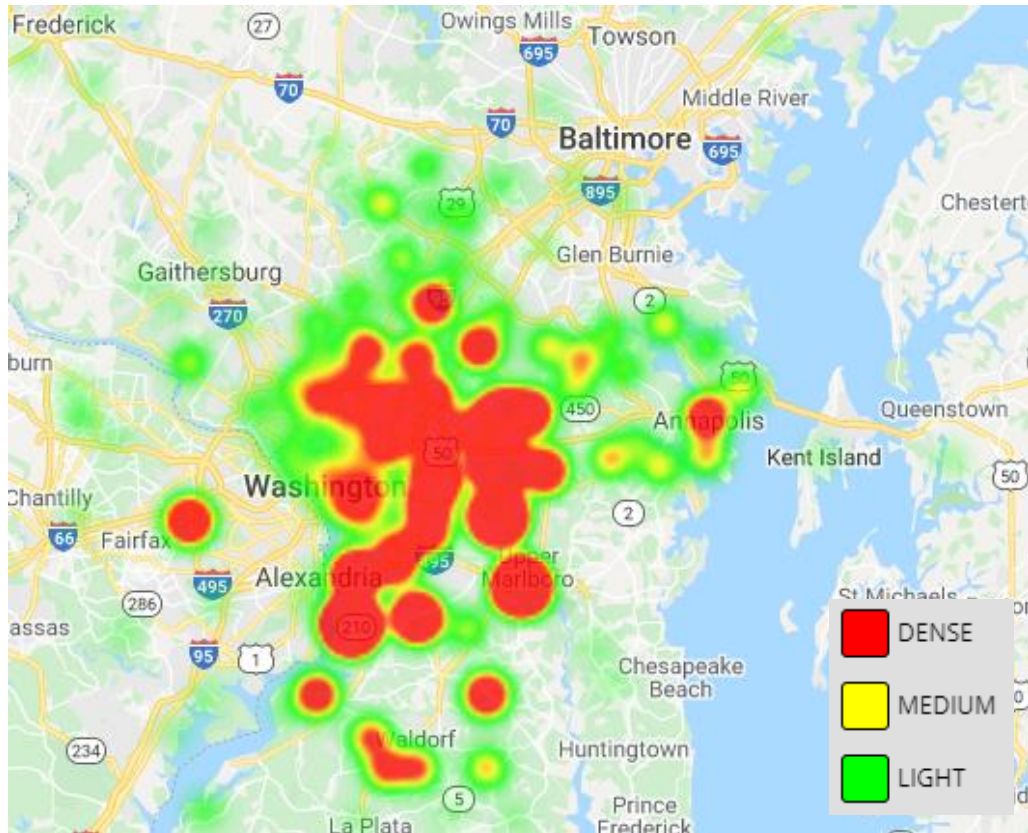
The following map illustrates respondents in Prince George's County that indicated they would play at the potential new tennis complex at least once a week.

Prince George's County Residents – Potential Frequent Users



The map below illustrates all respondents that indicated interest in playing at the potential new tennis complex at least once a week.

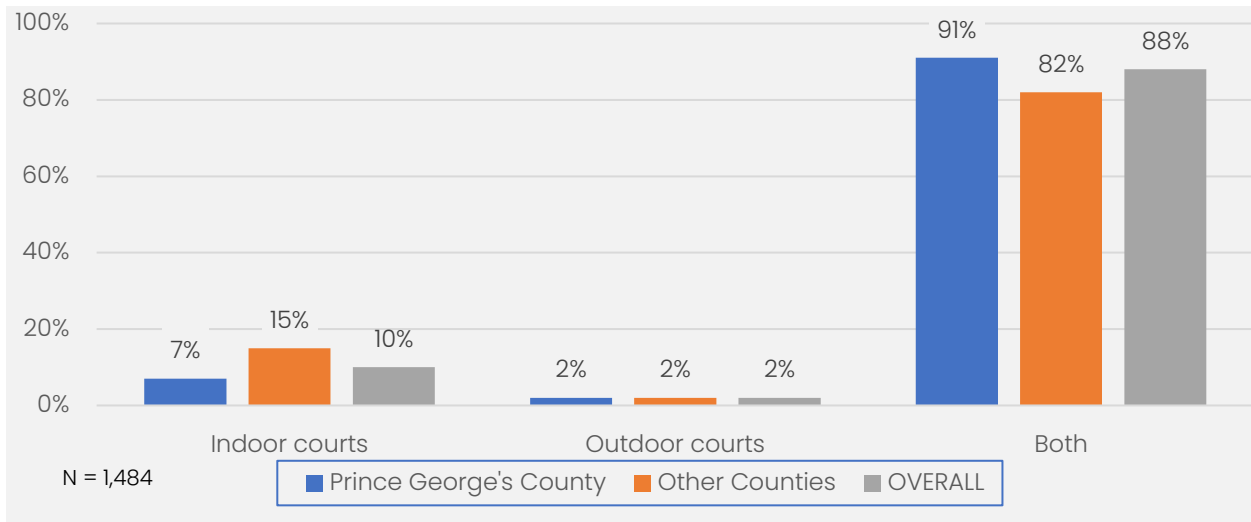
All Residents – Potential Frequent Users



Types of Courts Wanted

- Nine out of ten (91%) of Prince George’s County residents, and 88% of respondents overall, report that the interested participants would want to play on both indoor and outdoor courts.

What type of tennis courts would the interested participant(s) anticipate using?



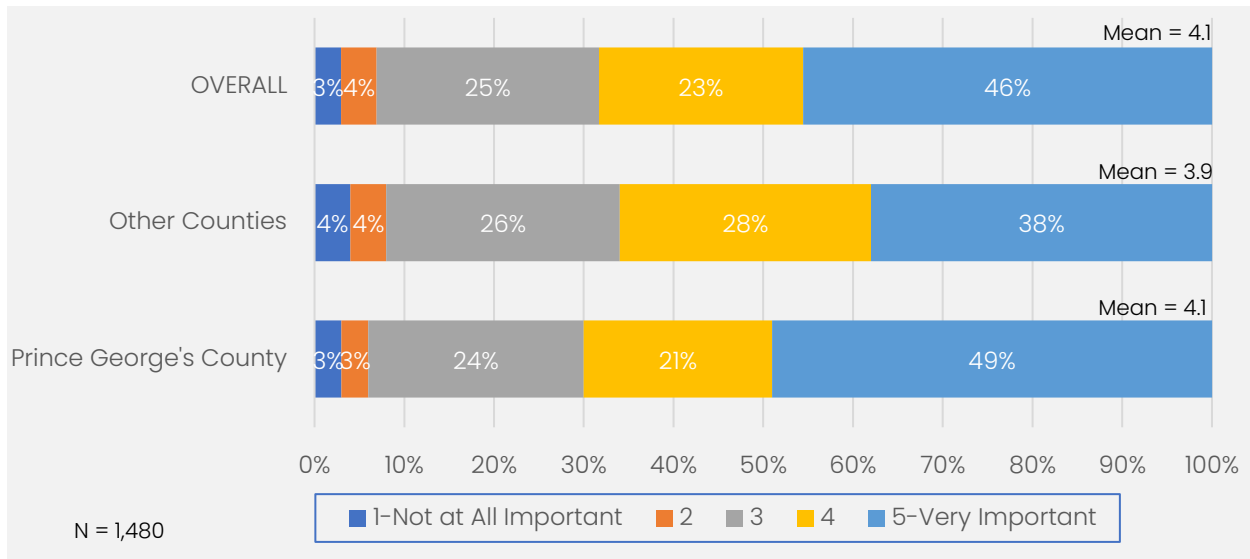
Importance of Facility Attributes

Survey respondents were asked to rank the level of importance of the following criteria for selecting a tennis facility: price, quality of programming, proximity to residence, overall quality of facility and number of courts on a scale of 1 to 5 scale where 1 is Not at all Important and 5 is Very Important.

Price

- When selecting a tennis facility, the majority of respondents, overall, say that price is very important (46%, mean score of 4.1 on a 5-point scale).
- More Prince George’s County respondents rated price as very important than did residents of other counties (49% as compared to 38%, respectively).
- Further, 4% more Prince George’s County residents who are potential frequent users agree that price is very important – 53% (as compared to 49%).

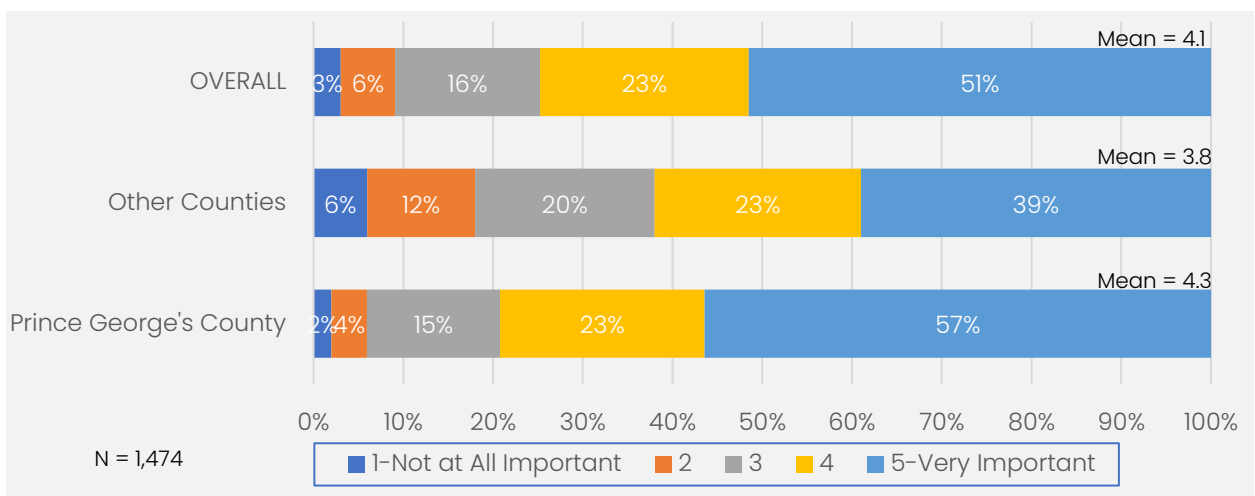
Level of importance – Price



Quality of Programming

- Overall, the majority of respondents agree that the quality of programming opportunities is at least somewhat important (74%) and more than half agree it is very important (51%, mean score of 4.1 on a 5-point scale).
- Fifty-seven percent (57%) of Prince George's County respondents rated the quality of programming opportunities as very important.
- Further, more residents who are potential frequent users agree that the quality of programming opportunities is very important (60% of Prince George's County and 43% of other county residents.)

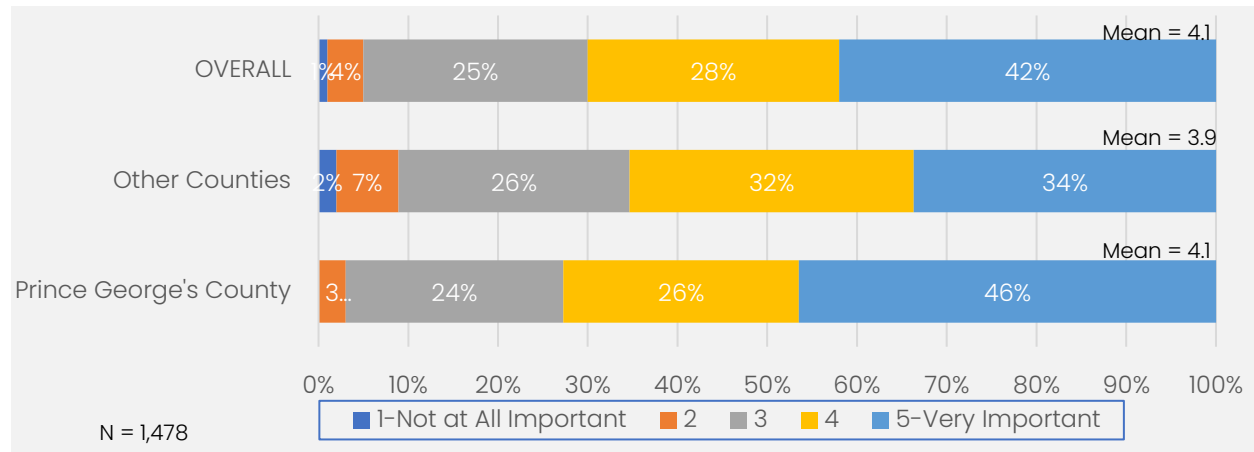
Level of importance – Quality of Programming



Proximity to Residence

- Just under three quarters (72%) of Prince George’s County respondents rated the proximity to their residence as a 4 or 5 on the 5-point scale (mean score rating of 4.1).
- The proximity is less important to respondents from other counties (mean score rating of 3.9).

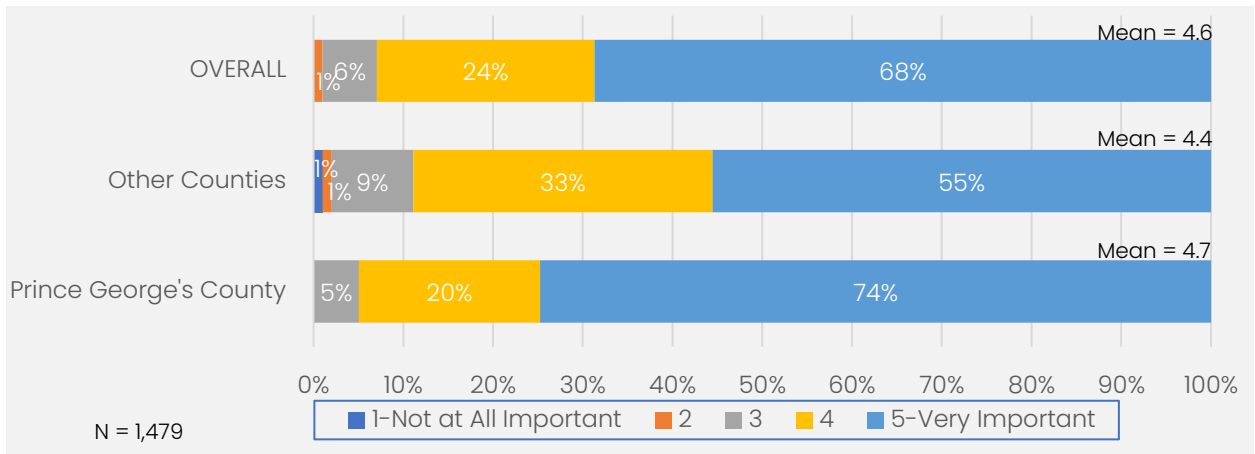
Level of importance – Proximity to Residence



Overall Quality of Facility

- The overall quality of the facility is highly important to all study participants. Overall, more than two thirds (68%) rated it as very important, and 92% rated as a 4 or 5 on the 5-point scale overall (mean score rating 4.6).
- Just shy of three quarters of Prince George’s County respondents (74%) rated the overall quality of the facility as very important and the mean score rating of 4.7 is the highest among all rated attributes.
- Residents who are potential frequent users agree that the overall quality of the facility is most important, with 78% of Prince George’s County and 60% of other county residents rating it as very important.

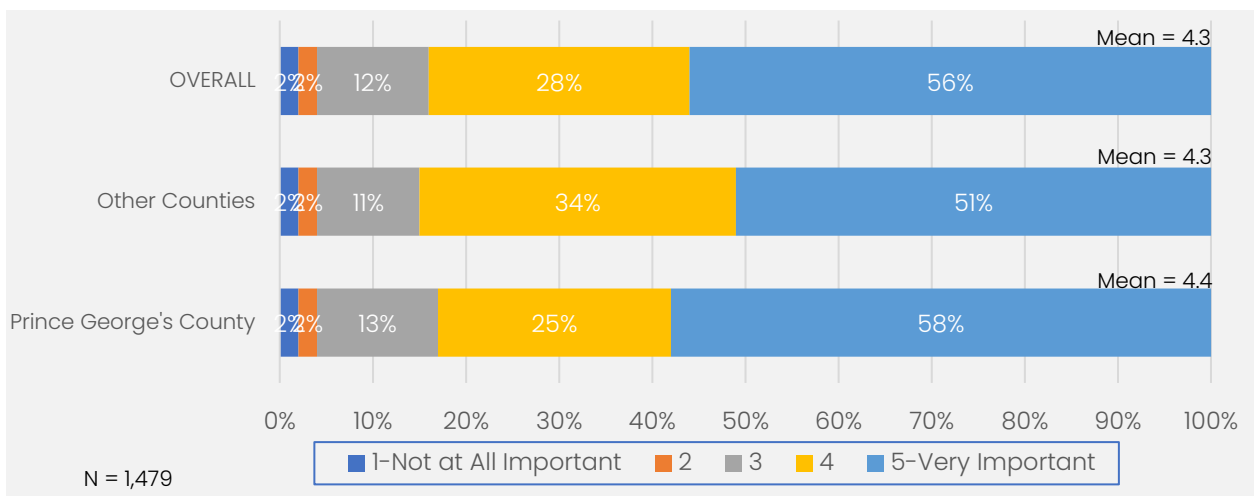
Level of importance – Overall Quality of Facility



Number of Courts

- More than half of all respondents rated the number of courts as very important (56%) and 84% rated as a 4 or 5 on the 5-point scale overall (mean score rating of 4.3).
- While a slightly higher amount of other county residents rated the number of courts as at least somewhat important compared to Prince George's County residents (85% as compared to 83%, respectively, more Prince George's County respondents (58%) rated this attribute as very important (as compared to 51% of other county residents).
- More residents who are potential frequent users agree that the *number of courts* is very important, with 63% of Prince George's County and 55% of other county residents rating it as such.

Level of importance – Number of Courts



Preferred Amenities

- Overall, access to organized tennis programs was the amenity most participants want to see in a new tennis complex (81%).

What amenities would you like to see in a new Tennis Complex? (PLEASE SELECT ALL THAT APPLY)

Desired Amenities	Prince George's County	Prince George's County Potential Frequent Users	Other Counties	Other Counties Potential Frequent Users
Access to organized tennis programs	83%	87%	76%	80%
Access to a local teaching professional	75%	76%	61%	65%
Spectator seating	68%	71%	48%	54%
Fitness center/group fitness area	65%	65%	33%	36%
Locker rooms	67%	66%	55%	54%
Pro shop (w/ equipment, apparel, & stringing services)	63%	69%	62%	61%
Concessions/food & beverage options	57%	57%	39%	41%
Multi-purpose meeting space	41%	42%	24%	29%
Other amenities (SPECIFY)	8%	9%	11%	12%
Number of Responses	1,565		979	

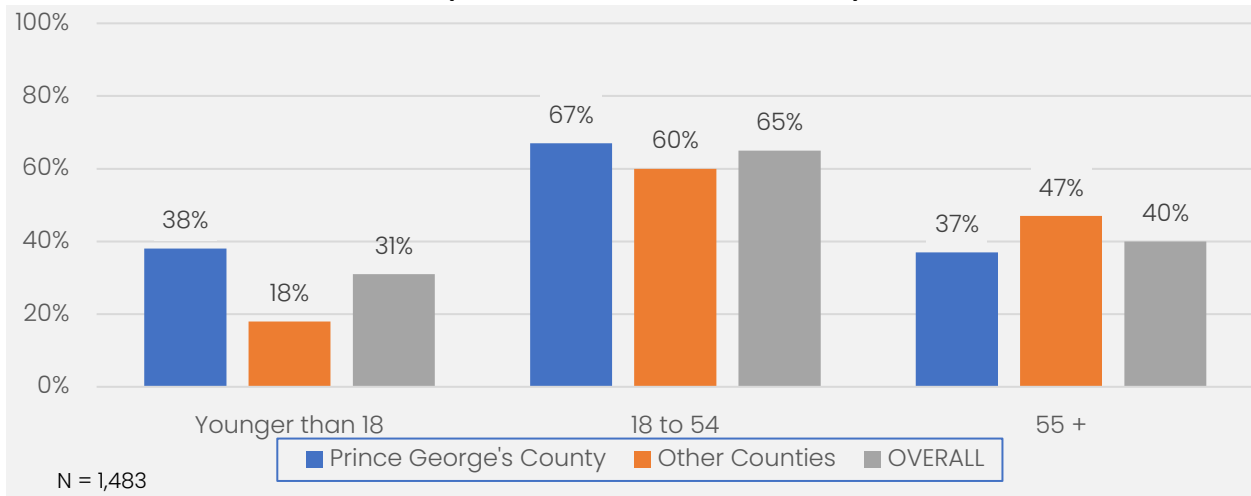
- Prince George's County participants are more interested in each of the possible amenities than are participants from other counties, with the exception of wanting a pro shop which was relatively similar.
- The 'other' responses cited by respondents included the following:
 - Wi-Fi
 - Hitting wall
 - Water fountains
 - Swimming pool
 - Walking track
 - Spa (showers, sauna, massage, etc.)
 - Ample parking
 - Playground
 - Organized league play
 - Ping pong tables
 - Childcare
 - Pickleball (and courts)
 - Outdoor lighting
 - Medical aid on-site
 - Accessible for all ability types
 - Racquetball
 - A/V services
 - Restrooms



Age of Interested Tennis Players

- Overall, 65% of respondents interested in playing tennis are between 18 and 54 years old.
- More of the players who are younger than 18 live in Prince George’s County (38%), and more residents who are 55 + live in the other counties (47%).

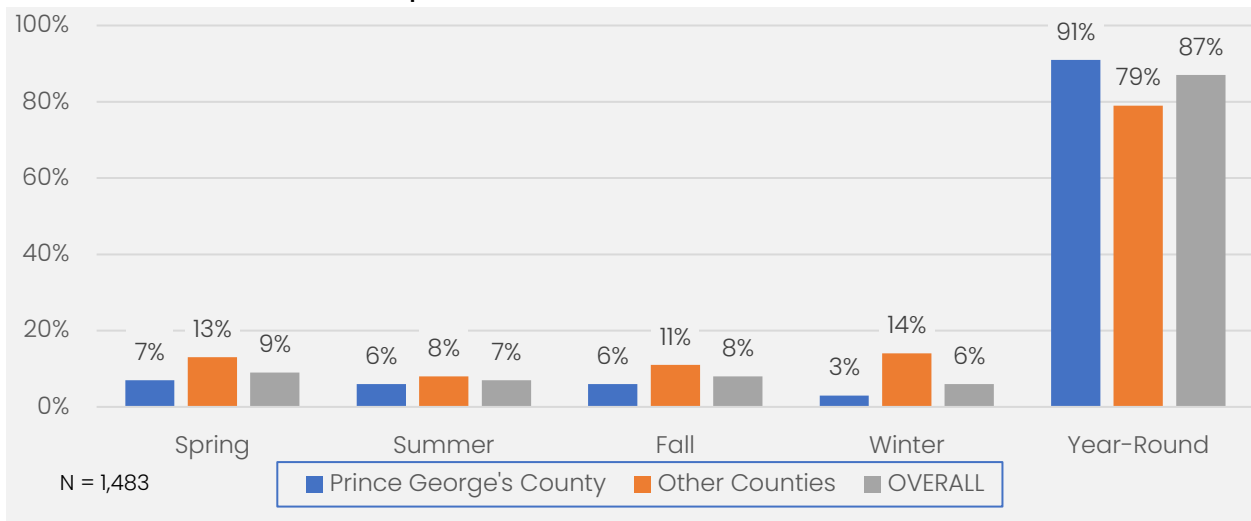
What age group does the interested tennis participant(s) in your household fall under?
(PLEASE SELECT ALL THAT APPLY)



Seasonality of Play

- The majority of respondents anticipate that they would use the new tennis complex year-round – 91% of Prince George’s County residents, 79% of other county residents, and 87% overall.

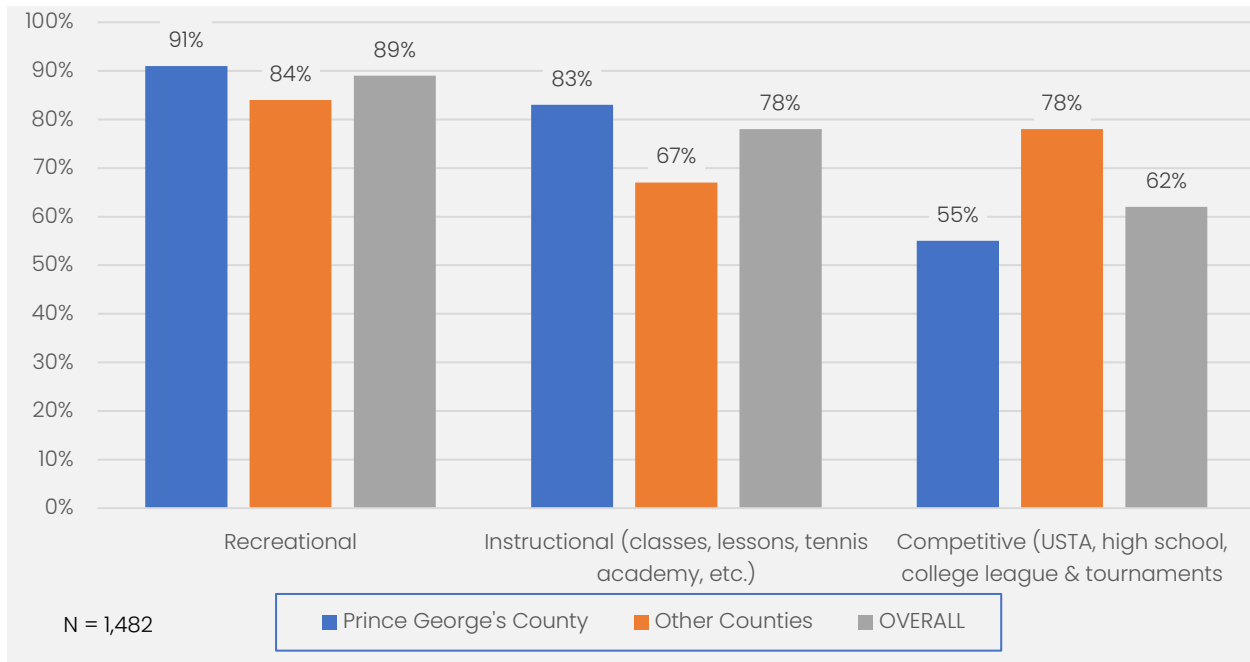
When would the interested tennis participant(s) anticipate using the proposed new Tennis Complex? (PLEASE SELECT ALL THAT APPLY)



Type of Play

- Prince George's County residents are mostly interested in recreational play (91% when compared to 84% in other counties) and instructional play (83% as compared to 67%, respectively), whereas more residents of other counties anticipate competitive play than do Prince George's County residents (62% as compared to 55%, respectively).
- A higher amount of Prince George's County residents who are potential frequent users anticipate competitive play when compared to all Prince George's County residents in general (64% as compared to 55%, respectively).

What types of tennis activities would the interested participant(s) anticipate participating in? (PLEASE SELECT ALL THAT APPLY)



Facilities Used in Prince George's County

- Prince George's County respondents currently play mostly at Watkins Regional Park (49%), whereas respondents in other counties most often play at the Tennis Center at College Park (44%).
- Other facilities are frequented as well, albeit, less often.

Where does the interested participant(s) currently play tennis in Prince George's County?

(PLEASE SELECT ALL THAT APPLY)

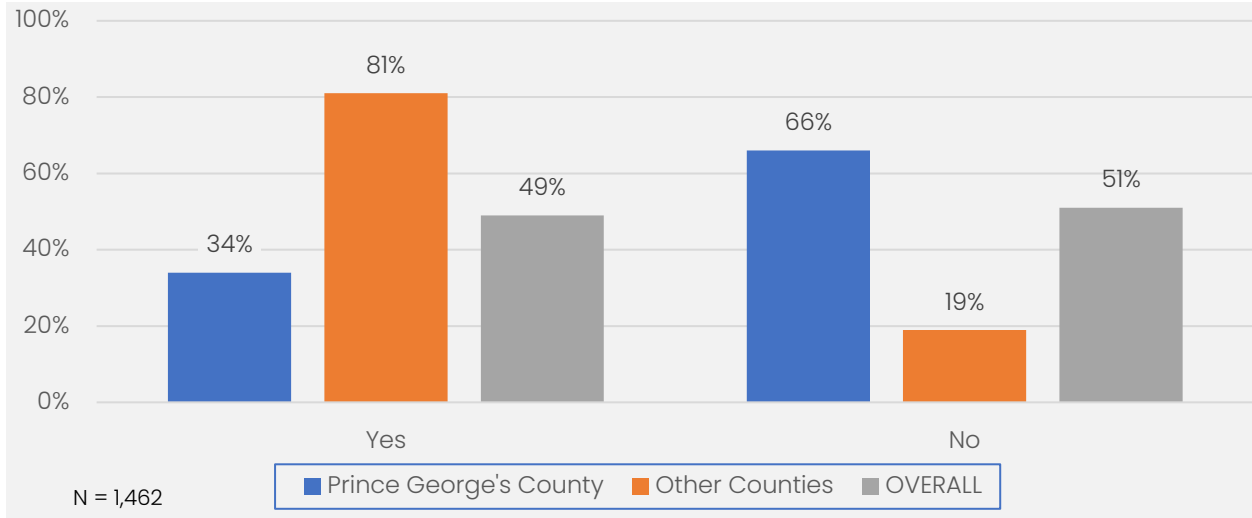
Where They Are Currently Playing in Prince George's County	Prince George's County	Prince George's County Potential Frequent Users	Other Counties	Other Counties Potential Frequent Users
Watkins Regional Park (includes Watkins Tennis Bubble)	49%	55%	38%	46%
Tennis Center at College Park (includes Junior Tennis Champions Center)	20%	24%	44%	44%
Cosca Regional Park	28%	34%	21%	28%
Allentown Aquatic and Fitness Center	25%	31%	16%	22%
Fairland Sports and Aquatics Complex	17%	21%	31%	32%
Tucker Road Athletic Complex	17%	21%	8%	11%
Kings Grant Community Park	11%	15%	12%	15%
Fox Hill Park	4%	3%	4%	3%
Vera Cape Weinback Park	2%	3%	3%	4%
Other (SPECIFY)	31%	31%	23%	24%
None of the Above	4%	3%	4%	3%
Nowhere at This Time	5%	3%	3%	2%
Number of Responses	1,480		977	

- Of those respondents that selected Other, the largest percentage indicated they currently play at Sport Fit Bowie. Additional facilities mentioned frequently included Braden Field Tennis Courts, Prince George's Community College, Country Club at Woodmore and various high school and neighborhood facilities.

Facilities Used Outside of Prince George’s County

- One third of Prince George’s County residents (34%) utilize tennis facilities outside of Prince George’s County, as do 8 in 10 (81%) of the other county residents.
- A higher amount of Prince George’s County residents who are potential frequent users utilize tennis facilities outside of Prince George’s County (40% as compared to 34% of general county residents).

Does the interested participant(s) utilize tennis facilities outside of Prince George's County?



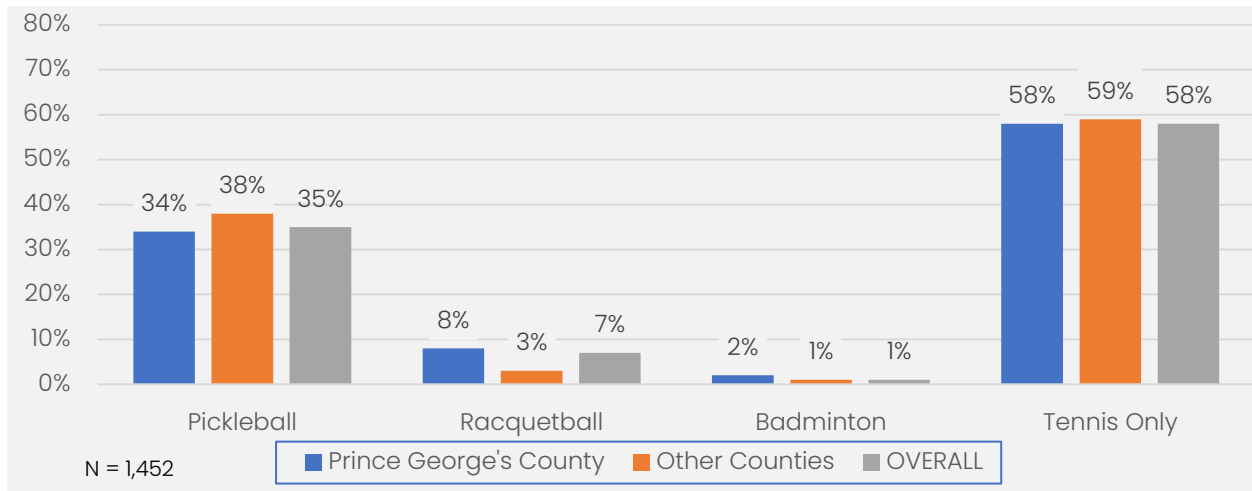
- Facilities outside of Prince George’s County frequently mentioned included Southeast Tennis and Learning Center, East Potomac Tennis Center, Fort Lincoln, and various others including community parks/high schools in Montgomery and Anne Arundel counties.

Interest in Playing Other Racquet Sports

- Overall, more than half of study participants would only play tennis at the new tennis complex in Prince George’s County (58%).
- One third of all respondents would play Pickleball as well (35%).

Please indicate if you or an individual in your household would anticipate playing a racquet sport other than tennis at a new Tennis Complex in Prince George's County.

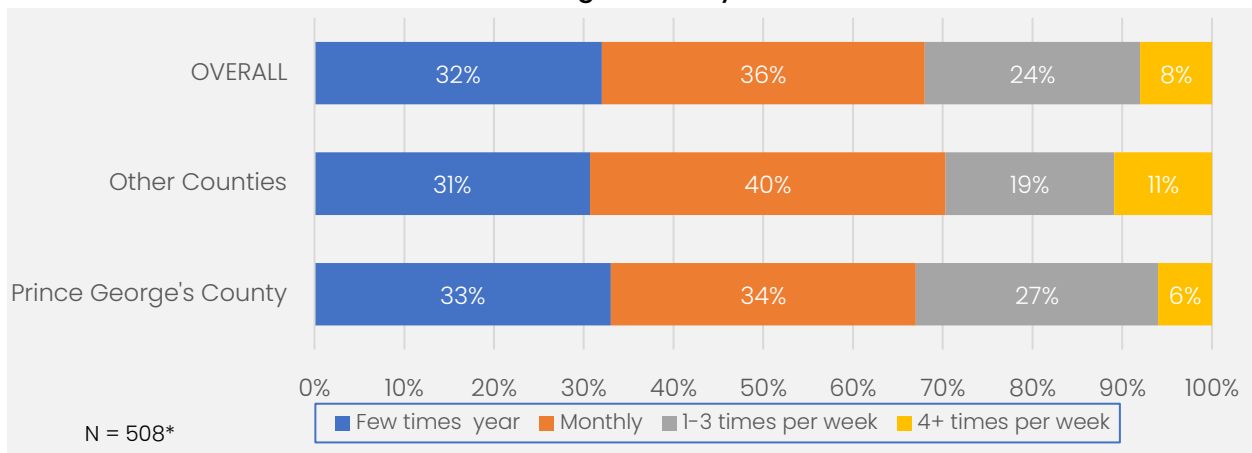
(PLEASE SELECT ALL THAT APPLY)



Interest in Pickleball Use

- More than one quarter of Prince George’s County participants would play Pickleball 1-3 times per week (27%) and just over a third would do so monthly (34%)
- The majority of other county residents would play Pickleball monthly (40%).

How frequently would the participant play Pickleball at a new Tennis Complex in Prince George's County?



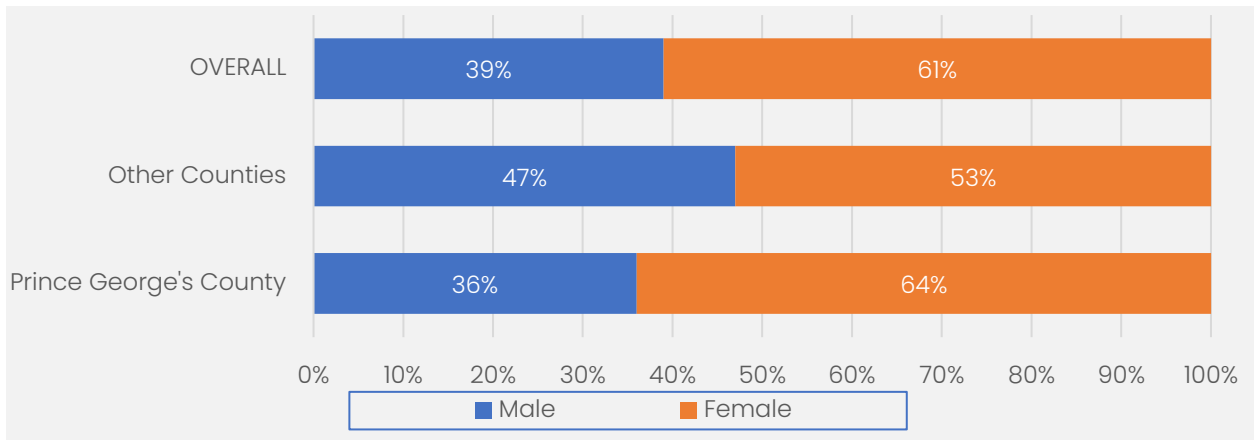
Note: * Please note the small base size when considering the responses to this question.

Demographics of Survey Respondents

The following charts summarize the demographics of survey respondents in terms of gender, age, race and highest level of education completed.

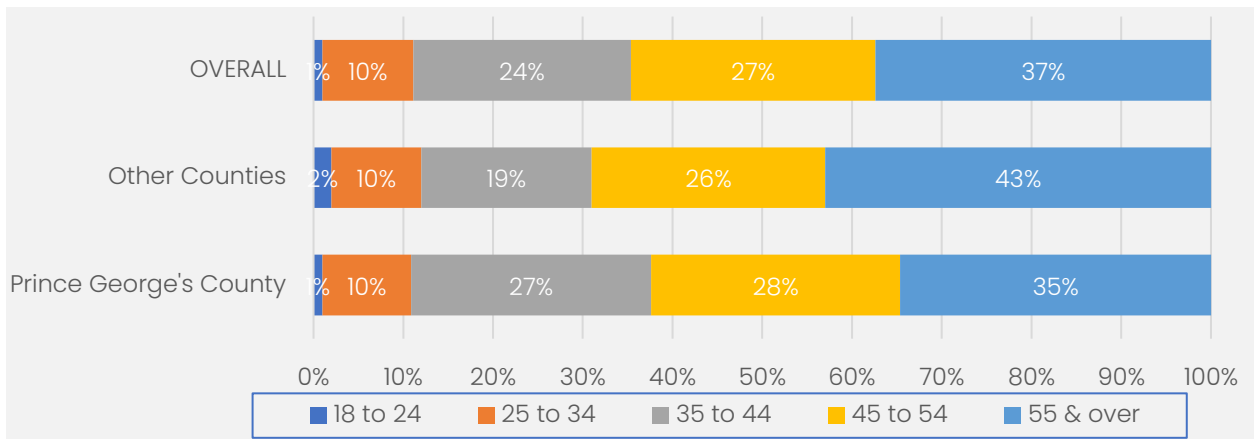
Gender

- The gender of participants skewed naturally.



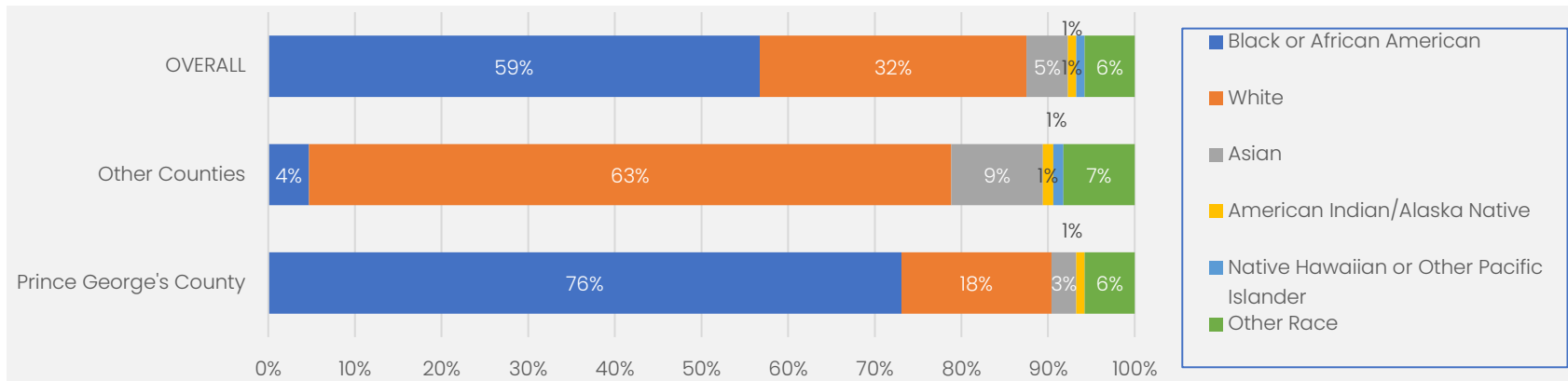
Age

- Most of the participants in the study were over 35 years old.



Race

- Race skewed naturally according to census information.



Highest Level of Education Completed

- The majority of respondents, overall, reported having earned an Associate degree (35%) or a Bachelor's degree (35%).

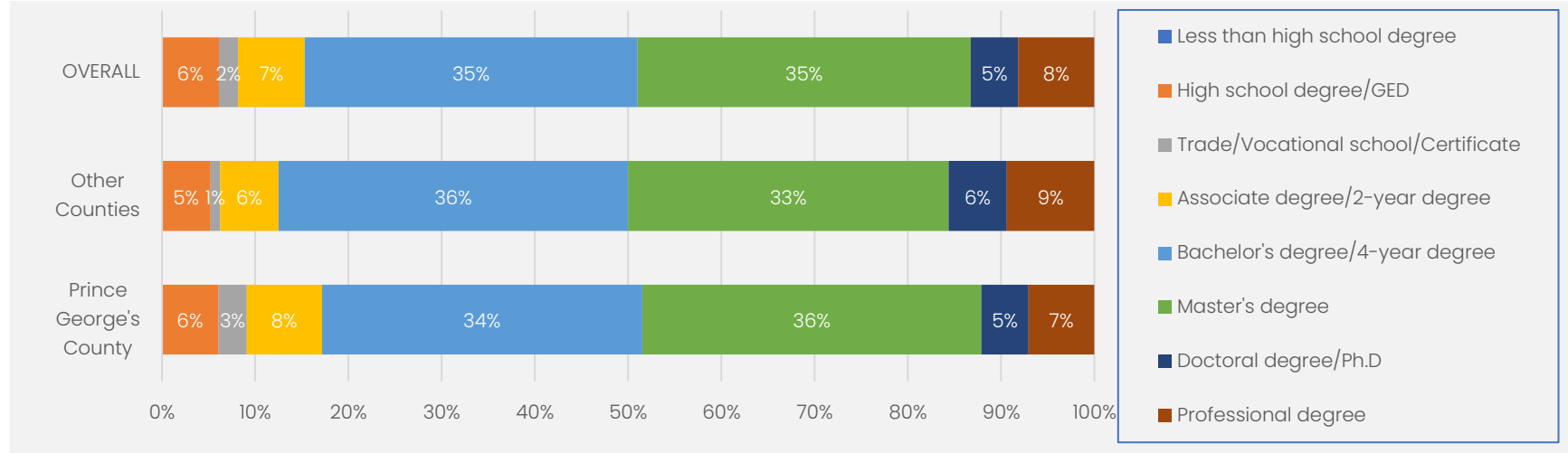


EXHIBIT 2 – PROGRAM-RELATED INFORMATION PROVIDED BY M-NCPPC

This exhibit includes information provided by M-NCPPC related to tennis programs, rental opportunities, partnerships and events offered at Cosca Tennis Bubble (CTB), Fairland Sports and Aquatics Complex (FSAC) and Watkins Tennis Bubble (WTB).

Tennis Programs

M-NCPPC actively programs its existing tennis facilities with multiple tennis offerings including the following.

Classes

- Children – beginner 1
 - Ages 6-11
- Children – beginner 2-3
 - Ages 6-11
 - 2 years tennis experience
- Children Quick Start
 - Ages 10 and under
- Pre School beginners
- Home School tennis classes (WTB)
- Children – intermediate
 - Ages 6 to mixed ages
- Teens – advanced
 - Ages 13-17
 - High School play level or formal tournament experience
- Adults – beginner
 - Technique and drills
- Adults – intermediate
- Adults – double strategy

Camps, Clinics and Lessons

- Tennis camps Ages 6-12
 - 4 two-week sessions
- Tennis clinics (FSAC) ages 6 -17 (divided by ages and abilities)
 - 8 one-week sessions
 - 9:00 AM to 12:00 PM
- Private and semi-private lessons

Cosca Tennis Bubble, Fairland Sports and Aquatics Complex and Watkins Tennis Bubble all offer at least one certified tennis professional.

The following summarizes the total number of class participants from FY 2019 through FY 2021

FY19	FY20*	FY21**
2,199	1,820	687

Notes: *Programs were interrupted due to COVID closedown.

**Programs were smaller due to COVID restrictions.

Source: M-NCPPC.

Rental Opportunities

The following summarizes rental opportunities at CTB, WTB and FSAC.

- *Contract Play* - Guaranteed to have same court and time for 36 weeks, offered in one- or two-hour time blocks
- *Spot or Open Play* - Call to make reservations
- *After Hour Socials or League Play* - Weekends (September - April)

The following summarizes the number of contracts from FY 2018 through FY 2021.

Facility	FY18 # of Contracts	FY19 # of Contracts	FY20 # of Contracts	FY21 # of Contracts
CTB	25	28	17	27
WTB	45	38	33	36
FSAC	69	66	45	62
Total	139	132	95	125

Source: M-NCPPC.

Partnerships and Events

M-NCPPC partners with multiple organizations to program tennis facilities in the County. The following summarizes current partnerships and events at CTB, WTB, FSAC and Tennis Center at College Park.

- Cosca and Watkins Tennis facilities have hosted the Prince George’s County Public Schools (PGCPS) High School Tennis Championships for over eight years.
- Cosca, Fairland, and Watkins Tennis Bubbles offer competitive Junior Team Tennis through the Maryland Junior Tennis League during the fall and winter months. These United States Tennis Association (USTA) sponsored events have taken place for over 15 years.
- Cosca, Fairland, and Watkins Tennis Bubbles host year-round competitive adult league play, which are USTA sponsored events.
- M-NCPPC has partnered with the Prince George’s County Tennis and Education Foundation (PGTEF) for more than 20 years. PGTEF is a USTA Community Tennis Association that provides tennis instruction, competition, mentoring, educational

assistance, and scholarships for Prince George’s County youth. PGTEF provides these activities at the Watkins Tennis Bubble.

- M-NCPPC has partnered with the USTA for many years with tennis clinics, Junior Team Tennis programs, special tennis events and other tennis programs.
- FSAC offers pickleball drop-in days. The program started December 1, 2021. Tennis Manager is working with the Prince George’s and Montgomery County Pickleball Ambassadors to assist with promotional efforts for this new program. Four courts are available Monday through Friday, 12:00 PM – 3:30 PM; it is currently being offered as a drop-in program. Attendance is being tracked for this new offering.
- The Department of Parks and Recreation’s Youth and Countywide Sports Division hosted its first “Try Pickleball” event at Mitchellville South Park in Bowie. This free event introduced individuals ages nine and up to the sport.
- “Pickleball with Norma”, is a program offered at the Lake Arbor Community Center and introduces pickleball to the senior community.
- M-NCPPC frequently partners with JTCC which manages the Tennis Center at College Park. This organization provides 8-week tennis instructional workshops and activity programs for youth participating in M-NCPPC Kids Care/Afterschool programs. JTCC also provides youth tennis clinics throughout the Prince George’s County Department of Parks and Recreation facilities (fall and spring sessions).
- A \$6,700 USTA grant was recently awarded to the M-NCPPC for the CTB, FSAC, and WTB, to assist with efforts to grow the game of tennis in Prince George’s County.
- Watkins Tennis Bubble has sponsored an annual overnight trip (for the past 6 years) for the tennis community to attend the US Open Tennis Tournament in Flushing Meadows, New York.
- Recently hosted “Watch Parties” on a large screen on the lawn in front of the Watkins Tennis Bubble for the Citi Open Tennis Tournament in Washington, D.C., and the US Open Tennis Tournament in New York.

Supply of Pickleball Courts in Prince George’s County

The following table provides a list of select pickleball facilities in the County. It should be noted that this list does not reflect an all-inclusive inventory of pickleball facilities and that there are other indoor and outdoor facilities that offer temporary pickleball court lining and portable nets.

Facility Name	County Area	Number of Full-Courts	Number of Side-Courts (Number of Short Courts)	Major Sport Use Type: Basketball, Volleyball, Pickleball, Futsal, etc.	Permanent Painted Lines (Yes or No)
College Park Community Center	Northern	1	2	Pickleball, Volleyball, Futsal	Yes
Vansville Community Center	Northern	1	2	Basketball, Pickleball	Yes
Bowie Community Center	Central	1	2	Basketball, Pickleball	Yes
Lake Arbor Community Center	Central	1	2	Basketball, Pickleball, Badminton	Yes
Patuxent Community Center	Central	1	2	Basketball, Pickleball, Volleyball	Yes
Peppermill Community Center	Central	1	0	Basketball, Volleyball, Pickleball	Yes
Baden Community Center	Southern	1	1	Basketball, Volleyball, Pickleball Futsal	Yes
Southern Aquatics and Recreational Complex	Southern	2	4	Basketball, Volleyball, Pickleball Futsal	Yes
Southern Technical Recreation Complex	Southern	2	4	Basketball, Volleyball, Pickleball Futsal	Yes
Suitland Community Center	Southern	1	4	Basketball, Volleyball, Pickleball Futsal	Yes

Source: M-NCPPC.

In addition, as of December 1, 2021, Fairland Tennis Bubble offers four (4) pickleball courts available Monday through Friday from 12:00 to 3:30 p.m. Currently, pickleball is only offered as a drop-in activity at this facility. However, as demand grows there are plans to create pickleball classes.

Summary of Ongoing Efforts to Increase Access to Pickleball Courts

Prince George’s County Department of Parks and Recreation has been actively increasing access to pickleball courts. Based on information provided by M-NCPPC, the following summarizes recently completed and ongoing efforts.

- Purchasing three (3) permanent pickleball posts/nets to be installed at Lakeland Park, which features three existing dedicated pickleball courts.
- Adding appropriately painted lines at South Bowie Community Center’s outdoor tennis courts.
- Painting new lines at Foxhill Park’s outdoor tennis courts.
- Evaluating transitioning tennis courts at Mitchellville South Park into a dedicated pickleball site.
- Added pickleball lines at Rollins Avenue Park.

12. LIMITING CONDITIONS AND ASSUMPTIONS

This analysis is subject to our contractual terms as well as the following limiting conditions:

- This analysis has been prepared for Maryland Stadium Authority (Client) on behalf of the M-NCPPC for its internal decision-making purposes associated with a proposed new indoor/outdoor tennis complex and should not be used for any other purposes without the prior written consent of Crossroads Consulting Services LLC.
- This report should only be used for its intended purpose by the entities to whom it is addressed. Reproduction or publication by other parties is strictly prohibited.
- The findings and assumptions contained in the report reflect analysis of primary and secondary sources. We have utilized sources that are deemed to be accurate but cannot guarantee their accuracy. No information provided to us by others was audited or verified and was assumed to be correct.
- Although the analysis includes findings and recommendations, all decisions relating to the implementation of such findings and recommendations shall be the Client's responsibility.
- Estimates and analysis regarding the proposed new tennis complex are based on trends and assumptions and, therefore, there will usually be differences between the projected and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.
- Although this analysis utilizes various mathematical calculations, the final estimates are subjective and may be influenced by our experience and other factors not explicitly stated.
- We have no obligation, unless subsequently engaged, to update this report or revise this analysis as presented due to events or circumstances occurring after the date of this report.
- The quality of ownership and management at a new tennis complex has a direct impact on economic performance. This analysis assumes responsible and competent ownership and management. Any departure from this assumption may have a significant impact on the findings in this report.
- Multiple external factors influence current and anticipated market conditions. Although we have not knowingly withheld any pertinent facts, we do not guarantee that we have knowledge of all factors which might influence the operating potential of the proposed new tennis complex. Due to quick changes in the external factors, actual results may vary significantly from estimates presented in this report.
- The analysis performed was limited in nature and, as such, Crossroads Consulting Services LLC does not express an opinion or any other form of assurance on the information presented in this report.
- The analysis is intended to be read and used in its entirety. Separation of any portion from the main body of the report is prohibited and negates the analysis.
- In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by the Client and may not be relied upon by any party for any purpose including any matter pertaining to financing.