

Chapter 2

Customer Analysis

INTRODUCTION

A parks and recreation agency should be managed much like a business that measures its success based on how well it meets the needs of its customers. The basic premise behind this philosophy is that a park and recreation agency serves a specific customer base and provides a specific service to its customers. Therefore, it is important that this plan analyze to whom the Township's park and recreation services should be directed.

To be assured that the park and recreation services recommended in subsequent chapters of this plan are being planned to effectively accommodate customers' needs, this chapter:

- identifies the appropriate role the Township should play in satisfying public park and recreation needs;
- defines a customer base and customer service areas;
- examines the community, including the people who live and work here; and
- projects changes in the profile of the customer base that may have implications on the services to be provided.

TOWNSHIP RESPONSIBILITY TO PROVIDE PARKS AND RECREATION SERVICES

All levels of government have a responsibility to provide adequate parks and recreation services. Each level fulfills its responsibility in a different manner. It is important to distinguish between the roles typically assumed by townships and the roles of higher levels of government so that a starting point for discussing local, park and recreation issues can be established. Focus can then be given toward planning for a well rounded parks and recreation services system that is consistent with local ideals and philosophies.

A Hierarchy of Responsibilities

A hierarchy of different types and sizes of parks should make up a park system within any given region. This hierarchy recognizes that no one level of government is responsible for providing the entire mix of parks and recreation facilities or recreation programs that the public expects to have provided for their use. The federal, state, county, and municipal governments all have an inherent responsibility to provide places, facilities, and programs for recreation.

Federal, state, and county governments provide large-sized parks of national, statewide, and regional importance with a focus on passive recreation. Conversely, municipalities provide small parks to meet the day-to-day and close-to-home active recreation needs of people. Aside from size, the primary distinction between parks owned by a municipality and those owned by higher levels of government is found in the geographic areas that they serve. For example, municipal parks are usually designed to serve residents of just one community. Parks provided by higher units of government are supposed to serve larger geographical areas comprised of many municipalities.

Federal, state, and county parks typically preserve natural, scenic, and historic features and provide opportunities for people to participate in passive outdoor recreation. Providing recreation facilities at these parks is often an objective secondary to preservation. While important features may be preserved at municipal parks, their primary objective is usually to provide recreation facilities.

Recreation programming at federal parks generally include interpretive lectures that explain to the participant and park visitor the qualities of the site that make it nationally significant. Organized recreation activities offered at state parks typically involve guided walks and talks centered around the park's natural and historic resources. County governments typically provide recreation programs aimed at increasing the environmental awareness of its citizens. Special activities such as cultural arts courses, concerts and festivals are common at county parks.

Horsham Township recognizes and supports the important role of federal, state, and county parks in the context of a regional park and recreation system. These parks offer township residents unique opportunities for recreation, and they provide places for day-use pursuits that are often beyond the scope of the Township to offer. Campgrounds, fishing and boating lakes, swimming areas, historic sites, and expansive open space preserves are just some of the facilities that are found at these larger parks. The needs of Horsham Township residents would not be served as well without these recreation resources, recreation programs included.

Not all parks and recreation services need be owned and managed by the government, nor are they. Numerous quasi-public and private entities also play a significant role in satisfying the recreation needs of a community. These include school districts; authorities; utilities and public service companies; conservation and historical organizations; commercial recreation enterprises; athletic associations; civic, religious and youth organizations; homeowners associations; private clubs; and private lands impacted by easements and deed restrictions. The supply of non-government recreation resources in Horsham and in surrounding communities helps to satisfy the needs of township residents.

Understanding precisely what Horsham Township and other area-wide public, quasi-public, and private providers of recreation offer township residents is important for making appropriate recreation planning decisions. Chapter 3 will examine the supply base.

Typical Responsibilities of Townships

Townships assume the duty of meeting the recreation needs of a community's population by developing several strategically located parks throughout the community, parks that are close to where residents live and easily and safely accessible by foot, bicycle, and car.

Townships generally support the concept of providing two types of parks designed to serve different service areas: community parks and neighborhood parks. The sizes of these parks reflect the populations they are intended to serve. Large "community parks" are provided to serve a large segment, if not all, of a community's population. Smaller "neighborhood parks" are provided to serve relatively smaller, more geographically localized populations.

Township parks, particularly neighborhood parks, are typically developed to conform to the recreation interests of nearby residents. If senior citizens make up the majority of nearby residents, facilities such as shuffleboard courts, paved walkways, benches, and quiet leisure areas might best serve the needs of the local population. On the other hand, facilities such as basketball and volleyball courts and baseball fields might be appropriate in an area of predominantly young and middle-aged adults.

Recreation programs provided by townships are diverse. They range from those geared toward satisfying the active recreation needs of the public (i.e. sports clinics, leagues and tournaments) to those which are more passive-oriented (i.e. arts/crafts/hobbies classes, nature studies, drama). Townships commonly satisfy the recreational needs of all community residents regardless of age, sex, race, creed, socio-economic status and handicap.

THE CUSTOMER BASE

Serving Resident and Nonresident Needs

In order to develop goals and policies to meet customers' future needs for parks and recreation services, it is necessary to clearly understand who should be served. An appropriate customer base must be defined.

There is no question that Horsham Township provides parks and recreation services to meet the needs of its residents. Persons who live in Horsham are the principal beneficiaries of the parks, facilities and programs that the Township offers. But there is another segment of the user group population that also benefits: nonresidents.

The Township does not prohibit people who live outside the community from using its parks or participating in its programs. In fact, some grant programs require as a condition to receiving funding that parks and programs be open for general public use regardless of place of residence. The reciprocal use of a region's collective resources is a key ingredient to maintaining the vitality of an overall park and recreation system capable of meeting the needs of all regional residents. This concept is evident in the knowledge that Horsham residents recreate at parks in neighboring communities and, conversely, residents in neighboring municipalities come to Horsham to recreate.

Although no statistics are available to reveal just how broad of an extent nonresident use and participation is in Horsham, it is a factor that must be considered in the planning process. The degree to which the Township desires to serve as a "provider" of recreation opportunities to nonresidents must be decided. The first step in making such a decision is to evaluate the nonresidents.

Nonresidents can be divided into two groups: 1) persons who do not live in the township, but work here, and 2) persons who neither live nor work in the township. Dividing nonresidents into these two groups is essentially a way of describing them based on whether they are direct taxpayers to Horsham Township:

- The first group of nonresidents are considered to be direct taxpayers because they pay occupational privilege tax and possibly earned income taxes to the Township. These taxes are a significant annual revenue source that supports the cost of providing municipal services, including parks and recreation.
- The latter group of nonresidents are indirect taxpayers since Horsham Township does not assess any taxes directly against them. However, these persons pay state and federal taxes, part of the revenue from which is *indirectly* distributed to local governments, including Horsham Township, through various assistance and subsidy programs.

Customer Base Priorities

By applying the above principles, the customer base can be profiled into three publics with each having a certain priority to which the Township should respond when planning and providing park and recreation services:

- **Primary Customers** – Because of Horsham Township's governmental responsibility to its citizens, the Township should place emphasis on meeting the park and recreation needs of its resident population. The Township should be most responsive to satisfying residents' needs, interests, and preferences as a first priority.
- **Secondary Customers** – Because Horsham receives a greater proportion of its annual budgetary funding from nonresidents who are direct taxpayers than from indirect taxpayers, it is logical for the Township to assume a greater fiscal accountability to them. Therefore, nonresidents employed in Horsham are assigned second priority as customers whose park and recreation needs should be met by the Township.
- **Tertiary Customers** – Meeting the needs of persons that both live and work outside of Horsham should not be a focus of Township efforts to expand parks and recreation services. Although the Township should not restrict such nonresidents from using or participating in its services, a concerted effort need not be made to tailor its services to expressly satisfy their needs. Therefore, this customer group is third in priority and generally should not receive preferential consideration over primary and secondary customers.

Customer Service Areas

Because local recreation areas, particularly neighborhood parks, are meant to be places where residents can recreate for short periods of time close to their homes, they should be conveniently and safely accessible by means of sidewalks, walking paths, bicycle routes, and other linkages that connect to residential areas. The automobile is intended to be a secondary mode of transportation used to reach parks, except that community parks are likely to be accessed more by car than by walking or biking.

Heavily traveled roadways, such as Easton Road, Horsham Road, Limekiln Pike, and Norristown Road, can make access to parks in Horsham Township difficult for pedestrians and bicyclists. Therefore, these roads can be used to divide the population of the township and to create separate geographic areas that can be studied individually in this plan. Figure 1 maps five areas termed "customer service areas."

The customer service areas should be served by sufficient recreation facilities so that the customers of each respective area will not have to cross the identified roads to satisfy their neighborhood-level park and recreation needs. The findings and recommendations presented throughout the remainder of this plan are organized by these areas. This organizational format allows park and recreation needs to be more precisely identified, resulting in more effective plan recommendations tailored to the uniqueness of each area. The customer service areas are described below.

- **Customer Service Area A** is approximately 3,770 acres in size and bounded by Horsham Road, Maple Avenue, Easton Road, County Line Road, and Lower State Road. The area includes the neighborhoods of Chestnut Creek, Fairway Estates, and Valley View Estates. Major business and employment centers include the Willow Grove Naval Air Station and the Commonwealth Corporate Center.
- **Customer Service Area B** is approximately 1,400 acres in size and bounded by Easton Road, Blair Mill Road, and County Line Road. The area includes the neighborhoods of Sherwood Village, Meetinghouse Village, Woods Edge, Hidden Creek Estates, Horsham Terrace, Clearbrook Village, Oak Hill Farms, and Horsham Heights. Business and employment centers are predominately located along Easton Road.
- **Customer Service Area C** is approximately 2,290 acres in size and bounded by Welsh Road, Limekiln Pike, Horsham Road, and the western boundary of the township where it abuts Montgomery Township. The area includes the neighborhoods of Glen Acres, Squires Knoll, Squire Estates, Hideaway Hills, Talamore, Oak Terrace Farms, and Greystone. The English Village Apartments, a large residential rental community, is also located in this area. The English Village Shopping Center that is being rebuilt will serve as a major business and employment center.
- **Customer Service Area D** is approximately 1,465 acres in size and bounded by Welsh Road, Norristown Road, Horsham Road, and Limekiln Pike. The area includes the neighborhoods of Kingswood Estates, Symphony Fox Development, Wynmere Hunt, Wynmere Downs, Maple Glen Hollow, Maple Glen, Wynmere, and Victoria Glen. Major business and employment centers include the Babylon Industrial Campus and the Keith Valley Business Park.
- **Customer Service Area E** is approximately 2,175 acres in size and bounded by Welsh Road, Blair Mill Road, Easton Road, Maple Avenue, Horsham Road, and Norristown Road. The area includes the neighborhoods of Maple Valley, Sawmill Valley, Hidden Meadows, Myers Tract, Sawyers Creek, Brookwood Condominiums, The Meadows of Horsham Towne, Hillside Estates, Tall Pines, Cloverly Farms, The Woodlands, Sawmill Meadows, and Evergreen Terrace. Major business and employment centers include the Horsham Business Center, the Pennsylvania Business Campus, and the Canterbury Corporate Center.

THE COMMUNITY, THE RESIDENTS, AND THE WORKERS

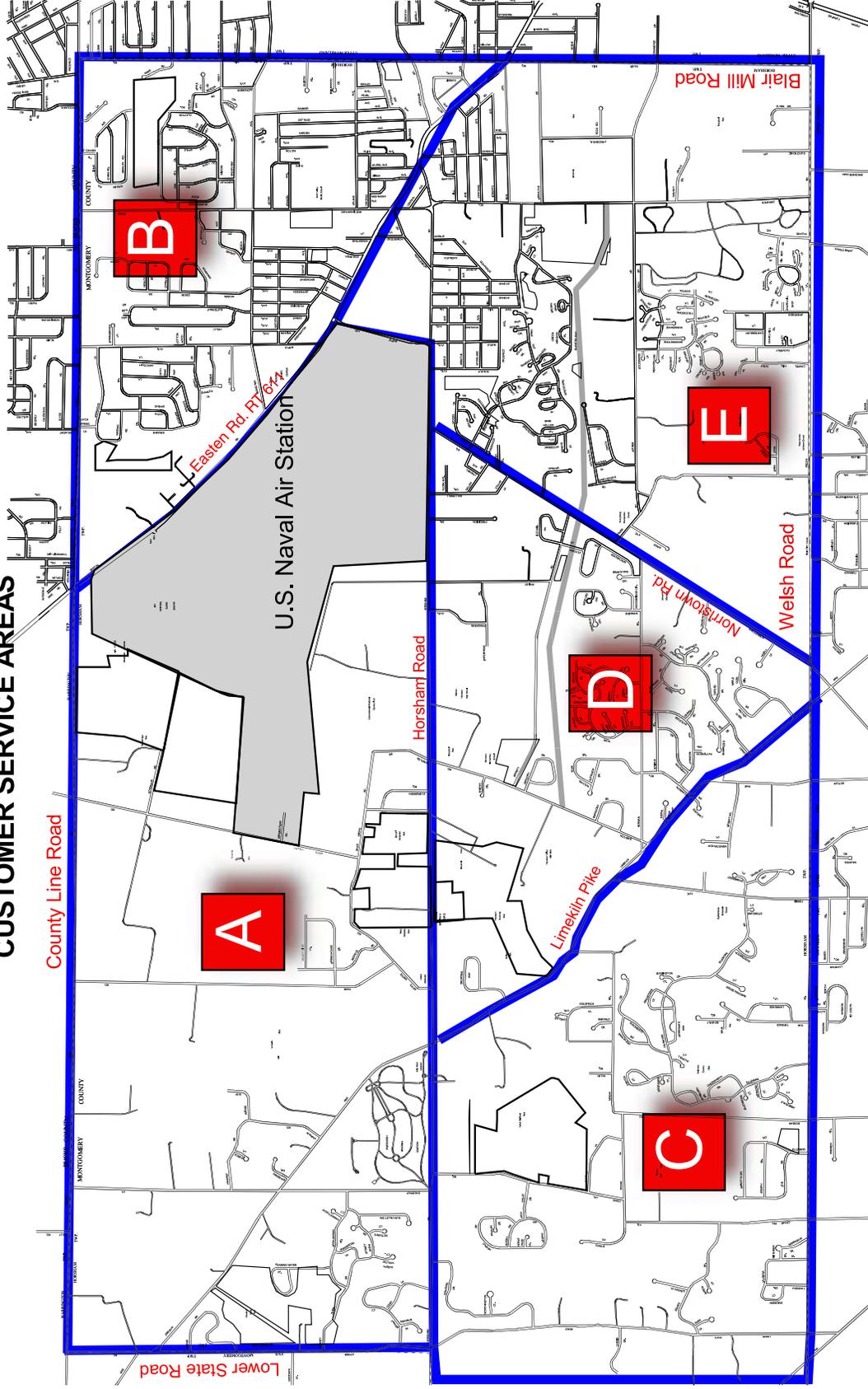
The Community

Horsham Township is a community approximately 17.33 square miles in size located in the eastern part of Montgomery County, Pennsylvania. It is bordered by six municipalities (Montgomery, Lower Gwynedd, Upper Dublin, and Upper Moreland townships in Montgomery County and Warrington and Warminster townships in Bucks County).

Horsham's geographical location and proximity to Philadelphia have strongly influenced growth and development since colonial times. The settlement pattern of the community can be traced back to the time of William Penn. Land in the township was first surveyed and plotted by Penn's engineers as they drew base lines for land grants and routes for future roadways. The township's present boundaries were established using these survey lines when a vote of the people made Horsham Township a municipal entity in 1717. County Line, Horsham and Welsh Roads were laid out following the historic survey lines drawn by the Penn engineers.

Once surveyed for settlement, lands of the township were offered for sale to individual purchasers beginning in 1684. The early settlers who purchased tracts were mainly of Quaker descent. Settlement first occurred as village clusters centered near the junction of roads. Horsham Village, Prospectville and Davis Grove were

FIGURE 1
CUSTOMER SERVICE AREAS



A Customer Service Areas are identified by a red box.

villages serving as the focus of early social and economic life in the community. These centers supplied goods and services for families that resided nearby. Agriculture was the basic way of life, though some settlers established businesses that served the community.

Grist and saw mills, taverns and inns, general stores and various shops were the earliest forms of industrial and commercial activity in the Township. The character of Horsham remained agricultural until railroads, trolleys and new roadways made the community easily accessible for business and trade. Direct commuting routes to surrounding communities increased the demand for goods, services and housing, and induced new development. The small villages grew and development expanded into the nearby farmland.

By 1930, the rural landscape of southeastern Horsham was altered by the construction of housing to support the growth of Hatboro Borough. Following World War II, development spread more widely throughout the Township. Industrial and commercial activity increased. Regional business and employment centers including the North Penn Area and the Fort Washington-Willow Grove corridor exerted significant influence on the development of the community.

In 1942, the United States Navy purchased a 190-acre private airport in the eastern part of Horsham Township to establish a base for training military and reserve personnel. Today, the Willow Grove Naval Air Station has grown to over 1,100 acres and is used primarily by the Navy, the Army, the Air Force, and the Marines for flight training and base operations. For decades, the station had influence on growth in the community by serving as a barrier to development in the northern part of the township. Given the widespread growth pressures throughout the township and beyond municipal boundaries, the airport no longer deters development, except that “approach zones” for aircraft are encouraged by the Navy to remain undeveloped.

Growth pressures remained relatively constant and minimal in Horsham Township until the 1980s when an increase in development ventures attracted residents, commerce and industry in the area. Developer interest remained high through the 1980s and 1990s due to the township’s prime location and the quantity of undeveloped land. Even today, the township is experiencing growth and pressures to develop vacant, undeveloped, and underdeveloped lands.

Land Use Patterns

Over time, Horsham Township has evolved to what exists today: a diverse mix of residential, institutional, commercial, office, and industrial development interspersed among agricultural, park, and other open space lands. Overall, the community is suburban in character, though areas of urban density uses in the southern portion of the township and pockets of open space that lend a rural feel in the northern part of the township exist.

In 1989, the Township Council adopted the Horsham Township Comprehensive Plan Update, which serves as the Township’s most current land use guide for orderly and logical future development. The self-described purpose of the plan was to prescribe a pattern of township growth to accommodate an appropriate balance of land uses into the 1990s. Now that the 1990s and the first two years of 2000 have passed, the land use policies of the plan, though they may still be valid for undeveloped parcels, are less relevant to parcels that have since been developed. Therefore, it becomes important for this park and recreation plan to get a true sense of existing land use conditions in the township. For example, what is the current pattern of land use and how might the remnant lands that still offer development potential be used in the future?

Land Use Map

Rather than simply show a map that represents where various types of land uses exist today, this plan attempts to account for land use changes that are likely to occur in the future by virtue of applications for subdivision and land development that have been submitted to the Township through the Spring of 2003. It is prudent that Horsham Township consider what the future might hold for continued community growth and for any changes to its socio-economic setting and then to plan an appropriate park and recreation system accordingly.

Although some lands in the township may be in an open space use today, they could be converted to a different use tomorrow. Unless there are easements or deed restrictions that permanently preserve the openness of a property, it should be considered to be vulnerable to development. For example, land classified as agricultural can be developed unless legal restrictions have been placed on the property to forever keep it as a farm. Similarly, even a developed property could be converted to a different use if permitted by zoning and provided that all applicable regulations can be adhered to (i.e., a large institutional use, like a church property with open land surrounding a building, might be able to be subdivided and developed for an alternative use). Nevertheless, the conversion of a developed property to another use is less likely to occur as opposed to the transformation of raw, undeveloped land. Vacant parcels are often the target of new construction because they are easier to subdivide and typically pose less constraints to discourage development.

Figure 2 is a land use map that assigns all parcels in the township one of seventeen land use classifications based on the following methodology and set of parameters:

1. Montgomery County Board of Assessment data was initially used to identify the type of land use for each parcel, which was then converted to a consolidated list of land use codes. Further refinement of the land use was conducted on a parcel-by-parcel basis, as needed for properties that had no known land use data and for parcels with erroneous coding.
2. Lands known to be permanently preserved but not otherwise identified as such by Board of Assessment data were mapped. Properties, such as private golf courses whose lands are wholly or partially protected, are examples. Likewise, land that had been set aside as open space during the development approval process was mapped.
3. Horsham Township has zoning and subdivision and land development ordinances that regulate the type, density, and physical layout of new development. In fact, prior to land development activity, such as the construction of a housing subdivision or an office center, landowners and developers are required to submit plans showing the planned use and design of their sites so that the Township can ensure that the uses and designs comply with all applicable regulations.

In order to gauge which properties are likely to undergo a change in land use, the following plans submitted for development approval have been identified:

- land developments that have received Township Council approval in the past seven years (from January 1996 through Spring 2003) but have not yet been completed or occupied; and
- proposed land developments that were submitted in the past two years (from January 2001 through Spring 2003) and have not yet been approved by the Township Council.

Because this plan makes the assumption that approved and proposed land developments are good indicators of a pending land use change, the land use map reflects the new type of classification that would occupy the respective properties should the developments actually be built. These subject properties are uniquely identified using a bold line that outlines the boundaries of the parcels in conjunction with the color-coded land use category.

Figure 3 is an inventory of the land use indicating the acreage of each classification and the percents that these amounts represent relative to the total land base.

**FIGURE 3
LAND USE INVENTORY**

LAND USE	ACRES	% OF TOTAL
Residential:		
Multi-Family	174.80	1.58%
Single Family Attached	219.05	1.98%
Twin / Duplex	59.33	0.53%
Mobile Home Park	8.24	0.07%
Single Family Detached	3744.78	33.76%
Country Residence	445.03	4.01%
Mixed Use	152.98	1.38%
Retail	224.21	2.02%
Office	583.84	5.26%
Industrial	419.26	3.78%
Institutional	1950.78	17.59%
Utilities	177.12	1.60%
Undeveloped	540.06	4.87%
Public Open Space	863.24	7.78%
Private Open Space	970.34	8.75%
Agriculture	523.65	4.72%
Water	34.29	0.31%
Township-wide Total	11,091.00	100.00%

NOTE:

1. Road rights-of-way are proportionately allocated to each land use classification.

- The predominant land use in Horsham Township is residential, accounting for a total area of 4,651 acres. This represents roughly 42% of the township. Single-family detached homes dominate the type of residential development at 3,744 acres and 33.76%, followed in descending order by country residence, single-family attached, multi-family, twin/duplex, and mobile home park uses.
- Institutional is the second most prevalent land use category with a total of 1,950 acres, which includes the 1,100-acre naval air station. Almost 18% of the township is institutional.
- Private Open Space is the third most prevalent land use (970 acres; 9%).
- The fourth largest category of land use is Public Open Space at 863 acres and almost 8% of the township. This category includes Township-owned properties as well as other publicly-owned parkland.
- Office ranks fifth as the largest land use component totaling 584 acres and little more than 5% of the township.

The Residents

An understanding of the existing population is useful for determining the appropriate kind of recreation opportunities that may be needed in a community. Characteristics, such as total population, household size, and age structure, have implications on recreation planning. These characteristics, as revealed by census data, are described below.

Total Population (refer to Figure 4)

According to the U.S. Census Bureau, 24,232 persons resided in Horsham Township at the time of the 2000 census. This population includes persons living in housing units (i.e., single family detached homes, townhouses, and multifamily dwellings or apartments) and in group quarters (i.e., nursing homes, rooming houses, group homes, religious group quarters, and military quarters). Of the 2000 population, 237 persons were living in group quarters and 23,995 persons were distributed among occupied housing units.

The population of the township grew considerably over the past decade. The population increased by 2,336 persons, or 10.7 percent, from 1990 to 2000. By comparison, the decade of the 1980s witnessed much more dramatic growth with an increase of nearly 6,000 persons, a growth rate of 37 percent.

**FIGURE 4
POPULATION**

POPULATION			POPULATION CHANGE			
2000	1990	1980	1990-2000		1980-1990	
24,232	21,896	15,959	2,336	10.7%	5,937	37.2%

Household Size (refer to Figure 5)

Census data for 2000 shows that there were a total of 9,269 housing units in the township when enumeration was conducted, which is a 7.8 percent increase and 670 more than in 1990. The housing unit totals include occupied and vacant units. At the time of the census, 9,158 units were occupied and 111 units were vacant. The vacant units were probably newly constructed and unoccupied or apartments and other rental properties that were in a transition period between leases.

**FIGURE 5
HOUSEHOLD SIZE**

YEAR	PERSONS IN HOUSEHOLDS	TOTAL HOUSEHOLDS	PERSONS PER HOUSING UNIT
2000	23,995	9,082	2.64
1990	21,503	8,279	2.60

The average household size (derived by dividing the number of persons in households by the total number of households) was 2.64 persons per housing unit at the township level for the year 2000. The average household size in the township has increased from 2.60 persons per household in the past decade. This increase was likely the result of housing construction activity and the influx of new families moving into the units.

Age Structure

Age has a significant impact on the provision of recreation. It is generally true that the younger the population, the greater the need is to provide facilities for active recreation. The demand for passive recreation opportunities grows as the population ages. The population of the township has aged slightly over the past two decades (refer to Figure 6).

**FIGURE 6
AGE STRUCTURE**

AGE COHORT	YEAR 2000		YEAR 1990		1990-2000 CHANGE	
	Population	% of Total	Population	% of Total	Population	% of Change
0 - 4	1,687	6.96%	1,863	8.51%	-176	-9.4%
5 - 24	6,495	26.80%	5,326	24.32%	1,169	21.9%
25 - 64	13,675	56.43%	12,793	58.43%	882	6.9%
65+	2,375	9.80%	1,914	8.74%	461	24.1%
Total	24,232	100.00%	21,896	100.00%	2,336	10.7%
Median Age	35.7		32.0		3.7	

Since 1990, the median age of the population has increased a total of 3.7 years, from 32.0 years in 1990 to 35.7 years in 2000. The preschool population (under five years) has decreased from 8.5 percent of the total township population to 6.9 percent. The school-age population (5 to 24 years) increased in terms of the net number of persons and in the proportion of the total population, from 5,326 persons to 6,495 persons and from 24.3 percent to 26.8 percent, respectively. The proportion of the adult population (25 to 64 years) grew by 6.9 percent, resulting in a net gain of 882 persons. The number of elderly persons (65 years and over) grew by 461 persons, increasing in proportion from 8.7 percent to 9.8 percent of the total township population.

The Workers

Horsham is part of the Philadelphia regional economy that has, by any measure, fared well historically. The township's strong economy is due in large part to its ability to participate and share in the regional commerce

base and the need for businesses, offices, and services. The major employment corridor associated with the Pennsylvania Turnpike has also played a significant role in the growth of the community and its employment base.

Horsham Township experienced a surge in industrial park and office building development in the 1980s and 1990s, making it one of the leading job centers in Montgomery County. According to Delaware Valley Regional Planning Commission (DVRPC) employment estimates for 2000, the township had 26,050 employees, the fourth highest employment base among all 62 municipalities in the county.

The number of workers in Horsham has experienced healthy growth in the recent past. This is reflected in the increase in the number of jobs in the township in the past decade. Figure 7 provides a summary of the changes in the number of workers in the township from 1991 through 2002 according to Occupation Privilege Tax records.

**FIGURE 7
TAX RECORDS WORKER POPULATION**

YEAR	# OF WORKERS
2002	34,843
2001	37,254
2000	38,363
1999	34,887
1998	30,292
1997	26,967
1996	23,835
1995	24,446
1994	23,450
1993	22,390
1992	21,784
1991	22,217

Based on the total tax collected in 2000, 38,363 persons were employed in the township during that year. But this count and others based on the tax likely overstate how many actual jobs there are in the township because the numbers are derived from a tally of tax revenue generated from full time, part time, and temporary positions and other jobs that may have high turnover rates.

An indication of how the tax data may exaggerate the number of workers in the township is revealed when the number is compared to the DVRPC estimate (i.e., 38,363 - 26,050 = 12,313 difference). To gauge which number more accurately represents the worker population, County Business Patterns data from the U.S. Census Bureau reveals that there were 24,720 people working in the township in 1997. Assuming an upward adjustment of the count each year to account for continued growth of the employment base, the Census Bureau and DVRPC numbers match fairly well. For this reason, the Census and DVRPC estimates and calculations are accepted as the official employment data for this plan.

Census data for 2000 indicates that of the 13,225 Horsham residents who work and are 16 years of age or older, 3,221 (13.3 percent) are employed within the township.

The major employers in the township are concentrated at the Willow Grove Naval Air Station and in the Babylon Industrial Campus, Canterbury Corporate Center, Commonwealth Corporate Center, Horsham Business Center, Horsham Ridge Industrial Center, Horsham Valley Industrial Park, Keith Valley Business Park, and Pennsylvania Business Campus developments. The nature of many of the jobs as well as the magnitude of the number of workers needed at these places of business necessitate that a large percentage of the employees come from outside of Horsham Township. In fact, over 87 percent of the township workers are nonresidents.

Aside from simply offering residents an abundant supply of jobs, goods and services, a stable and growing labor force supports the local tax base through Horsham Township's occupation privilege tax. An added benefit of the

township being an important job center is that the businesses represent a large tax base that provides substantial support to the school district, which consequently defers the residential tax bills. Although the labor force is a source of tax revenue, it also has implications on the local park and recreation system. As noted previously in this chapter, the workers are secondary customers for whom the Township’s parks and recreation services should be planned to serve.

PROJECTIONS OF CUSTOMER BASE CHANGES

Since a function of this study is to plan for a park and recreation system to meet the needs of the Township’s customers into the future, it is useful to estimate future resident and worker population levels and how these new populations will affect the system. The long-term probability of growth among these two customer groups will bring pressures for the Township to develop new recreational facilities and offer more recreation programs.

Population Forecasts

The demand for recreation in any community is dynamic and primarily a reflection of the population—the larger the population; the greater the demand. The Township must anticipate future population needs and plan to make a sufficient supply of recreation opportunities available to serve new as well as existing residents. Forecasts of the population of the township through the year 2025 were prepared by the DVRPC in June, 2002 (refer to Figure 8).

**FIGURE 8
POPULATION FORECASTS**

YEAR	# OF PERSONS	CHANGE	
		Population	% of Change
2000 (base)	24,232	na	na
2005	26,110	1,878	7.8%
2015	28,450	2,340	9.0%
2025	30,890	2,440	8.6%

These forecasts indicate that the population is expected to increase to 26,110 people for the year 2005, nearly an 8 percent increase from the 2000 population. Between the years 2005 and 2015, the township is expected to gain an additional 2,340 residents for a total of 28,450 persons. The year 2025 population is projected to be 30,890 persons, a total of 2,440 persons higher than expected at 2015. The population forecasts include persons living in housing units as well as group quarters. The forecasts reflect the influence that development pressures, available developable land, and zoning will likely have on future growth. The forecasts also account for trends and natural occurrences in population change.

Employment Forecasts

Forecasts of employment within the township through the year 2025 were also prepared by the DVRPC in June, 2002 (refer to Figure 9).

**FIGURE 9
EMPLOYMENT FORECASTS**

YEAR	# OF WORKERS	CHANGE	
		Population	% of Change
2000 (base)	26,050	na	na
2005	27,050	1,000	3.8%
2010	28,050	1,000	3.7%
2015	29,050	1,000	3.6%
2020	30,050	1,000	3.4%
2025	31,000	950	3.2%

These forecasts consider historical data projections, ratio and density trends, infrastructure availability, environmental constraints to development, local zoning policy, and development proposals. The forecasts also were adjusted to account for input obtained from the county planning commission and local government officials.

The township's overall employment growth is forecast to be evenly distributed in 5-year increments over the next 25 years. A 1,000-employee gain is expected every five years, growing from a base of 26,050 employees in 2000 to a 2025 estimate of 31,000 employees. This represents a total of about 5,000 more workers in the township.

SUMMARY

This chapter defined who the Township's customers are. The following conclusions were made:

- In accordance with the traditional hierarchy of meeting public needs, the Township's responsibility should be to provide parks, recreation facilities, and recreational programs to serve the interests and preferences of the local population.
- The local population to be served by the Township should include residents and nonresidents.
- The customer base is comprised of three groups, each having a certain priority to which the Township should respond when meeting each group's respective needs. 1) Persons who reside in Horsham are the *primary customers* and whose needs should be of utmost concern to the Township. 2) Nonresidents that work in the township are defined as *secondary customers* and should receive second priority as users of parks and participants in programs. 3) *Tertiary customers* are persons that neither work nor live in the township and whose recreation interests need not be directly satisfied by Township efforts.
- The township is divided into five *customer service areas*, which are geographic units that should each be served by sufficient neighborhood-level parks and recreation facilities.
- Although the township is largely developed, open space remains to accommodate additional residential and nonresidential land use growth.
- The current population (i.e., 24,232 persons) is projected to grow to 30,890 persons for the year 2025, which is a 27 percent increase in the *primary customer* base.
- The current labor force (i.e., 26,050 employees) is forecast to grow to 31,000 employees for the year 2025, which is a 19 percent increase in the *secondary customer* base.
- If development pressures continue in Horsham and both population and employment grow to the extent forecasted, then the public demand for recreation opportunities will be much greater in the future than it is now.