

# MARCO ISLAND RACQUET CENTER FACILITY USE AND DEMAND ASSESSMENT



Final Report  
August 15, 2022



**BALLARD\**KING***  
& ASSOCIATES LTD  
Recreation Facility Planning and Operation Consultants

Ballard\*King & Associates  
2743 E. Ravenhill Circle  
Highlands Ranch, CO 80126  
303-470-8661 (phone)  
[bka@ballardking.com](mailto:bka@ballardking.com)  
[www.ballardking.com](http://www.ballardking.com)

## Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>Demographic Characteristics and Racquet Sports Participation .....</b>	<b>2</b>
<b>Assessment of the Racquet Center's Current Condition and Use.....</b>	<b>20</b>
<b>Racquet Center Recommendations .....</b>	<b>28</b>

### **Introduction**

The following assessment of the City of Marco Island's Racquet Center is based on a site visit to the facility, interviews with Parks and Recreation staff, a review of information provided by staff on the management and operation of the facility, a community meeting that featured patrons that utilize the center on a regular basis and emails from other users of the facility who could not be physically present.

The purpose of the assessment is to identify factors, issues, and concerns with the current use of the Racquet Center and identify the demand for future programs and services. This informs changes to the focus and physical layout of the center for the future.

## **Demographic Characteristics and Racquet Sports Participation**

An important step in completing an assessment of the Marco Island Racquet Center is understanding the demographic characteristics of the market area for the center as well as examining racquet sports participation statistics.

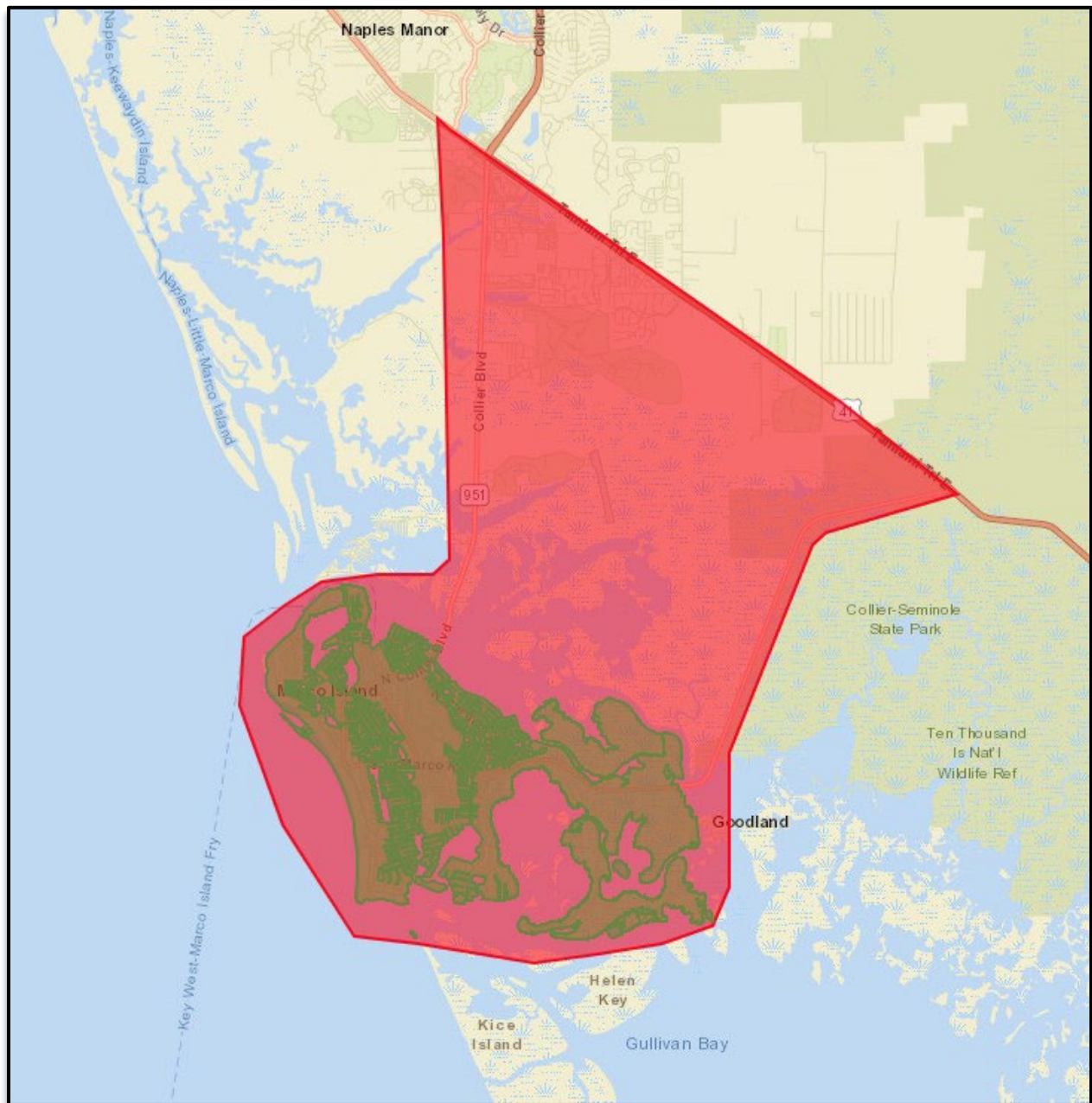
### ***Demographics***

The following is a summary of the demographic characteristics within areas identified as the Primary and Secondary Service Areas. The Primary Service Area is defined as the City of Marco Island, Florida. The Secondary Service Area is approximately 62 square miles and encompasses all of Marco Island and extends to the north to Hwy 41.

B\*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2020 Census data and their demographers for 2022-2027 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities.

These demographic figures refer only to the permanent year-round residents of Marco Island and the Secondary Service Area. The City estimates that there are as many as 29,000 other people in the community during the high season.

## Service Area Map



- Green Boundary – Primary Service Area (Marco Island city limits)
- Red Boundary – Secondary Service Area

## Demographic Summary

	Primary Service Area	Secondary Service Area
<b>Population:</b>		
2020 Census	15,760 <sup>1</sup>	27,140 <sup>2</sup>
2022 Estimate	15,761	27,397
2027 Estimate	15,788	29,549
<b>Households:</b>		
2020 Census	7,957	13,371
2022 Estimate	7,982	13,529
2027 Estimate	8,056	14,558
<b>Families:</b>		
2020 Census	1,192	8,101
2022 Estimate	1,190	8,962
2027 Estimate	1,199	9,640
<b>Average Household Size:</b>		
2020 Census	1.98	2.03
2022 Estimate	1.97	2.03
2027 Estimate	1.96	2.03
<b>Ethnicity (2022 Estimate):</b>		
Hispanic	7.7%	13.0%
White	89.8%	82.7%
Black	0.4%	3.7%
American Indian	0.2%	0.3%
Asian	1.1%	1.0%
Pacific Islander	0.0%	0.0%
Other	2.4%	4.2%
Multiple	6.1%	8.1%
<b>Median Age:</b>		
2020 Census	65.3	63.0
2022 Estimate	67.5	65.1
2027 Estimate	68.9	65.9
<b>Median Income:</b>		
2022 Estimate	\$105,944	\$89,857
2027 Estimate	\$121,357	\$106,601

<sup>1</sup> From the 2010-2020 Census, the Primary Service Area experienced a 3.9% decrease in population.

<sup>2</sup> From the 2010-2020 Census, the Secondary Service Area experienced a 5.0% increase in population.

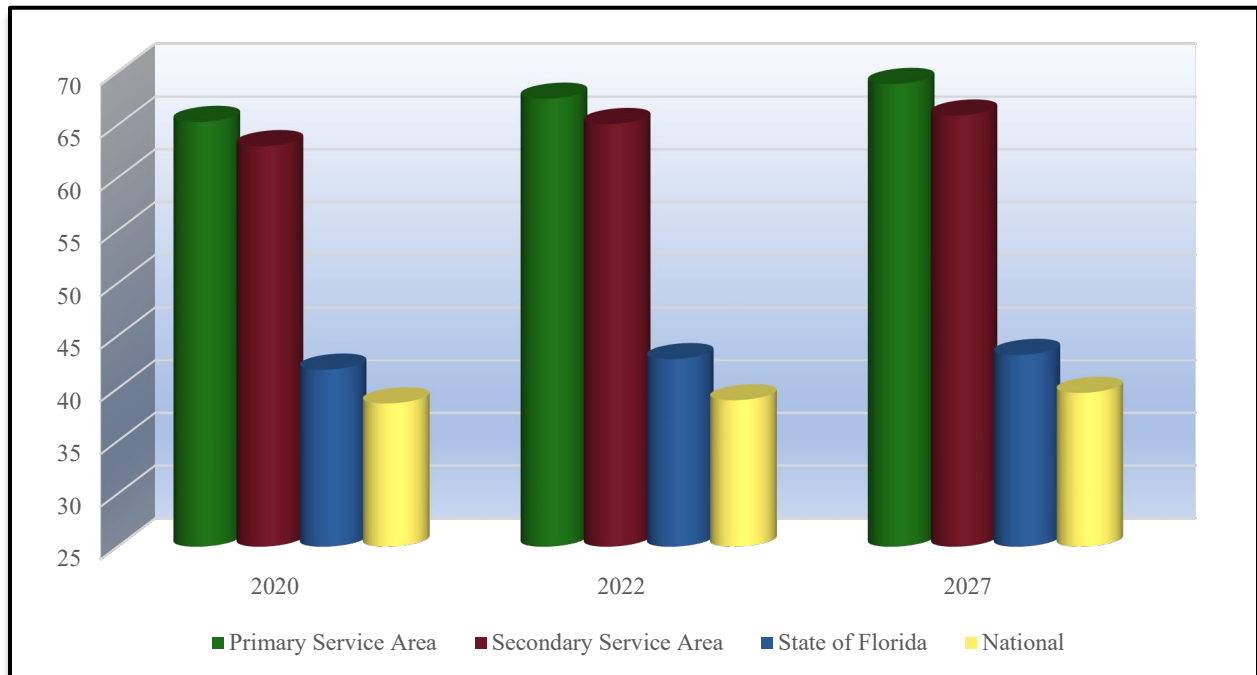


**Age and Income:** The median age and household income levels are compared with the national number as both of these factors are major determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

**Table A – Median Age:**

	2020 Census	2022 Projection	2027 Projection
Primary Service Area	65.3	67.5	68.9
Secondary Service Area	63.0	65.1	65.9
State of Florida	41.8	42.8	43.2
Nationally	38.6	38.9	39.6

**Chart A – Median Age:**

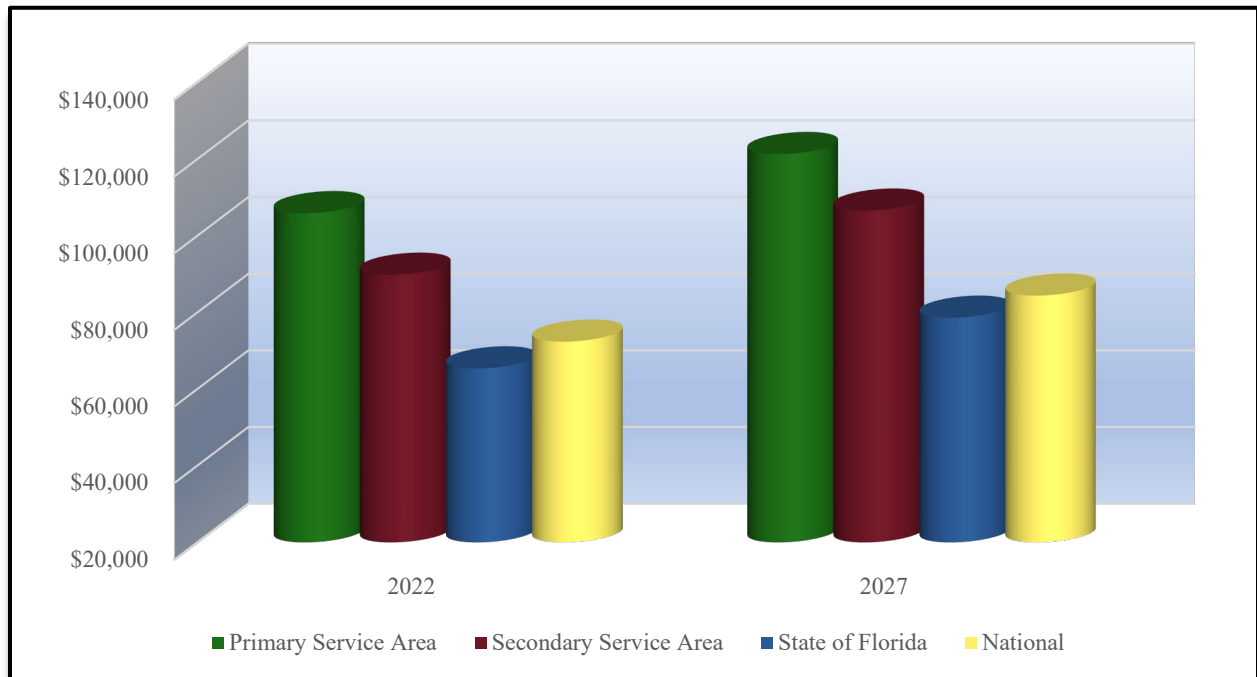


The median age in the Primary and Secondary Service Area is significantly higher than the State of Florida and National number. A lower median age typically points to the presence of families with children.

**Table B – Median Household Income:**

	2022 Projection	2027 Projection
Primary Service Area	\$105,944	\$121,357
Secondary Service Area	\$89,875	\$106,601
State of Florida	\$65,438	\$78,674
Nationally	\$72,414	\$84,445

**Chart B – Median Household Income:**





**Recreation Expenditures Spending Potential Index:** Finally, through ESRI, it is possible to examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

**Table C – Recreation Expenditures Spending Potential Index<sup>3</sup>:**

Primary Service Area	SPI	Average Spent
Fees for Participant Sports	198	\$259.67
Fees for Recreational Lessons	130	\$207.32
Social, Recreation, Club Membership	162	\$456.86
Exercise Equipment/Game Tables	141	\$88.32
Other Sports Equipment	181	\$14.61

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	172	\$225.32
Fees for Recreational Lessons	115	\$183.63
Social, Recreation, Club Membership	141	\$399.34
Exercise Equipment/Game Tables	126	\$79.16
Other Sports Equipment	159	\$12.85

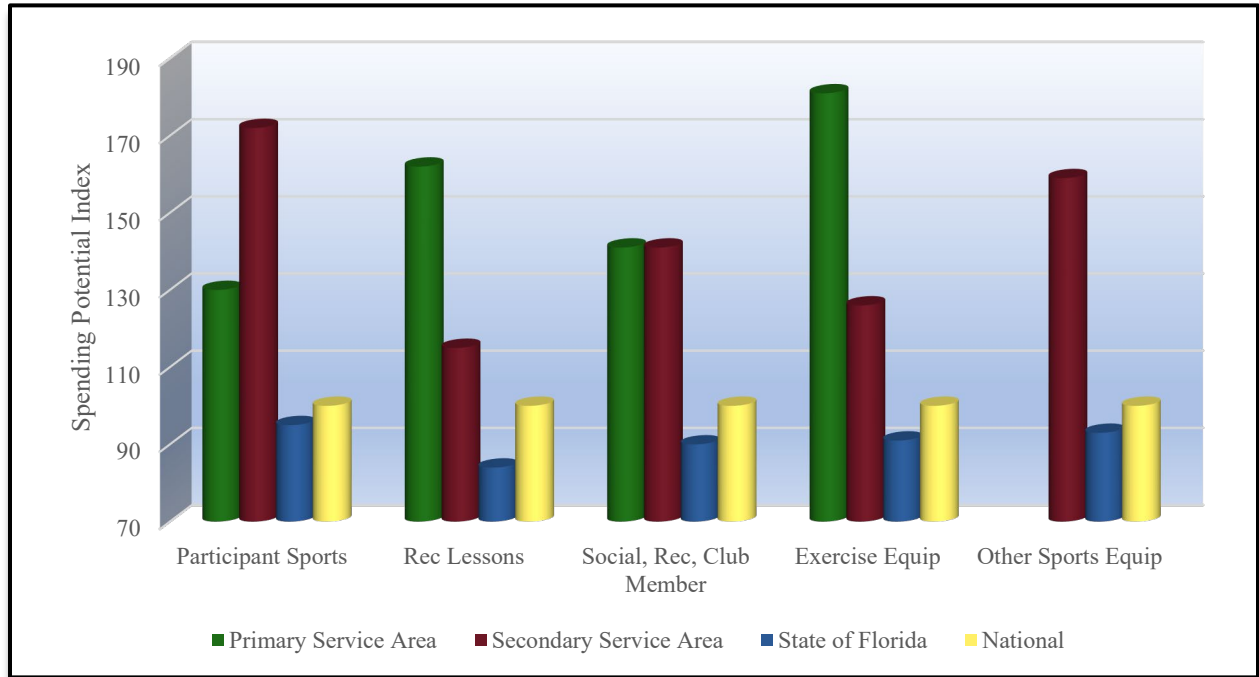
State of FLORIDA	SPI	Average Spent
Fees for Participant Sports	95	\$124.51
Fees for Recreational Lessons	84	\$134.73
Social, Recreation, Club Membership	90	\$253.91
Exercise Equipment/Game Tables	91	\$56.92
Other Sports Equipment	93	\$7.56

**Average Amount Spent:** The average amount spent for the service or item in a year.

**SPI:** Spending potential index as compared to the national number of 100.

<sup>3</sup> Consumer Spending data are derived from the 2018 and 2019 Consumer Expenditure Surveys, Bureau of Labor Statistics.

**Chart C – Recreation Spending Potential Index:**



**Population Distribution by Age:** Utilizing census information for the Primary and Secondary Service Areas, the following comparisons are possible.

**Table D – 2022 Primary Service Area Age Distribution**  
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	245	1.6%	5.8%	-4.3%
5-17	913	5.8%	15.9%	-10.1%
18-24	394	2.5%	9.2%	-6.7%
25-44	1,640	10.4%	26.8%	-16.4%
45-54	1,119	7.1%	12.0%	-4.9%
55-64	2,575	16.3%	12.8%	+3.5%
65-74	4,249	27.0%	10.2%	+16.8%
75+	4,629	29.4%	7.2%	+22.2%

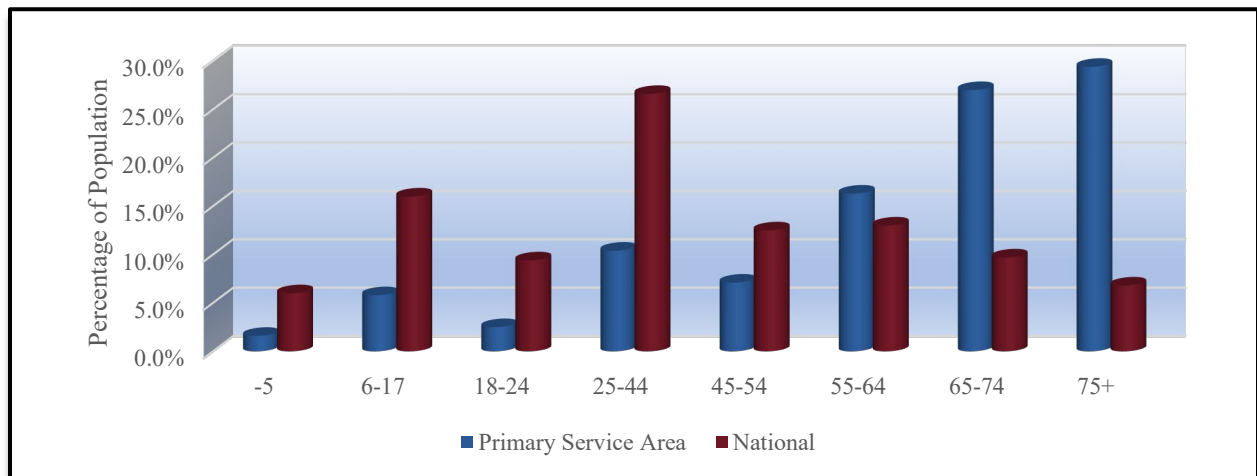
**Population:** 2022 census estimates in the different age groups in the Primary Service Area.

**% of Total:** Percentage of the Primary Service Area population in the age group.

**National Population:** Percentage of the national population in the age group.

**Difference:** Percentage difference between the Primary Service Area population and the national population.

**Chart D – 2022 Primary Service Area Age Group Distribution**



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some significant differences with a smaller population in the Under 5, 6-17, 18-24, 25-44, and 45-54 age groups. The greatest positive variance is in the 75+ age group with +22.2%, while the greatest negative variance is in the 25-44 age group with -16.4%.

**Table E – 2022 Secondary Service Area Age Distribution**  
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	672	2.5%	5.8%	-3.4%
5-17	2,172	7.9%	15.9%	-8.0%
18-24	938	3.4%	9.2%	-5.8%
25-44	3,284	12.0%	26.8%	-14.8%
45-54	2,188	8.0%	12.0%	-4.0%
55-64	4,348	15.9%	12.8%	+3.1%
65-74	6,811	24.9%	10.2%	+14.7%
75+	6,981	25.5%	7.2%	+18.3%

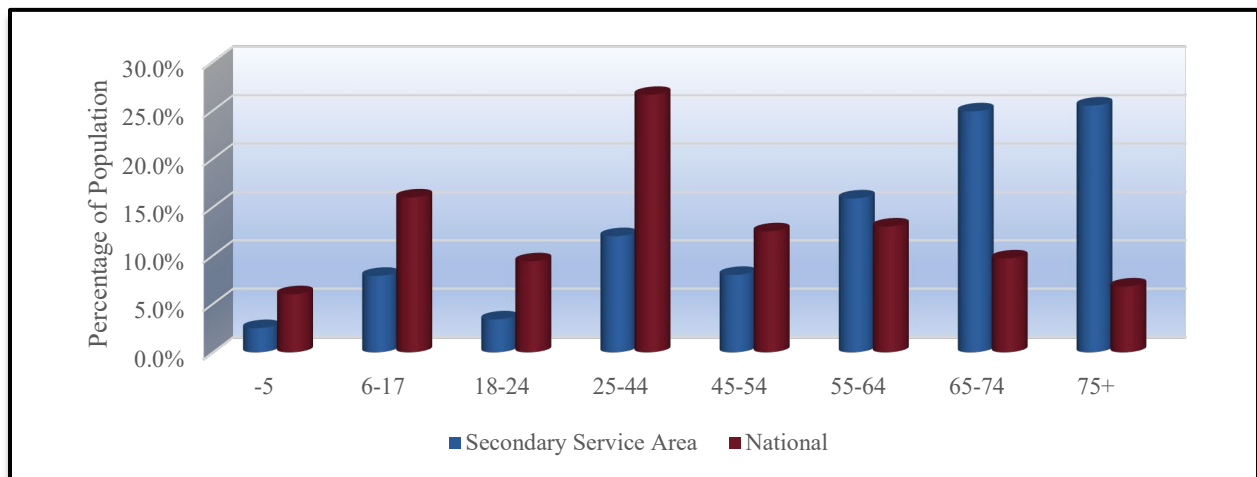
**Population:** 2022 census estimates in the age groups in the Secondary Service Area.

**% of Total:** Percentage of the Secondary Service Area population in the age group.

**National Population:** Percentage of the national population in the age group.

**Difference:** Percentage difference between the Secondary Service Area population and the national population.

**Chart E – 2022 Secondary Service Area Age Group Distribution**



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the age groups 0-54. The greatest positive variance is in the 75+ age group with +18.3%, while the greatest negative variance is in the 25-44 age group with -14.8%.

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

**Table F – 2022 Primary Service Area Population Estimates**  
(U.S. Census Information and ESRI)

Ages	2020 Census	2022 Projection	2027 Projection	Percent Change	Percent Change Nat'l
-5	310	245	242	-21.9%	-8.3%
5-17	1,150	913	876	-23.8%	-8.5%
18-24	510	394	353	-30.8%	-8.9%
25-44	1,686	1,640	1,618	-4.0%	+3.3%
45-54	1,797	1,119	1,047	-41.7%	-17.8%
55-64	2,971	2,575	2,117	-28.7%	+2.5%
65-74	4,162	4,249	4,348	+4.5%	+58.2%
75+	3,174	4,629	5,191	+63.5%	+46.3%

**Chart F – Primary Service Area Population Growth**

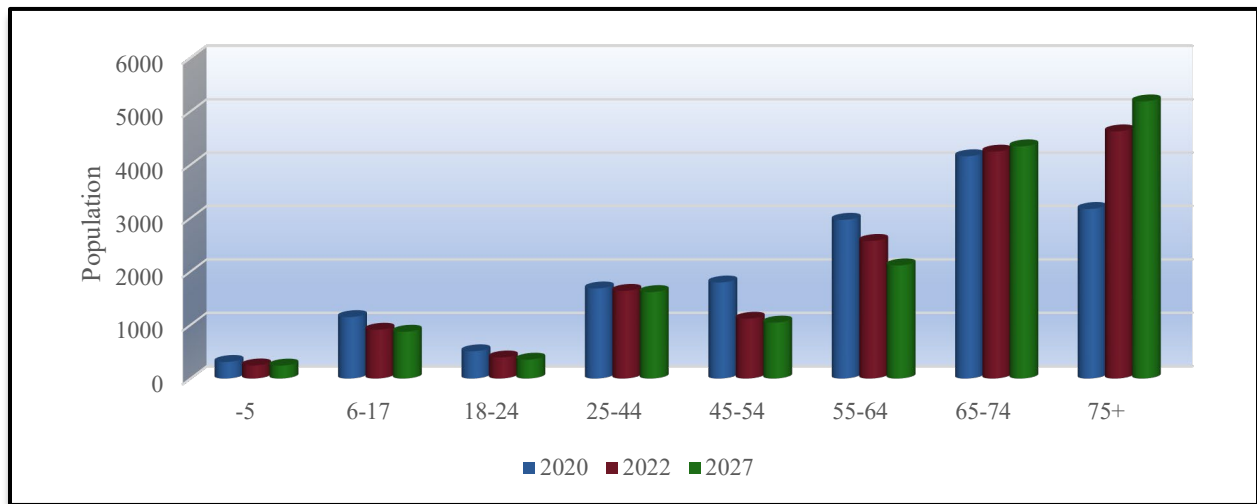


Table-F illustrates the growth or decline in age group numbers from the 2020 census until the year 2027. It is projected age categories 65-74 and 75+ will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

**Table G – 2022 Secondary Service Area Population Estimates**  
(U.S. Census Information and ESRI)

Ages	2020 Census	2022 Projection	2027 Projection	Percent Change	Percent Change Nat'l
-5	782	672	751	-4.0%	-8.3%
5-17	2,546	2,172	2,359	-7.3%	-8.5%
18-24	1,005	938	989	-1.6%	-8.9%
25-44	3,403	3,284	3,635	+6.8%	+3.3%
45-54	3,042	2,188	2,315	-23.9%	-17.8%
55-64	4,807	4,348	4,066	-15.4%	+2.5%
65-74	6,605	6,811	7,285	+10.3%	+58.2%
75+	4,949	6,981	8,152	+64.7%	+46.3%

**Chart G – Secondary Service Area Population Growth**

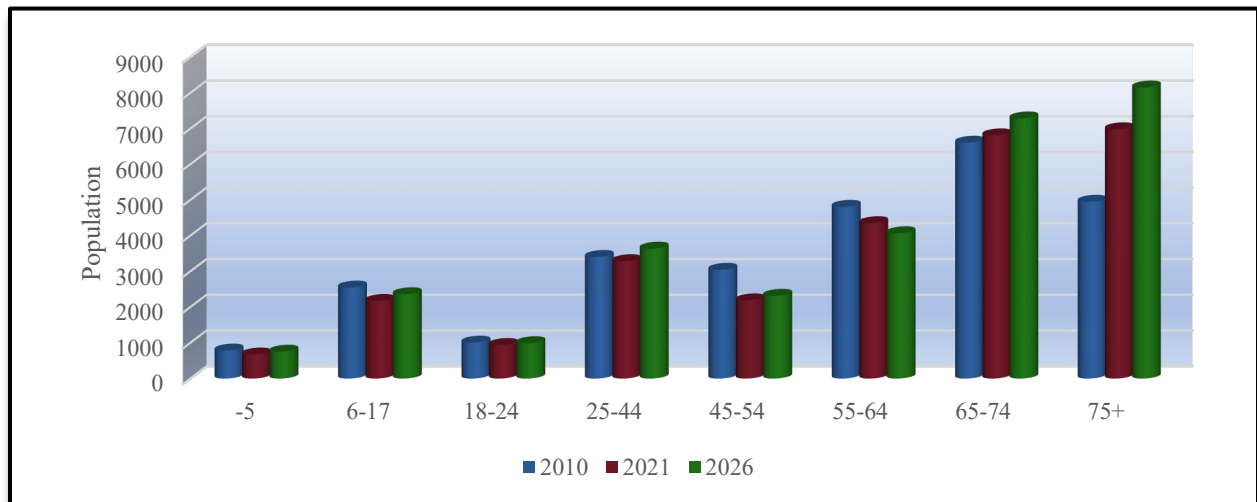


Table-G illustrates the growth or decline in age group numbers from the 2020 census until the year 2027. It is projected age categories 25-44, 65-74 and 75+ will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

### ***Racquet Sports Participation Rates***

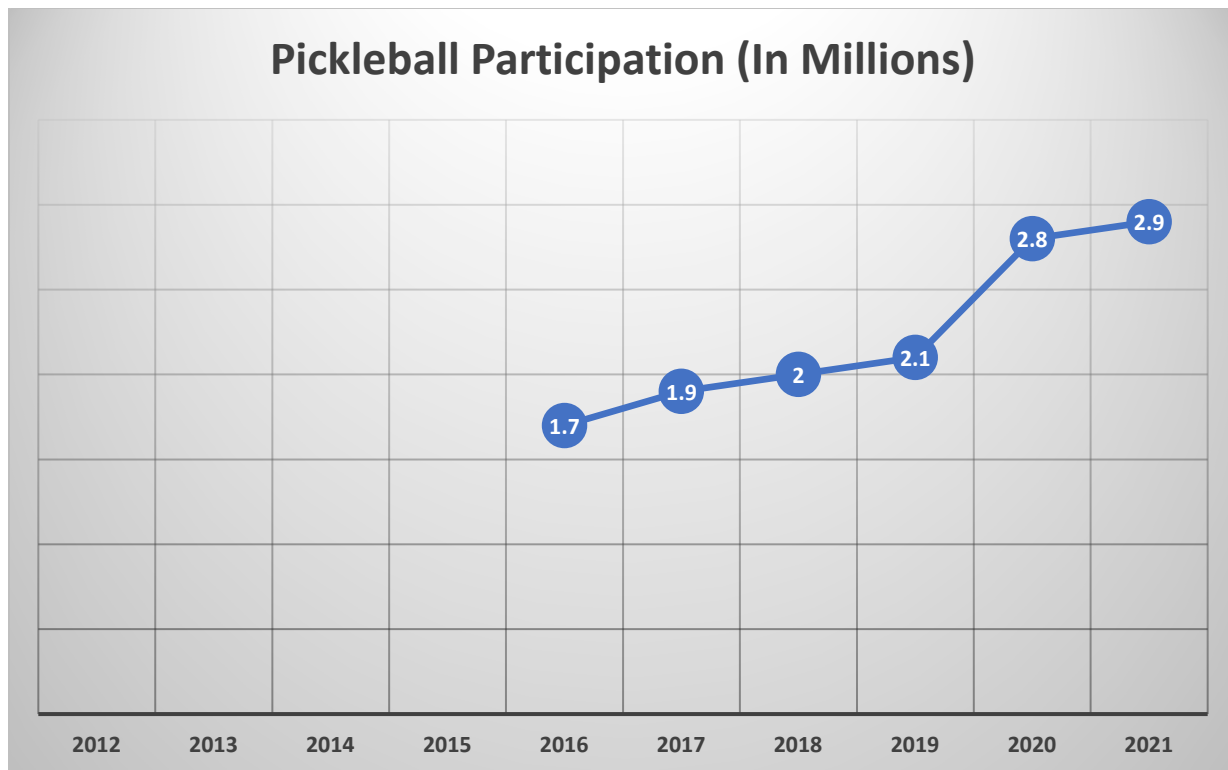
The following information examines the rate of participation in tennis and pickleball. Unfortunately, the rate of participation in racquetball has dropped to such a low level that it is no longer tracked by the major sports participation data sources.

A number of sources of data were utilized for this report including the National Sporting Goods Association (NSGA), Sports & Fitness Industry Association (SFIA) and information was also gathered from the United States Tennis Association.

The NSGA completes a study each year on the level of participation in the United States in over 50 sports. The following summarizes the participation in pickleball and tennis. A participant is defined as an individual 7 years of age or older who participates in a sport/activity at least 2 days per year for all sports/activities.

#### Pickleball

Chart H – NSGA Participation in Millions over the Last Ten Years

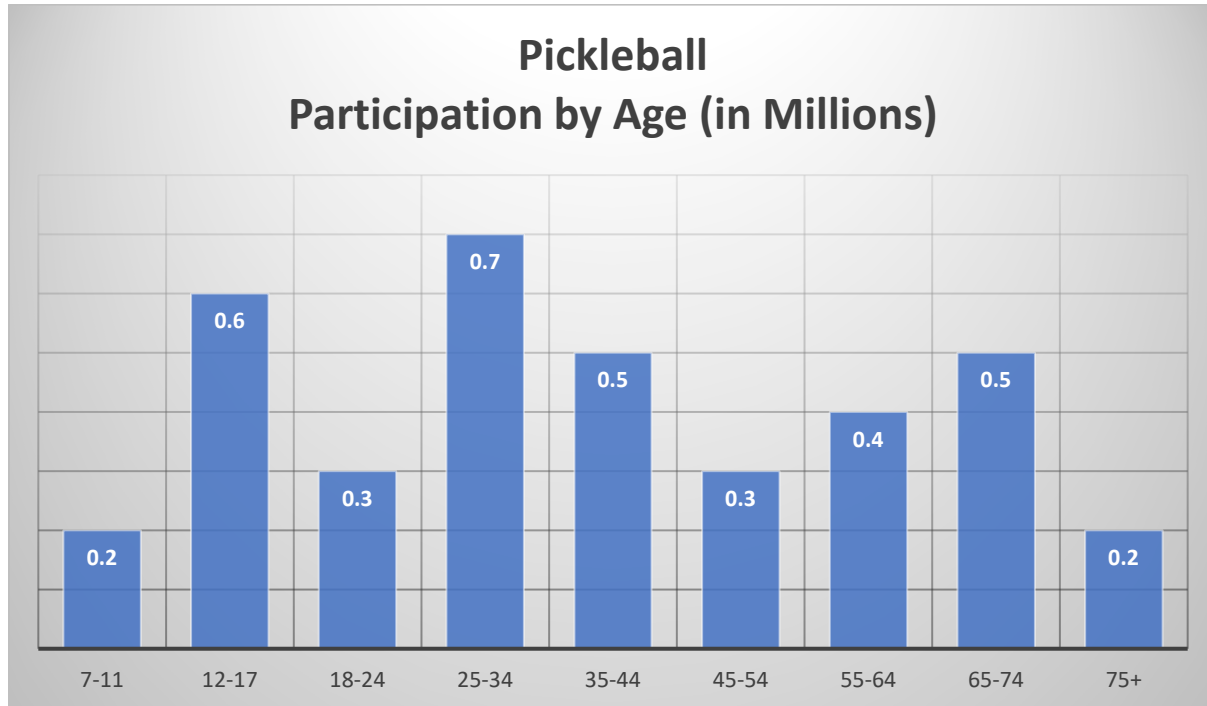


Note: Pickleball participation was not tracked by the NSGA until 2016.

- Pickleball participation has increased dramatically in the last 5 years.



Chart I – NSGA Participation by Age in 2021



- Pickleball participation was highest in the 25-34 age group followed by age 12-17.
- Participation is highest in the South Atlantic region (includes Florida).
- 44.2% of players are Occasional Players (5-29 times a year) followed by Infrequent Players (2-4 times a year) at 35.7% and Frequent Players (30 plus time as year) at 20.1%.

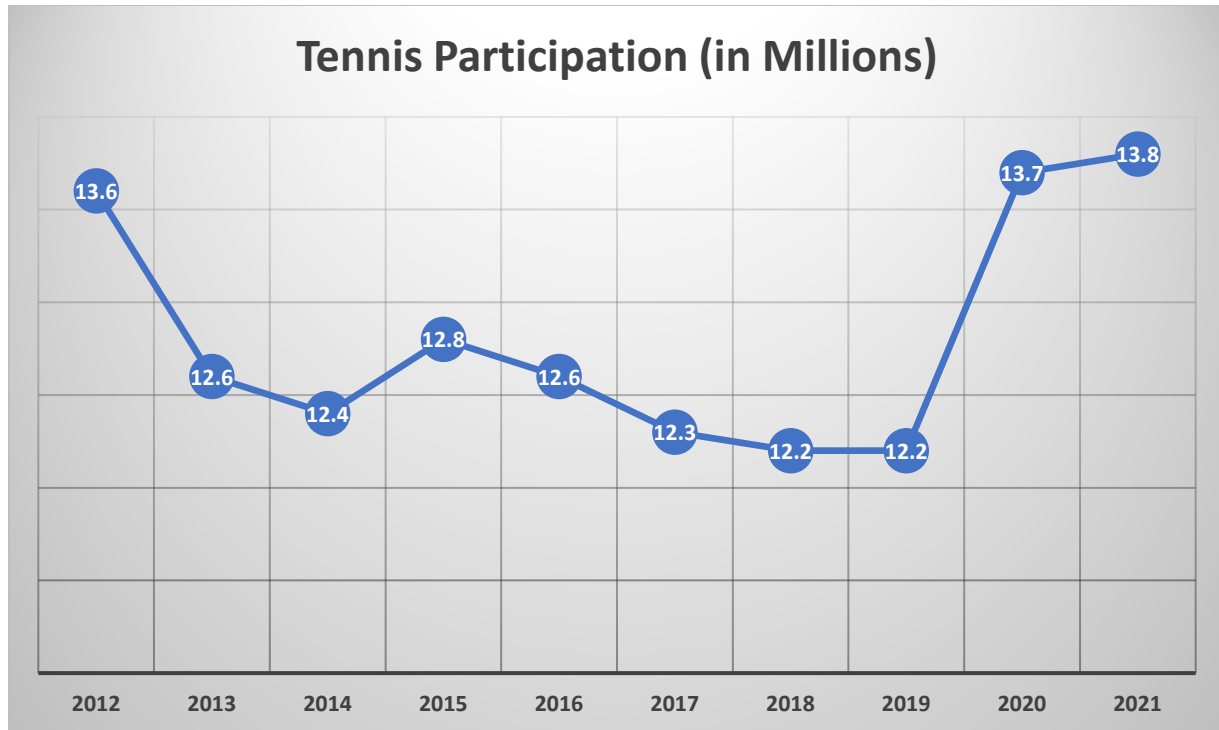
Sports & Fitness Industry Association (SFIA) reported that in 2021 pickleball had 4.8 million players in the US – an increase of 14.8% over 2020 and a 11.5% 5-year annual average growth. Additional details from the 2022 SFIA Report:

- 3.5 million were “Casual” participants who play 1-7 times a year. This segment grew by 22% from 2020.
- 1.4 million were “Core” participants who play 8 or more times a year. This segment remained the same from 2020.

It is important to note that the NSGA measures participant as 2 times or more a year while the SFIA measures participation as 1 or more times a year.

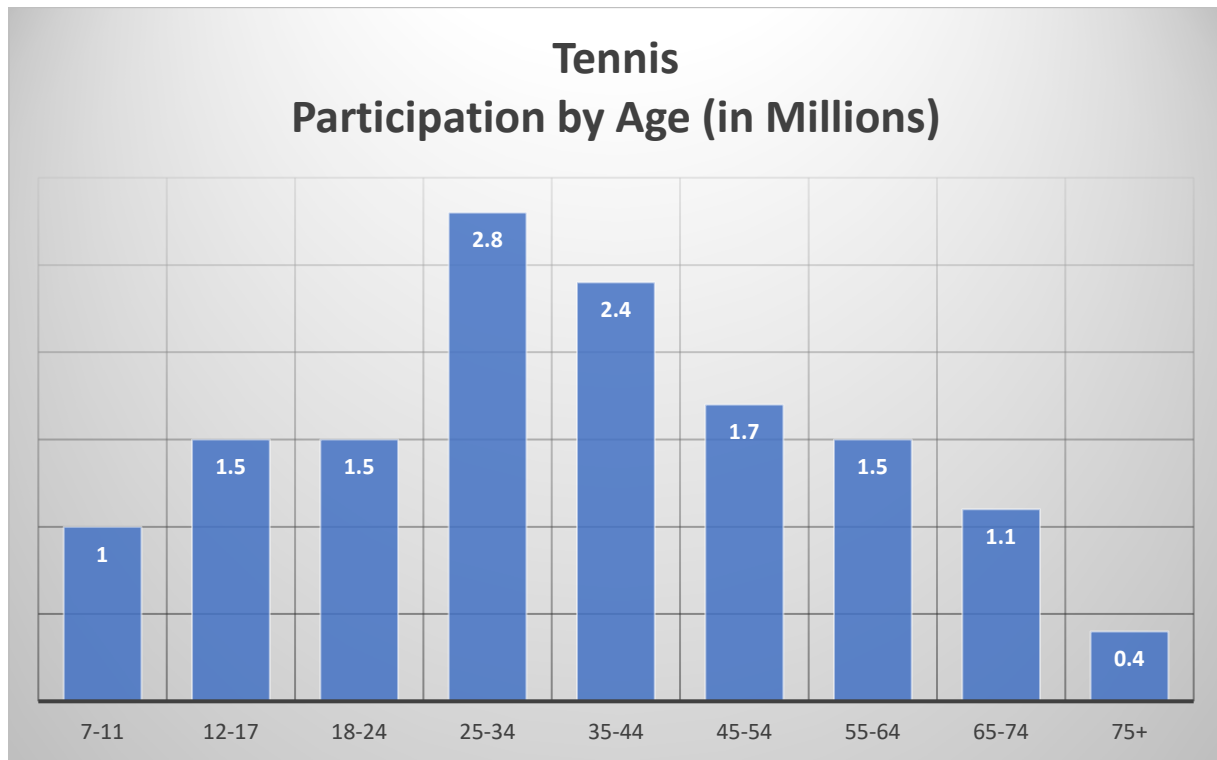
Tennis

Chart J – NSGA Participation in Millions over the Last Ten Years



- Tennis participation has vacillated significantly over the last 10 years before showing strong growth over the last two years.

Chart K – NSGA Participation by Age in 2021



- Tennis participation was highest in the 25-34 age group followed by age 35-44.
- Participation is highest in the South Atlantic region (includes Florida).
- 51.0% of players are Occasional Players (5-29 times a year) followed by Infrequent Players (2-4 times a year) at 28.8% and Frequent Players (30 plus time as year) at 20.2%.

The USTA released information earlier this year from The Physical Activity Council (PAC): “PAC study's latest findings: that more than 22.6 million players took to the court in 2021, a 4.5% increase from 2020 and a 27.9% increase from 2019. Tennis participation has grown by 4.9 million tennis players over the last two years, an increase that has outpaced that of pickleball, badminton, table tennis and paddle combined, and has largely been driven by a rise in popularity amongst young people and communities of color.”

Again, it is important to note that the NSGA measures participant as 2 times or more a year while PAC measures participation as 1 or more times a year.

It is also important to realize that COVID had a big impact on the participation rates of many sports and those that are primarily outdoor based and not a team activity, saw large increases in participation as people gravitated to outdoor activities.

## Other Sports Participation Comparisons

Comparing the rate of participation in pickleball and tennis with other common sports is helpful for context. Below NSGA lists a number of sports activities and the percentage of growth or decline that each has experienced nationally over the last five years.

Chart L – Sports Participation Last 5 Years

	2017 Participation	2021 Participation	Percent Change
Pickleball	1.9	3.6	89.5%
Boxing	3.7	4.6	24.3%
Skateboarding	5.5	6.7	21.8%
Exercise Walking	104.5	125.0	19.6%
Strength Training	36.4	42.8	17.6%
Cardio Fitness	75.2	86.1	14.5%
Tennis	12.3	13.8	12.2%
Table Tennis/Ping Pong	10.2	11.4	11.8%
Golf	17.9	19.0	6.1%
Yoga	29.6	30.7	3.7%
Exercising w/ Equipment	55.5	57.2	3.1%
Volleyball	10.5	10.8	2.9%
Running/Jogging	43.8	45.0	2.7%
Weightlifting	36.5	37.5	2.7%
Pilates	5.7	5.8	1.8%
Soccer	14.3	14.5	1.4%
Swimming	47.9	47.1	-1.7%
Hockey (ice)	3.3	3.2	-3.0%
Wrestling	3.2	3.1	-3.1%
Softball	9.8	9.3	-5.1%
Ice/Figure Skating	8.8	8.3	-5.7%
Baseball	12.1	11.3	-6.6%
Basketball	24.6	22.5	-8.5%
Lacrosse	2.9	2.6	-10.3%
Football (tackle)	7.5	6.7	-10.7%
Martial Arts / MMA	6.0	5.2	-13.3%
Football (touch)	9.5	8.2	-13.7%
Cheerleading	3.5	3.0	-14.3%
Gymnastics	6.0	5.1	-15.0%
Football (flag)	6.5	5.4	-16.9%
Workout @ Club	37.4	24.6	-34.2%

**2017 Participation:** The number of participants per year in the activity (in millions) in the United States.  
**2021 Participation:** The number of participants per year in the activity (in millions) in the United States.  
**Percent Change:** The percent change in the level of participation from 2017 to 2021.

While pickleball has seen the greatest increase in participation over the last five years, when ranked against the other 57 sports in overall participation, it only ranks number 50 and tennis is ranked number 22.

### ***Other Local Tennis and Pickleball Courts***

There are other facilities available for tennis and pickleball on and off Marco Island. These include:

- The YMCA of South Collier is a major provider on Marco Island and has great tennis (6 clay courts) and pickleball courts (9). The pickleball courts are only a year old.
- The Greater Naples YMCA also 7 pickleball courts as well 10 tennis courts (8 clay and 2 hard courts).
- East Naples Community Park has a huge pickleball complex (64 courts) that is operated by Collier County. The County also has Veterans Community Park with 14 pickleball courts, Pelican Bay Community Park with 8 tennis courts and Eagle Lake Community Park with 2 tennis courts.
- The City of Naples has several tennis and pickleball court locations. Fleishman Park has 6 pickleball courts (overlaid on basketball courts), and the Arthur Allen Tennis Center has 12 clay tennis courts.
- A number of condominium units on Marco Island have tennis and pickleball courts that are available to their residents.
- It is important to note that JW Marriot removed their tennis courts to make room for more parking.

### ***Market Assessment Summary***

The following is a summary of the market assessment portion of the report.

#### ***Demographics***

- Marco Island has a reasonably small permanent population to support a large racquet center.
- The seasonal residents, visitors and Secondary Service Area individuals provide a much larger market. The Marco Island Racquet Center must have a strong appeal to these groups.

- The population of Marco Island and the surrounding area is much older, has a higher household income level, and is not racially diverse. With a much older population it is difficult to grow participation at the racquet center among younger age groups due to the smaller population in these age groups.
- There is a high spending potential index (SPI) for recreation purposes. Paying for services is less of an issue.

### *Racquet Sports Participation Rates*

- Pickleball has had a dramatic increase in participation over the last 5 plus years but overall, the sport still has a relatively small participant level (50) compared to other sports. The sport has a strong appeal across all age groups but is growing very fast among the younger age groups.
- While tennis has not enjoyed the massive growth of pickleball, it has shown reasonably steady rates of participation over the last 10 years and significant growth in the last two years. The sport has a significant participation level (22) when compared to other sports. The sport has the greatest appeal in the younger age groups.
- The majority of participants in both sports are “occasional” players (5-29 times a year).

### *Other Local Tennis and Pickleball Courts*

- The YMCA is a major provider of both tennis and pickleball courts in Marco Island. This impacts the demand for courts in the immediate area.
- East Naples Community Park is a regional and national pickleball facility that is able to serve as a tournament facility.

### **Assessment of the Racquet Center's Current Condition and Use**

The following is an assessment of the Marco Island Racquet Center's current condition and utilization.

#### ***Image and Appeal***

The Racquet Center offers two indoor air-conditioned racquetball/handball courts, nine pickleball courts (includes 1 stadium court), and Six (6) Har-tru tennis courts, and an office area with an upstairs meeting room.

The Racquet Center is an older facility that is in need of a significant upgrade. As a result, the center is not particularly visually pleasing, has poor signage, and lacks an identity.

The center used to be owned and operated by Collier County. When it was deeded to the City of Marco Island there was a requirement that the city have open/free use times for the facility.

Other issues include:

#### **General**

- There is no real sense of arrival at the center or an obvious entry building/area.
- The parking lot is small and only has 48 parking spots. This impacts programs and use. Parking lot lighting is poor and needs to be upgraded.
- There is no ability to control who accesses the facility due to the location of the main office structure which is off to the side of the main entrance. Staff uses a temporary tent at the main entrance with a scanner for members during high use times.
- The office has upgraded restrooms, but a poor office area and an upstairs meeting/event room with a small kitchen. This space is underutilized and in the process of being repainted/upgraded. There is no elevator to this level. Staff wants to use this for events and social functions. There is also an outdoor covered deck but it is seldom used.
- All the courts (except the tournament pickleball court) generally sit below the height of the landscaping, walkways and other areas. This results in flooding and water damage to the courts.
- The court lighting system is old, inefficient, and should be upgraded.



- There is limited shade in the complex especially in the off-court areas.
- It is difficult to host tournaments or any significant events as there is simply not enough parking.
- Court rentals are not a strong program for the center.
- Alcohol is allowed in the center on a permit basis.
- There are limited social events held at the center and most are pickleball related.
- There is not a facility or court sponsorship program in existence. It is not unusual to see this type of program for public facilities.

### Tennis Courts

- The 6 clay courts need irrigation upgrades, 1 court (8) is not playable at all as a total rebuild of the irrigation system is needed. Another court's (7) system is failing and may need to be replaced soon as well.
- Previously the other 4 courts below ground irrigation system had to be replaced but was done with an above ground system which is inefficient and requires that the courts be shut down in the afternoon for 4 hours for watering.
- Court 7 is often used for lessons since it is isolated from the other courts.

### Pickleball Courts

- There are 8 courts located together and 1 tournament court that is not lighted and has no seating.
- The clay material migrates from the tennis courts onto the pickleball courts at times causing slipping issues.
- Players do not like to have to walk through the west courts to get to the east courts. They want a path around the west side to enter those courts.
- The City is resurfacing some of the courts now due to cracking but there is concern that they will still crack again over time. To solve this problem would require a total court rebuild.

### Racquetball Courts

- The two courts have panel front walls, but all other walls are plaster and in very poor condition. One court appears to have water seepage in the walls that is

causing them to peel. The plaster walls have to be patched every year. This is an old and ineffective court wall system.

- The upstairs viewing area is full of equipment and not useable. There is also no elevator for access.
- The main level is also full of equipment and unsightly.
- There is only one entry/exit door, and the entrance is very uninviting.

### ***Racquet Center Operations and Utilization***

The Marco Island Racquet Center is generally well managed but could be better maintained and utilized.

#### Operations

- Staff is limited with only one full time position. There are also two part-time desk staff and contract instructors. The front desk often has two people working during the season while the rest of the time there is generally only one on duty.
- There is no true operations or staff manual but there are basic operations procedures in place. However, there is no emergency action plan.
- Program instructors are contracted with a 65/35 split of revenue. The city collects all the money. This is a normal rate of revenue split for contract instructors.
- The center uses Civic Rec software program for registrations and point of sale, but this is not being utilized to its fullest capacity. Excel and other programs are used as well, and the information is not directly linked to Civic Rec.
- The market is primarily older adults (especially for tennis) with fewer middle aged, younger adults and youth participants. This matches the demographics of Marco Island but diminishes the overall market for the center.
- Seasonal and visitors to the island make up an important market segment for the center.
- It is estimated that 15% to 20% of users are non-residents of Marco Island.
- The center lacks a program/operations plan that identifies the programs and services that will be provided, the timing and how to maximize the utilization of the courts.
- There is also no formal marketing plan to guide efforts to market the facility or its programs.

- There is a small pro-shop operation that is really not viable as there is limited product and no display area. There is also no inventory of goods and items sold. While each sale is run through Civic Rec, the actual item(s) being sold is not noted.
- There is also no food/beverage service. However, with the current utilization rate for the center there is not enough volume or demand to really support this service on a consistent basis.
- The fee schedule needs to be revised and updated. However, users do not seem to be willing to pay higher fees for use.
- The current center users seem to be happy with the operations staff but less so with the maintenance and condition of the facility and courts.
- There are limited performance metrics in place. Improved and more consistent data on who uses the courts, when they use it, and for what purposes is needed.
- Need to consider working with the local resorts to increase use from visitors to Marco Island.
- There are no actual cost recovery goals for the center, but the center does not have to cover its cost of operation.

### Maintenance

- Maintenance is handled by Facilities and is adequate at best. Maintenance is hampered in part by the fact that there is not a comprehensive maintenance plan for the facility. The center has one part-time maintenance staff assign to the facility. Improvements/maintenance to the center are charged back to Parks and Recreation.
- Facilities staff has a list of daily and weekly tasks that must be completed.
- Facilities contracts for certain services including:
  - Irrigation repairs
  - Landscaping
  - Resurfacing of courts (every 5 years for hard surfaced courts)
- There is no lifecycle costing of items or long-term projections of capital costs for needed improvements. There is a CIP budget that handles most capital improvements.
- Custodial services are conducted by City staff and the building is cleaned 5 days a week (Monday through Friday).

### Utilization

Below is an assessment of current utilization of the various elements in the Marco Island Racquet Center. It is important to realize that the requirement that the center have open times for use results in weekday afternoons (4pm-6pm) being scheduled for free open play. Also, the high season is from October through April when there are the most seasonal residents and visitors to Marco Island.

### Tennis Courts

- There are currently 81 memberships, the lowest number in the last 4 years. The high number was 159 members in 2019.

Year	Total
2022 (half year)	81
2021	118
2020	114
2019	159

- Tennis day guest passes from April to April over the last three years.

Type	2021-2022	2020-2021	2019-2020
Morning Guest Count	222	N/A	N/A
Mid-Day Guest Count	238	N/A	N/A
<b>Total</b>	<b>460</b>	<b>434</b>	<b>385</b>

Note: Tennis guest passes included racquetball in 2020-2021 and 2019-2020.

- Tennis court rentals from April to April over the last three years.

Type	2021-2022	2020-2021	2019-2020
Half Hour Rentals	69	7	0
Full Hour Rentals	473	439	219
<b>Total</b>	<b>542</b>	<b>446</b>	<b>219</b>

Court rentals decreased significantly during the start of the pandemic.

- Court rental revenue for the season for tennis is shown below (1/2 hour and 1-hour rentals) over the last 3.5 years.

Year	Total
2022 (half year)	\$5,218
2021	\$12,189
2020	\$5,998
2019	\$5,849

It is important to note that court rental revenue during the season rose substantially right after the pandemic. Most of the rental revenue is from non-residents.

- Tennis has a higher number of court rentals and revenue than pickleball.
- The prime times of use are weekday mornings from 8am until 12:15pm, when there is league play. Afternoons and weekends are mostly for rentals and lessons but afternoons on 4 courts are interrupted by irrigation. From 4pm to 6pm is reserved for open free play. Weekday evenings (during the season) are a combination of reserved play, lessons, and rentals. During the off season there is a much lower rate of use during the evening hours.
- The priority of use for tennis courts are:
  - League play
  - Court reservations/rentals

Members can reserve a court to play, then guests. There are no reservations during afternoon free play.

- Having 6 courts is more than adequate for the tennis market as it presently exists. The courts can reach capacity during the season in the morning hours on weekdays. However, demand is much lower during the afternoons, and evenings as well as weekend afternoons. There is significant capacity available during these times. Afternoons are not generally high use times for most racquet facilities.

### Pickleball Courts

- There are currently 360 memberships (highest number in the last 4 years).

Year	Total
2022 (half year)	360
2021	359
2020	343
2019	219

- Memberships for pickleball are capped at the current level and there is a waiting list of 123.
- Pickleball day guest passes from April to April over the last three years.

Type	2021-2022	2020-2021	2019-2020
Morning Guest Count	850	N/A	N/A
Mid-Day Guest Count	503	N/A	N/A
Total	1,353	988	688

- Pickleball has a higher number of guest passes than tennis.
- Pickleball court rentals from April to April over the last three years.

Type	2021-2022	2020-2021	2019-2020
Half Hour Rentals	10	1	0
Full Hour Rentals	258	112	51
<b>Total</b>	<b>268</b>	<b>113</b>	<b>51</b>

Court rentals decreased significantly during the start of the pandemic.

- Court rental revenue for the season for pickleball is shown below (1/2-hour rentals) for the last 3.5 years.

Year	Total
2022 (half year)	\$3,408
2021	\$3,947
2020	\$1,250
2019	\$1,470

It is important to note that court rental revenue during the season rose substantially right after the pandemic. Most of the rental revenue is from non-residents.

- Pickleball has a lower number of court rentals and revenue than tennis, but rentals are not usually a big aspect of pickleball facilities.
- The prime times of use are weekday mornings from 8am to noon when round robin play is the norm. The courts are reservable from noon to 4pm. From 4pm to 6pm is reserved for open free play. Weekday evenings (during the season) are generally for socials and reserved play. During the off season there is a much lower rate of use during the afternoon and evening hours. Afternoons are not generally high use times for most racquet facilities.
- The priority of use for pickleball courts are:
  - Drop-in round robin play
  - Court reservations/rentals
  - Socials during the season (6pm-8pm)

Members can reserve a court to play, then guests. There are no reservations during afternoon free play just open round robin play.

- It is projected that the center could likely support up to 16 courts or possibly even more during the season and during the morning hours on weekdays. Demand is much lower during the afternoons, and evenings as well as weekend afternoons. There is capacity available during these times.

## Racquetball Courts

- There are currently only 10 memberships for the racquetball courts.

Year	Total
2022 (half year)	10
2021	18
2020	N/A
2019	N/A

- City employees had been primary users in the past but are now required to have memberships, so the number of users has dropped.
- Racquetball day guest passes totaled 42 from April 2021 until April 2022.
- Racquetball court rentals from April to April over the last three years.

Type	2021-2022	2020-2021	2019-2020
Full Hour Rentals	14	21	23

Court rentals have been really low for all three years.

- The courts are also used for wallyball and also for some youth movies and other functions.
- The priority of use for racquetball courts are:
  - Reservations for play
  - First come, first serve

Members can reserve a court to play. There are no reservations during afternoon free play.

- Regardless of the day of the week, time of the day or season of the year, the racquetball courts receive a very low level of use.

## Lesson Programs

The center contracts with instructors for both tennis and pickleball. There are two instructors each for tennis and pickleball. From 1/1/2020 until 4/18/2022 there were 486 tennis lessons given and 1,017 pickleball lessons. Most of the lessons are in the afternoons or evenings on weekdays and weekend mornings.



## **Racquet Center Recommendations**

The following recommendations are based on what would best serve the City of Marco Island, its residents, and the tennis, pickleball and racquetball players.

### ***General***

- Doing nothing with the Marco Island Racquet Center is not an option. If the center, in any form, is going to be sustainable in the future, then the facility has to be improved both in its physical appearance as well as the way it is operated.
- Both tennis and pickleball are viable sports that should be accommodated with public courts in Marco Island. Racquetball has limited market appeal and there are very few players in the area.
- The final decision on the future direction for the Racquet Center should be based on an overall system wide parks and recreation master plan that determines the importance and priority for the racquet center when compared with other parks and recreation needs in the community.
- The center should undergo a full master plan based on the recommendations and options noted below. The master plan needs to be predicated on the willingness of the city to fund improvements and the operational requirements of any changes.
- From the master plan, there will need to be short- and long-term steps identified for physical and operational improvements.

### ***Physical Changes***

- Racquetball should be eliminated. The building and courts are in poor condition and the rate of use is very low. This building should ultimately be demolished.

When the racquetball courts are removed the area should be utilized for expanded parking.

- Parking needs to be reconfigured and expanded on site where possible. The lack of parking severely impacts the use of the tennis and pickleball courts.
- There needs to be a better sense of arrival and improvements to the entry experience. Improved signage is also needed.
- The city does not really own any land that would be large enough or in a good location for a new racquet center of any type. The City would need to purchase property for this purpose. The best site is next to the new development that is across the street from City Hall. It will be expensive to acquire.

- The entrance to the courts should be moved to force users to go directly past the office area to better control access, payment for services, and overall security.
- The court lighting systems should be replaced as well as the parking lot lights.
- The irrigation systems for all the tennis courts should be replaced and located below ground.
- The office area needs to be renovated and improvements made to the pro shop space if this is going to continue. This would also include better inventory controls and tracking of sales by type of merchandise.
- Additional shade in the main area between the courts is needed.
- Drainage issues are dealt with in a comprehensive manner that protects the court surfaces.
- If the pickleball courts remain at the center, then having direct access from both sides of the court area will eliminate cross court traffic.
- The pickleball courts should be resurfaced every 5 years as a result of surface cracks and the need for an optimal playing surface. To significantly reduce court cracking permanently would require a total rebuild of the courts at a high expense and even then, some cracking would likely still occur.

### ***Future Facility Options***

The following options should be considered for the future of the Racquet Center.

#### **Option 1 – Maintain the balance between tennis and pickleball**

- The racquetball courts are removed. The area is replaced with additional parking.
- The 6 tennis courts remain, and the irrigation is improved on all courts with all underground watering.
- The 9 pickleball courts remain, and the courts are resurfaced on a regular basis.
- Lighting is improved throughout the center as well as the parking lot.
- The office area is improved, an elevator is added, and the upstairs is renovated.
- The entry to the facility and courts is improved with a better sense of arrival.

#### ***Pros***

- Both tennis and pickleball remain as viable sports at the center.
- There is operational efficiency by having one racquet center.
- Capital costs are minimized.

#### ***Cons***

- Neither tennis nor pickleball are properly served at the center.
- Parking continues to be a problem.

- A capital investment in the facility is still required.

### Graphic Representation of Proposed Changes



### **Option 2 – Return the facility to a tennis center/Build a new pickleball center**

- The racquetball courts are removed.
- The existing 6 tennis courts remain, and the irrigation is improved with all underground watering.
- The existing 8 pickleball courts are converted to additional parking.
- The pickleball stadium court is converted to a tennis hitting wall and warmup area for tennis.
- The entry area, office and lighting are all improved.
- A 12-16 court pickleball complex is built elsewhere. This will require a new site. If the site across the street from City hall is obtained, at approximately 2 acres in size it should be large enough to support a 12-16 court complex and the required parking (this information is based on preliminary calculation by staff at Bermello Ajamil & Partners, a Miami based landscape architecture firm).

#### *Pros*

- Both tennis and pickleball are accommodated and courts are expanded for pickleball.
- Parking is improved and is no longer an issue.
- Programming for both sports can expand including tournaments and other events that require additional parking.

#### *Cons*

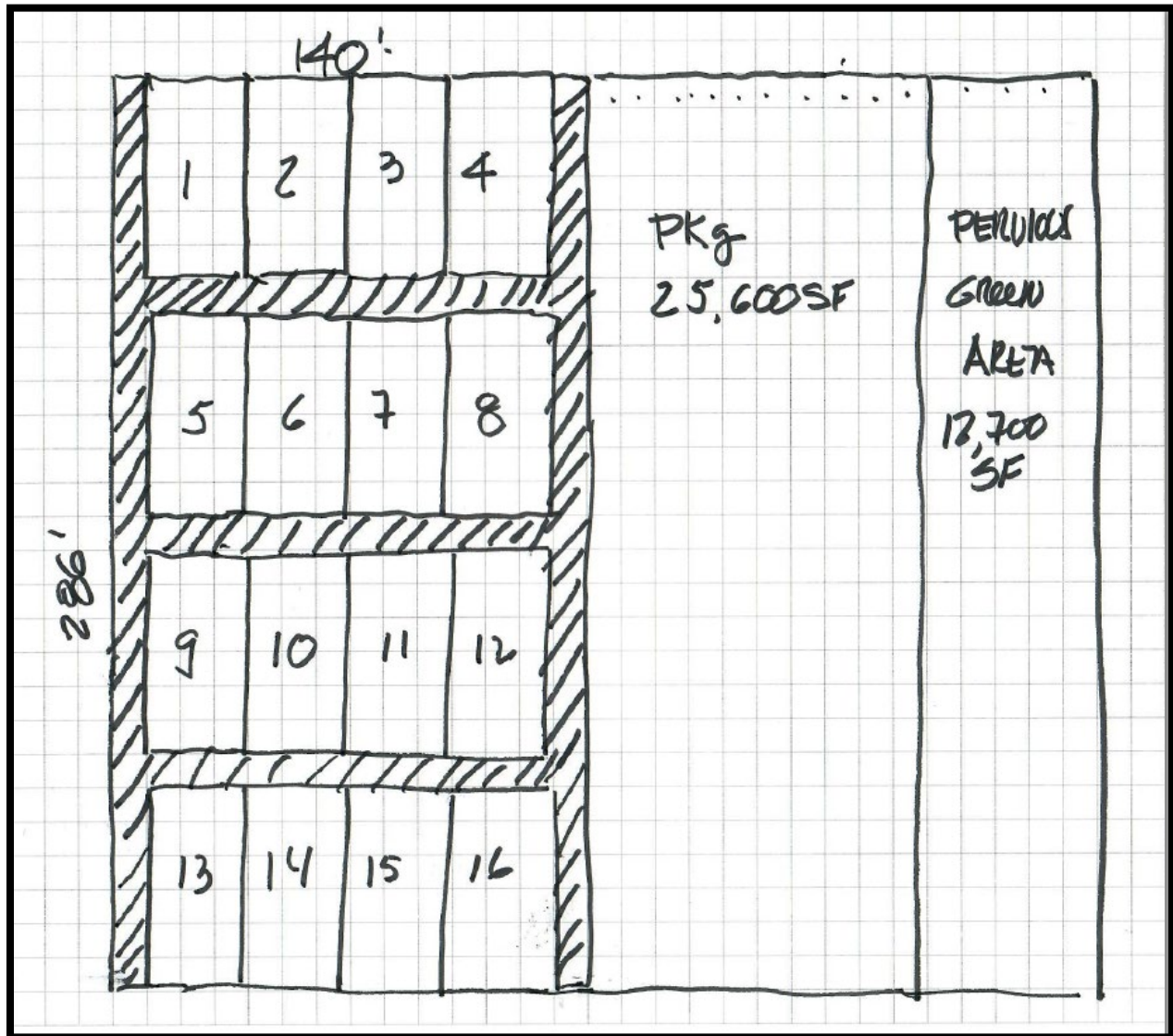
- There is a loss of operational efficiency by having two racquet facilities. Operating costs are higher.
- Capital costs are much higher.
- Tennis remains at 6 courts.



Graphic Representation of Proposed Changes



Possible Site Diagram for a New Pickleball Center (16 courts/2 acre site)



Graphic developed by Bermello Ajamil & Partners. This is very preliminary only and does not represent a site plan for any actual location.

### **Option 3 – Convert 2 tennis courts to an additional 8 pickleball courts**

- The racquetball courts are removed and replaced with additional parking.
- The two most north tennis courts (courts 3 and 4) are removed and replaced with 8 pickleball courts. The total number of courts available is 17.
- Additional offsite parking is provided across the street to support the additional pickleball courts.
- The 4 remaining tennis courts irrigation is improved with all underground watering.
- The pickleball courts are resurfaced on a regular basis.
- Additional pickleball programming is possible including tournaments.
- Lighting is improved throughout the center as well as the parking lot.
- The office area is improved, an elevator is added, and the upstairs is renovated.
- The entry to the facility and courts is improved with a better sense of arrival.

#### *Pros*

- The number of pickleball courts are expanded.
- Parking is added.
- Additional pickleball programming is possible, including tournaments.
- Capital costs are lower than building a new pickleball court facility.
- Operational costs are slightly lower by not having to maintain as many clay tennis courts.
- The sport with the largest current user base is better accommodated.

#### *Cons*

- The number of tennis courts are reduced to four which is the absolute minimum number to continue the tennis program. There is not any opportunity to grow the tennis program in the future.
- Most of the additional parking is available offsite.
- There could be a capital expenses for offsite parking or an on-going lease of existing parking.



Graphic Representation of Proposed Changes



### **Option 4 – Convert the facility to a pickleball only center**

- The racquetball courts are removed and replaced with additional parking.
- All the tennis courts are removed and replaced with pickleball having 25 courts working from the back of the site forward.
- The existing pickleball courts (8) at the front of the site are converted to parking.
- The pickleball courts are resurfaced on a regular basis.
- Additional pickleball programming is possible including tournaments.
- Lighting is improved throughout the center as well as the parking lot.
- The office area is improved, an elevator is added, and the upstairs is renovated.
- The entry to the facility and courts is improved with a better sense of arrival.

#### *Pros*

- The number of pickleball courts are expanded.
- Parking is improved onsite and is no longer an issue.
- Additional pickleball programming is possible including tournaments.
- Capital costs are lower than building a new pickleball court facility.
- Operational costs are somewhat lower by not having to maintain clay tennis courts.
- The sport with the largest current user base is better accommodated.

#### *Cons*

- Tennis courts are no longer available, and the tennis program is discontinued.
- Capital costs are higher than Option 1.
- Having 25 pickleball courts is a high number to keep occupied at times.

Graphic Representation of Proposed Changes





### Recommendation

The best option for the City of Marco Island to pursue is Option 2. This allows both tennis and pickleball to have improved facilities (and pickleball more courts), and more parking. However, the City has to be willing to expend significant capital dollars to acquire land and build a new pickleball facility and pay the increased operating costs for two facilities. If the City is not willing to commit to this level of funding, then Option 1 is the most realistic option to pursue but with the understanding that capital improvements are still required.

### **Operations and Maintenance Changes**

- Work to significantly improve maintenance of the facility. Develop a long term pickleball resurfacing schedule and tennis court irrigation replacement schedule.
- Consider dropping the reserved parking plan for tennis league participants.
- Negotiate an agreement with the county to eliminate the deed requirement for free and open use.
- Better utilize the Civic Rec software program for point of sale, scheduling, and pro-shop inventory. Increase the operational performance metrics that are being tracked.
- There must be greater programming and increasing appeal to a younger age group (including youth).
- Consider coordinating programs and fees with the YMCA.
- Consider running two separate open round robin sessions a day for pickleball to increase the number of users and memberships.
- Offer additional social activities to generate use and excitement for the facility. The upstairs room and deck could be used for socials as well as other recreation programs if it is upgraded.
- Work to increase the number of tennis court rentals during the season.
- Develop a cost recovery policy for the center:
  - The ability to recover all true operating costs with earned revenue will be a challenge.
  - There should be no expectation that the center will be able to cover capital improvements with user fees.
  - The center should have a small fee increase every two years based on the fees charged at other similar locations in the area.
  - Continue to have a resident/non-resident fee.

- Benchmark fees and services with other providers at least every two years.
- Recreation and center staff should develop:
  - Marketing plan that focuses on:
    - Full time residents
    - Seasonal residents
    - Visitors
    - Younger age groups
    - School teams and groups
    - Lessons and league participation
    - Rentals
  - Operations policies and procedures that cover:
    - Emergency action plan
    - Use of Civic Rec
    - Money handling
  - Program plan that focuses on:
    - Lesson programs
    - League development
    - Round robin play
    - Social programs for both tennis and pickleball
  - Maintenance plan
    - On-going maintenance plan
    - Capital/lifecycle replacement schedules
    - Preventive maintenance requirements
  - Use and operations metrics development
    - Resident and non-resident use
    - Use by month/season/time of day
    - Capacity analysis by court
    - Membership trends and retention rates
- The full cost of operating and maintaining the center needs to be included in the operations budget. This means the Facilities time and materials should be listed as a line-item within the center's budget.
- Consider the development of a sponsorship program for the facility.
- The City should consider possible contract management of the center. This is a common practice in many south Florida communities.

### ***Possible Financial Impact of Changes***

The goal of the assessment of the Marco Island Racquet Center is to improve the condition of the facility and its use. Based on the recommendation of pursuing Option 1 or 2, to accomplish this the following financial commitment needs to occur. It should be noted that these are general estimates only and could vary substantially based on construction costs, center usage and fee schedules.

### Physical Improvements

Unless significant physical improvements are made to the existing center then the other use and operational goals are not attainable.

#### Option 1

- The improvements that have been recommended to the existing facility could be \$1.5 to \$2 million or more.

#### Option 2

- The construction of a new pickleball facility, depending on the site and the number of courts that are constructed, could cost \$4 to \$8 million or more in addition to the cost of site acquisition.
- Most all of the proposed improvements to the existing center (now tennis only) will still have to occur so the \$1.5 to \$2 million figure will need to remain.

### Operational/Budget Improvements

Although less expensive than capital, there are additional operational costs that will need to be incurred to implement the recommendations noted in this assessment.

#### Option 1

- An increase in staff time to implement the operational goals that have been identified could result in an additional \$3,000 to \$5,000 in part-time staff a year (5 to 7 hours a week).
- Additional maintenance staff time is needed to adequately maintain the existing center at a higher level. This could add \$7,000 to \$10,000 in part-time staff a year (7 to 10 hours a week).

#### Option 2

- If a new pickleball center is built, the cost of operation could be \$125,000 to \$175,000 per year (depending on the number of courts, location, and other support amenities).
- Operating expenses for the existing center (now tennis only) would not increase and it is expected that some of the management and operations cost could be shared with the pickleball center. This might result in a reduction in cost of \$15,000 to \$25,000.

### Revenue Enhancement

#### Option 1

- With improvements and changes in operations to the existing center there should be an increase in overall revenue in the range of \$15,000 to \$25,000 per year.

#### Option 2

- The presence of a new pickleball center should be able to increase overall revenue by \$40,000 to \$70,000 a year from memberships, lessons and other activities.
- With a tennis only facility there would be a small increase in overall revenues in the range of \$5,000 to \$15,000 per year.

### Other Options

If either Option 3 or 4 is chosen, it is projected that overall capital costs will be higher than Option 1 but lower than Option 2.

For either option, the operations costs will drop slightly (even with the anticipated operational enhancements in Option 1) as fewer or no tennis courts will be included in the Racquet Center. Overall revenues will increase slightly (even with the loss of some tennis courts) for Option 3 but will likely be slightly less than Option 4.