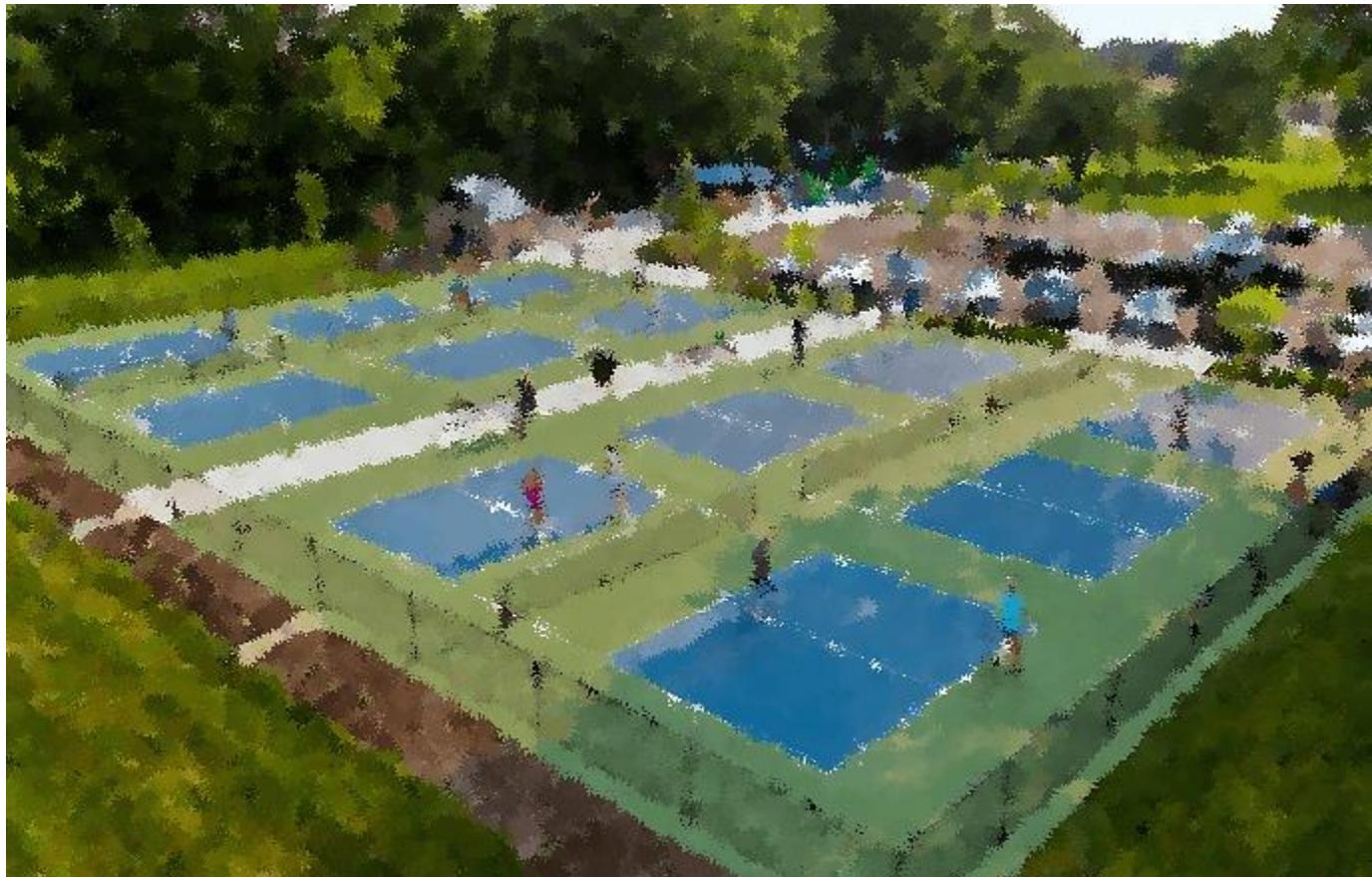


Whitpain Township

Pickleball Feasibility Analysis



Prepared For:
Whitpain Township, Pennsylvania

Prepared By:
4ward Planning Inc.

September 12, 2024

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Executive Summary

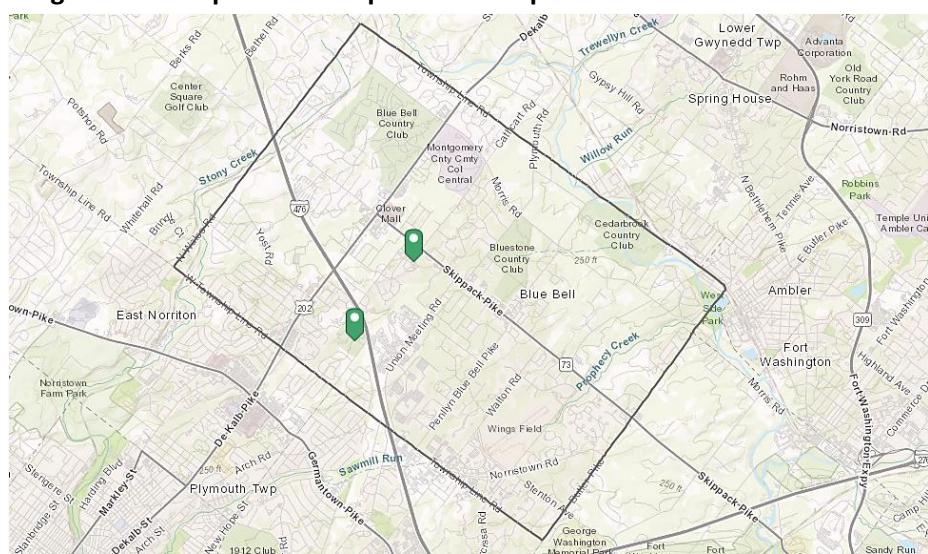
Project Overview

Whitpain Township is considering two different sites for the development of a potential pickleball court facility. One site is at Mermaid Park (1002 Jolly Road, Blue Bell) and the other site is at the existing tennis courts at Wentz Run Park (1000 Anvil Lane, Blue Bell). 4ward Planning was hired by Whitpain Township to determine the current and future demand for a hypothetical pickleball court in Whitpain Township and the associated capital and operating costs.

This study answers the following questions:

- What is the demographic profile of pickleball enthusiasts (age, race, income, educational attainment, etc.)?
- How many pickleball enthusiasts (play at least once per month or would like to play if facilities were located locally) live in Whitpain Township?
- How many prospective pickleball enthusiasts live within a 15-minute drive of one or more potential pickleball court locations within Whitpain Township?
- How many pickleball court facilities exist within a 20-minute drive of one or more potential pickleball court locations within Whitpain Township? What share of these facilities are municipally operated?
- How many and in what locations are there proposed pickleball courts and when are they likely to come online?
- What is the capital cost to develop pickleball courts (either from scratch or adaptively reusing existing court surfaces such as basketball or tennis)?
- What are current best-case examples of municipally facilitated pickleball courts?

Figure 1. Prospective Whitpain Township Pickleball Court Locations



Key Findings & Recommendations

The following are the key findings generated from our high-level market and case study analysis:

There is unmet demand for pickleball courts in Whitpain Township. Within a 20-minute drive time from the center of Whitpain Township's two potential pickleball court sites, there are just 0.28 pickleball courts per 1,000 people, a number much lower than the service levels observed in the states of New York, New Jersey, and Pennsylvania (1.0 court per 1,000 participants). Further, Township's demographics, when compared to pickleball user profile data for the nation, suggest strong demand for pickleball courts in the township. Seventy-nine percent of survey respondents indicated they are "extremely" or "very" interested in seeing pickleball courts created in Whitpain Township, and 68 percent anticipate using such courts regularly.

Demand could support three to six dedicated pickleball courts in Whitpain Township. According to our supply and demand analysis by age cohort, by 2029, approximately 3,620 township residents will be interested in playing pickleball, assuming that approximately 1,100 of these residents would actually play pickleball if new courts were built in the township (conservatively assumes 30 percent of residents with interest). To meet this unmet demand, 4ward Planning recommends the development of three to six dedicated pickleball courts in Whitpain Township. It is recommended that the courts be first offered to Township residents (for one to two years), which could later be adjusted based on usage.

Survey respondents want outdoor, low-fee pickleball courts that would not replace tennis. Survey responses indicate enthusiasm for outdoor, low- or no-fee pickleball courts in Whitpain Township, though not at the cost of reducing the number of the township's tennis courts nor developing the courts adjacent to quiet residential neighborhoods. Survey results also suggest the creation of Whitpain Township pickleball courts will increase local participation in the sport.

Area municipal pickleball revenue-generation covers basic administrative costs. Among case study municipalities examined, some generate revenue through memberships and/or pickleball classes and programs or do not generate revenue at all. Those that generate revenue solely through classes and programs seem to collect enough to cover administrative costs of those programs.

Area municipal pickleball operating costs are minimal, while installment costs vary. Annual operating costs among case study examples are relatively minimal, consisting of items such as new pickleballs, net repair, and routine clean up, and are absorbed by general parks and recreation department budgets. Different pickleball court (i.e., shared/hybrid or dedicated) and program (i.e., membership/day pass only, combination meet-up membership and open play, and all open play) models serve different types of players, as well as require different levels of municipal installment costs and oversight.

The cost of developing pickleball courts varies widely. Costs are based on numerous factors including court type (indoor or outdoor), materials (asphalt or concrete), location and placement, sitework (electric or water access, grading or drainage), fencing materials, and additional structures or amenities (wind or shade structures, lighting, benches, and restrooms, etc.). To accommodate day and night play, as well as a longer play season, outdoor pickleball courts built under a pavilion with LED lights are recommended.

Market Analysis

Pickleball Overview

INDUSTRY GROWTH

USA Pickleball is the national governing body for the sport of pickleball and provides players with official rules, tournaments, rankings, and promotional materials. According to Pickleheads, the official court and game finder of USA Pickleball, pickleball is now the fastest-growing sport in America for the third year running. The sport, which is a cross between table tennis, badminton, and tennis, was invented by three vacationers on Bainbridge Island, near Seattle, in 1965. Currently, Pennsylvania ranks eighth out of the top states with the most pickleball facilities.

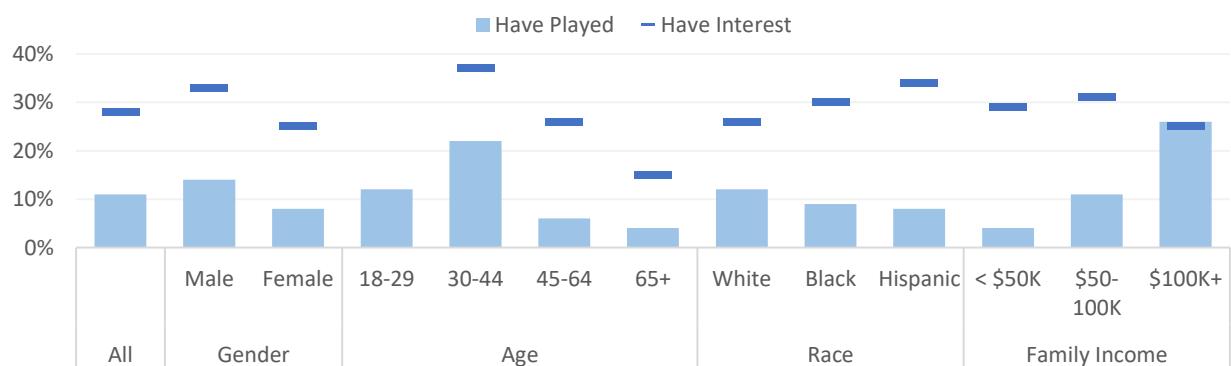
PICKLEBALL USER PROFILE

National Survey

The following summarizes key demographic characteristics of U.S. adults 18 years and older who have played pickleball or have interest in playing, according to a 2024 study conducted by YouGov (an international online research data and analytics technology group):

- **All:** While just 11 percent of U.S. adults over 18 have played pickleball at least once, 28 percent have some interest in playing.
- **Gender:** Men are more likely than women to have played pickleball or have interest in playing. Men made up 60.5 percent of pickleball players in 2021, while women made up 39.5 percent.
- **Age:** The national average age of pickleball players was 38.1 years in 2021. Adults between ages 30 and 44 represent the cohort most likely to have played pickleball or have interest in playing.
- **Race/Ethnicity:** White adults are most likely to have played pickleball or have interest in playing.
- **Income:** While adults with annual household incomes over \$100,000 are those most likely to have played pickleball, adults in all income cohorts appear to have interest in playing.

Figure 2. Share of U.S. Adults Who Have Played or Have Interest in Pickleball, 2024



Note: There is no data available for the share of adults ages 18-29 with an interest in playing pickleball.

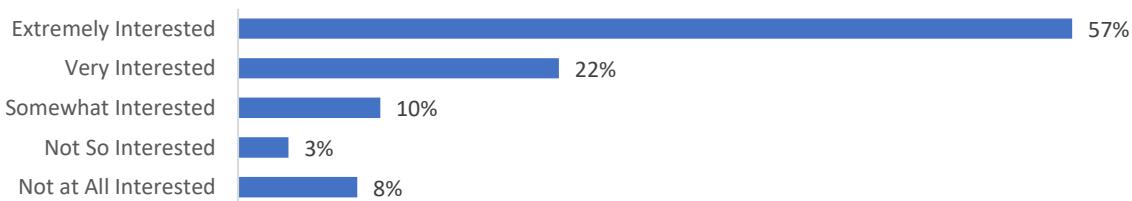
Source: YouGov Survey: Pickleball, conducted March 12 - 15, 2024

Whitpain Township Survey

4ward Planning designed a survey instrument (using Survey Monkey) to identify prospective demand for the creation of one or more pickleball facilities within Whitpain Township. The 14-question online survey gathered the demographic profile of survey participants, the details of their current pickleball participation, their desire to have the Township develop one or more pickleball facilities, and additional comments and concerns they have about such development. In all, 342 surveys were completed over a two-and-a-half-week period in June 2024 and are summarized by the following key findings:

- Seventy-nine percent of respondents indicated they are “extremely” or “very” interested in seeing pickleball courts created in Whitpain Township, and 68 percent anticipate using such courts regularly.
- A large majority of respondents live in Whitpain Township (82 percent) or within a 15-minute drive (13 percent). Sixty-three percent of respondents who indicated they are “extremely” or “very” interested in seeing pickleball courts created live in Whitpain Township.
- Approximately 54 percent of survey respondents were between ages 45 and 64 - older than the national average for pickleball players (38.1 years) but consistent with Whitpain Township’s demographics.
- Half of respondents who indicated they are “extremely” or “very” interested in seeing pickleball courts in Whitpain Township and who disclosed income levels had annual household incomes over \$150,000.
- A large majority of respondents (86 percent) have a bachelor’s degree or higher level of education and either work full-time (52 percent) or are retired (29 percent).
- Fifty-eight percent of respondents currently play pickleball, with the majority (57 percent) of these playing between one and five times per week.
- Sixty-nine percent of respondents who currently play pickleball do so either exclusively or primarily on outside courts (as opposed to indoor courts), and 62 percent of these respondents do not regularly pay a fee or membership to play.
- Sixty-eight percent of respondents who currently play pickleball travel between five and 20 minutes to play.
- The factors respondents selected as most influential in determining where they play pickleball were convenience of location (83 percent), court availability (76 percent), playing with friends and family (59 percent), cost (52 percent), and quality of facilities (39 percent).

Figure 3. Interest in Whitpain Township Pickleball Courts



Source:

4ward Planning, Whitpain Township Survey, June 2024

Whitpain Township Pickleball Feasibility Analysis

Figure 4. Survey Respondents by Interest and Age

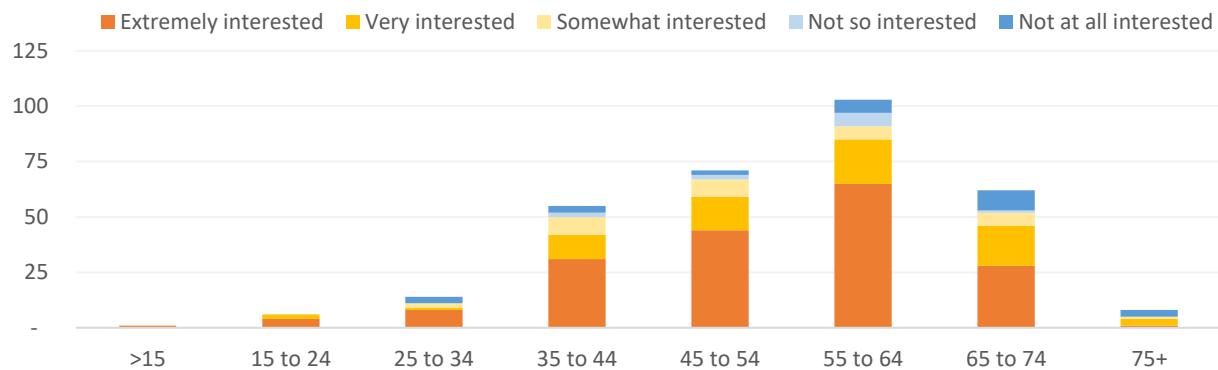


Figure 5. Survey Respondents by Interest and Place of Residence

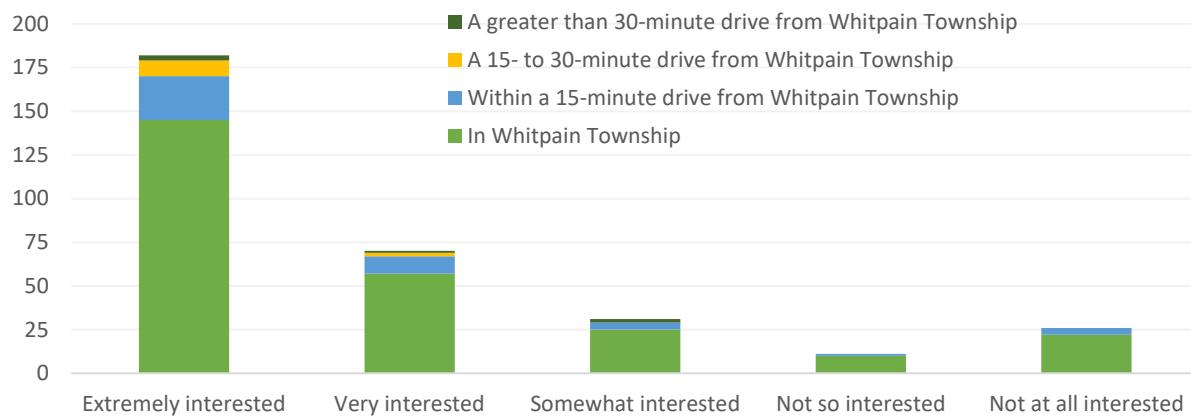
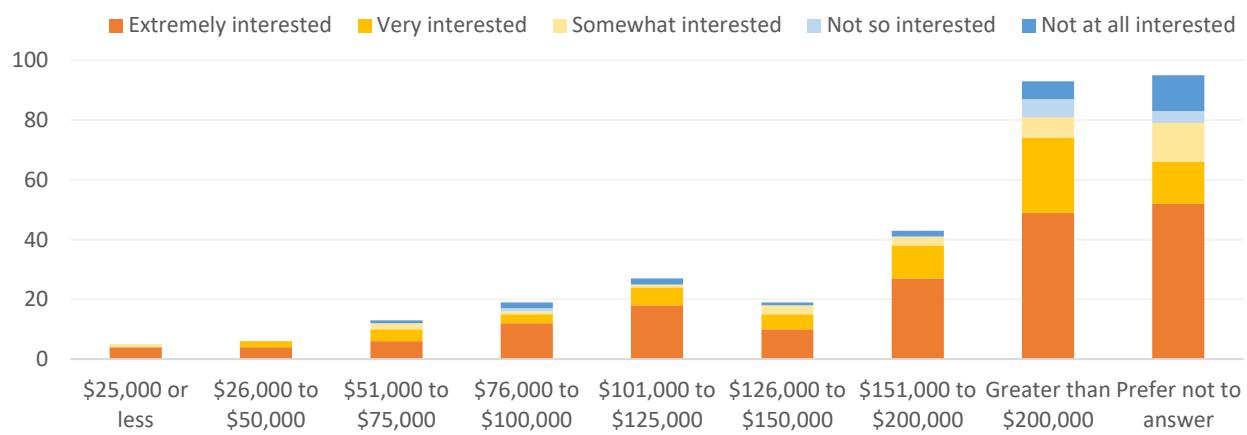


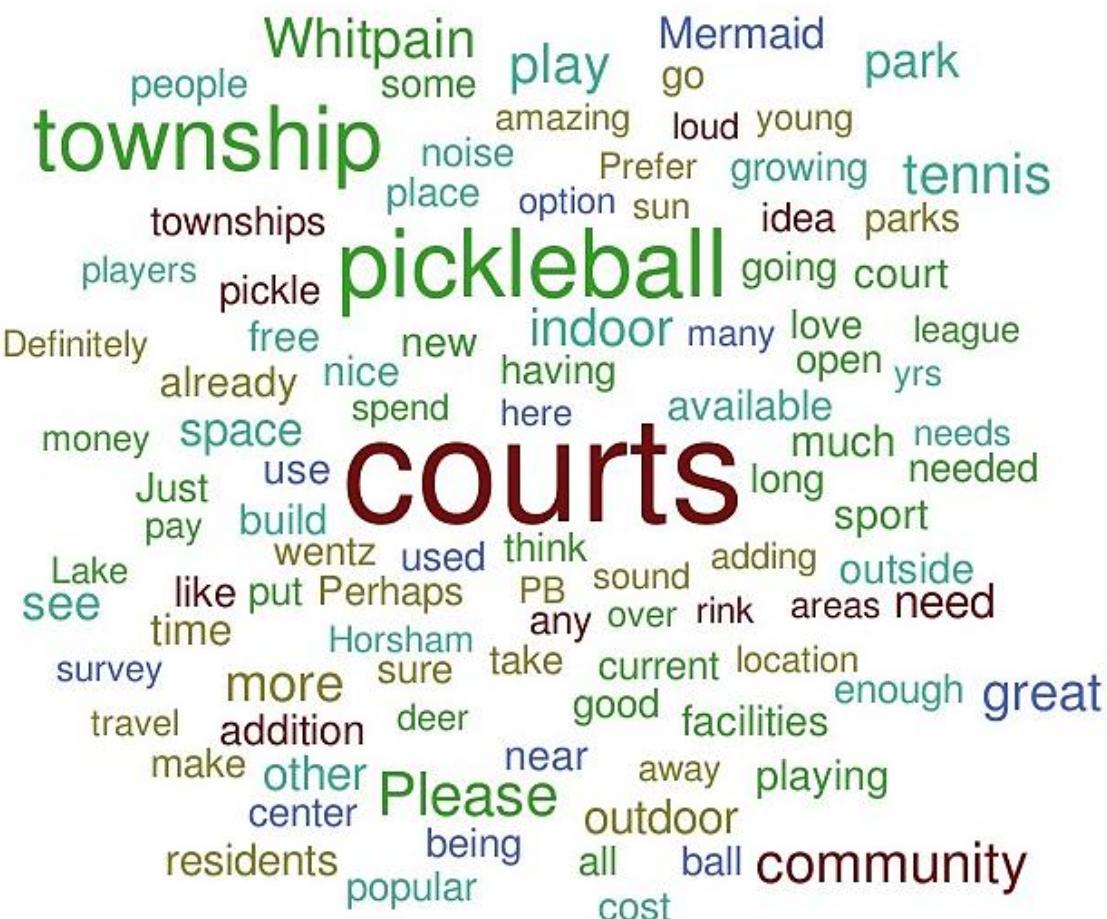
Figure 6. Survey Respondents by Interest and Annual Household Income



Source: 4ward Planning, Whitpain Township Survey, June 2024

- Open-ended survey commentary revealed a host of support for and concerns about the creation of pickleball courts in Whitpain Township. The top concerns registered in the survey are tennis courts would be replaced and, thus, reduced in number by pickleball courts and that the noise of pickleball playing could be problematic if developed close to residential areas.

Figure 7. Pickleball Survey Open-Ended Comments Word Cloud



Source: 4ward Planning, Whitpain Township Survey, June 2024

High-Level Socio-Economic Analysis

4ward Planning performed a high-level socio-economic analysis for Whitpain Township, the 15-minute primary market area (PMA) where better than 70 percent of potential pickleball users are likely to originate, and the 30-minute drive-time secondary market area (SMA). Socio-economic data identified includes total population, population age, household income, educational attainment, and race. Based on the data findings, 4ward Planning identified the likely share of residents within Whitpain Township (today and five years from now) fitting the profile of recreational pickleball players.

TOTAL POPULATION

The size and growth of a region's population influences markets, as households drive demand for goods and services. Approximately 176,850 people live within a 15-minute drive from the center point between the two potential pickleball sites, and 1.2 million people live within a 30-minute drive. Although the township experienced strong annualized population growth from 2020 to 2024 (1.1 percent), it is projected to experience flat population growth through 2029 (0.0 percent).

Figure 8. Population Estimates and Projections

Study Area	Population			Annualized Population Change	
	2024	2029	Change	2020-2024	2024-2029
Whitpain Township	21,257	21,281	24	1.1%	0.0%
15-Minute PMA	175,387	176,847	1,460	0.5%	0.2%
30-minute SMA	1,166,834	1,175,653	8,819	0.3%	0.2%

Source: Esri

POPULATION BY AGE

The population living in the township is slightly older than that in the PMA and SMA. For example, the median age in the township is 45 years, compared to 43 and 42 years in the PMA and SMA, respectively. Through 2029, the greatest population growth in the township is expected among residents ages 45 to 50, which will likely drive near-term recreation demand.

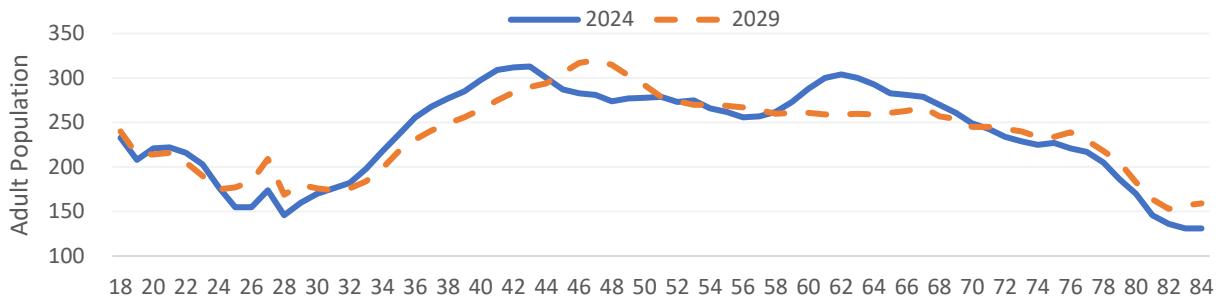
Figure 9. Median Age



Source: Esri

Whitpain Township Pickleball Feasibility Analysis

Figure 10. Adult Population by Age, Whitpain Township

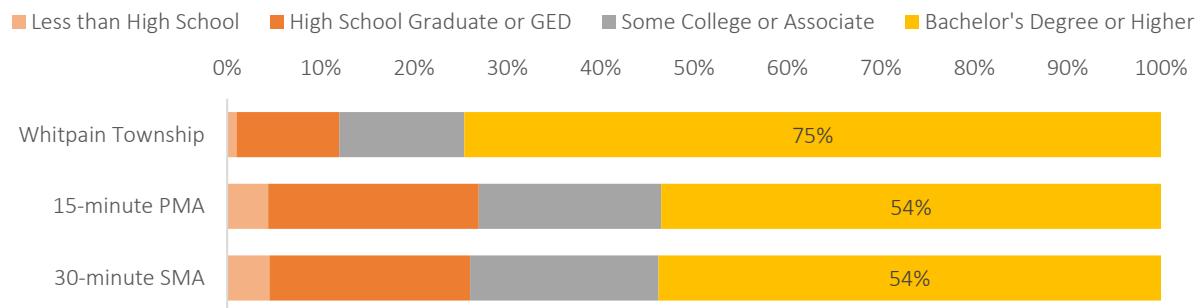


Source: Esri

EDUCATIONAL ATTAINMENT AND INCOME LEVELS

Educational attainment and income levels are relatively high in the township. For example, 75 percent of the township's adult population ages 25 and older have attained a bachelor's degree or higher, compared to 54 percent in the SMA. Since educational attainment is often strongly and positively correlated with income, it is not surprising the median household income in the township (approximately \$166,250) is also relatively high, about 55 percent higher than that in the PMA and 57 percent higher than that in the SMA. People with higher incomes tend to have higher disposable incomes and the ability to spend more on non-essential items, such as recreational equipment and fees.

Figure 11. Educational Attainment



Source: Esri

Figure 12. Median Household Income

	2023	2028	2023-2028	% Change
Whitpain Township	\$166,252	\$187,442	\$21,190	2.5%
15-minute PMA	\$107,312	\$122,426	\$15,114	2.8%
30-minute SMA	\$105,812	\$120,325	\$14,513	2.7%

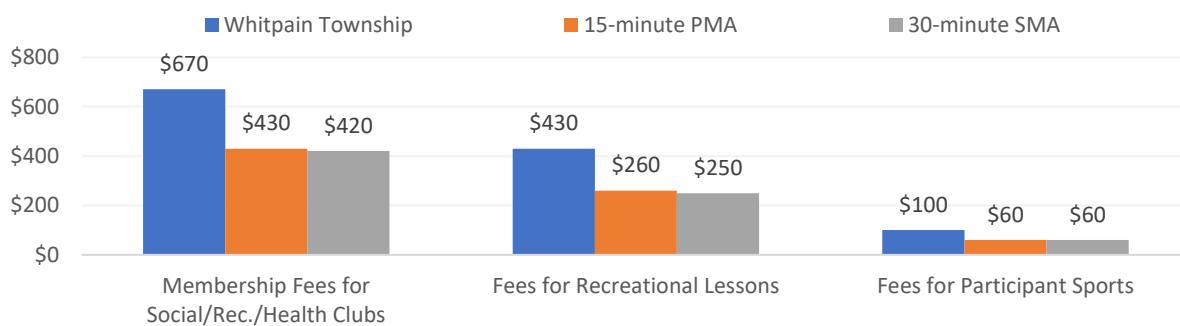
Source: Esri

Whitpain Township Pickleball Feasibility Analysis

RECREATIONAL BEHAVIOR AND SPENDING

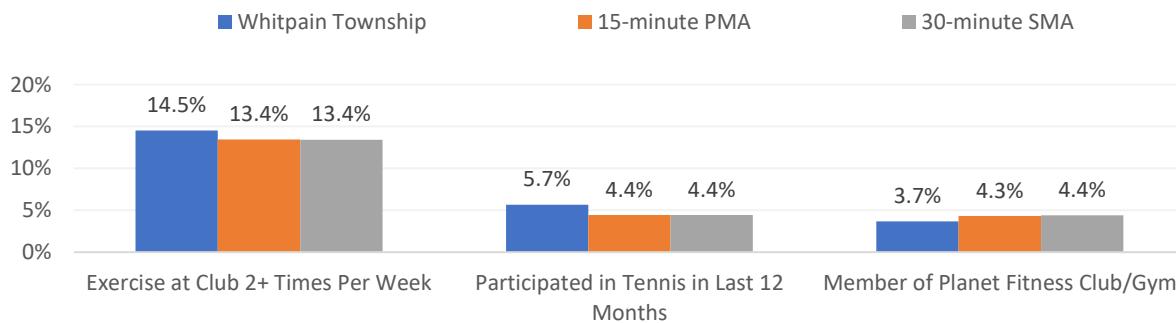
According to household behavior estimates provided by Esri (data is from MRI-Simmons, a marketing firm that makes projections based on surveying), the average Whitpain Township household spends more on recreational membership and participation fees than the average household in the PMA and SMA. For example, in 2024, the average Whitpain Township household spent approximately \$670 per year on memberships to social, recreational, and health clubs, compared to just \$430 in the PMA and \$420 in the SMA. Furthermore, the population in Whitpain Township is slightly more likely to have participated in tennis in the past 12 months (5.7 percent), compared to those in the PMA and SMA (both 4.4 percent). Both household recreation spending and behavior estimates are positive signs for a prospective new pickleball facility in Whitpain Township.

Figure 13. Average Recreation Spending per Household



Source Esri

Figure 14. Recreation Participation



Source Esri

Supply and Demand Analysis

SUPPLY

Competitive Inventory

As illustrated in more detail in the map and table on the following page, according to data from Pickleheads, area private facility administrators, and municipal parks and recreation departments, there are 23 existing pickleball facilities offering 113 pickleball courts (52 indoor and 61 outdoor courts) within a 20-minute drive time from the center of the two potential pickleball court sites in Whitpain Township. Additionally, according to an April 2024 article in the North Penn Reporter, Maryland-based Dill Dinkers Pickleball, one of the nation's leading providers of dedicated indoor pickleball facilities, is scheduled to open 11 courts at the 19-acre industrial complex at 1180 Church Road in Lansdale and up to 15 courts in nearby Hatboro (located just outside the 20-minute drive-time area at 330 South Warminster Road) before the end of 2024. The company has stated its intention to open a total of 14 such facilities within Montgomery and Chester Counties in the coming years. Although the Dill Dinkers facilities increase area pickleball court supply, its indoor courts and night hours options contrast with those of outdoor municipal park courts and will likely attract a different type of player – those who are more competitive and not as focused on recreating in park settings.

Current Service Levels

According to Sports and Fitness Industry Association (SFIA)'s 2023 State of Pickleball: Participation and Infrastructure Report, there is a shortage of pickleball courts, with certain areas not keeping pace with the demand. The states of New York, New Jersey, and Pennsylvania, for example, have approximately one dedicated court (i.e., not shared with another sport such as tennis or basketball) per 1,000 participants (compared to as many as 4.6 courts per 1,000 participants in the states of Arizona, California, and Utah).

The table below provides a snapshot of the current level of service standards for the township and the two drive-time contours, based on the competitive inventory of pickleball courts in the 20-minute drivetime areas. For the 20-minute drive time, there are just 0.28 pickleball courts (both indoor and outdoor) per 1,000 people, a number much lower than the service levels in the Mid-Atlantic region (1.0 courts per 1,000 participants) and suggests unmet demand for pickleball courts.

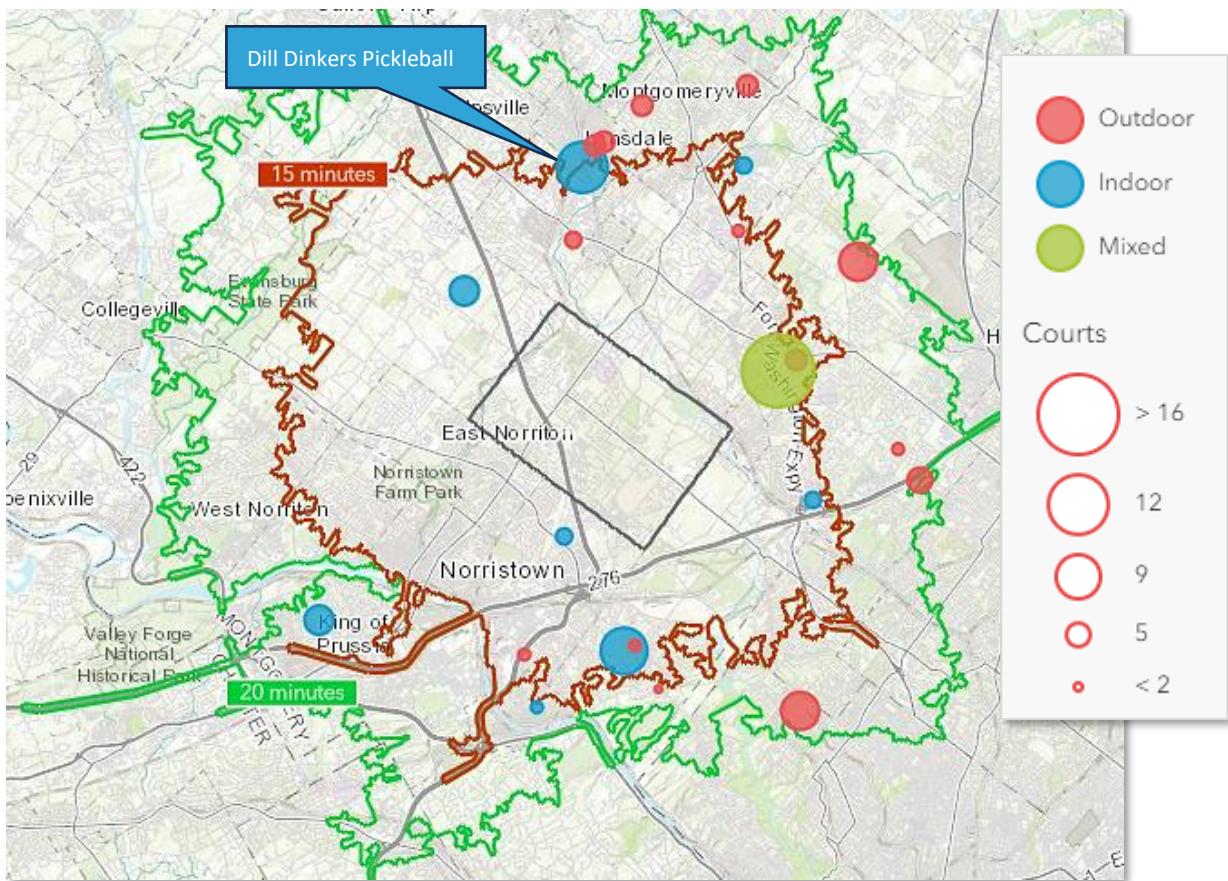
Figure 15. Current Pickleball Court Service Levels

	Inventory (courts)			2024 Population	Current Service Levels (per 1,000 persons)		
	Indoor	Outdoor	Total		Indoor	Outdoor	Total
Whitpain Township	-	-	-	21,257	-	-	-
0-15-Minute Drive	41	21	62	175,930	0.23	0.12	0.35
16-20-Minute Drive	11	40	51	227,505	0.05	0.18	0.22
20-Minute Drive	52	61	113	403,435	0.13	0.15	0.28

Source: Esri, Award Planning Inc.

Whitpain Township Pickleball Feasibility Analysis

Figure 16. Competitive Supply of Existing Pickleball Courts



Source: Pickleheads; Private Facilities; Municipal Parks and Recreation Departments

Whitpain Township Pickleball Feasibility Analysis

Name	Location	Facility Sponsor	Indoor Courts	Outdoor Courts	Shared Courts (e.g., tennis)	Outdoor Lights	Limited Access/Gates	Payment Type	Proximity to Major Arterials
Aidenn Lair Park	Dresher	None	-	2	✓	No		Free	I-276
Colwell Park	Conshohocken	None	-	2	✓	No		Free	I-476
Conshohocken Community Center at the Fellowship House	Conshohocken	None	2	-	✓	n/a	✓	Membership/Daily Pass/Limited Open Gym	I-476
Dill Dinkers Pickleball (opening summer 2024)	Lansdale	None	11	-		n/a	✓	Membership	No
Fellowship Park	Lansdale	None	-	4	✓	No		Free	SR 309
Fourth Street Park	Lansdale	None	-	4		No		Free	No
Friendship Park	North Wales	None	-	2		No		Free	SR 309
Frog Hollow Racquet Club	Lansdale	None	6	-	✓	n/a	✓	Membership/ Daily Pass	I-476
Greater Plymouth Community Center	Plymouth Meeting	None	3	-	✓	n/a	✓	Membership/Daily Pass	I-476
Green Valley Country Club	Lafayette Hill	None	10	-	✓	n/a	✓	Membership/ Daily Pass	No
Horsham Township Community Center	Horsham	None	-	8		No		Membership/Open Gym	SR 463
Koontz Park	Lafayette Hill	None	-	1	✓	No		Free	No
Life Time Fort Washington	Fort Washington		3	-		n/a	✓	Membership	I-276
Memorial Park	Lansdale	None	-	4	✓	Yes		Free	SR 63
Miles Park	Lafayette Hill	None	-	2	✓	Yes		Free	No
Montgomery Township Community & Recreation Center	Montgomeryville	None	3	-	✓	n/a	✓	Open Gym/Limited Membership	SR 464
Parkside Place Park	North Wales	None	-	3	1 shared	No		Free	No
Spring Valley Park	North Wales	None	-	4	✓	Yes		Free	SR 202
Three Tuns Park	Ambler	None	-	4	✓	No		Free	SR 309
Twining Valley Park (courts in development)	Dresher	None	-	5		No		Free	I-276
Upper Dublin Sports Ctr.	Ambler	None	8	8		No	✓	Membership/Daily Rental	SR 309
Upper Merion Community Center	King of Prussia	None	6	-		n/a	✓	Membership/Daily Pass	SR 23
Water Tower Rec. Center	Philadelphia	One pending	-	8	1 shared	Yes	✓	Free	No
Total			52	61					

Source: Pickleheads; Private Facilities; Municipal Parks and Recreation Departments

Whitpain Township Pickleball Feasibility Analysis

POTENTIAL DEMAND

Potential Pickleball Participants

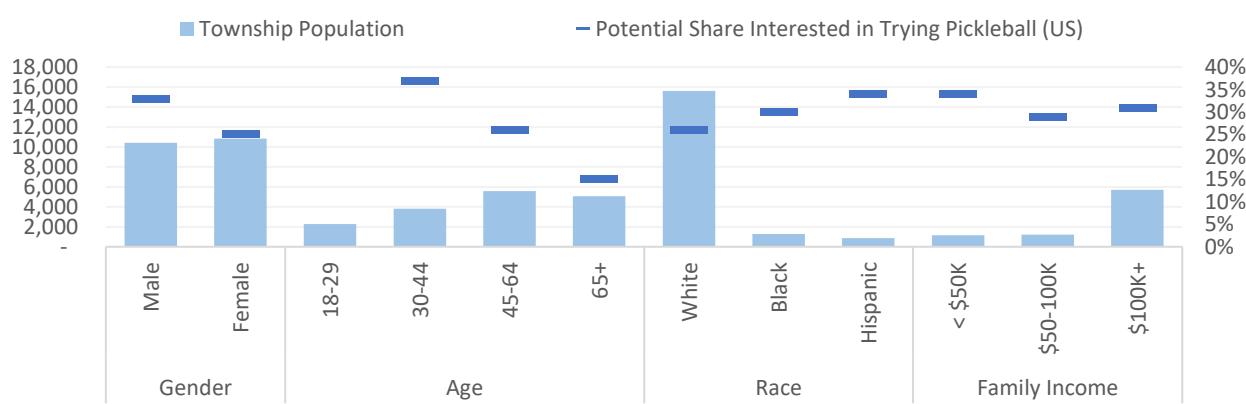
As exhibited in the table below (and in more detail in the *Pickleball User Profile* section), interest in playing pickleball varies by age, with U.S. adults between ages 30 and 44 having the highest interest in trying pickleball (37 percent) compared to those ages 65 and older (15 percent). In 2029, the township is projected to have 14,760 adult residents ages 30 and over. Assuming a similar share of township adults are interested in trying pickleball as those represented in the 2024 YouGov Survey, approximately 3,620 township residents will be interested in playing pickleball in 2029. Assuming a conservative 30 percent of township residents with interest in trying pickleball will actually play pickleball if new courts were built in the township, this represents approximately 1,100 participants. Further, the township's strong household income metrics are reflective of the national household income of current and prospective pickleball players.

Figure 17. Likely Township Pickleball Participants by Age Cohort

Age Group	Share of US Adults Interested in Trying Pickleball (YouGov Survey, 2024)	Potential Township Participants (2029)		
		Residents	Have Interest	Play Pickleball (30%)
30 to 44 Years	37%	3,818	1,406	422
45 to 64 years	26%	5,565	1,448	434
65+ years	15%	5,380	761	228
Total		14,763	3,615	1,084

Source: Esri, 4ward Planning Inc.; YouGov Survey: Pickleball March 12 - 15, 2024

Figure 18. Whitpain Township Residents and Share Interested in Playing Pickleball, 2024



Source: Esri

Case Studies Background and Findings

Based on third-party literature and interviews with pickleball court facility administrators, 4ward Planning developed six case studies of nearby municipalities with outdoor pickleball facilities. The examples that follow feature municipalities with dedicated pickleball courts; those with a combination of shared (hybrid) and dedicated pickleball courts (two with dedicated courts as the result of tennis court conversions), and one municipality with only shared-use pickleball courts. The collective case study profiles and interviews are intended to offer Whitpain Township a range of pickleball facility development and management options as exemplified by its neighbors.

Along with identifying the case study facilities' locations, 4ward Planning detailed the number of pickleball courts, hours of operation, costs to install, and annual operating expenses, where possible. 4ward Planning also identified fee revenue sources (e.g., court usage fees, sponsorship revenue, grant funding, if any). Additionally, the case studies summarize lessons learned, as gleaned from municipal contacts, and provide contact information for those interviewed.

The following are key findings resulting from our case study analysis:

- Different pickleball court (i.e., shared/hybrid or dedicated) and program (i.e., membership/day pass only, combination meet-up membership and open play, and all open play) models serve different types of players, as well as require different levels of municipal investment and oversight. As such, Whitpain Township should determine which model best suits its mission prior to pursuing pickleball court development plans.
- Many municipalities have followed an incremental approach to pickleball court development, assessing community demand prior to adding the maximum number of feasible courts.
- Among the six case study municipalities, some generate revenue through memberships and/or pickleball classes and programs or do not generate revenue at all. Those that generate revenue solely through classes and programs seem to collect enough to cover administrative costs of those programs.
- Pickleball court installation costs among the case study examples range from \$2,000 to \$215,000 per park, ranging from painting pickleball lines on shared courts to new court development. Some installation figures were not available.
- Annual operating costs among case study examples are relatively minimal, consisting of items such as new pickleballs, net repair, and routine clean up, and are absorbed by general parks and recreation department budgets. Of the administrators that responded to our inquiries regarding liability insurance, all four indicated premiums were not increased with the addition of pickleball courts to their parks.
- To manage crowds and help pickleball players organize themselves, municipalities with membership programs use meet-up apps for court scheduling, which removes a municipality from this administrative responsibility. Additionally, most park courts feature signs posting pickleball court etiquette rules to help guide participant behavior.
- Complaints about pickleball court noise is fairly common among municipalities with residential areas adjacent to courts. As such, court placement should be informed by this experience.

COMMUNITY CENTER, HORSHAM TOWNSHIP

Year Courts Opened: 2020 and 2024

Number of Courts: 8 (dedicated)

Hours of Operation: 7am to dusk

Lights: No

Access: Gated

Payment Type: Annual membership (\$60-\$95), day pass (\$5), and open play (free)



Background and Features

Horsham Township's eight dedicated municipal pickleball courts are located at its Community Center. Four of the courts were installed between 2019 and 2020, and the remaining four were added in 2024. Although Horsham Pickleball Club membership or a day pass is required to play on six of the eight courts, two courts are available every day for open, free play. A limited number of annual memberships are available for residents and non-residents (\$60 and \$95, respectively), with longer play-time scheduling reserved for resident members. Five-dollar day passes are also available. Once registered, members must create an account on the designated meet-up app and request to join the township pickleball group for scheduling court times.

Costs and Revenue

Installation of the first four courts cost approximately \$68,000, followed by \$147,000 for the 2024 expansion. As Horsham Township does not track annual pickleball court operation costs, and court repairs and maintenance are somewhat random, these expenses are simply absorbed by the parks department budget. The township pickleball club is run by community volunteers who are offered free memberships for their efforts.

Revenues are generated by annual pickleball club memberships, which totaled \$21,570 in 2023 and \$33,910 in 2024. This revenue spike was a result of increased fees and membership numbers.

Lessons Learned

Horsham Township, like other municipalities, has taken an incremental approach to pickleball court development. Such an approach, combined with a thorough understanding of regional demand and inventory, is advisable. As with other burgeoning activities, pickleball will likely experience a leveling out in demand, decelerating court development.

Contact: Kyle Lynch, Assistant Director of Public Works, Horsham Township

COMMUNITY PARK, HATFIELD TOWNSHIP

Year Courts Opened: 2021
Number of Courts: 6 (dedicated)
Hours of Operation: 6am to 8pm
Lights: No
Access: Gated (typically unlocked)
Payment Type: Meet-up registration (\$20-\$35/season) and open play (free)



Background and Features

Community Park in Hatfield Township, which lies just beyond the 20-minute drive time from Whitpain Township, features six dedicated pickleball courts, a result of Hatfield Township's incremental approach to court development. The Township initially introduced pickleball by taping lines on its street hockey court, followed by taping lines on a few tennis courts. As the sport's popularity and demand for more courts grew, the Township fully converted its tennis courts into six pickleball courts in 2021.

Although the Community Park pickleball courts are free and open to the public, the Township offers seasonal pickleball meet-up programs for which participants can register throughout the year. Program prices vary based on the season, with the spring/summer session costing \$20 for residents and \$35 for non-residents. The courts are reserved for the township program on Mondays through Fridays, 8am to 1pm.

Costs and Revenue

Full conversion and installation of the six dedicated pickleball courts cost the Township roughly \$80,000. Annual operation costs, including new pickleball and routine net maintenance, are covered by Hatfield Township's capital project funds, as well as some of the revenue generated by its seasonal pickleball programming. The bulk of this revenue is used to fund the group hired to run the pickleball programs and provide routine maintenance (e.g., cleaning up the courts after use).

Lessons Learned

Within just a couple years, Hatfield Township found itself looking for ways to quickly accommodate a growing number of pickleball players at Community Park. With up to 200 people now participating in its pickleball programming, use of the courts, among the setting of the park's playground, pavilion, street hockey court, dog park and aquatic center, is beginning to outgrow the space originally allotted. The Township is currently considering how to better utilize park space, which may or may not include adding more pickleball courts or relocating them. Although Hatfield Township may not have been able to foresee the extent of pickleball court demand, it learned the wisdom of planning and installing its courts more methodically.

Contact: Ashley Broudy, CPRP, Director, Parks and Recreation Department, Hatfield Township

PARKSIDE PLACE, UPPER GWYNEDD TOWNSHIP

Year Courts Opened: 2018

Number of Courts: 3 (2 dedicated, 1 shared with tennis)

Hours of Operation: 8am to 8pm, daily

Lights: Yes

Access: Gated (1 unlocked, 1 locked)

Payment Type: Meet-up registration (\$30-\$50) and open play (free)



Background and Features

Upper Gwynedd Township's three municipal pickleball courts (two dedicated and one shared with tennis) are located at Parkside Place park. To control crowds at its two dedicated pickleball courts, the Township created a meet-up group, helping players organize themselves in the spring through fall seasons during times allotted for registered players (Tues, Wed, Thurs from 6 to 8pm, and Fri and Sat from 9am to 12pm). Annual meet-up registration fees are \$30 for residents and \$50 for non-residents. Currently, the township has just over 200 registered meet-up members. There are free, open play sessions throughout the week. Pickleball lessons are also available, and regular gatherings such as Drinks after Pickleball (DAP) are posted on the township website.

Costs and Revenue

Installation, minus lighting, for all three courts cost the Township approximately \$147,400, which was completely funded by the Township. The lighting, with a price tag of approximately \$45,300, was funded by a Montgomery County 20/40 grant, with Upper Gwynedd Township covering the 20 percent local match. Total annual operation costs are approximately \$5,000 (\$1,000 of which is used for labor/maintenance), inclusive of new nets, windscreens, replacing bulbs, and lighting from 6pm to 11pm seven nights a week.

The revenue collected from meet-up registration and pickleball lessons (the Township receives 20 percent of class revenue) cover administrative costs.

Lessons Learned

Like other studied municipalities, Upper Gwynedd Township has discovered there can be strong community feelings where pickleball is concerned, with many passionate about the sport and a few sensitive to the noise of its play.

Contact: Sarah Prebis, Director, Parks and Recreation Department, Upper Gwynedd Township

MEMORIAL AND FOURTH STREET PARKS, LANSDALE BOROUGH

Year Courts Opened: 2021 and 2022

Number of Courts: 8 (4 shared, 4 converted from tennis court)

Hours of Operation: 7:30am to 8pm

Lights: Yes/No

Access: Open (partially fenced)

Payment Type: Open play (free)



Background and Features

In 2021, Lansdale Borough upgraded four of its tennis courts at Memorial Park into four hybrid pickleball/tennis courts, which are lighted. The following year, the Borough converted one of its tennis courts into four dedicated, unlighted pickleball courts at Fourth Street Park.

Costs and Revenue

The Memorial Park pickleball/tennis courts upgrade cost the Borough \$168,000, while the Fourth Street Park conversion cost \$22,000. Since switching the lights to LED at Memorial Park, annual operating costs are considerably low - less than \$1000 annually. The Borough accesses the parks department operating budget for nets, while larger repairs such as court resurfacing will be drawn from the capital budget.

Currently, the Borough generates some revenue from pickleball activities and lessons in the spring, summer, and fall. It is considering adding meet-up scheduling that would require a modest membership fee from participants, similar to Upper Gwynedd Township model.

Lessons Learned

Although the hybrid courts at Memorial Park are popular, the shared tennis nets used are wider than those at regulation pickleball courts, which can create an issue for players attempting "around-the-post" shots. Thus, awareness of facility and equipment differences between shared sports is helpful when developing new pickleball spaces.

While some community members have requested conversion of the tennis-only court at White's Road Park to hybrid, the Borough see the wisdom in offering one park for pickleball only, one for tennis only, and one hybrid court.

Additionally, Lansdale Borough found that posting "pickleball etiquette" signs, particularly for play-time limits (one-hour maximum) at their courts offers a level of structure for players without necessitating additional administrative oversight.

Contact: Courtney Meehan, Director, Parks and Recreation, Lansdale Borough

FRIENDSHIP, FELLOWSHIP, AND SPRING VALLEY PARKS, MONTGOMERY TOWNSHIP

Year Courts Opened: 2021 and 2023

Number of Courts: 10 (2 dedicated, 8 shared with tennis)

Hours of Operation: 6/7am to 8pm

Lights: No

Access: Gated (unlocked)

Payment Type: Open play (free)



Background and Features

Montgomery Township began including outdoor pickleball options at its parks in late 2021, with the installation of overlay lines on the tennis courts at Fellowship and Spring Valley Parks, totaling four shared-use pickleball courts per park. Subsequently, in 2023, the Township developed two new construction, dedicated pickleball courts at Friendship Park. While all three parks offer open (first come, first served) pickleball play, the Township also has three indoor courts in its Community and Recreation Center, which require membership.

Costs and Revenue

Although Montgomery County did not have its pickleball court installation costs readily available and does not segregate annual parks operation costs, the Township Capital Investment plan was used for court installation and its annual operating budget for operational costs.

The Township's outdoor pickleball courts are free to the public and do not offer revenue-generating programming, unlike the indoor courts at the Community and Recreation Center.

Lessons Learned

Currently, demand is exceeding available public pickleball courts in Montgomery Township. However, the Township seems to be committed to keeping all its existing tennis courts in place.

Contact: Floyd Shaffer, Director, Recreation and Community Center, Montgomery Township

MILES AND KOONTZ PARKS, WHITEMARSH TOWNSHIP

Year Courts Opened: 2023

Number of Courts: 4 each (both shared with basketball)

Hours of Operation: 9am to 2pm, daily

Lights: Yes/No

Access: Open

Payment Type: Open play (free)



Background and Features

Whitemarsh Township introduced shared basketball/pickleball courts at both Koontz and Miles Parks in early and late 2023, respectively. While the one hybrid court at Koontz is simpler and unlighted, the two full-court basketball/pickleball courts at Miles Park are lighted and developed enough to host pickleball clinics and camp activities. Both parks are run on an honor-code policy, offering priority to pickleball (with 90-minute session limits) from 9am until 2pm, after which basketball takes priority, barring tournament days. Community members must bring their own pickleball nets to play, as Township nets are stored for programming.

With local schools introducing pickleball in their athletic programming, the Township anticipates demand for pickleball courts will continue, now among younger participants than over the last few years. However, there is not a feasible location to create a separate pickleball facility in the township. In the fall of 2024, Whitemarsh Township will be conducting an informal active space needs analysis in reaction to community inquiries about creating more public recreation options.

Costs and Revenue

Installation for the shared basketball/pickleball courts in Whitemarsh Township was approximately \$2,000 per park, with costs principally related to the application of pickleball lines on the existing basketball courts. Annual maintenance costs are minimal and paid for with general parks funding. The greatest pickleball expenditures for the Township currently include court surfacing, nets for programs, and summer camp, with top-coating and drainage amendments expected in approximately 10 years.

Whitemarsh Township works with a local pickleball company that runs the summer pickleball camp at Miles Park. The Township's percentage of camp revenue covers cost of administering the program, allowing the program to pay for itself.

Lessons Learned

The Whitemarsh Township shared pickleball courts represent the most basic municipal pickleball court model – with the lowest installation and maintenance costs and reliance upon players to provide their own nets and adherence to rules of conduct. Since different municipal court models serve different types of players, it behooves a municipality to consider the community needs it will be fulfilling with its pickleball courts, as well as the different levels of management necessitated by court features and offerings.

Contact: Thomas Blomstrom, Director, Parks and Recreation Department, Whitemarsh Township

Whitpain Township Pickleball Feasibility Analysis

Figure 19. Case Studies Comparative Chart

Municipality	Facility	Designated or Shared Courts	Lights	Number of Courts	Installation Costs	Annual Operating Expenses	Revenue Sources
Horsham Township	Community Center	Dedicated	No	8	\$215,000	n/a	Membership fees
Hatfield Township	Community Park	Dedicated (converted tennis)	No	6	\$80,000	n/a	Meet-up program fees
Upper Gwynedd Township	Parkside Place	Dedicated	Yes	2	\$147,400 court installation/ \$45,300 lights	\$5,000 (incl. \$1,000 in labor & maintenance)	Meet-up program and lessons fees
		Shared (with tennis)	Yes	1			
Lansdale Borough	Fourth Street Park	Dedicated (converted tennis)	No	4	\$22,000	Minimal	Activities and lessons fees
	Memorial Park	Shared (with tennis)	Yes	4	\$168,000	>\$1,000	Activities and lessons fees
Montgomery Township	Friendship Park	Dedicated	No	2	n/a	Not calculated	None
	Fellowship Park	Shared (with tennis)	No	4	n/a	Not calculated	None
	Spring Valley Park	Shared (with tennis)	No	4	n/a	Not calculated	None
Whitemarsh Township	Koontz Park	Shared (with basketball)	No	4	\$2,000	Minimal	None
	Miles Park	Shared (with basketball)	Yes	4	\$2,000	Minimal	Classes and camps fees

Note: Shaded rows represent shared facilities.

Source: 4ward Planning Inc.

Feasibility Analysis

Capital Costs

The cost of developing pickleball courts varies widely, based on a number of factors:

- Will the court be built from asphalt or concrete? Reinforced concrete or post-tensioned concrete?
- Court location and placement, sitework, access for equipment, grading & drainage
- Will there be fencing, windscreens, lighting, shade structures?
- Any zoning restrictions, setback requirements, etc.?
- Access for electric and water, if needed by the court
- New courts versus resurfacing of existing basketball and/or tennis courts
- Indoor courts or outdoor courts
- Associated support features such as benches and restrooms

According to SportMaster Sport Surfaces (www.sportmaster.com), a manufacturer and distributor of surfacing and repair materials for tennis, basketball, and pickleball courts, the general cost to build a pickleball court ranges from \$15 to \$40 per square foot for a 30-foot by 60-foot pickleball court. The lower cost of development is associated with resurfacing an existing basketball or tennis court, with higher development costs associated with new construction.

Assuming a \$15 to \$25 per square foot cost range for resurfacing existing tennis or basketball courts with no additions, the Township would realize a total capital cost range of \$27,000 to \$45,000 per court. Assuming high-end build for dedicated courts, the capital costs would range from \$63,000 to \$81,000 per court developed (assumes a \$35 to \$45 per square foot cost, respectively).



Source: SportMaster Sport Surfaces

Whitpain Township Pickleball Feasibility Analysis

As the capital costs associated with the creation of pickleball courts ranges widely for the reasons earlier identified, and having only survey responses to gauge prospective use of the courts if developed, we recommend the Township give serious consideration to resurfacing underutilized and/or unutilized tennis and/or basketball courts as an initial foray into developing pickleball courts and based on resident use over a 12- to 18-month period, evaluate whether newly built pickleball courts are warranted and at what price point of development.

An alternative approach is to build two new courts and resurface up to four existing tennis and/or basketball courts.

According to SportMaster, four pickleball courts can be created from one tennis court resurfacing, provided the tennis court is regulation size (120 feet by 60 feet). Further, according to Courtmaster Sports Inc. (www.courtmastersportsinc.com), a full-service sports surfacing company which constructs and repairs basketball, tennis, and pickleball courts, a full-size basketball court can accommodate up to three pickleball courts via resurfacing.



Source: CaliforniaLightingsales.com