

# Building a Case for Troy Park Tennis & Sports Center

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## Market Demand Study

In 2006, Brailsford & Dunlavey (B&D) conducted a market demand study funded by the HCTP, with funds from USTA Maryland District. B&D employs more than 40 professionals and has managed or consulted on recreation centers, professional sports facilities, student housing, and other "quality of life" facilities worth more than \$10 billion dollars in completed construction value. Their statistically valid study examined and evaluated the demand for tennis in Howard County relative to the supply of actual courts and provided solid evidence that more tennis courts are needed in the County. In addition, the study examined market demographics, user groups, and tennis facility case studies.

The proposed 29 new courts at Troy Park should be easily absorbed by the existing latent demand for tennis facilities in the region. Also, given the location of Troy Park as geographically central between Baltimore and Washington and close to the Thurgood Marshall Baltimore Washington International airport, it is an ideal location for both outreach programs designed to grow the sport within a diversifying population and major tournament play. The former is deemed a positive in terms of providing additional outlets for youth and new players. The latter represents a significant opportunity for positive economic benefit for the County and the region. In short, B&D recommended that HCTP implement a plan to construct at least 25 new tennis courts at the Troy Park location and urged strong consideration of the possibility for a major event facility or at least one that is adaptable for occasional major tournament play.

## The Demand for Tennis Courts in Howard County Far Exceeds the Supply

For the past 5 years, the popularity of tennis in the United States has increased significantly. According to a national survey published by the Tennis Association of America (TIA), tennis is the fastest growing traditional sport in the U.S., growing five times faster than football or golf. According to a 2005 study commissioned by the USTA, more than 25 million Americans play tennis, representing a 1.1 million increase over 2004. And, of the 25 million, 5.2 million consider themselves to be frequent players, playing at least 21 times a year. Additional evidence of the growth of the sport is the increased purchase of tennis equipment such as tennis balls and racquets. Between 2003 and 2007 racquet shipments alone increased 29.7 percent nationally. The largest increase (youth racquets) was up 48.9 percent.

USTA League Tennis is the country's largest recreational tennis program. Only representing 1.2 percent of all tennis players, USTA League Tennis has approximately 295,000 players 19 years of age and older. In fact, Howard County has the highest per capita ratio of league tennis participation in the entire State, totaling approximately 450 players. If this ratio of 1.2 percent holds true in Howard County, then the total number of tennis players probably exceeds 40,000.

The 2007 U.S. Census estimates Howard County's population to be approximately 272,000. USTA estimates that 27 indoor courts are needed for a population of 270,000 (10,000 Residents per Court). However, there are only 17 indoor courts in Howard County, and all require the payment of guest fees for non-members:

- Circle D Tennis Club (4 courts),
- Columbia Athletic Club (4 courts),
- Forty West Racquet Club (4 courts), and
- Owen Brown Tennis Club (5 courts in a temporary bubble structure).

A market study sponsored by HCTP and implemented by Brailsford & Dunlavey, found that there is an insufficient number of indoor courts in Howard County. Even without the study, casual observation can determine that the demand for courts far exceeds the supply of courts.

Court use, particularly during prime time (6:00 p.m. to 11:00 p.m. weekdays and all day weekends), is dominated by USTA league tennis, block time (court time purchased by a group of individuals usually for the duration of the indoor season), and tennis lessons. If you are not involved with one of these activities, it is very difficult to find an indoor or lighted court. More often than not, to secure court time one must leave Howard County. As Bob Weiss, then-President of the Howard County Tennis Association was quoted in 2002 in the Baltimore Sun: "The biggest obstacle for the development of county tennis hopefuls (youth) is limited access to local indoor facilities." The dearth of indoor tennis courts represents a serious impediment to the growth of tennis in Howard County.