

Annual Report

July 2016 - July 2017

Introduction

This Annual Report covers the 12 month period since the 2016 AGM. It provides details of the association's mission, operations and achievements during this period.

Although the association's financial resources has remained challenging, the past year's activities are believed to have positively impacted the profile and positioning of the organisation and has delivered a good platform to deliver future growth in membership and activity.

Objectives of the Association

The TIA UK reviewed and updated its mission statement and objectives during the period to further clarify its purpose, positioning and membership scope.

Although all working in the industry have the same objective - to grow and sustain the sport of tennis - real gaps remain in areas such as accessing and sharing information, partnership working, networking and harnessing collective effort to achieve this objective. Bridging these gaps is a key role for the Tennis Industry Association UK in addition to supporting member products and services to the wider UK tennis audience.

"Bringing together companies, clubs and individuals with business interests in tennis"

• Supporting all the UK tennis industry and promoting products and services

• Providing industry news and best practice and collating trends, data and information

• Providing a platform for industry networking, member trading and marketing opportunities

• Initiating and organising industry support towards efforts to increase tennis participation

The UK tennis economy is varied and significant in number. Our members include representation from a wide range of tennis-related business interests including suppliers of rackets, balls, equipment, apparel and footwear; court contractors and court equipment manufacturers and suppliers; suppliers of training and learning aids; tennis books, gifts and memorabilia; tennis consultants and management services; tennis media and communications; clubs, venues and operators; business support

services such as legal, finance, business coaching, travel and hospitality and affiliated organisations relevant to tennis.

However, there is a need to attract more members in the sectors identified above and some sectors, such as retailing, are hardly represented at all.

We designed and adopted a strap-line **“The Business of Tennis”** in 2016 that is now used for all marketing activities to further clarify our purpose and activities.



Activity and Impact

How well have we achieved our objectives during the period?

Fees from **membership** subscriptions continue to provide the main source of income. The number of members has slightly increased in 2017 to 54, providing a net income of £23,000 for the year, with a real growth in interest in ‘Associate’ membership from newly-formed or ‘niche’ tennis companies.

“Teach Tennis International has developed a unique digital Mini Tennis coaching syllabus and is now seeking to sell the product to the UK and global tennis communities. The TIA could not have been more helpful in helping expose our company and product to the marketplace during our first year in membership. We would have no hesitation in recommending membership of TIA UK to other companies in the tennis industry” - Roy Holland TTI Commercial Director

Importantly, a new Partner member joined in 2017 - Bridome - joining The Chiltern Group, JB Corrie, Wilson, The LTA and The All England Tennis Club.

Closer engagement with our **affiliated organisations** was achieved and there is potential to work more closely with some of these to achieve mutual benefits. During the year the association presented at the BTCA Annual Conference, attended the IOG Saltex event and the Lawn Tennis Writers Association Lunch.

Currently the association has 4 **‘Business Support Partners’** in the areas of travel, insurance, business mentoring, hospitality and legal advice, however the basis upon which the Partners were initially involved is being reviewed to ensure that there is a better commercial ‘fit’ to maximise mutual benefits.

Whilst there were some noticeable member resignations due to significant changes in commercial and business activity (Prince Global, Junior Tennis Centres Ltd, Dunlop Slazenger) it is pleasing to note the variety of companies and organisations that have joined since the last AGM including:

Company	Product/Service
Bridome	Airhalls
Downe House School	School tennis
fibodo	Booking software
Kollectaball	Tennis equipment/aids
Rebel Creative	Tennis Threads' magazine
socialtennis	Tennis software
Surbiton Racket and Fitness Club	Major tennis club
Teach Sport Ltd	Learning and training
Twisternet	Court equipment

A full list of members can be found on the website. We would like to thank all our members for their support over the past 12 months.

Member benefits continue to be reviewed with the aim of both increasing benefits across the board and to develop a clearer differentiation within membership categories, such as is the case for Wimbledon accreditation and the Business of Tennis Forum tickets.

Bringing together business interests in tennis, the association held its fourth annual **Business of Tennis Forum** in April at The Queen's Club. The annual Forum is the most important event for the TIA UK in relation to enhancing its profile and positioning. The theme was 'Tennis Economics' and the event was recognised as the 'best ever'.

57 delegates attended the event representing clubs and venue operators, equipment suppliers, management consultants, related organisations, the media and tennis coaches although this number was slightly down from the previous year. Some benefit was gained from promotion by the LTA to (Home County) British Tennis Members but this activity was undertaken late in the day and so it was not possible to maximise the marketing opportunities on this occasion.



The event benefitted from a high quality speaker list on a wide range of tennis economy-related subjects, including presentations from Greenwich Leisure, The Edgbaston Priory Club and SMS Inc. and the LTA was heavily involved presenting its new Participation and Commercial strategies.

Thanks go to Sunbaba who kindly donated the excellent branding for the event and to The Queen's Club.

The International Tennis Federation took the opportunity of filming the presentations that will be uploaded to its **iCoach platform**. iCoach is an international on-line resource centre for players, coaches and parents/guardians of young players. Discussions are being held between the TIA UK and the ITF to ascertain other 'tennis-business' input that could result in mutual benefits to both organisations.

Tennis iCoach

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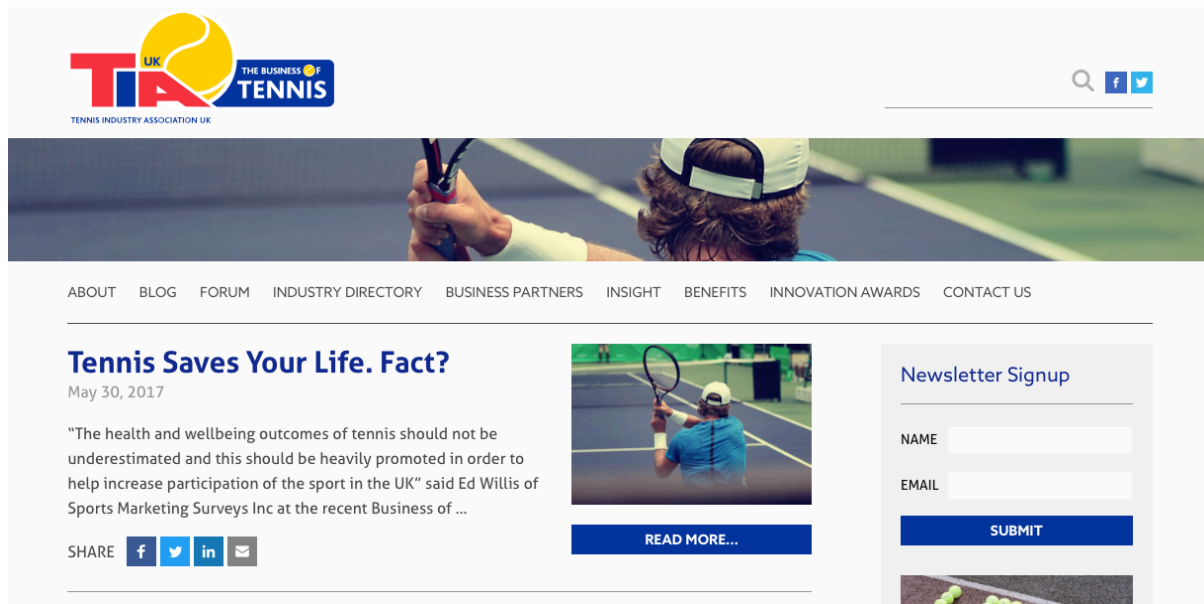
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Enhancing the **profile and positioning** of the association has been an important task over the past 12 months. The association has worked with ib3 creative communications agency to completely re-fresh the **website** and to develop a more modern feel. The result is a significantly more user friendly and flexible site than ever before.



The website now provides opportunities to enhance member promotion via stories and articles on the blog page, rolling adverts on each page, the industry directory and other features that can be further developed.

We are currently developing our **Digital Directory** and at the time of writing we are in discussion with the LTA regarding its circulation to the 2,700 LTA Registered Clubs. If achieved, this will be a significant achievement in the relationship between the two organisations and will result in raising the profile and awareness of all our members and their products and services to all tennis clubs.

Business of Tennis News is a compilation of the most recent articles reproduced from the website blog page resulting in time and expense savings and is circulated on-line to 2,000 contacts on our database. Due to the changes made to our corporate image only one issue has been released during 2017 but it is planned to be issued every three months going-forward. Members are invited to produce articles for the blog to promote activities, new products and services.

We are slowly enhancing our **social media** platform to raise awareness of the association and its members and to drive traffic to our website, but there is much more that needs to be done in this area. We are currently considering a proposal to appoint an 'intern' to develop our social media platform to maximise this resource.

Internal communications improved through several face-to-face meetings with members to discuss the future direction of the association and the services and benefits that members believe would be of benefit. Key areas of activity and interest mentioned by members are listed below and all are being considered for future activity.

Brands	Equipment	Clubs / Operators
Provision of industry data	Provision of industry data	Group purchasing platform
Tennis show/event	Increased awareness of companies and products	Specialist business development services
Improving links - retail, clubs, coaches	Increasing trade opportunities	Improved networking opportunities

Two **Advisory Groups** were formed composed of TIA UK Council members. The first is for the planning of the Business of Tennis Forum and the second on future strategy. Both Groups proved to be very constructive and the Groups will continue to provide advice and ideas to the Executive team and the Board during the next 12-month period.

The **relationship with the LTA** grew stronger during the period, with Steve Matthews instrumental in this area through his regular engagement with the CEO and his position on the LTA Council, representing the TIA UK. The improvement in the relationship was highlighted by Michael Downey, LTA CEO, at the LTA Council meeting in 2017 when he stated that the “TIA UK is one of the four key partners the LTA will continue to work with to help grow the game”.

Importantly the **LTA sponsored** the 2017 Forum and has an option to continue for 2018 - this is currently being addressed although the imminent departure of Michael Downey has delayed a final decision. Support for the Forum by the LTA also unlocked access to the British Tennis Membership Team and the LTA Registered Clubs Team, both of which may provide important new communication and potential trading channels for the TIA UK members.

Through TIA UK influence, the LTA hosted a **meeting with the major racket and ball brands** in October to discuss issues of mutual interest and to develop thoughts on industry support to grow the game. Of particular importance was the agreement by the LTA to look at the issue of procurement ‘transparency’ as the brands felt that the historical process and negotiations with the governing body had been “severely flawed”.

The meeting was also an opportunity for the brands to highlight some of the key challenges the industry faces in selling and promoting tennis equipment. The LTA for its part outlined its Participation and Commercial Strategies at the meeting. This was

the first time such a meeting was held with the governing body and a further (annual) meeting is planned.

In order to cement our position as the leader in the promotion and use of innovation and technology in tennis, the inaugural **Innovation Awards**, supported by tennishead, was launched at the Business of Tennis Forum. This is a new Award that aims to recognise products and services marketed in the UK that make the most positive impact to the delivery or presentation of tennis.

The introduction of the award also provides additional opportunities to raise awareness of the trade association to other sectors and to prospective members.



The Awards will benefit from a judging panel composed of key influential people in UK tennis who have extensive business skills and experience from a range of industry sectors. The panel is chaired by Steve Matthews (Chairman TIA UK) and includes: Dr Stuart Miller (ITF Senior Executive Director, Development and Integrity); Alastair Marks (LTA Participation Director); Judy Murray (Creator of Miss-Hits, Tennis on the Road, She Rallies, set4sport); Ross Matheson (Manager AELTC); Bridget Marrison (Director AMN/Publisher tennishead); David Minton (Founder and Managing Director Leisure Database Ltd); Jon Southcombe (Group Chief Executive Officer RMI Ltd).

If TIA UK members have new products or services that they would like to submit for the Innovation Awards, entry forms are available from the TIA UK website. Judging of entries will take place during October and the winners will be presented with their awards at the Business of Tennis Network Xmas Lunch to be held on 13th December at The Queen's Club.

Governance and Management

The TIA UK Board has met four times since the last AGM. Regrettably Mike Ballardie resigned as Vice-President in 2016 due to structural and business changes at Prince Global. Mike has been heavily involved in the TIA UK since it started and his contribution and his valuable input has been immense. Mike was also a Board

member of the US TIA and provided a vital link between the two organisations. We wish him well for the future.

New Board members from differing membership sectors were appointed to provide additional and new insight and guidance - Andy Burrell of the Chiltern Group (court contractors); David Carpenter of TrioPlus Sport and Leisure (independent consultants) and most recently, Paul Jepson of Yonex. They join Steve Matthews, Jan Booth and Rob McCowan to complete the Board that now has a wide range of interest and industry expertise.

The Council only met formally in November but additional input was provided by Council members through the Advisory Groups which proved to be particularly constructive and helpful.

The day to day running and development of the association's business continues to be undertaken by the Executive Team of Phil Sandilands, Business Development Manager and Gilly English, Membership and Events Manager.

Ambition and Strategy

Given the progress made over the past 12 months, it was considered opportune to review the association's strategy and this has been undertaken by David Carpenter, Director of TrioPlus Sport and Leisure and TIA UK Board member. It is hoped that the revised strategy will be ready for the AGM for review and feedback.

It is clear that much has been achieved to enhance the profile and positioning of the association but this activity must be continued and increased in the coming 12 months. We must build upon the success of the Forum to ensure that it becomes recognised as the 'must go to' annual tennis business event and make the inaugural Innovation Awards a success to illustrate our outward-looking vision.

As a membership organisation we must as a priority continue to develop relevant and valued services for our current members and benefits that can attract new members and new sectors. This is an on-going challenge given the wide variety of member interests within the association and the resources we have at our disposal. Cementing partnerships with other like-minded organisations for mutual benefit will continue to be important activity in the next 12 months.