



TENNIS OPENED UP

Chris Pollard, Abbie Lench, Tom Murray

AGENDA

- Journey over the last 12 months
- Bringing the LTA Vision to life
 - Rally
 - Junior Programme
 - Club update
 - Padel
 - Tennis Facility Funding



VISION

Tennis Opened Up

MISSION

Relevant



Accessible



Welcoming



Enjoyable



OBJECTIVES

- ❖ Increase the number of fans engaging with tennis from 635k to 1m by 2023
- ❖ More people playing more often;
 - > increase the number of adults playing from 4m to 4.5m and the frequency of adults playing once a month to 1.5m by 2023
 - > increase the number of children playing tennis once a week from 550k to 700k (10% of the population) by 2023
- ❖ Enable 5 new singles players to break into the top 100 by 2023 and win 2 medals at the Paralympic Games

STRATEGIES

Visibility

Broaden relevance and increase visibility all year round to build engagement and participation with fans and players

Innovation

Innovate in the delivery of tennis to widen its appeal

Investment

Support community facilities and schools to increase the opportunities to play

Accessibility

Make the customer journey to planning tennis easier and more accessible for anyone

Engagement

Engage and collaborate with everyone involved in delivering tennis in Britain, particularly coaches and volunteers to attract and maintain more people in the game

Performance

Create a pathway for British champions that nurtures a diverse team of players, people and leaders

Leadership

Lead tennis in Britain to the highest standard so it is a safe, welcoming, well-run sport



RALLY: DIGITAL PROGRAMME

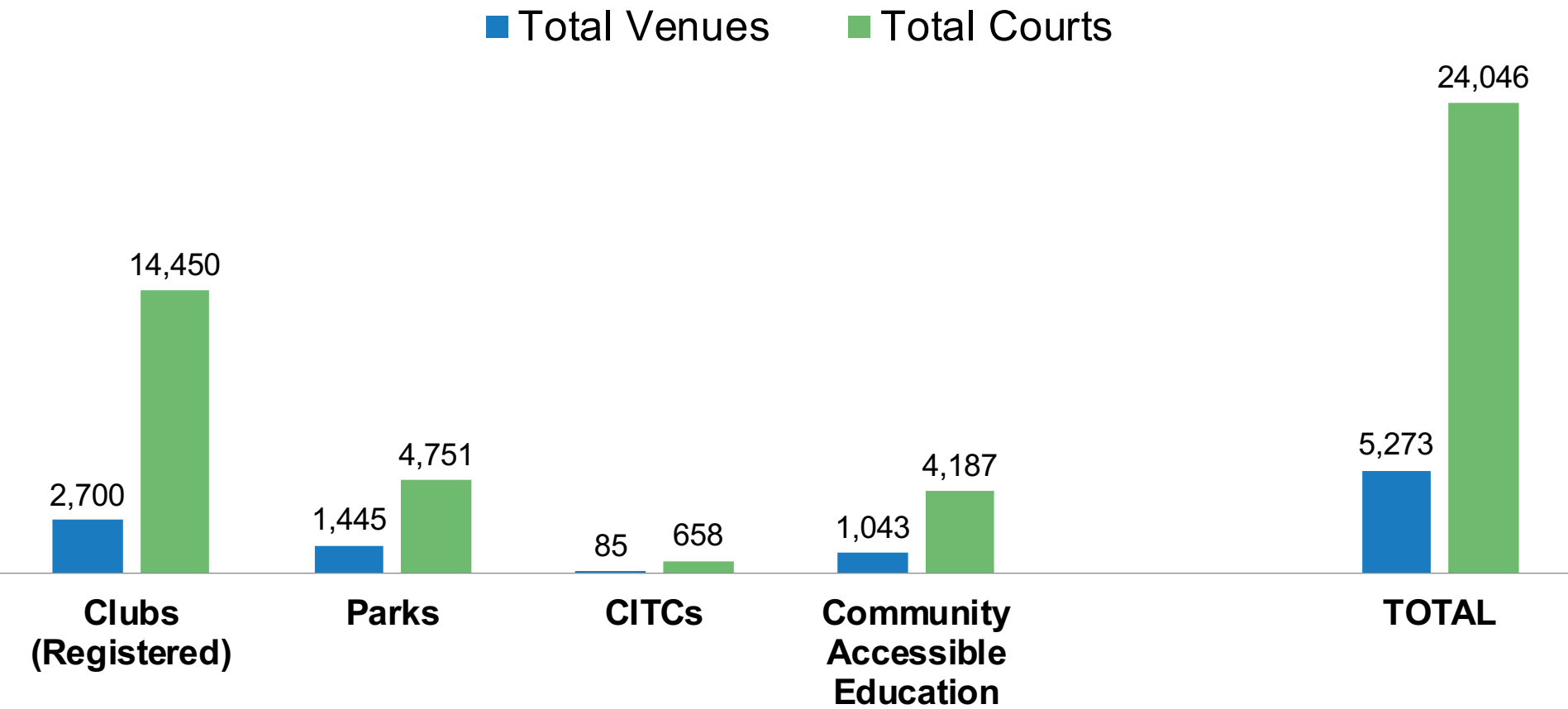
BARRIERS TO PARTICIPATION

<p>Players lapsed 37% because no one to play against</p>	<p>Lapsed players 41% interested in playing again</p>
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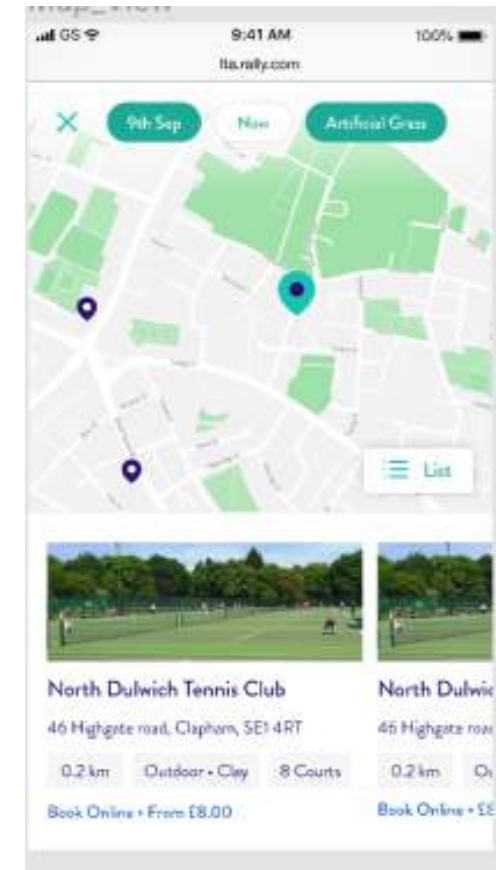
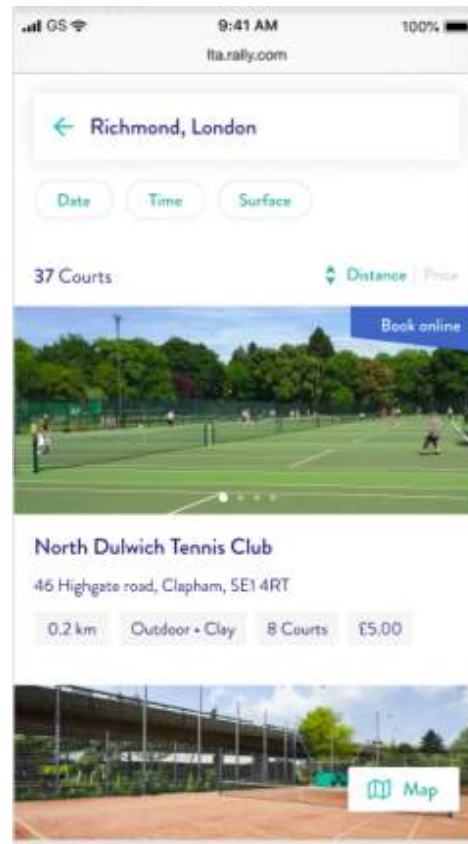
THREE MAIN BARRIERS TO PARTICIPATION

<p>1 Finding and booking a court</p>	<p>2 Not feeling like I am good enough to play</p>	<p>3 Finding someone of the right level to play with</p>
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MARKET SIZE: TOTAL TENNIS LANDSCAPE



USER EXPERIENCE ON MOBILE



USER EXPERIENCE ON COURT

Poster



Pull-up banner



Flyer

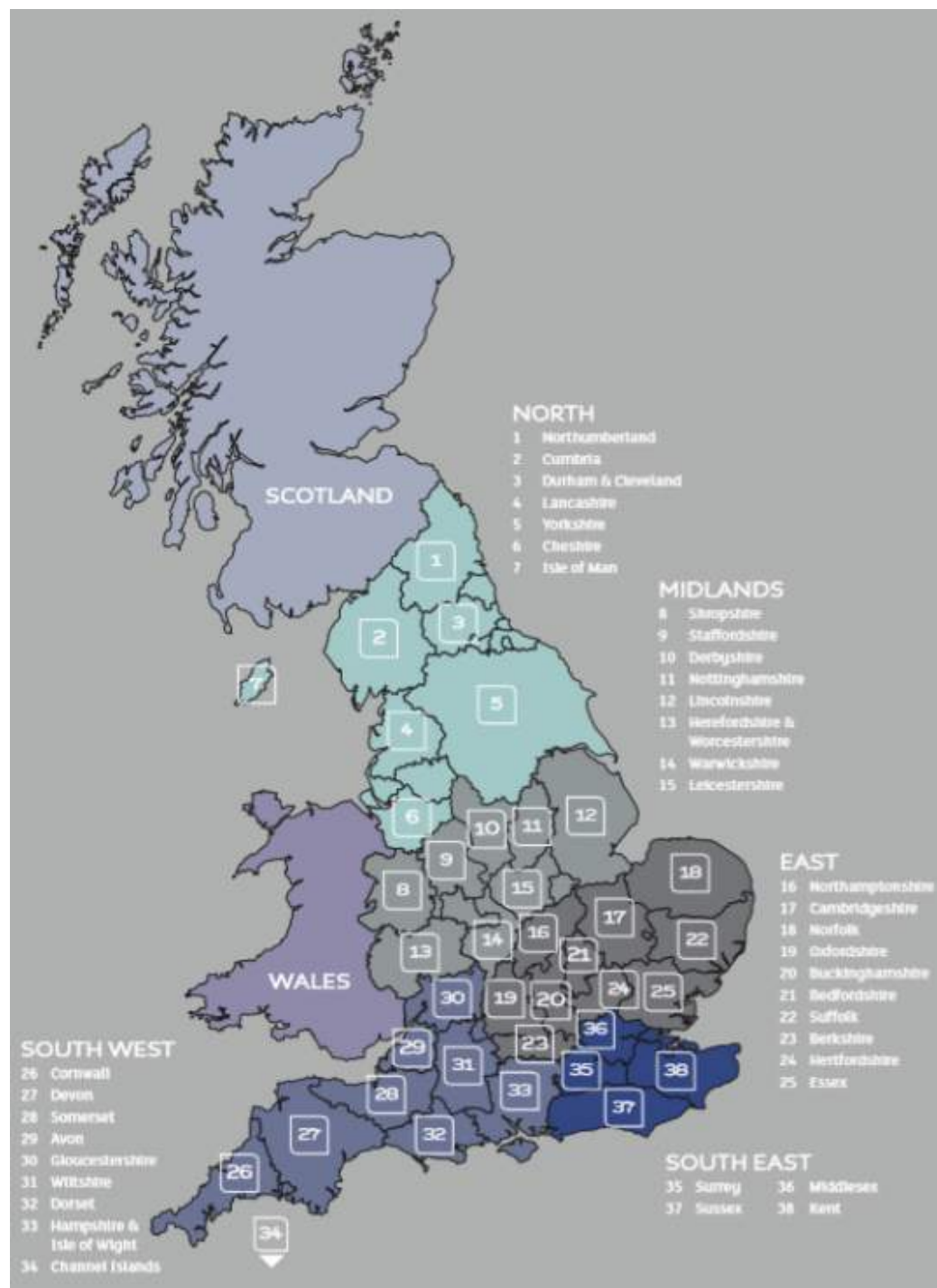


Signage



WHAT'S NEXT?

- Gate Access roll-out
- National roll-out of court booking in 2020
- Pilot and launch of session booking in 2020

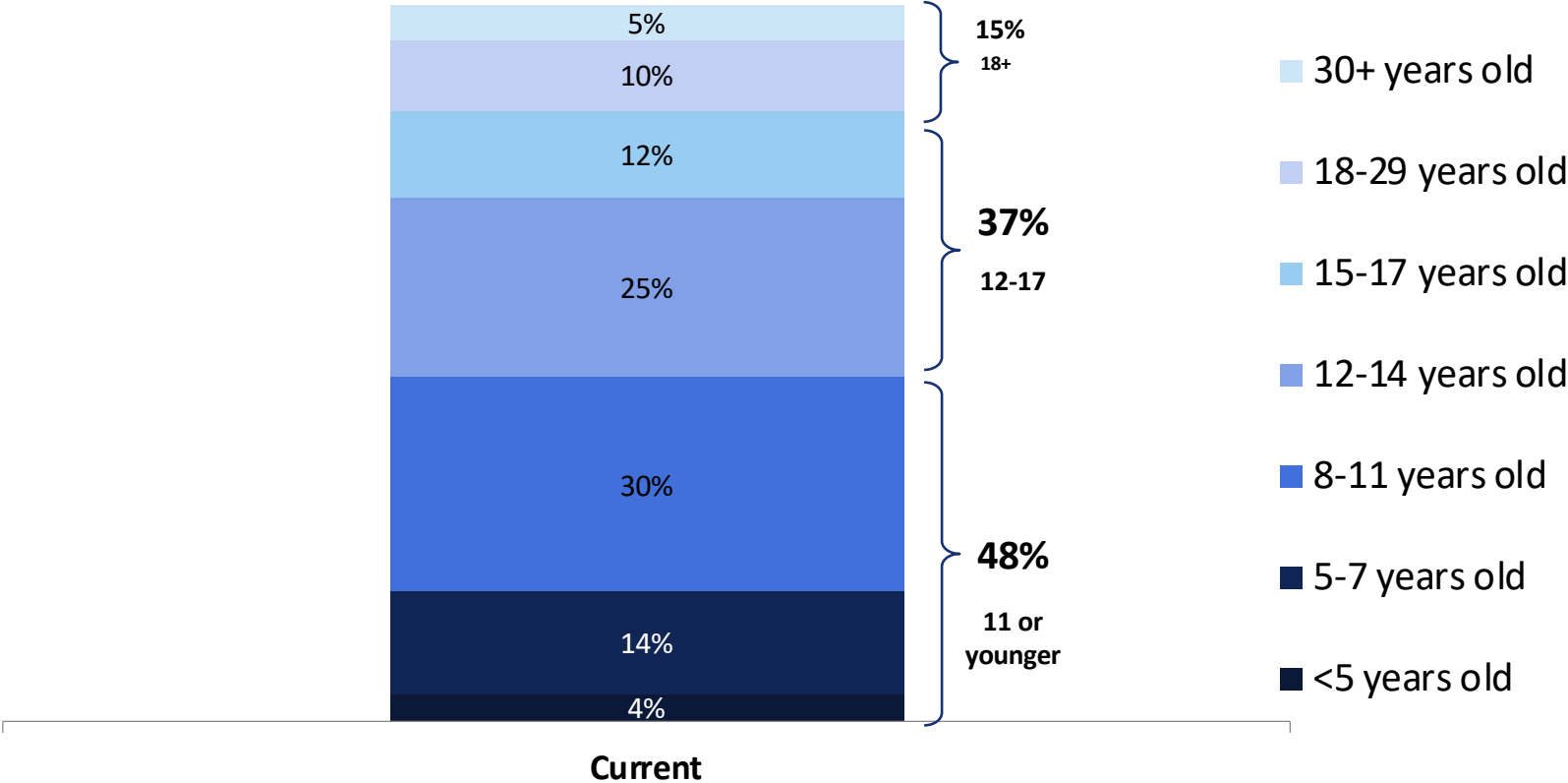




JUNIOR PROGRAMME

MAJORITY OF ADULTS FIRST LEARN TO PLAY TENNIS WHEN UNDER 18

Age When Started Playing Tennis



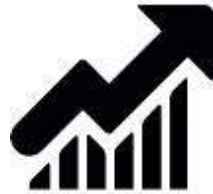
TENNIS NEEDS A JUNIOR PROGRAMME THAT :

PROVIDES

Enjoyment



Sense of progress



Competition



WORKS IN

Clubs & Camps



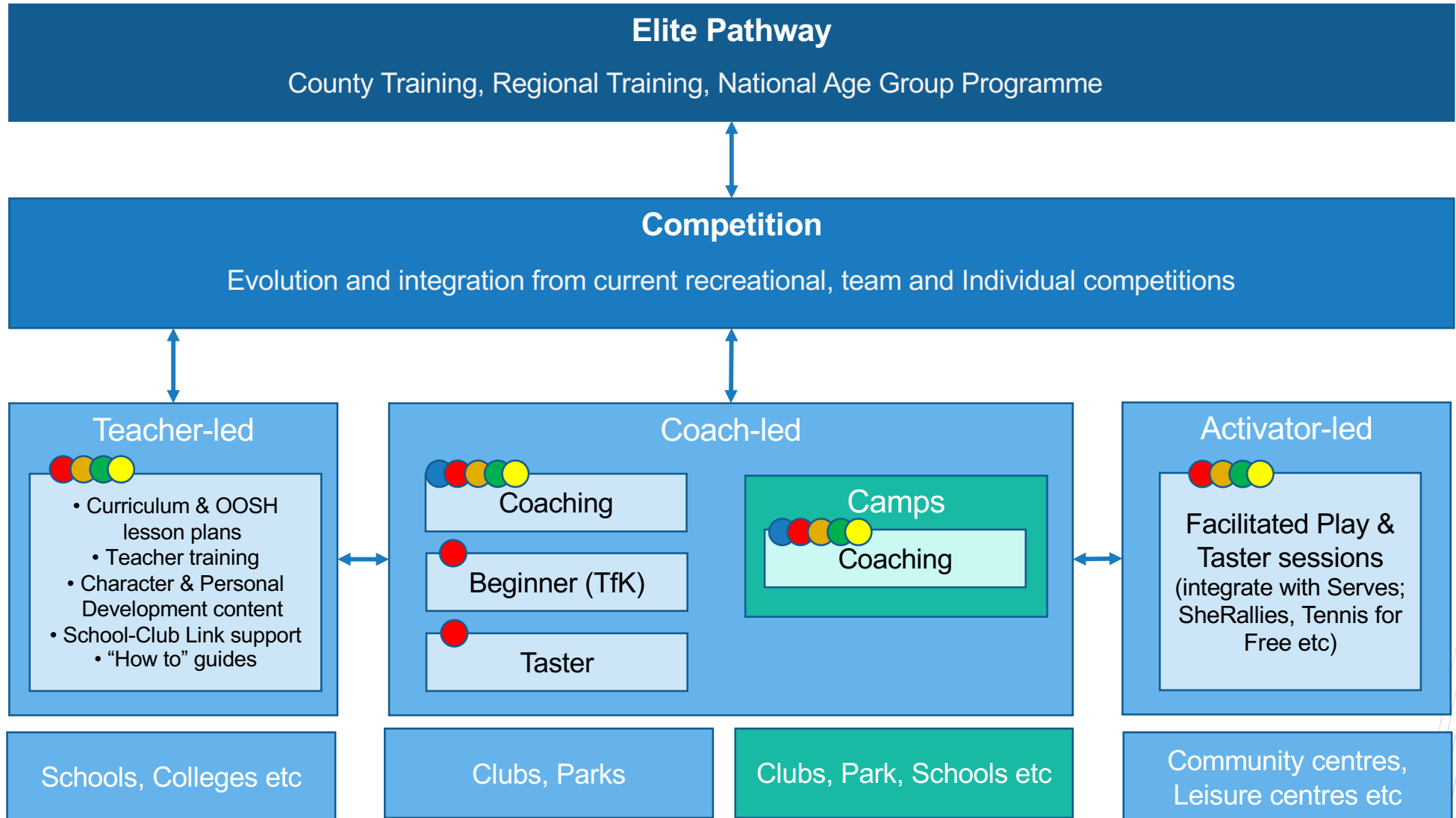
Parks / Community venues



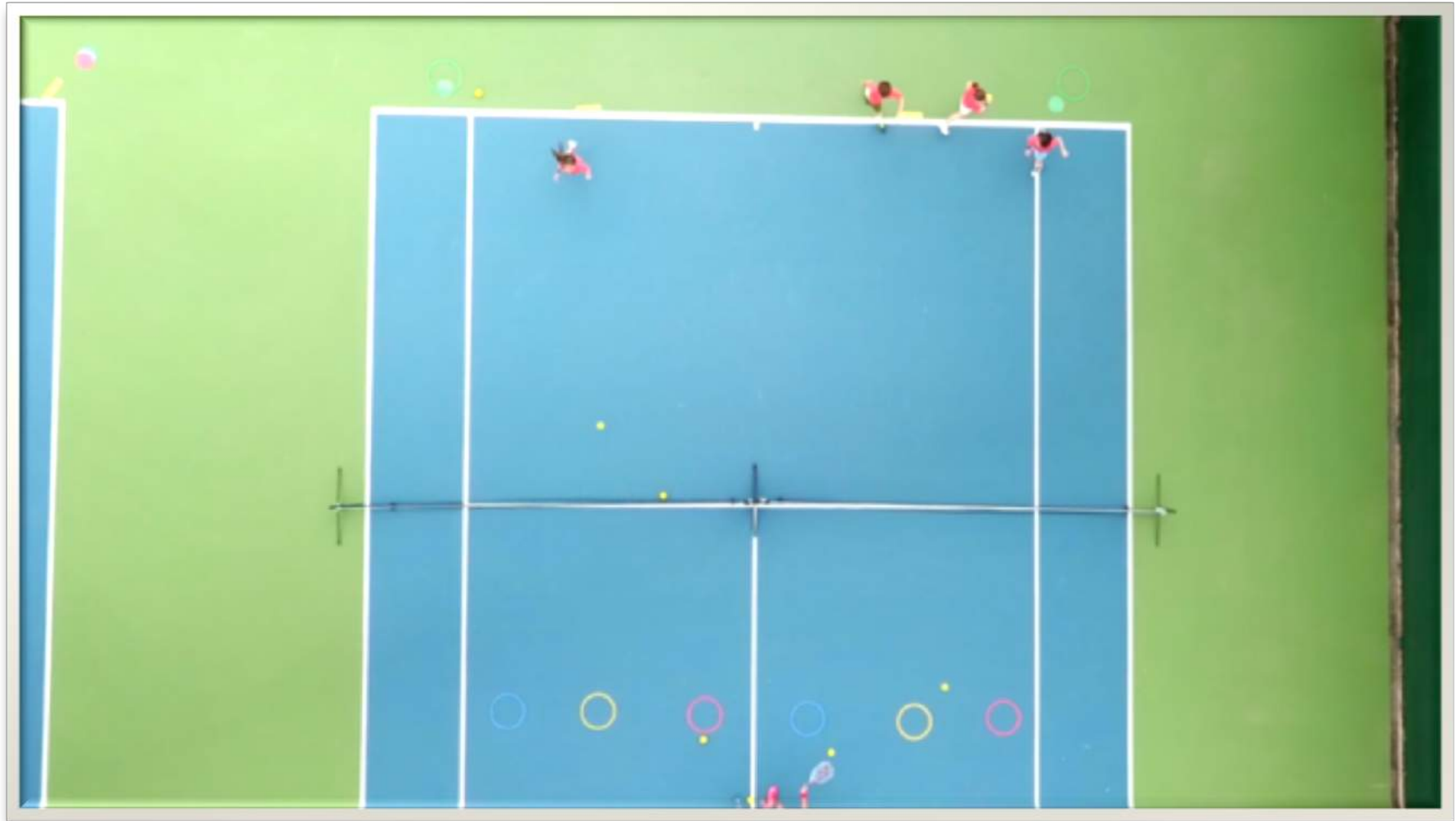
Schools



JUNIOR PROGRAMME FRAMEWORK



VIDEO





CLUB UPDATE

Abbie Lench

CLUB LANDSCAPE NATIONALLY & REGIONALLY

NUMBER OF CLUBS IN BRITAIN

- 2566 LTA Registered Clubs
- 46% have 1-3 courts (small)
- 37% have 4-7 courts (medium)
- 17% have more than 8 courts (large)

NUMBER OF CLUBS BY REGION

Size of Clubs	London & South East	South & South West	Central & East	Midlands	North	Wales
Small	190	211	274	168	185	31
Medium	205	141	178	134	168	29
Large	132	52	86	53	77	15
Total	527	404	538	355	430	75

MEMBER & PLAYER LANDSCAPE NATIONALLY & REGIONALLY

NUMBER OF MEMBERS & PLAYERS NATIONALLY

- 734,371 declared club members
- 556,985 adults playing weekly
- 1,327,395 adults playing monthly
- 3,716,707 adult playing yearly

NUMBER OF MEMBERS & PLAYERS BY REGION

Type of Players	London & South East	South & South West	Central & East	Midlands	North	Wales
Declared Members	228,045	86,952	151,676	81,843	116,636	14,446
Weekly Players	238,301	41,236	68,247	128,146	123,376	18,475
Monthly Players	574,219	96,676	158,911	286,394	272,923	34,383
Yearly Players	1,452,775	358,296	457,305	735,336	891,050	150,362

WHAT A GOOD CLUB LOOKS LIKE

Club H: A traditional family friendly sports and tennis club in a suburban setting

GOVERNANCE & MANAGEMENT

- Company Limited by Guarantee
- Board of Directors - 10 volunteers, Centre Manager attends
- Full Time Centre Manager, 3 full-time and 8 part-time employees
- Safeguarding Standards Complete
- One full-time employed Programme Manager
- Self-employed coaching team:
 - 2x Level 5 Coaches
 - 3x Level 4 Coaches
 - 4x Level 3 Coaches
 - 2x Level 2 Coaches
 - 2x Level 1 Coaches
 - Tennis Leaders
- Leasehold - 136 years
- Long-term Business Plan (3-5 years)
- Three key priorities:
 - Growing membership
 - Improving facilities
 - Retain membership

MEMBERSHIP

No joining fee

Adults	£399
Juniors	£136
Minis	£98

- Annual Payments and Direct Debit
- 603 members in total (163 minis, 80 juniors and 360 adults)
- Pay and play access - 100s of non-members accessing facilities
- Coaching programme open to non-members (with equipment available)



PROGRAMME OF ACTIVITY

- Tots, Red, Orange and Green Tennis across all three terms
- Junior Yellow Ball Tennis across all three terms
- Holiday camps running all year round
- Fun and informal competition for adults and juniors
- Social Tennis for adults throughout the week
- Adult coaching programme including beginners. Improvers, cardio, matchplay and drills
- Adult Team Tennis & Winter Box League
- Summer Club Championships
- Multiple Teams in the County Leagues
- Host a Grade 3 and Grade 4 event each year
- Open Days used every year to raise awareness of the club and programme
- Links with 6 primary schools and 3 secondary schools
- Over 450 players taking part in the weekly coaching programme

RETENTION

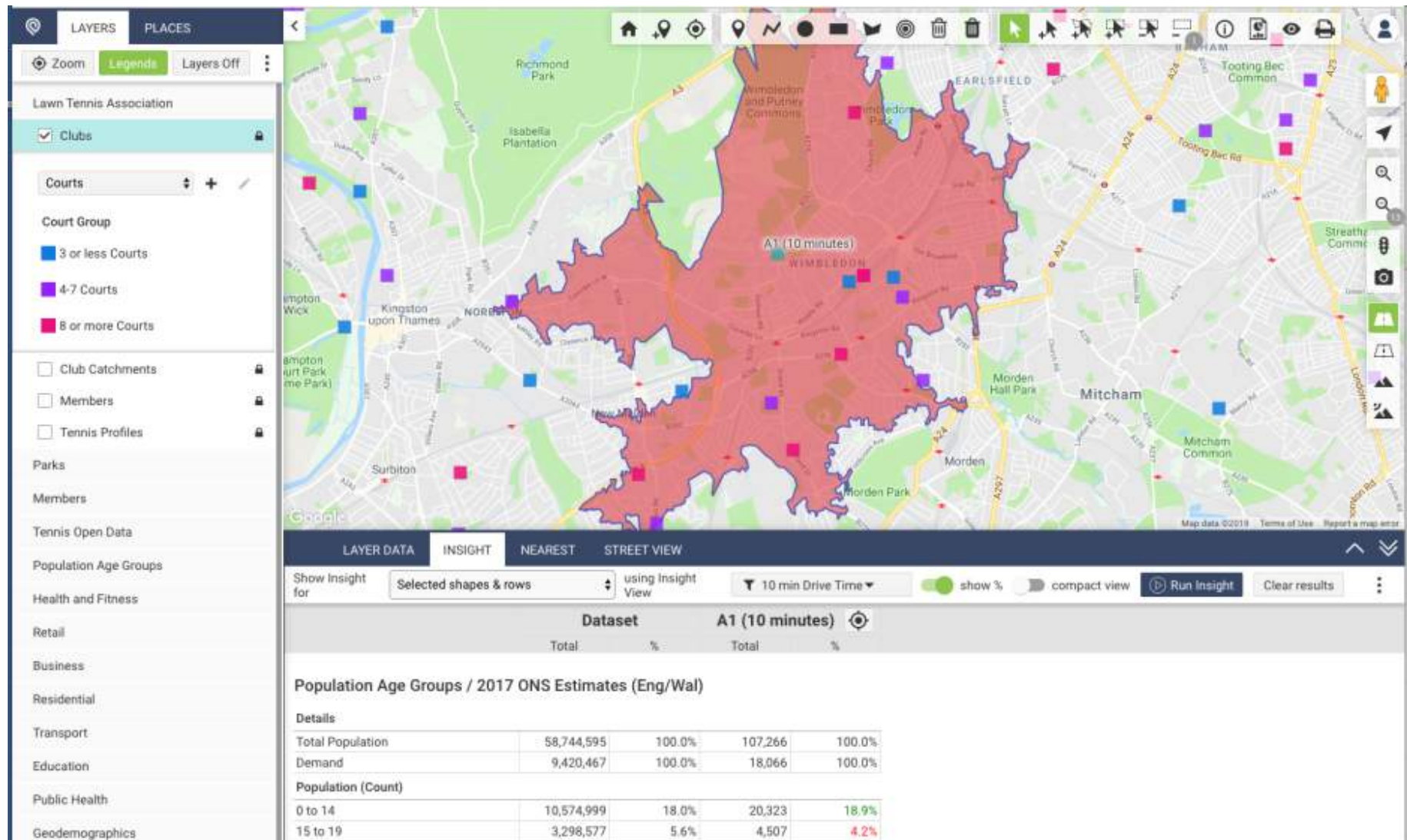
- All members receive a welcome pack and on court induction and assessment with a coach
- Regular programme of social events
- New member evenings once a month
- Members sent periodic email as well as up to date notices via website, facebook, twitter, noticeboards
- Regular e-newsletter for members
- Coach reviews the programme of activity as part of the overall business plan

FINANCE

Total Income	£415,000
Coaching	£145,000
Membership	£240,000
Social/Bar/Ops	£30,000
Total Expenditure	£343,000
Operating Costs	£190,000 (maintenance, energy, staff)
Membership	£56,000
Coaching	£97,000
Annual Surplus	£72,000
Annual Sinking Fund	£21,300

CLUB TOOLKIT: GROWING MEMBERS & PLAYERS

KNOW YOUR CATCHMENT, KNOW YOUR MEMBERS, KNOW YOUR POTENTIAL



THE BENEFITS OF USING THE MAPPING REPORT

TAKING A STEP BACK TO LOOK AT THE BIGGER PICTURE IN TERMS OF:

- ✓ Existing membership profile
- ✓ Member and player catchment
- ✓ Breakdown of local competition

...CAN ASSIST WITH A NUMBER OF KEY AREAS;

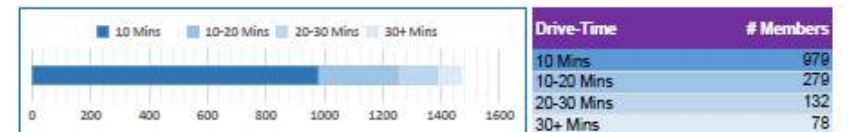
- Identifying what's special about your club
- Presenting your club in the best light both online and offline
- Reviewing the playing programme to ensure it meets the needs of all members
- Developing new membership packages to meet the needs of different players
- Understanding where and how to promote your offers

3. Membership

3.1 Members within 10 mins drive time of Chapel Allerton Lawn Tennis and Squash Club

Tennis Segment	Total	10 mins	Total %	10 mins %
Tennis Titans	235	142	10%	18%
Tennis Troupers	283	227	23%	29%
Seasonal Spinners	89	75	7%	9%
Wimbledon Warriors	39	30	3%	4%
Social Butterflies	19	14	2%	2%
Senior Stalwarts	543	280	43%	35%
Non Tennis	41	23	3%	3%
Total	1249	791	100%	100%

3.3 All members drive time of Chapel Allerton Lawn Tennis and Squash Club



TAILORED SUPPORT FOR YOUR CLUB

PRACTICAL TOOLS AVAILABLE;

- A self-service guide to 'Growing Your Membership'
- A tailored mapping report for each club which includes;
 - details of your local competition within 10 and 20 mins
 - profile of your existing members as tennis segments
 - drive time analysis of your existing members
 - postcode sectors of your potential 'lookalikes'
- Marketing collateral to support roll out of campaigns



OTHER BITS IN THE PIPELINE;

- Member survey guidance and a potential solution to make this easier
- Governance, management & strategic planning guidance, workshop and upgraded legal & tax helpline
- Financial sustainability guidance, including new finance package and costs savings partners



Tom Murray
Head of Padel, LTA

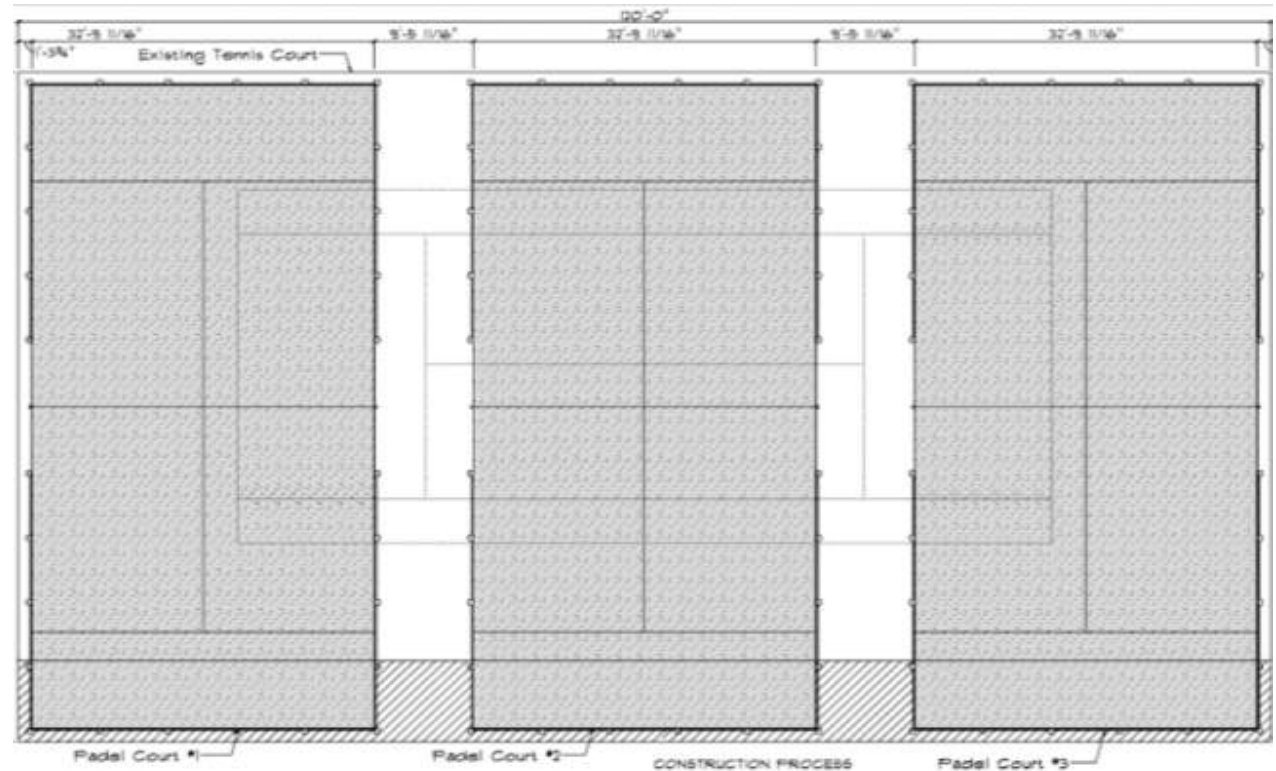


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KEY BENEFITS FOR CLUBS



1. MAXIMISE SPACE
2. RETAIN & ATTRACT NEW AUDIENCES
3. FINANCIAL WELFARE



CLUB SUCCESS STORY

TENNIS WORLD MIDDLESBROUGH

*“ADDING PADEL COURTS WILL RETAIN
AND GROW A MEMBERSHIP BASE”*

Nigel Garton, Club Manager

PADEL IN THE UK



As of 31/08/2019

PARTICIPATION



82%
play at least once a month



47%
play at least once a week

DEMOGRAPHICS



78%
adult players (16-64 years)



10%
junior players (from 5-15 years)



12%
Older adult players (65-74 years)



71%
male players



29%
female players



21 TENNIS FEDERATIONS NOW GOVERNING PADEL IN EUROPE



Padel in Europe is expected to follow similar growth to that in Spain, where there is an estimated 20,000 padel courts and 6 million players.

Andorra (17 courts)

Armenia

Austria (20 courts)

Belarus

Belgium (190 courts)

Bulgaria (1 court)

Croatia (8 courts)

Denmark (32 courts)

France (589 courts)

Germany (49 courts)

Great Britain (65 courts)

Greece (41 courts)

Ireland (12 courts)

Israel

Italy (784 courts)

Malta

Netherlands (195 courts)

Norway (17 courts)

Romania (10 courts)

San Marino (2 courts)

Turkey

NEW CHANNELS



AN OPPORTUNITY TO GROW PARTICIPATION:


- City Centres
- Public Parks
- Schools & Universities
- Squash Clubs
- Leisure Centres
- Trampoline, Go-Carting & Football venues



COMPETITIONS



PADEL
Tour



COACHING PATHWAY



REPRESENTING TEAM GB

PERFORMANCE PLAYERS

TENNIS FACILITY FUNDING

EASY ACCESS LOANS

- LTA will support projects that enhance facilities and support all year round play
- Funding up to £250,000 interest free
- Priority given to increasing floodlit and indoor courts
- No fixed partnership funding rates, potential flexibility with repayment lengths
- Planning not needed to make an application; will be a condition of funding if approved



GATE ACCESS SYSTEM GRANT SCHEME

- Commitment to improving accessibility to courts – we will provide grant funding to venues to support the installation of gate access technology.
- Eligibility dependent on:
 - Minimum tennis demand of 12,500 within a ten minute walk of the venue
 - Community accessible offer at all times
 - An LTA registered venue
 - Use of the Clubspark booking platform (linking to the LTA Rally Programme)
 - Maintain a sinking fund for the future replacement of the gate access technology
 - Cover maintenance and data fees

