

# Tennis in Britain

## Growing the Game: Challenges, Opportunities

Paul Burditt

Head of Insight and Planning

THE  
TRAGEDY  
OF THE DUTCHESSE  
Of Malfy.

*As it was Presented privately, at the Black-  
Friars; and publicly at the Globe, By the  
Kings Majesties Servants.*

The perfect and exact Coppy, with diverse  
things Printed, that the length of the Play would  
not bear in the Performance.

Written by John Webster.

Hoc. ——— Signat. ———  
Candide Imperitiam barbae meretur.

*J. gates.*

LONDON

Printed by NICHOLAS ORES, for JOHN  
WATSON, and are to be sold at the  
signe of the Crowne, in Pauls  
Church-yard, 1623.

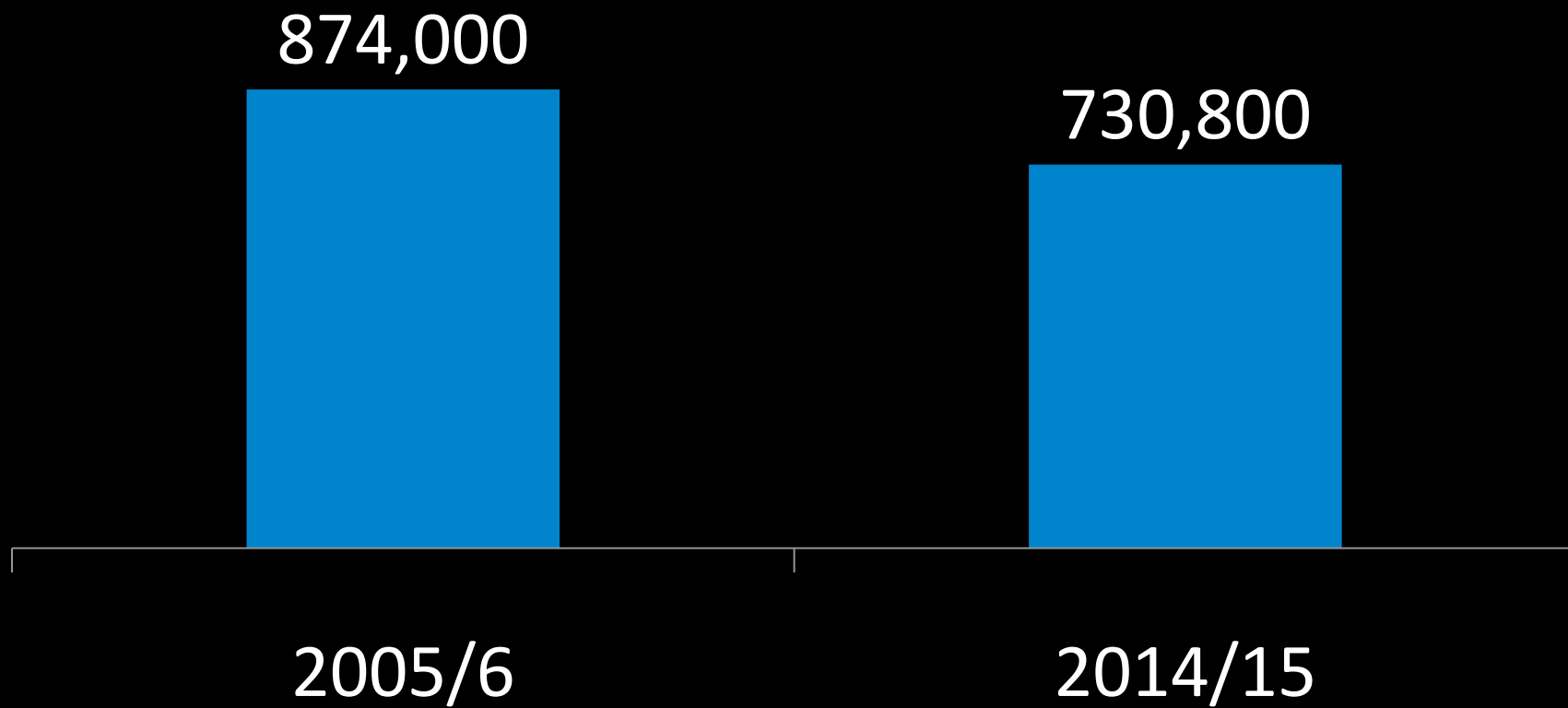
*We are merely the stars'  
tennis-balls, struck and  
banded  
Which way please them*

5 million

# 10 Year Challenge



# Monthly Participation



-16%

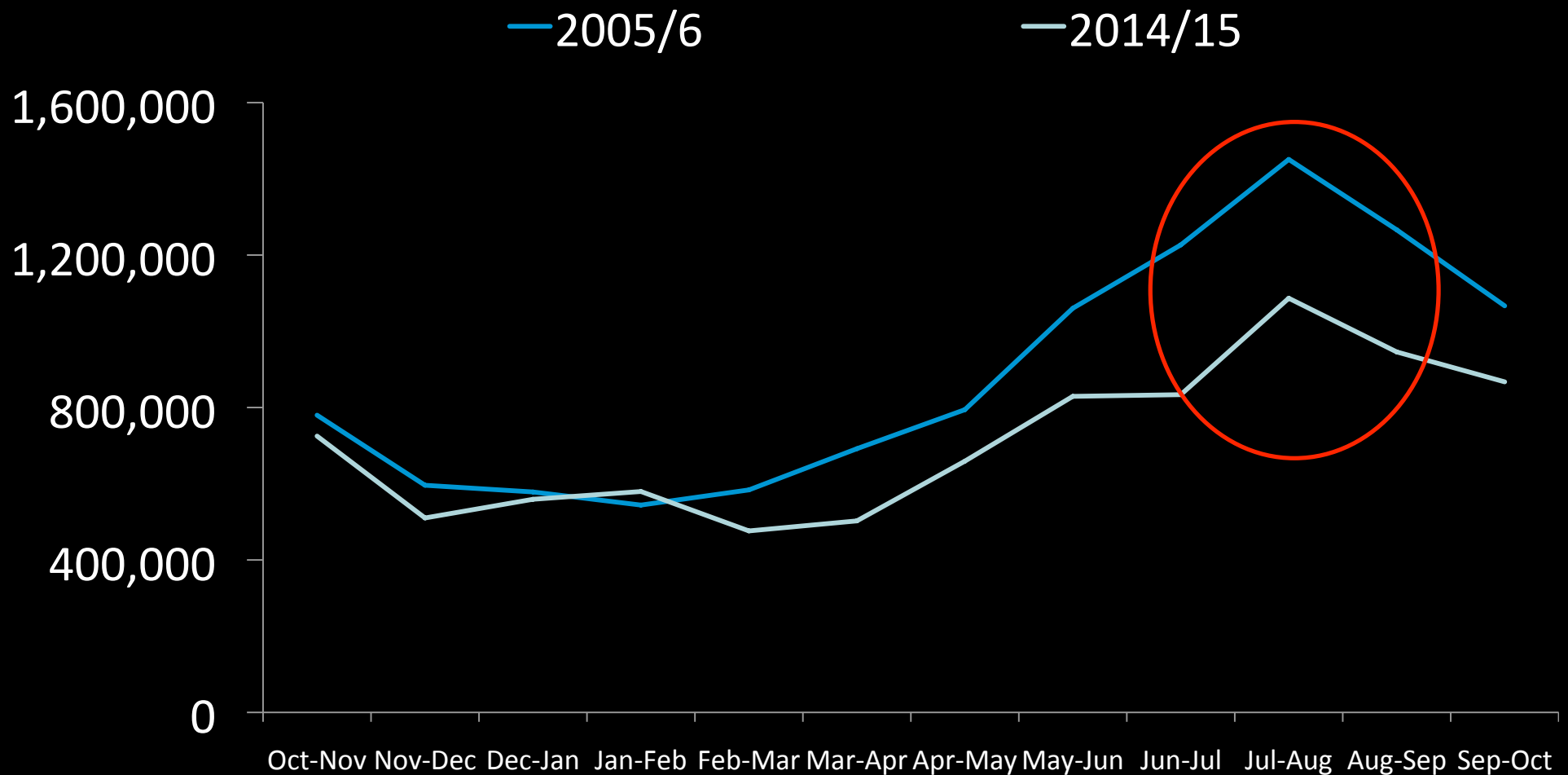
16-25	-22%
26-34	-32%
35-44	-39%
45+	+14%

16-25	-22%
26-34	-32%
35-44	-39%
45+	+14%

16-25	-22%
26-34	-32%
35-44	-39%
45+	+14%

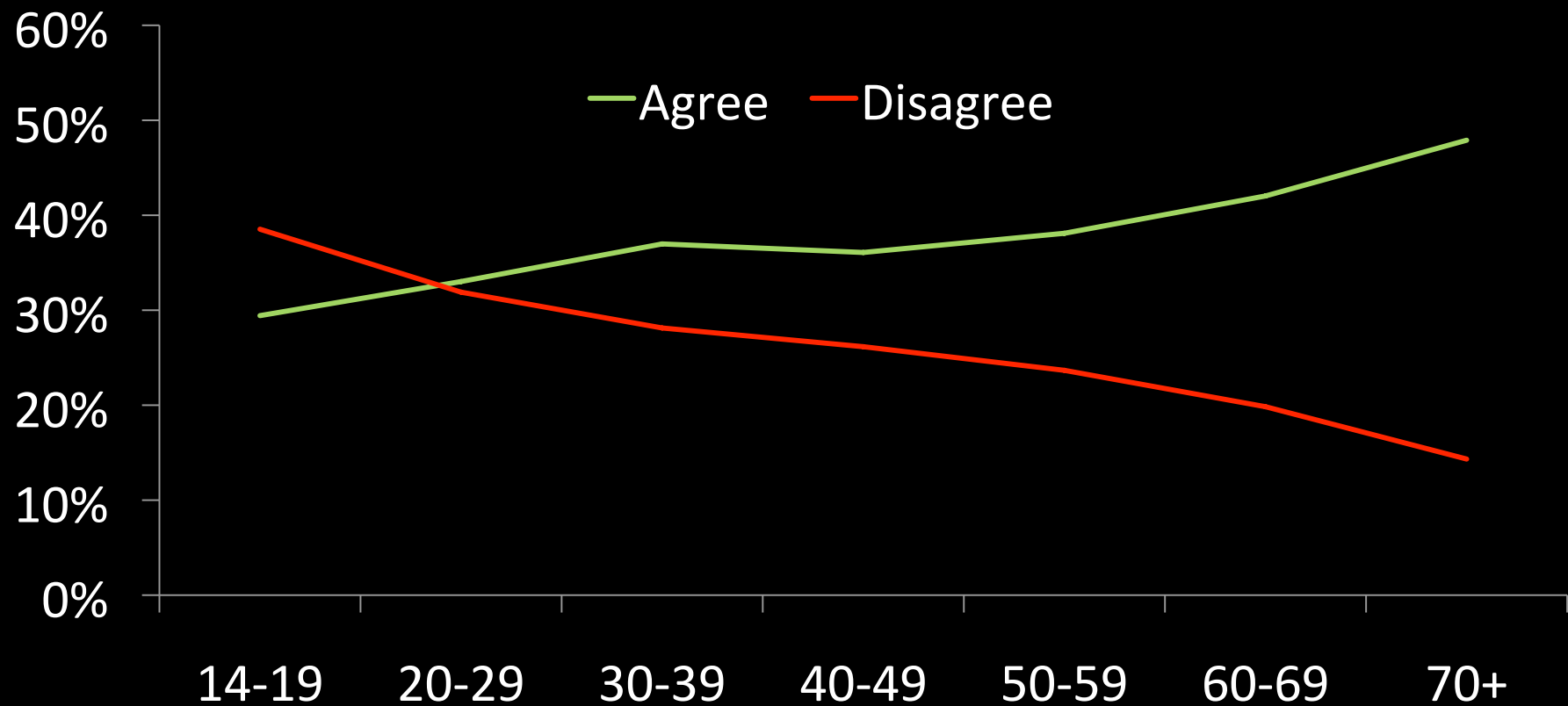
16-25	-22%
26-34	-32%
35-44	-39%
45+	+14%

# Monthly Participation



-25%

“Tennis is a sport which can be played all year round”





**Fitness/Conditioning: +75%**

**Keepfit classes: +33%**

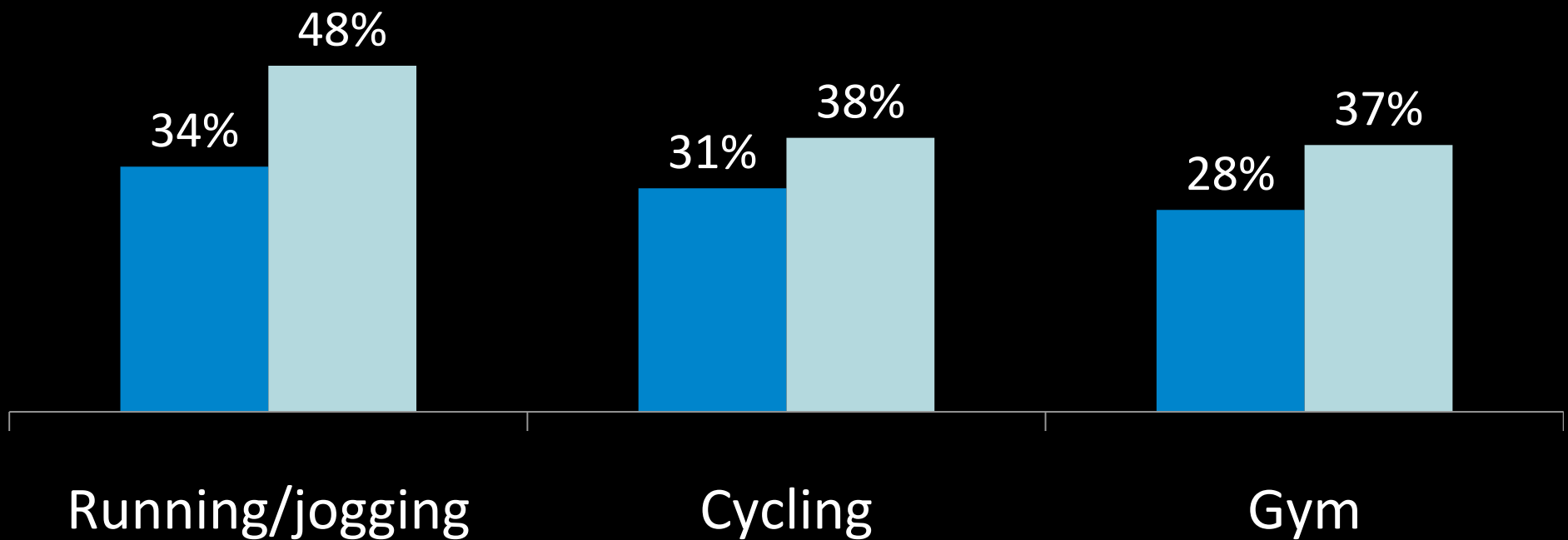
**Gym: +15%**

**Cycling: +9%**



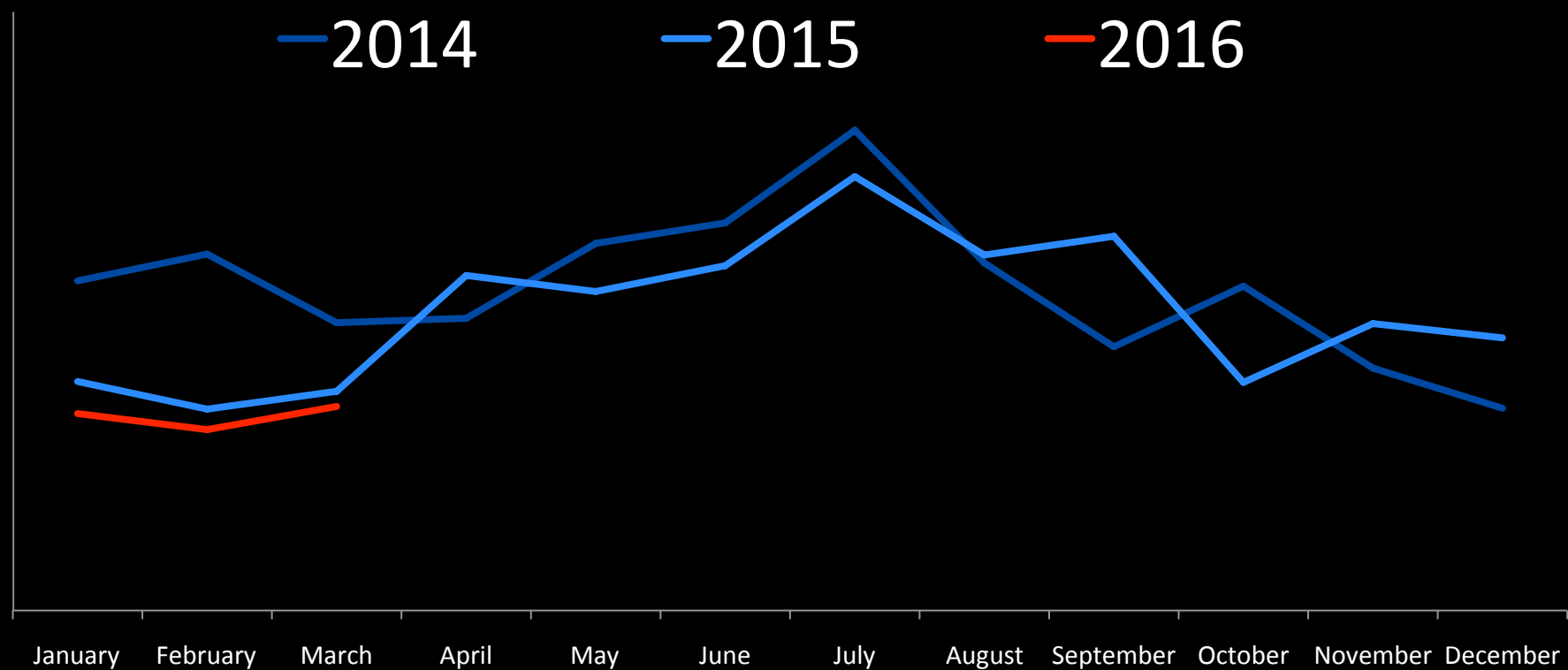
# Activities Tennis Players take part in

■ Frequent Tennis Players   ■ Infrequent Tennis Players

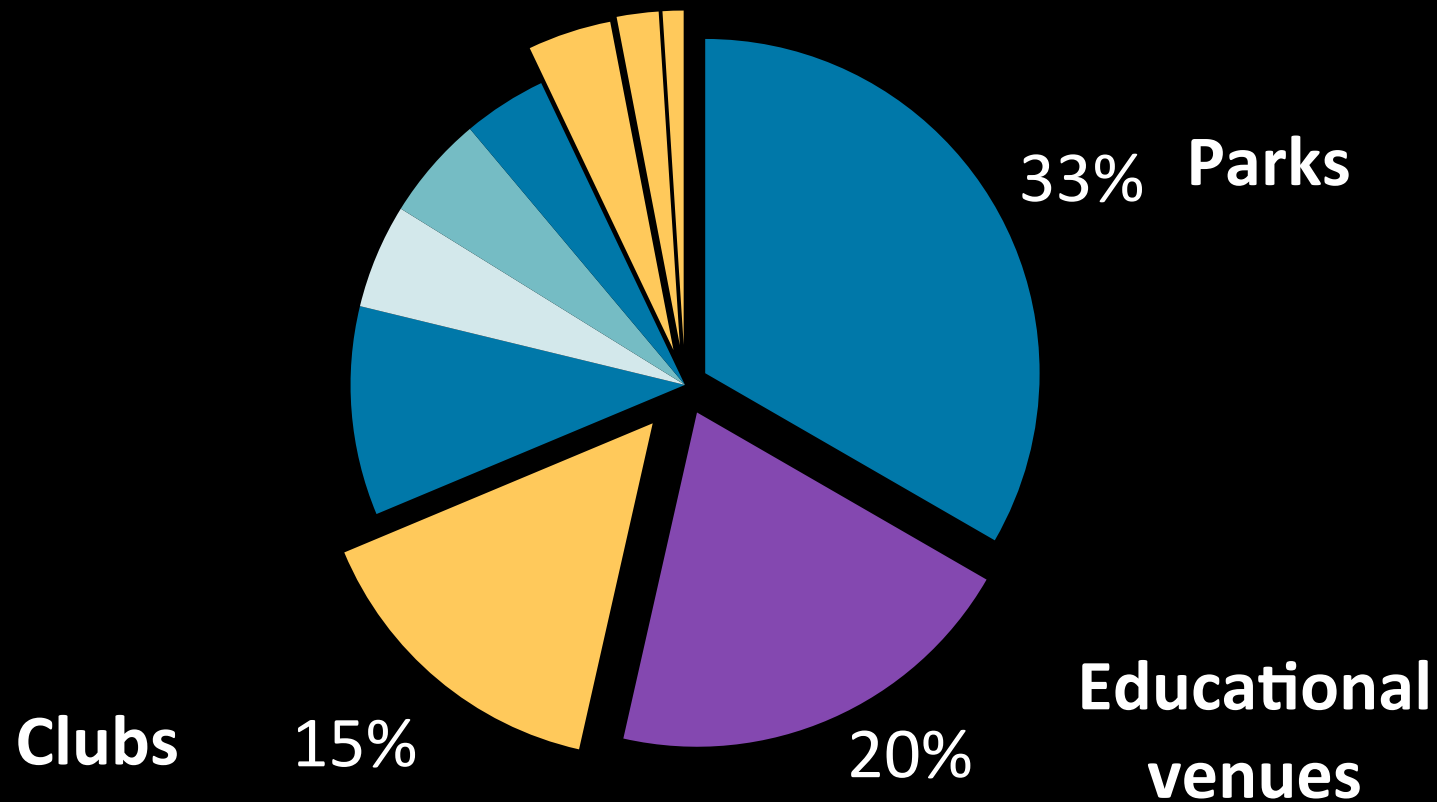


obsessed  
feel ok  
lots of them  
testosterone  
competitive  
uncomfortable  
sweat  
judgmental people  
noisy  
neon  
bright  
muscles  
dance  
greasy  
unwelcome  
exhausted  
grunting  
awkward  
varied  
industrial  
claustrophobic  
glass ceilings  
wishing time away  
sound of machinery  
rigid people not interacting  
chore  
shouting from aerobics instructor  
functional  
constrained  
factory  
weather  
all  
vanity  
inspiring  
metal  
futuristic  
masculine  
oblivious to others  
indoor machinery

# % played in the each month




# Where people play



A vintage-style photograph of a tennis club lounge. In the foreground, several people are seated at a wooden table, engaged in conversation. A man in a white polo shirt is on the left, and a man in a white jacket is on the right. The table has some items on it, including a glass and a small container. In the background, a large tennis court is visible, with a few people playing. Beyond the court, there are rows of multi-story buildings, likely in a city like New York. The overall tone is nostalgic and elegant.

2,600+ clubs  
16,000+ courts



The background image is a faded photograph of an outdoor tennis court. In the foreground, several people are seated at a table, which is decorated with large red flowers. The table also holds some bottles and a small container. In the background, a tennis court with a green net is visible, and a few more people can be seen on the court. The overall scene is bright and sunny, with a clear sky and some buildings visible in the far distance.

Ageing membership  
Lack of money to resurface courts  
Lack of money to install floodlights  
Lack of volunteers



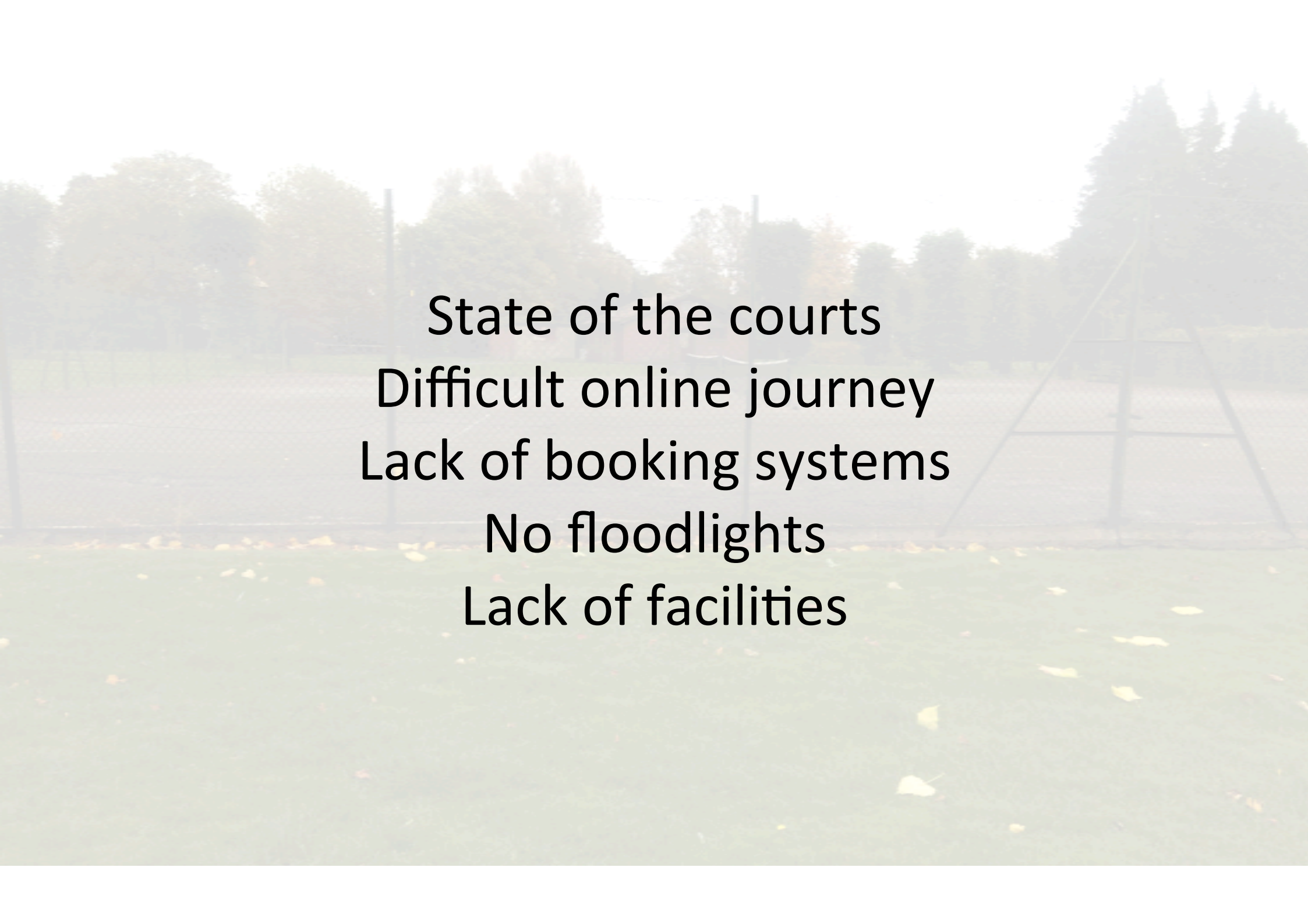
A grayscale photograph of a man in a light-colored shirt, smiling and holding a tennis racket. The image is faded and serves as a background for the text.

Expensive  
For serious players only  
Exclusive  
Rules and regulations  
Invite-only  
No flexible memberships



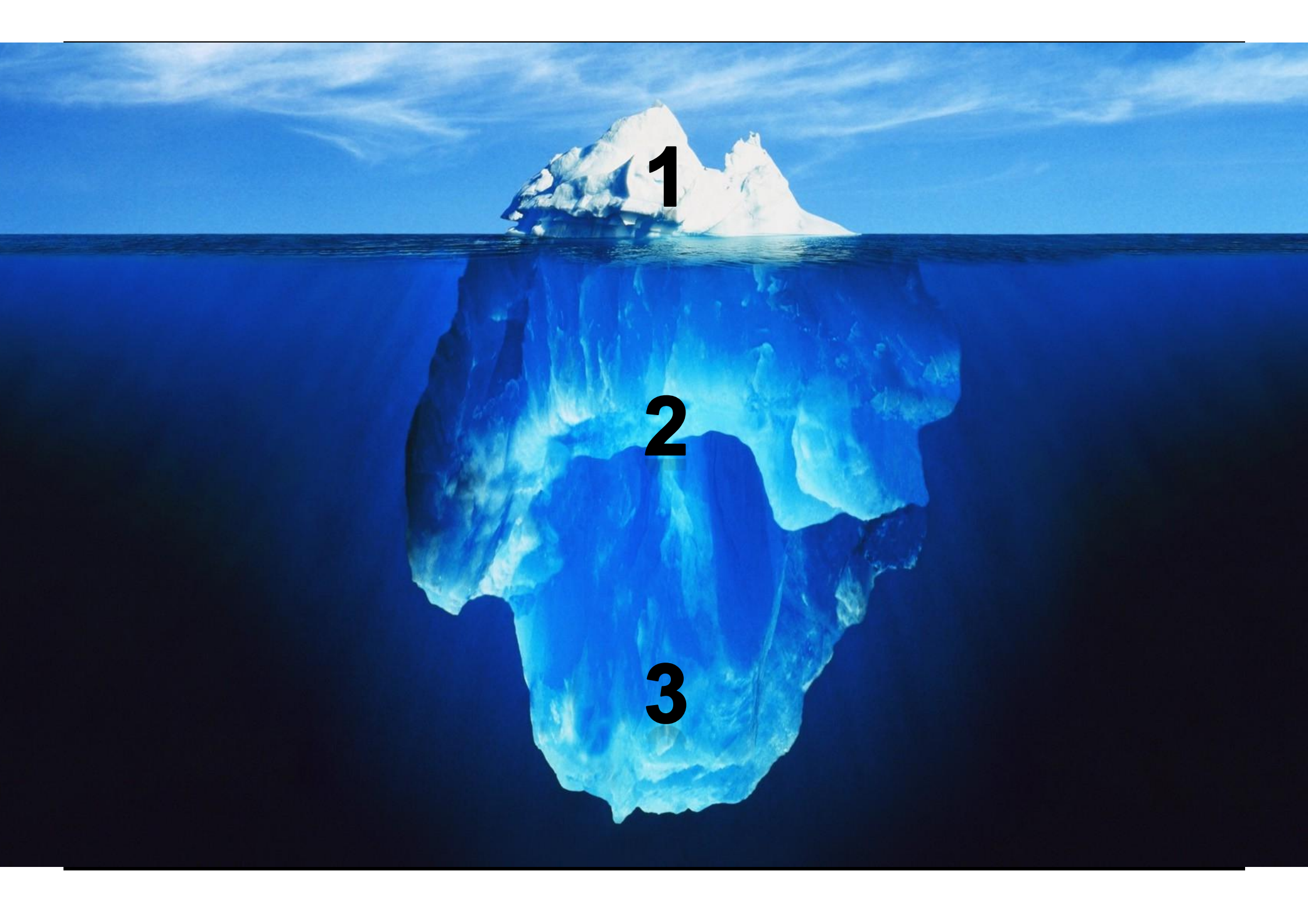


7000+  
courts

A foggy outdoor sports field with a goalpost visible on the right. The ground is covered with fallen leaves. The text is centered in the middle of the image.

State of the courts  
Difficult online journey  
Lack of booking systems  
No floodlights  
Lack of facilities





An iceberg floating in a blue ocean under a blue sky with light clouds. The tip of the iceberg is above the water surface, while the much larger, jagged base is submerged. The text is overlaid on the image in a bold, black, sans-serif font.

**RATIONAL**

**BELOW THE SURFACE**

**PSYCHOLOGICAL**

# RATIONAL

Antiquated  
booking systems

Having to wait for  
courts to become  
available

Poor quality of  
courts / nets

Finding someone  
to play with

Not light  
enough / courts  
are not floodlit

Weather

Need for  
equipment –  
balls, racket

Parking

# BELOW THE SURFACE

People rarely  
walk past  
courts

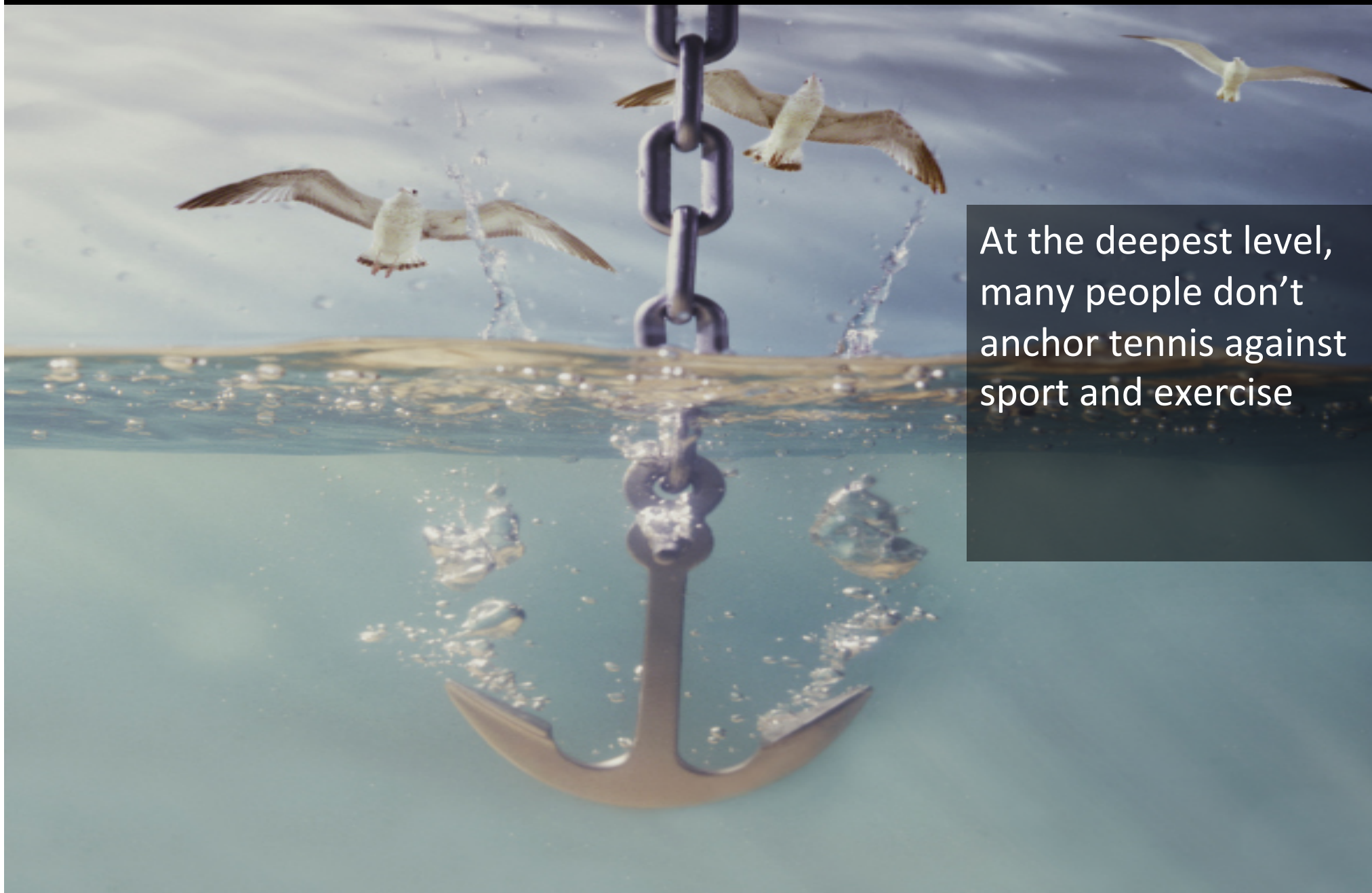
People don't see other people playing that often,  
so they are not prompted to play.

Wimbledon  
does prompt  
play

Only two weeks in the year, too late in  
the year to get into a routine.

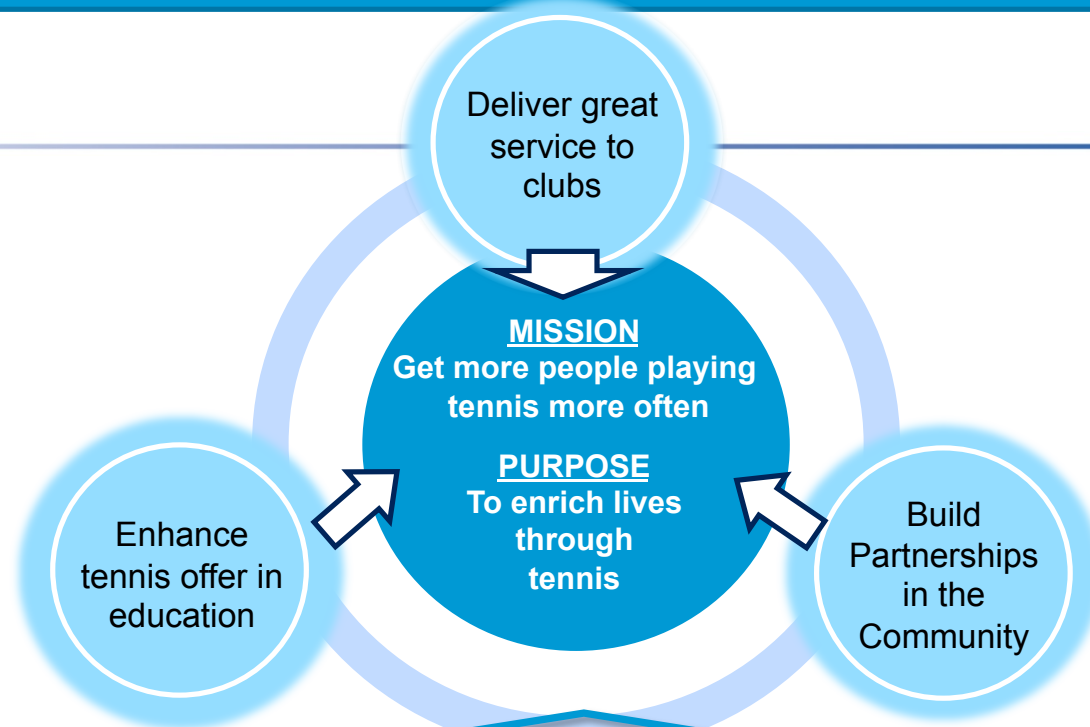


# PSYCHOLOGICAL

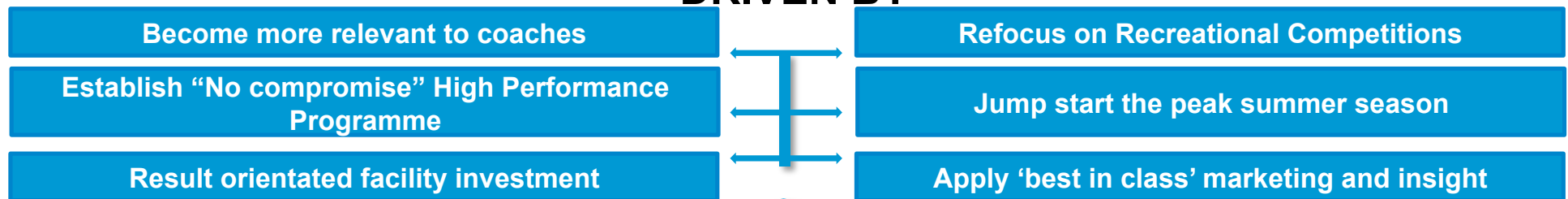


At the deepest level,  
many people don't  
anchor tennis against  
sport and exercise

# BRITISH TENNIS STRATEGIC PLAN 2015-2018



## DRIVEN BY



## ENABLED BY





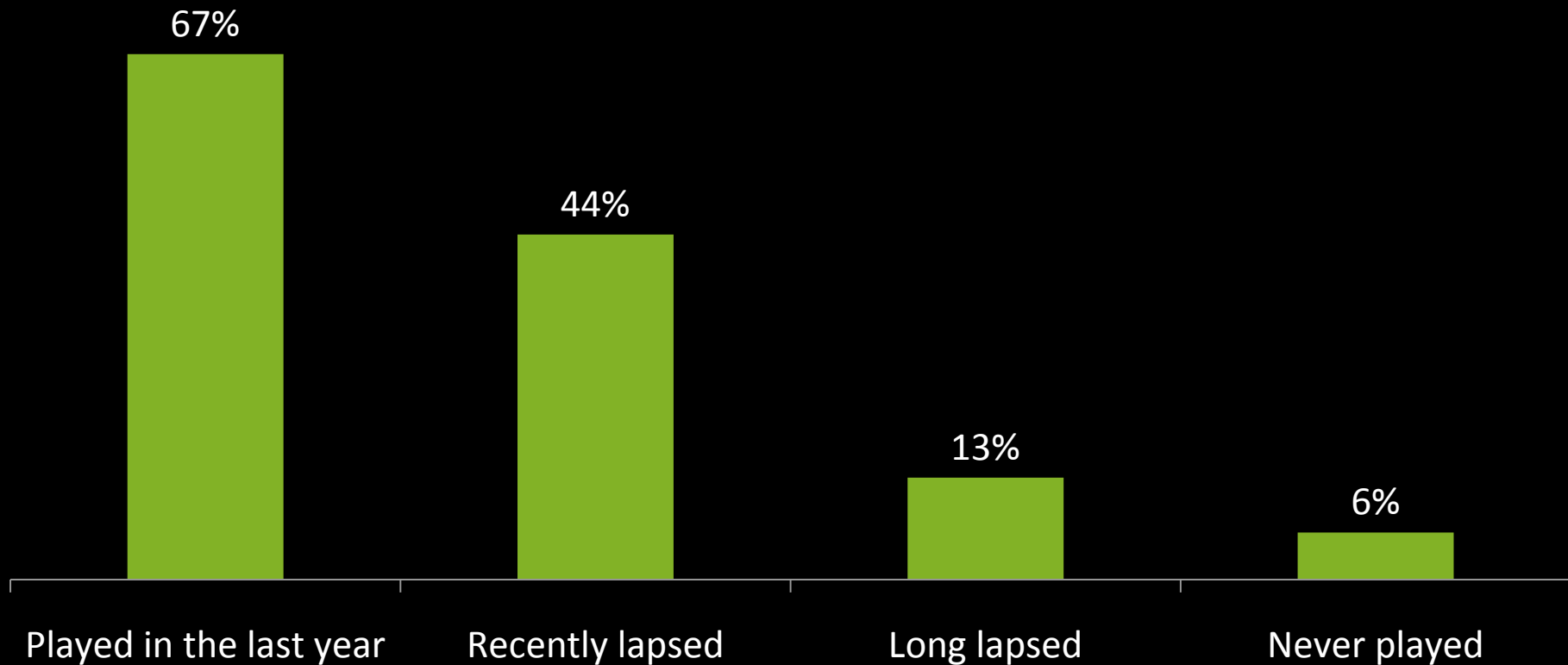


Focus

The right people

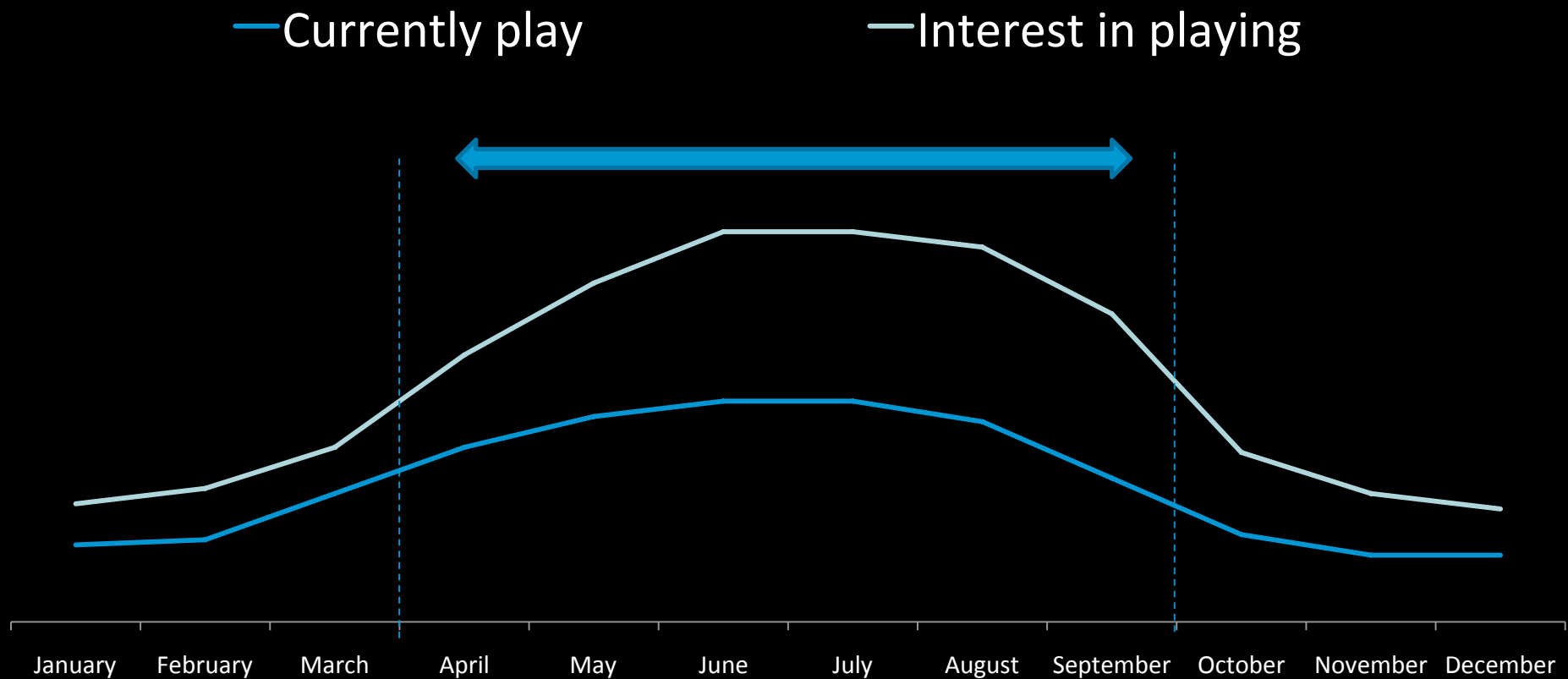
The 3 levels of barriers

# % who want to play more, or at all



87%

# Play vs interest in playing – by Month







**Physical release**

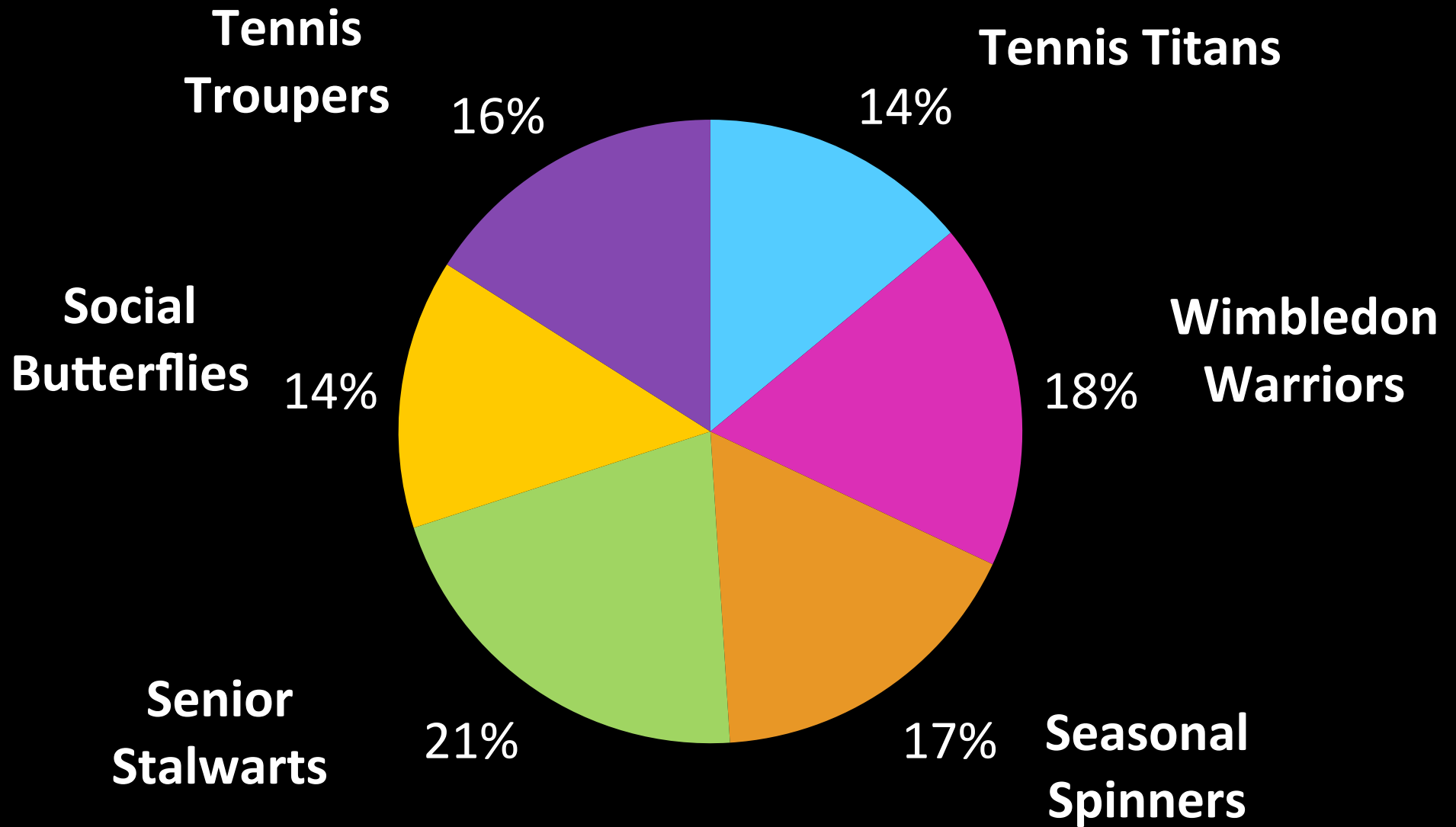
**Mental release**

**Competitiveness**

**Being outside**

**Progression**

**Sociability**



# Who plays tennis?

Adult Segmentation  
February 2016

## Welcome

To build on our understanding of the world of tennis, the LTA has developed a detailed profiling of the types of people who play tennis, including how often, where, and what stops them from playing.

The following pages detail the knowledge of the segments so far.

### Who does our segmentation cover?

- Adults aged 18+ in Great Britain, who have played tennis at least once in the last 12 months
- This market accounts for 5.3m adults in Britain

### How did we create our segmentation?

- Detailed analysis of all quantitative data on tennis participation
- Qualitative research on behaviours and attitudes among a range of audiences
- Quantitative surveys and creation of segments through statistical clustering methodology
- Qualitative testing of segments to sense check and stress test



For more information contact  
the LTA Insight and Planning team  
[insight@lta.org.uk](mailto:insight@lta.org.uk)

# Tennis Titans





# Wimbledon Warriors



# Seasonal Spinners



# Senior Stalwarts



# Tennis Troupers



# Social Butterflies



A large iceberg floats in a deep blue ocean under a clear sky. The visible tip of the iceberg is small and jagged, while the submerged portion is much larger and more complex in shape. The text 'Action – tackling the iceberg' is written in white, with the numbers 1, 2, and 3 positioned above, between, and below the words respectively.

1

Action –  
2  
tackling the  
iceberg  
3

# 1. On the surface: Rational Resistances

170

1

1265 – 3+ Park  
courts

2

2700 Clubs

3

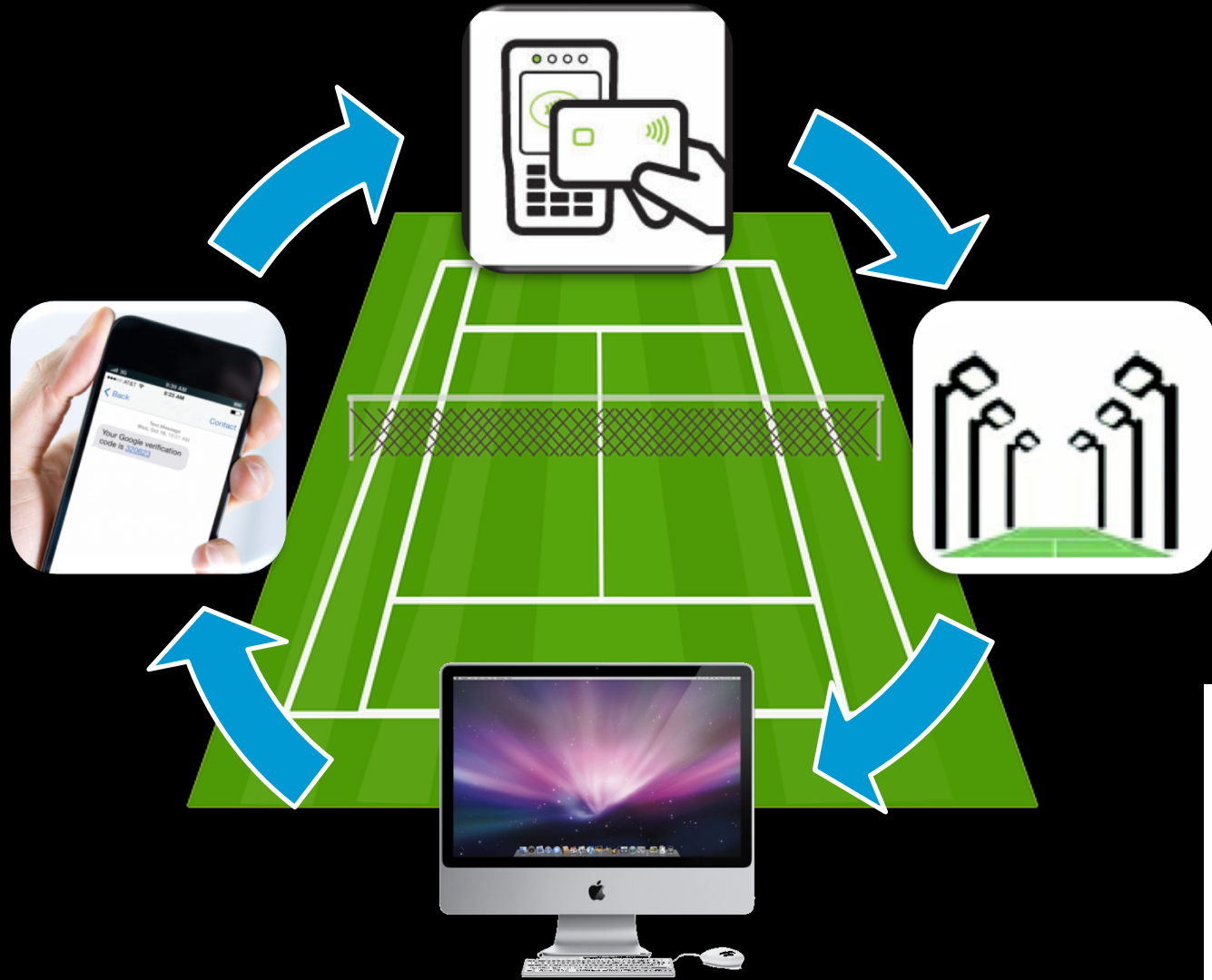
Leisure Trusts, clubs  
& commercial

4

New coaches  
and operators



# 1. On the surface: Rational Resistances



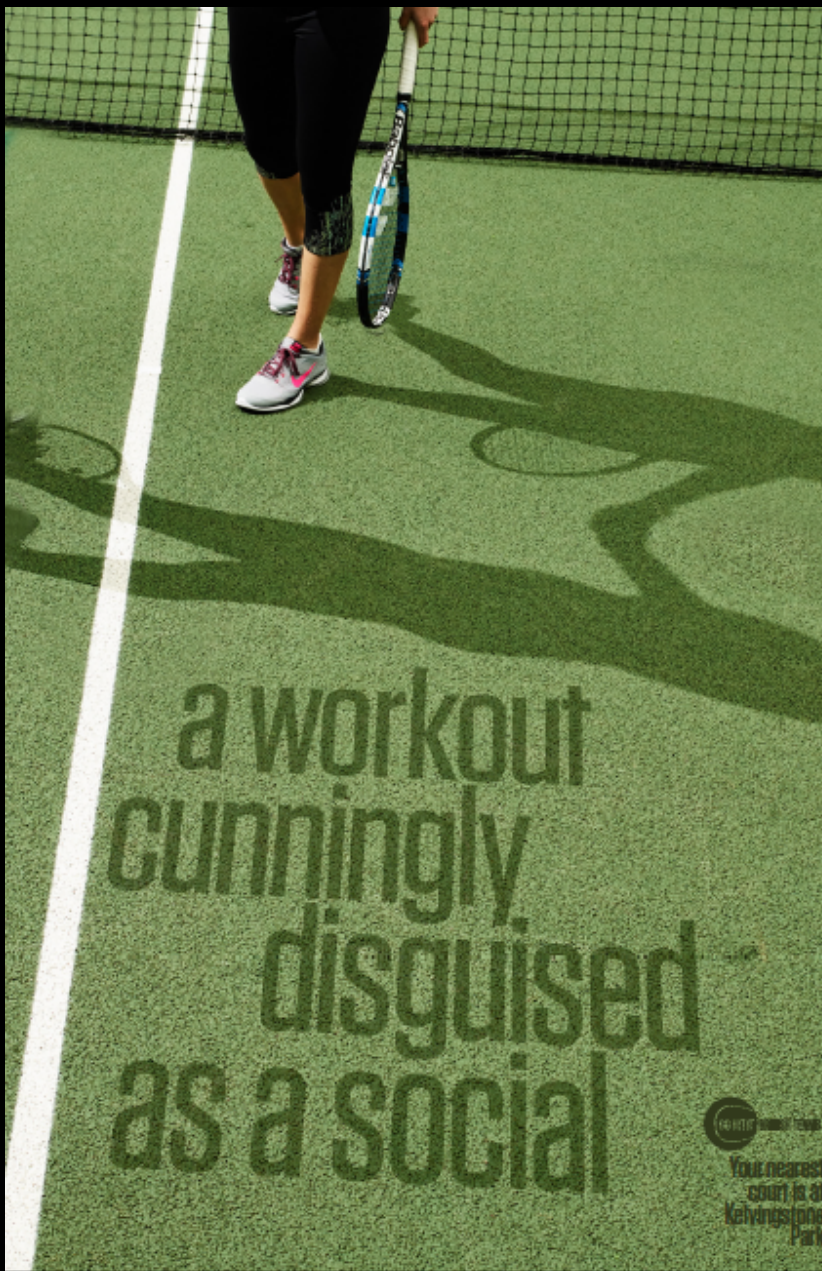


## 2. Below the surface: Prompting play





**GO HIT IT**  
Your nearest  
court is at  
Kelvingstone  
Park



**GO HIT IT**  
Your nearest  
court is at  
Kelvingstone  
Park



**Your nearest  
court is at  
Kelvingstone  
Park**

### 3. Psychological Resistances, Behaviour Change

Data Analysis



Real life understanding: Diaries, Focus Group Workshops,  
Interviews



Concept development and testing



Real life experience testing

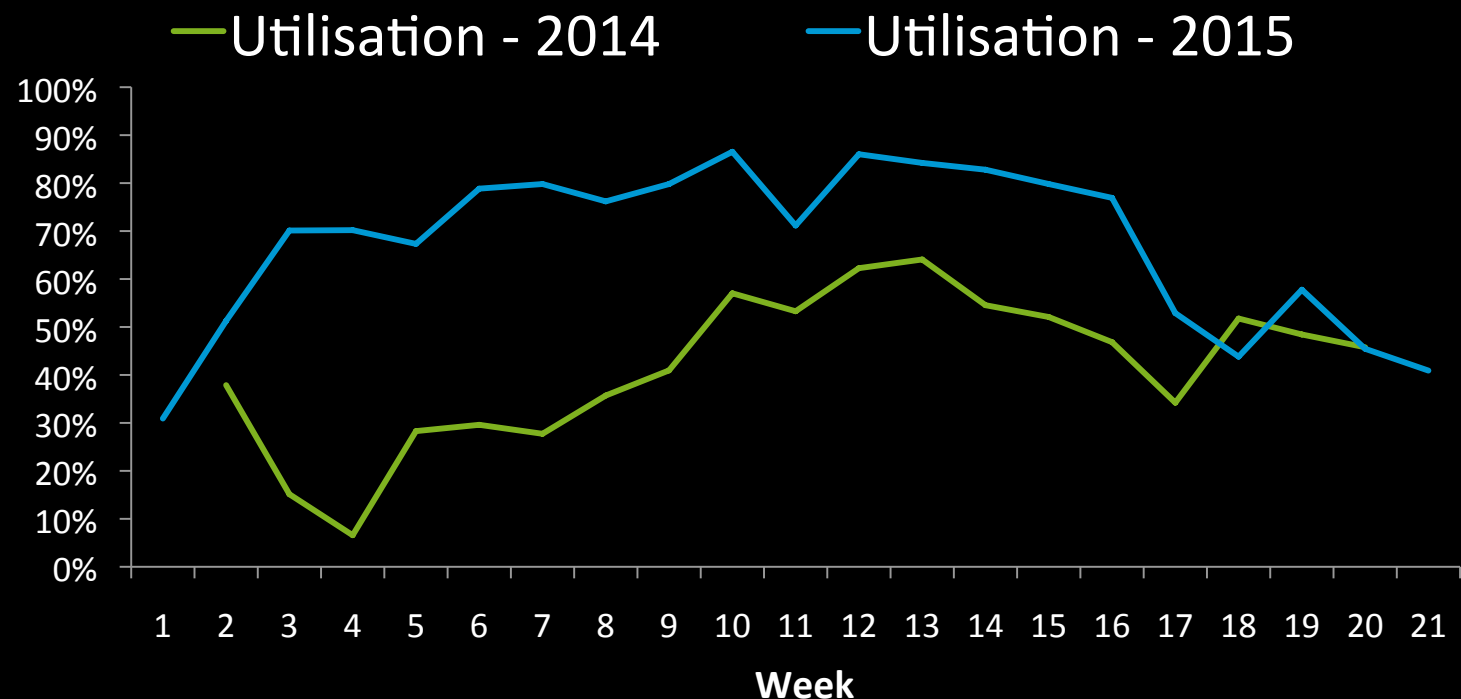


Tracking, Measurement, Refinement

# 3. Psychological Resistances, Behaviour Change

**TENNIS**  
**TUESDAYS**  
SOCIAL TENNIS. SERIOUS FUN.

83% satisfaction

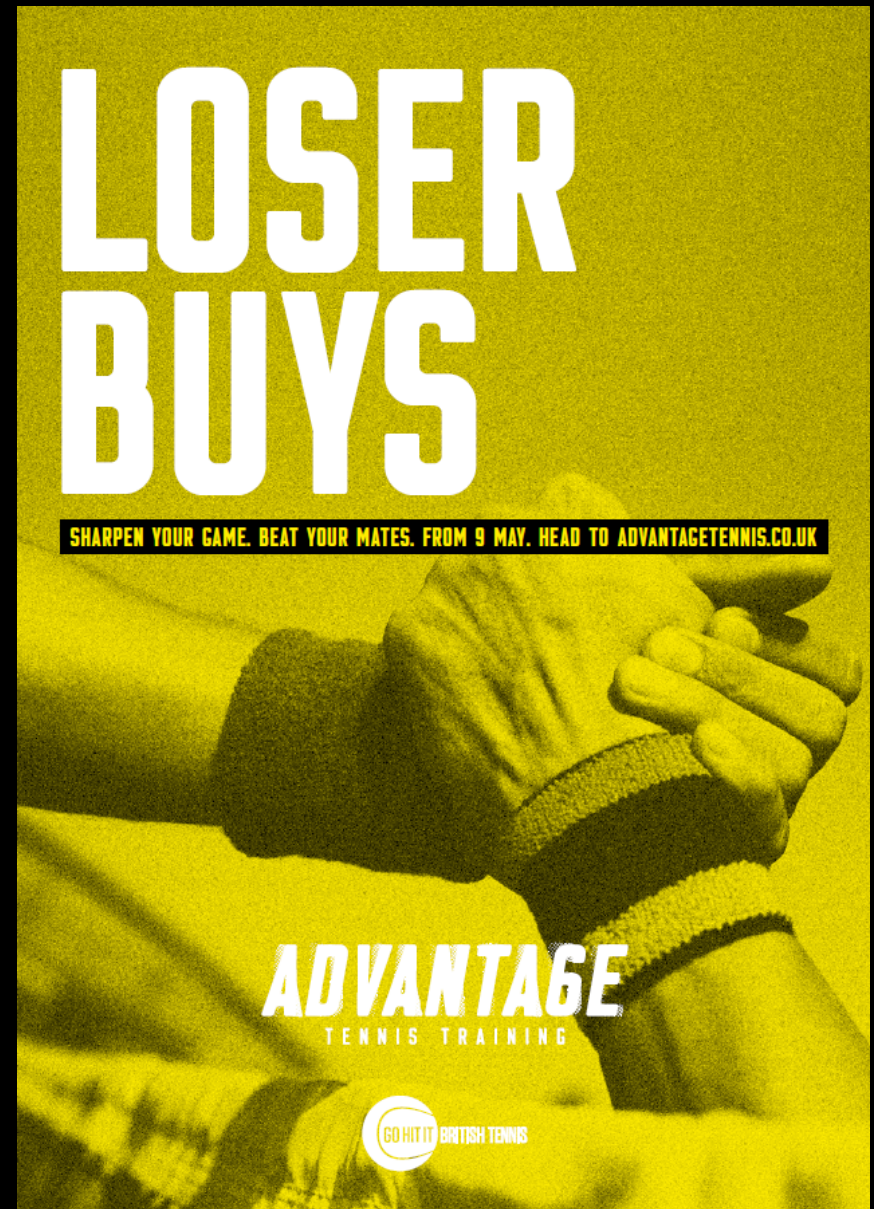




### 3. Psychological Resistances, Behaviour Change



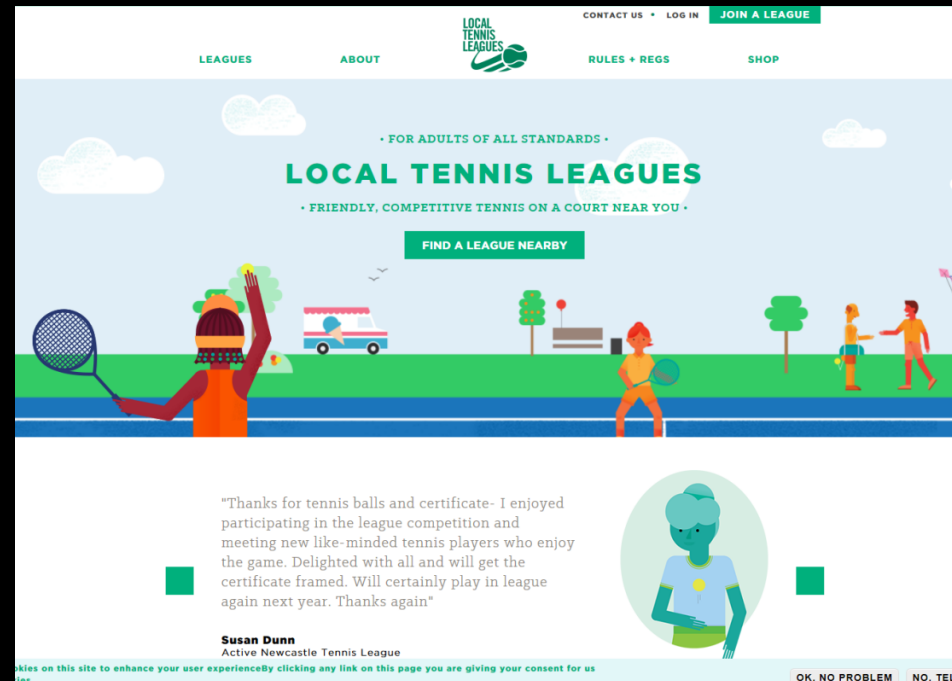
I really enjoyed it. I'd (come back) –  
it's something different. They  
definitely should go ahead with it  
**Leeds, 21-30**

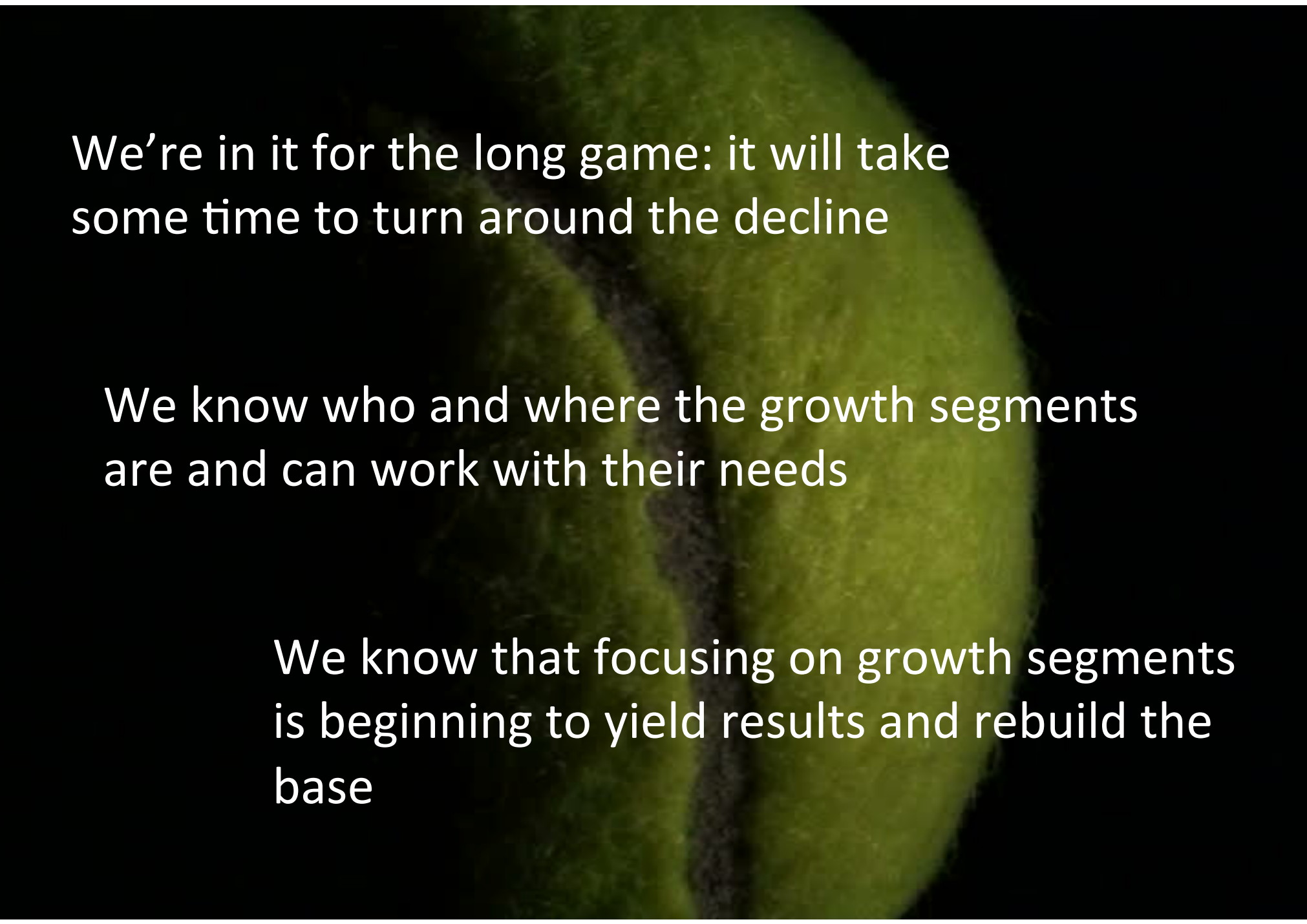


# 3. Psychological Resistances, Behaviour Change



## 93% satisfaction





We're in it for the long game: it will take  
some time to turn around the decline

We know who and where the growth segments  
are and can work with their needs

We know that focusing on growth segments  
is beginning to yield results and rebuild the  
base



A close-up, low-angle shot of a green tennis ball against a black background. The ball is positioned on the right side of the frame, with its curved surface and fuzzy texture clearly visible. The lighting is dramatic, highlighting the ball's shape and color against the dark background.

**We can only grow participation by working together with everyone in tennis**

**We will continue to share information so that we can grow the game together**

A large crowd of British tennis fans is shown, many wearing blue t-shirts with the text 'BACK THE BRITS' and the Union Jack. They are holding up red and green foam paddles, some with 'WE ARE TENNIS' and 'WENNE' written on them. The crowd is cheering and waving their hands.

# Thank you

[paul.burditt@lta.org.uk](mailto:paul.burditt@lta.org.uk)