

Tennis in Britain: Rising to the challenge?

Paul Burditt

5 million

-16%



-14%

-22%



-29%

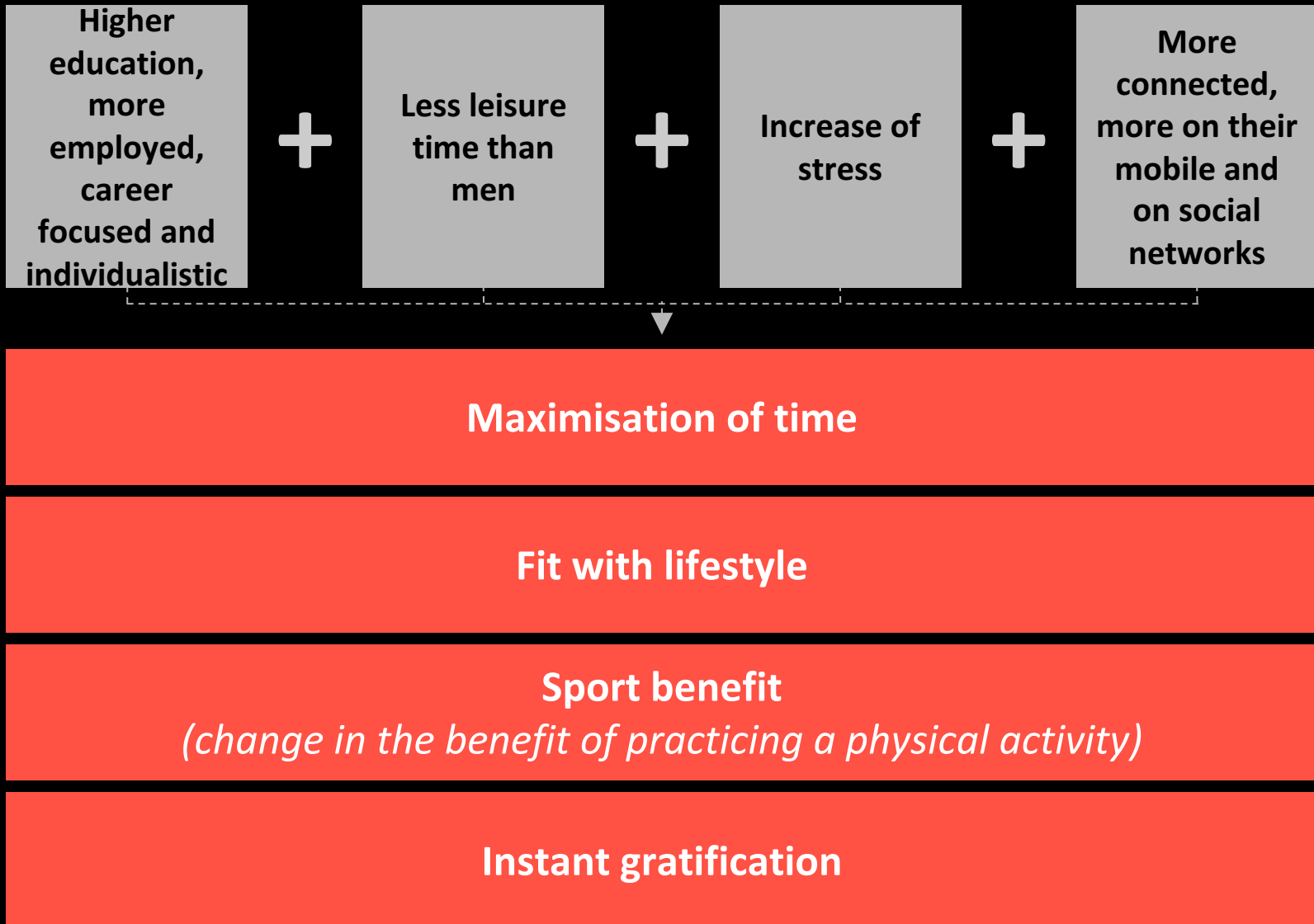


-41%

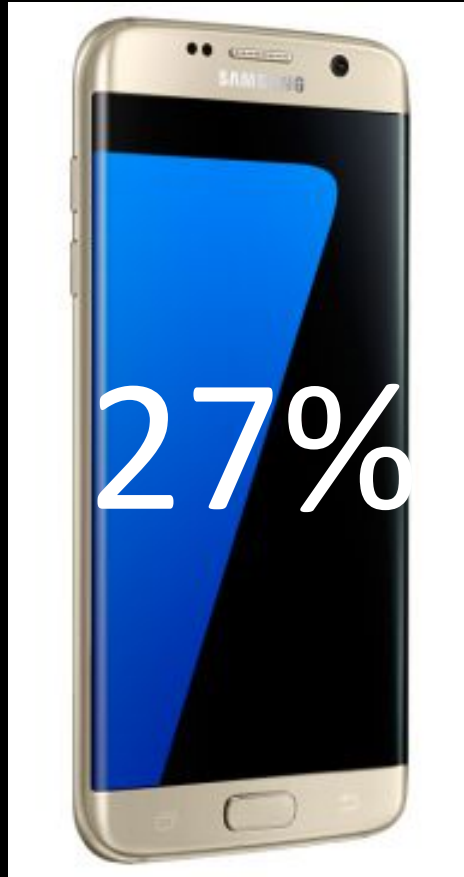
2017: Developing a Women and Girls Participation Strategy

1. Arresting Adult Female Decline and reversing it
2. Maximising the number of Girls introduced to, and staying in, tennis
3. Growing the number of female Coaches, Trainers, and Activators
4. Engaging Women, strengthening positive perceptions, and encouraging behaviour change
5. Changing culture and networks: bringing the voice of women to the tennis world

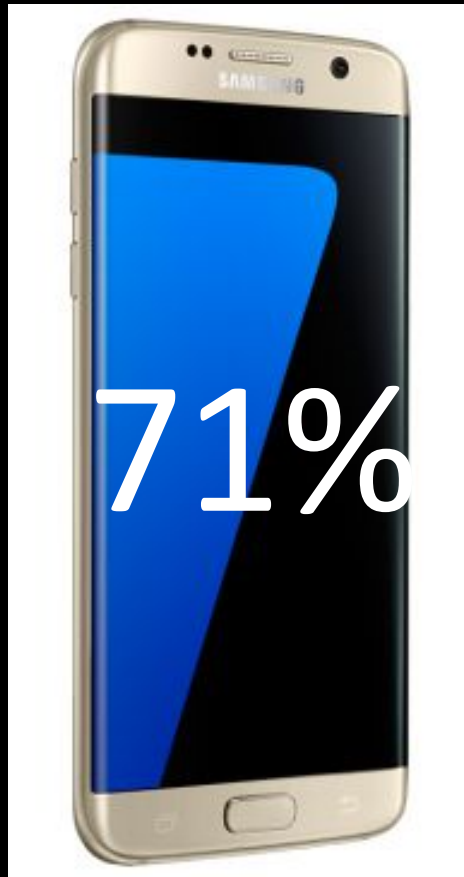
Tennis has lost relevance to many women



5 years ago...



Today...



5 years ago...



Today...



Tennis doesn't yet fulfil these needs

Maximisation of time

Fit with lifestyle

Sport benefit

(change in the benefit of practicing a physical activity)

Instant gratification

Tennis isn't considered
an everyday option

Tennis is a leisure/social activity
& less mindful

Tennis is hard to master

Tennis is rooted in the past

Athletics: +83%

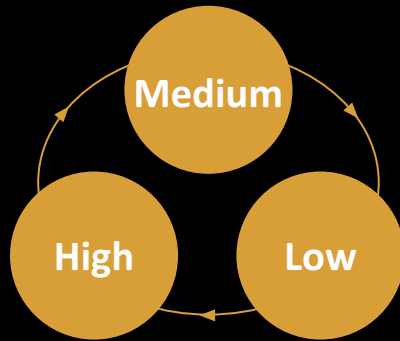
Fitness/Conditioning: +75%

Keepfit classes: +65%

Fitness classes have diversified products and adapted to provide different motivations



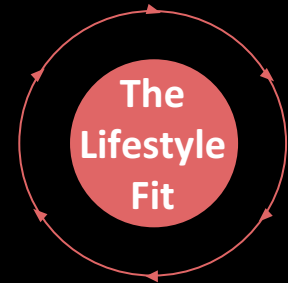
Recognise Men and Women's needs as the same: both want physical & mental strength



Meet the different Format needs



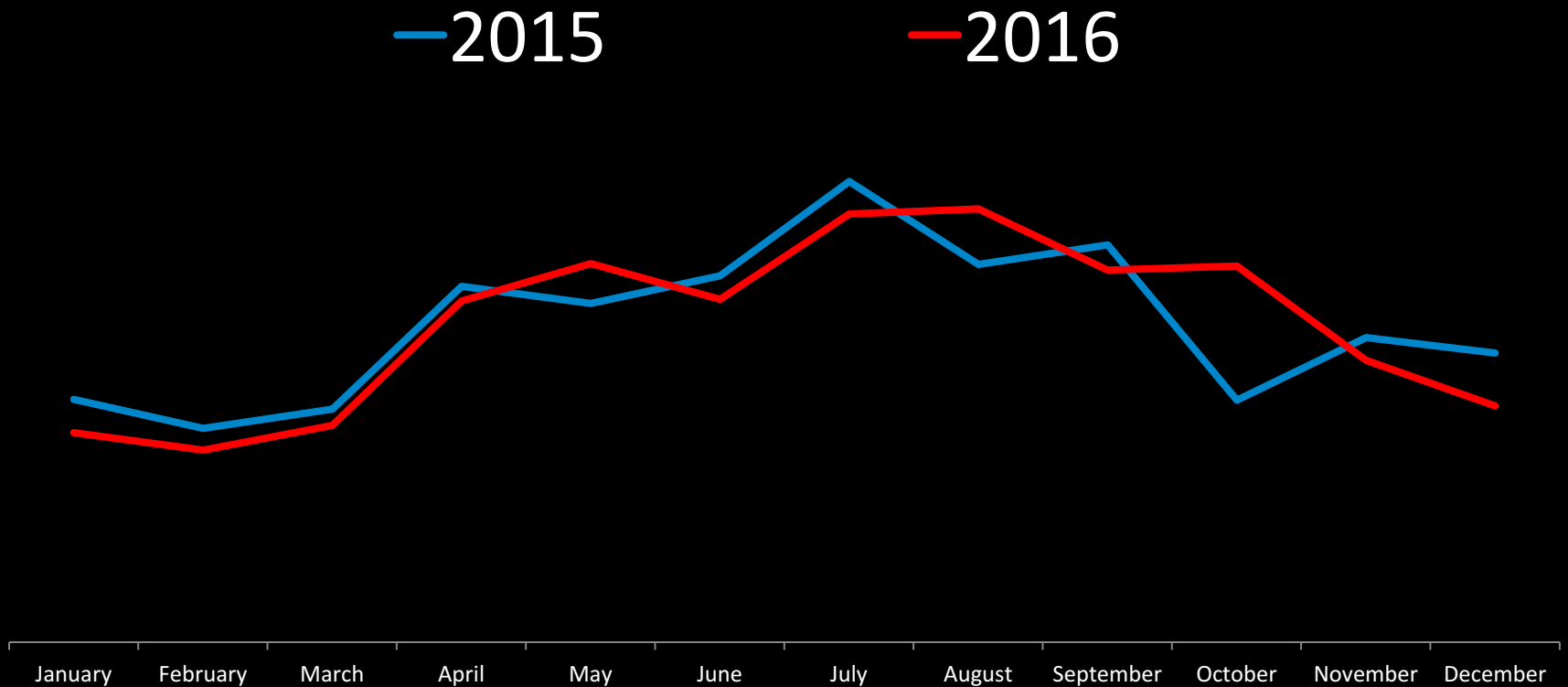
Provide different emotional motivations



Communicate the lifestyle not the class

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

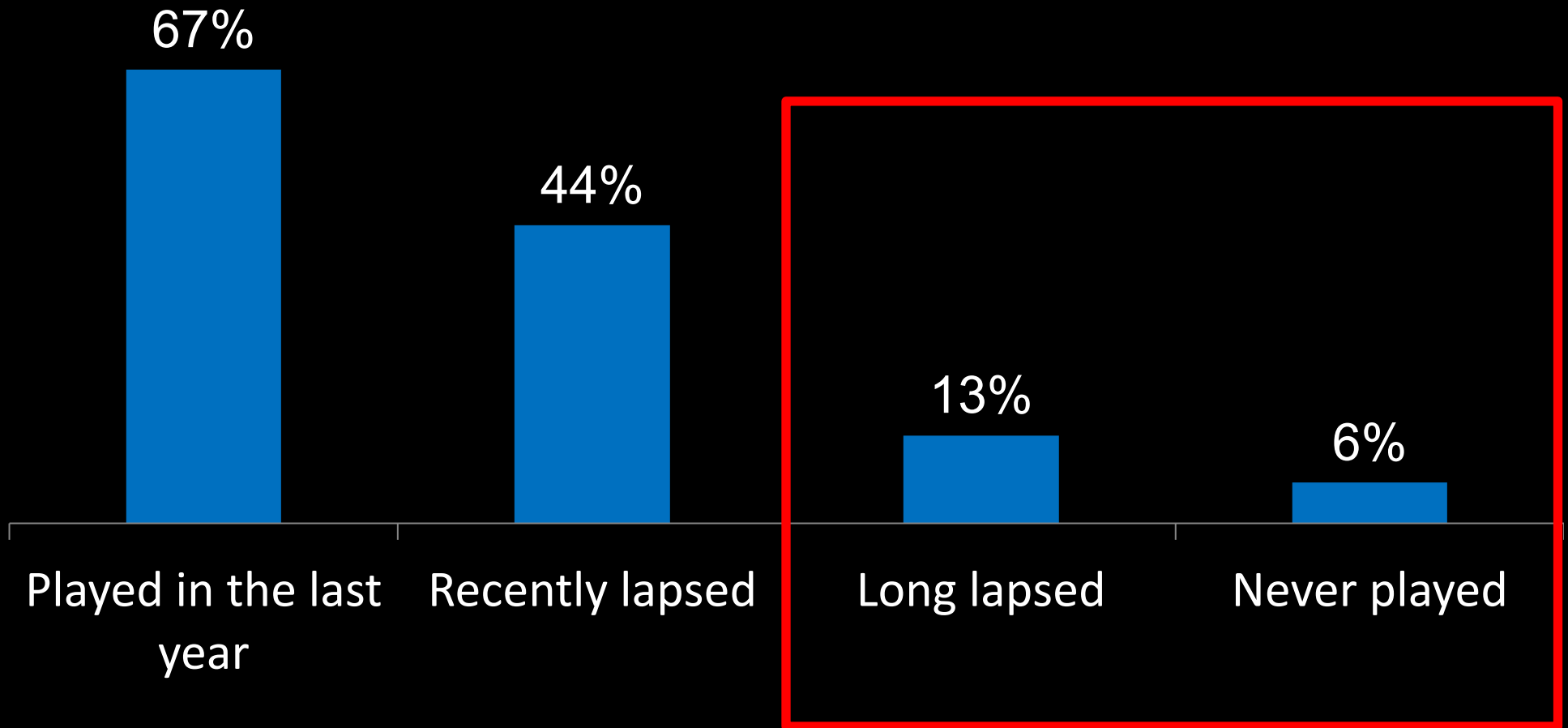
% played monthly in each month



Relevance
+
Inspiration

Relevance

% who want to play more, or at all





When online booking system
installed...

It doubled the number of players....

...and 45% played more tennis

Having to book means I am more organised and schedule it in with friends.
(Cannon Hill Park)

It is more convenient to know that you have a time slot guaranteed than having to take a chance and have to wait or give up.
(Sheffield Parks Tennis)



96% satisfaction
(up from 83%)

97% satisfaction

I love it! I am so happy that I have found somewhere to play tennis with a nice group of people and an excellent coach. From meeting people at TT we now play regularly on other days of the week and I have made many local friends in my community. It is the best thing that has happened for me since I moved here.

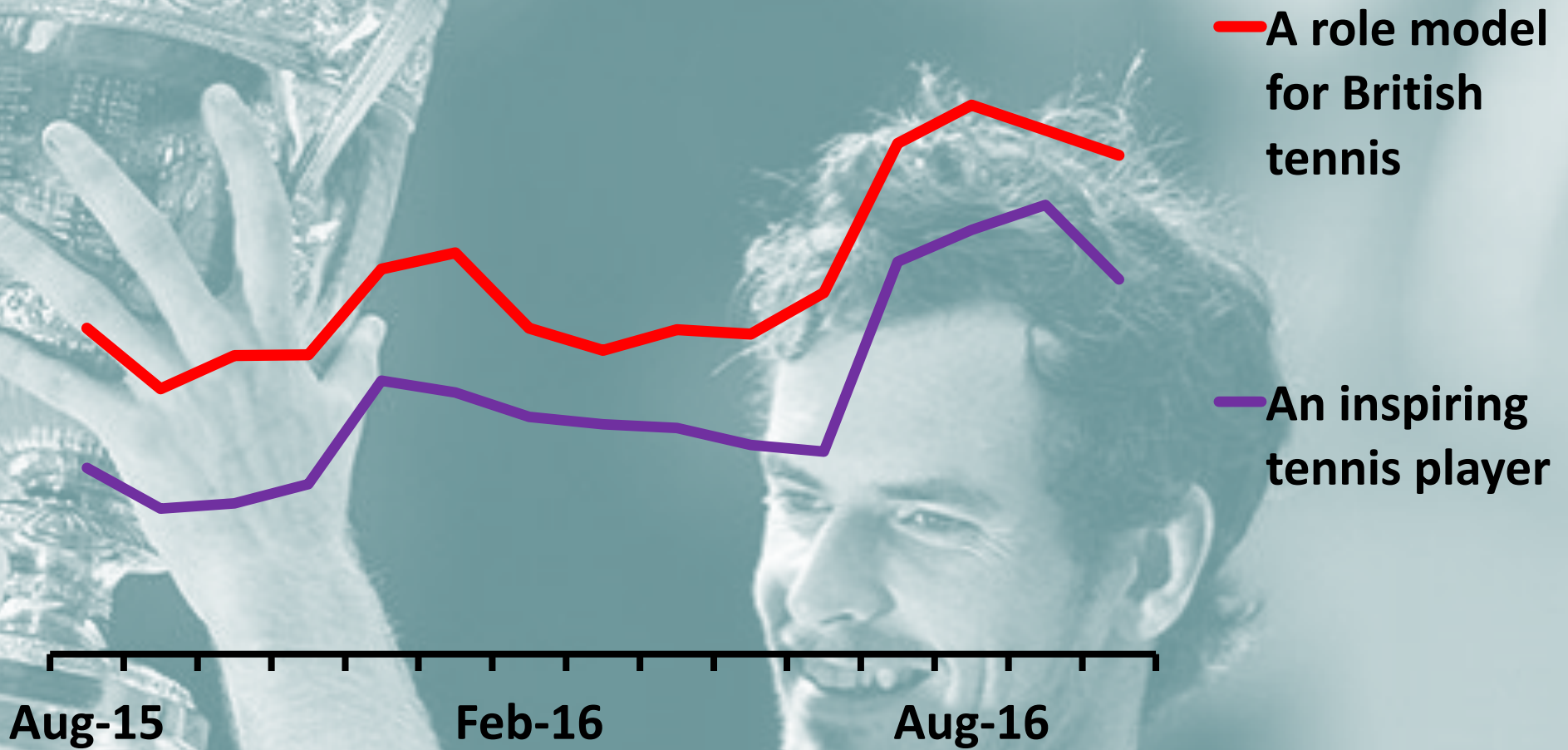
Inspiration



+13%



Perceptions of Andy







26%





31%

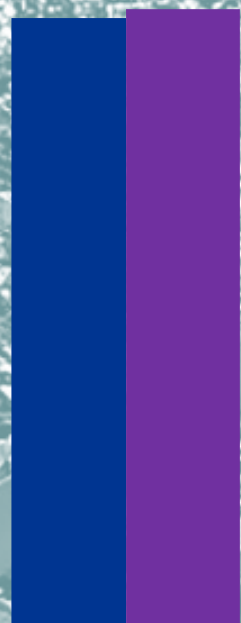


Major Events - Awareness

■ 2015

■ 2016

68%69%



45%

60%



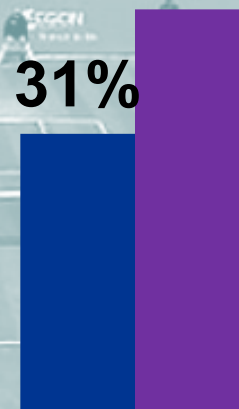
32%

43%



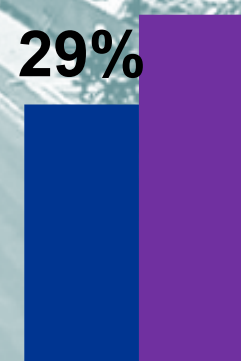
31%

45%



29%

39%



Queen's

Eastbourne

Nottingham

WTA

Birmingham

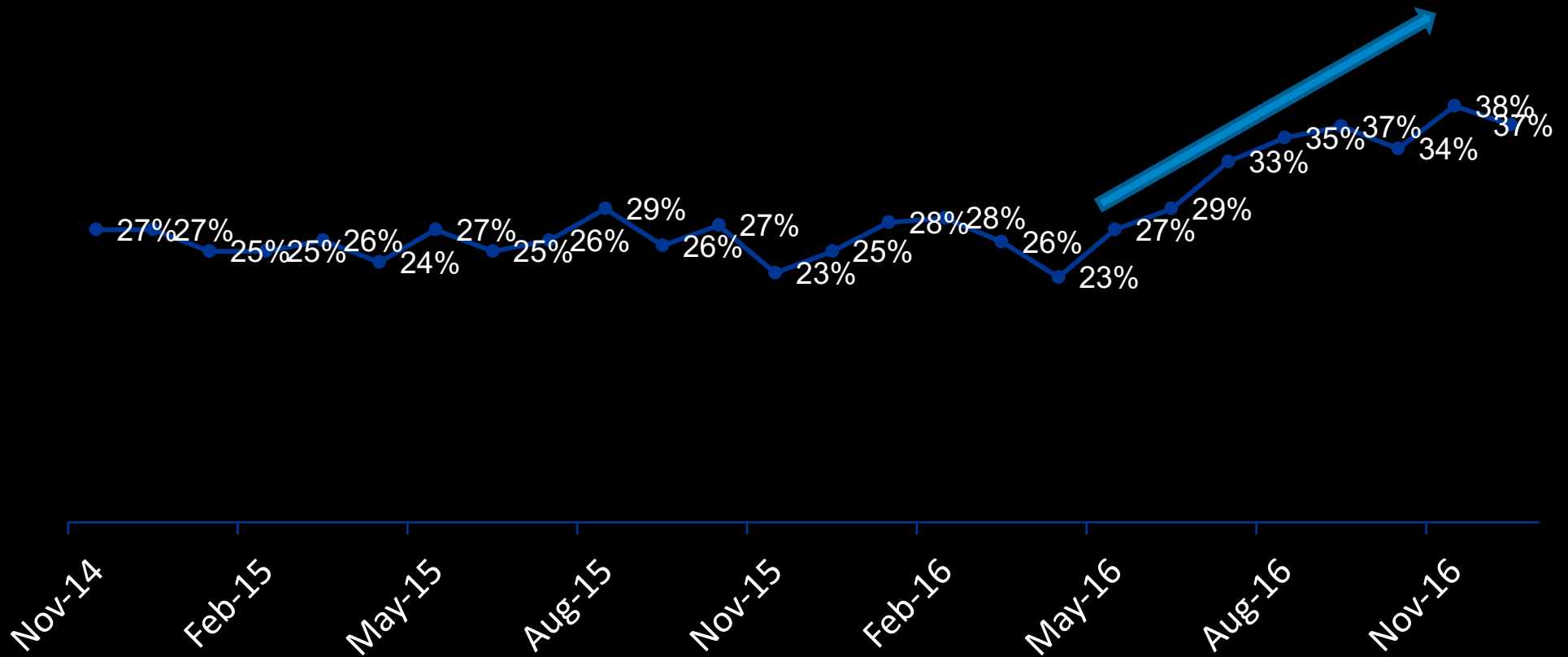
Nottingham

ATP



He's discovered a new passion and I will want him to continue. He's quitting football as a result. He was so excited each week to return to training

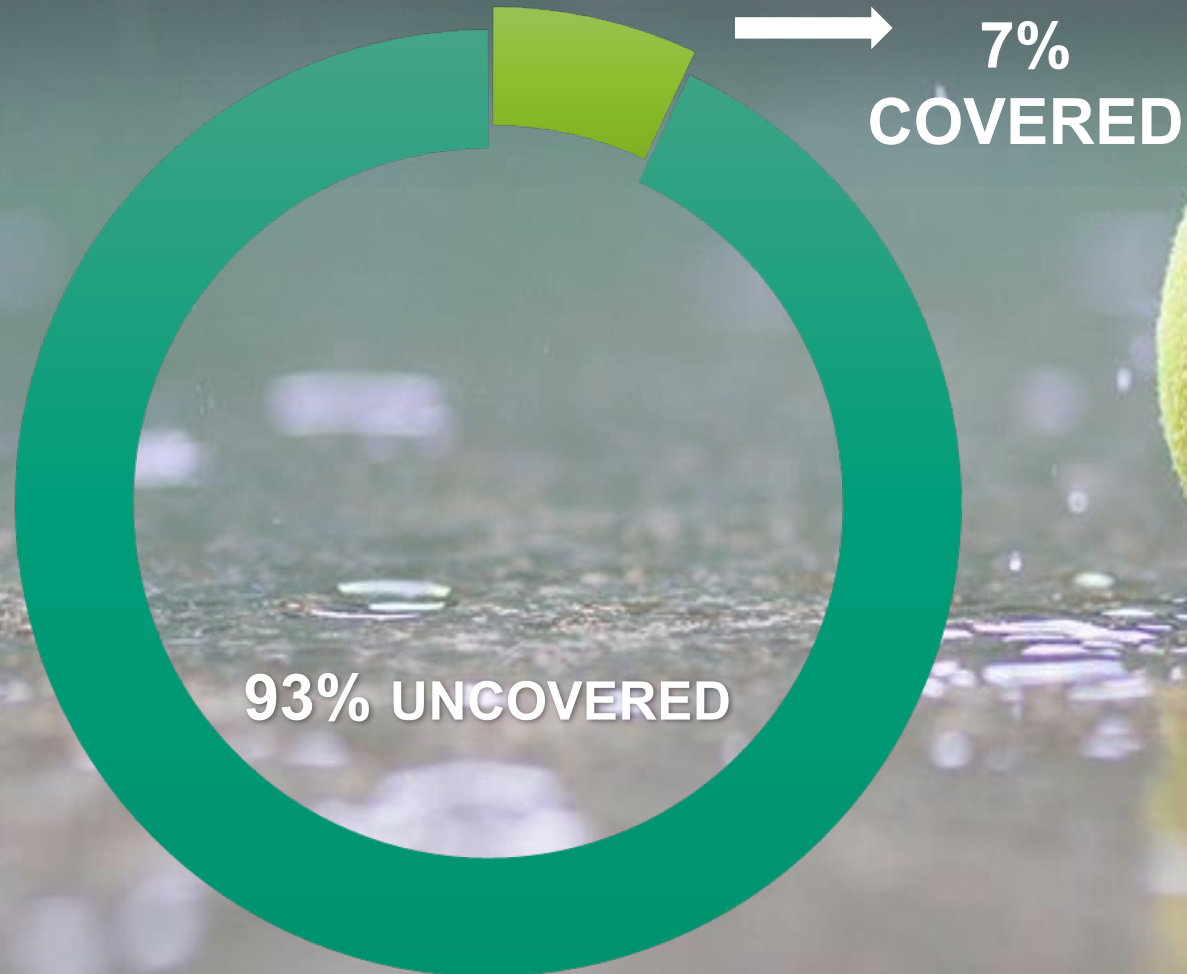
% agree tennis is getting more popular



We know it's the time now to
build on this positivity

Out of
23,000 courts
in Britain...

Only 7% are covered



Mainly in
clubs most
people can't
access

**1 in 3 outdoor club
courts are floodlit**

**But only 1 in 7 park
courts are floodlit**



1 in 4 are unaware of tennis facilities nearby



**We are an
analogue sport in
a digital age**

Sign up here for tennis

We know we need to bring
communities together to
succeed

We will update in the
Summer

% agree tennis is getting

I feel it's changing...I think there's more tennis on the TV, I'm seeing more events, I'm hearing more about it on the news. So, I'd love to be able to say, let's play a game of tennis

Tennis for Kids Mum

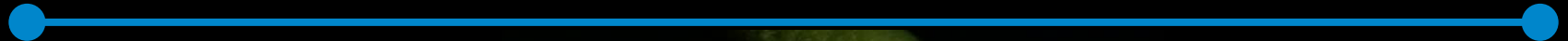


Social:

Being outside
Spending time with
friends

The Game:

Physical release
Mental release
Satisfaction of
progression
Element of competition



**While there has been long-term decline
in our sport, we are now seeing the
beginnings of positive growth**

**We will continue to focus on growing the game,
and making sure we think about the twin themes
of relevance and inspiration**

**Tennis is becoming once again a part of
wider culture: we recognise we have an
opportunity to do more to build on this**