

SPORTS MARKETING SURVEYS INC.

“TRENDS IN TENNIS PLAYING”

UKTIA – TENNIS SUMMIT
THE QUEEN'S CLUB – APRIL 2015



TRENDS IN TENNIS PLAYING

- **Key Tennis Indicators 1: Player Numbers**
 - Active People Study
 - ITF & USTIA International Participation Study
- **Key Tennis Indicators 2: Tennis Equipment Sales**
 - European Shipment reports – Racquets & Balls
- **Key Tennis Indicators 3: Attitudes and Behaviour**
 - CORE TENNIS PLAYERS
 - Tennis Europe & the Junior Elite
- **Final thoughts & issues**

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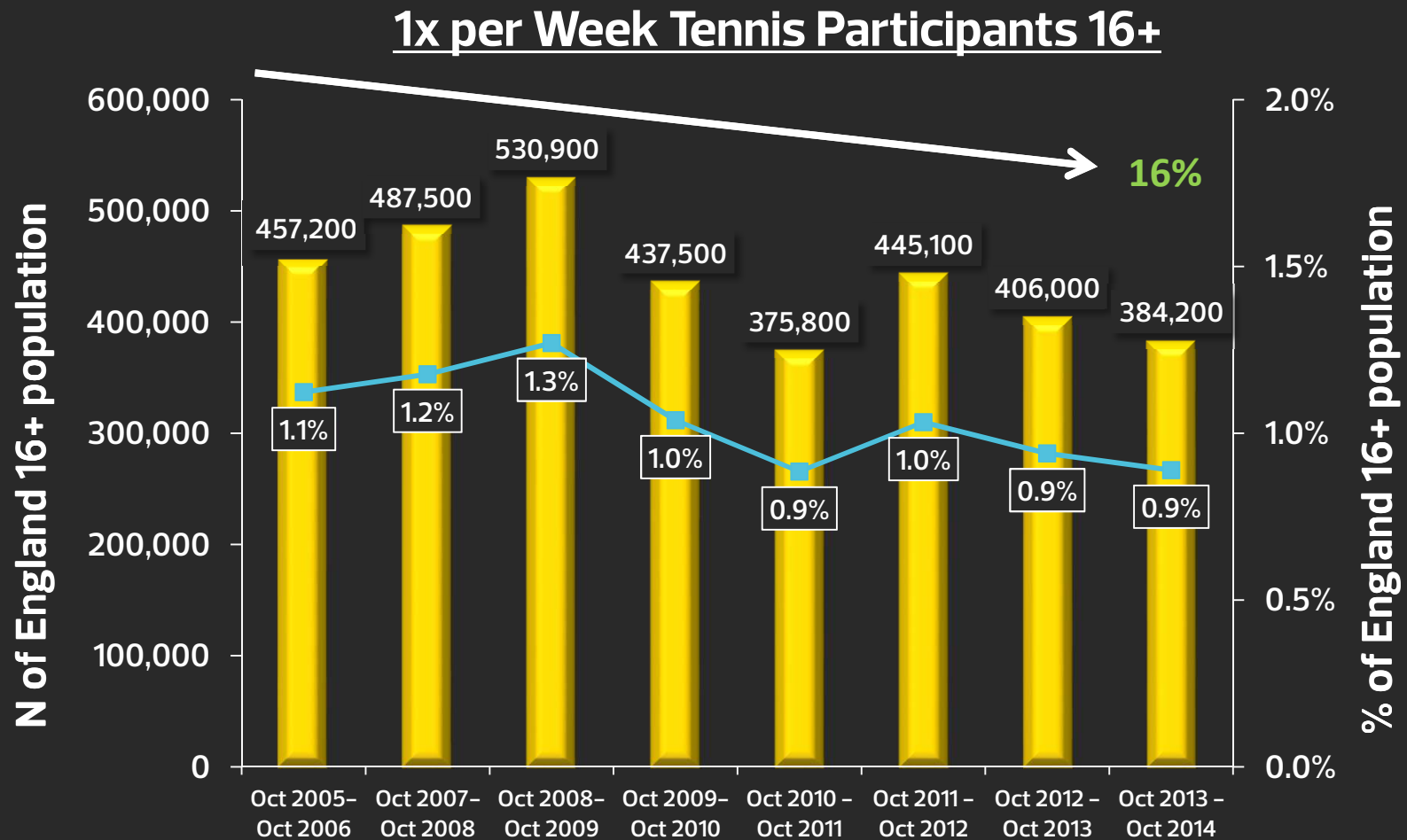
KEY PERFORMANCE INDICATORS 1: PARTICIPATION: OVERALL RATE

SPORT ENGLAND ACTIVE PEOPLE STUDY



Overall Tennis Participation | England

SPORT ENGLAND ACTIVE PEOPLE SURVEY 8



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UK TOP SPORTS – TENNIS

ITF/TIA Participation Survey 2014



INTERNATIONAL PARTICIPATION STUDY 2014/2015

Two Year Programme – rolling market survey

TENNIS participation analysed:

- Current participation levels of players & analysis of lapsed players;
- Play frequency and reason for changes;
- Image of tennis;
- Nationally representative study – 3,000 households per market (aged 7+);
- Split by age & gender;



2014

Argentina
Australia
Denmark
France
Germany
Great Britain

India
Japan
Poland
Sweden
USA

2015

Belgium
Brazil
Canada
China
Finland
Netherlands

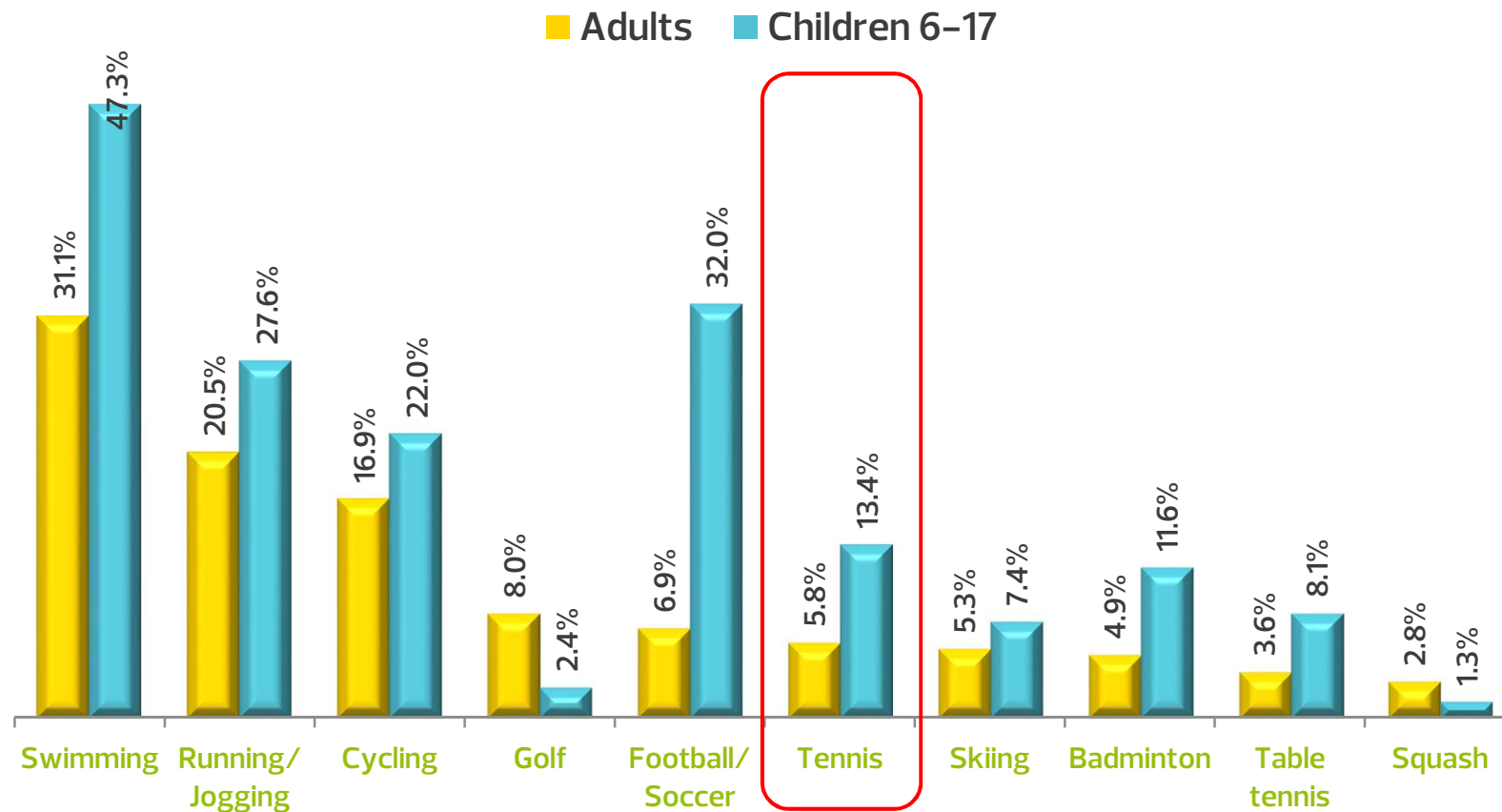
Norway
Russia
South Africa
Switzerland
USA

Top Sports by Market | EUROPE

	Denmark	France	Germany	Poland	Sweden	UK
1	Run/Jog (20%)	Swimming (22%)	Cycling (26%)	Cycling (24%)	Cycling (23%)	Swimming (28%)
2	Cycling (14%)	Run/Jog (16%)	Swimming (24%)	Swimming (17%)	Run/Jog (22%)	Run/Jog (19%)
3	Swimming (13%)	Skiing (14%)	Run/Jog (22%)	Run/Jog (12%)	Swimming (19%)	Cycling (15%)
4	Weight Training (13%)	Cycling (12%)	Weight Training (12%)	Soccer (8%)	Skiing (12%)	Weight Training (10%)
5	Soccer (9%)	Tennis (7%)	Skiing (9%)	Volleyball (6%)	Soccer (11%)	Soccer (9%)
6	Badminton (6%)	Golf (5%)	Soccer (6%)	Badminton (4%)	Weight Training (9%)	Golf (8%)
7	Skiing (3%)	Soccer (4%)	Tennis (5%)	Skiing (4%)	Golf (6%)	Tennis (7%)
8	Golf (3%)	Table Tennis (3%)	Golf (5%)	Basketball (4%)	Table Tennis (4%)	Badminton (6%)
9	Handball (2%)	Badminton (3%)	Badminton (4%)	Weight Training (3%)	Tennis (4%)	Skiing (6%)
10	Martial Arts (2%)	Martial Arts (2%)	Table Tennis (3%)	Tennis (3%)	Bandy (3%)	Table Tennis (4%)
11	Tennis (2%)	Basketball (2%)	Basketball (2%)	Handball (2%)	Martial Arts (3%)	Cricket (3%)

Top 10 Sports | UK

% of Population



Base: UK: Adults (3,020), Children 6-17 (547)

Tennis ranking: Adults at position 5, Children 6-17 at position 4

Tennis Participation | EUROPEAN MARKETS

Number of players by play frequency

	Denmark	France	Germany	Poland	Sweden	UK
C – Casual – less than once a quarter	0.01M	0.53 M	0.41M	0.14 M	0.11 M	1.17 M
O – Occasional – at least once a quarter	0.01M	0.71M	0.36 M	0.19 M	0.08 M	0.89 M
R – Regular – at least once a month	0.04 M	2.10 M	2.05 M	0.47 M	0.14 M	1.54 M
A – Avid – at least once a week	0.02 M	0.99 M	1.10 M	0.15 M	0.05 M	0.58 M
C – CORE (Regular + Avid)	0.06 M	3.09 M	3.15 M	0.62 M	0.19 M	2.12 M
% of population that are CORE players	1.1%	5.1%	4.1%	1.7%	2.2%	3.6%
Total players (Age 6+ playing once or more)	0.08 M	4.33 M	3.92 M	0.94 M	0.38 M	4.18 M
% of population playing once or more	1.5%	7.1%	5.0%	2.6%	4.3%	7.1%

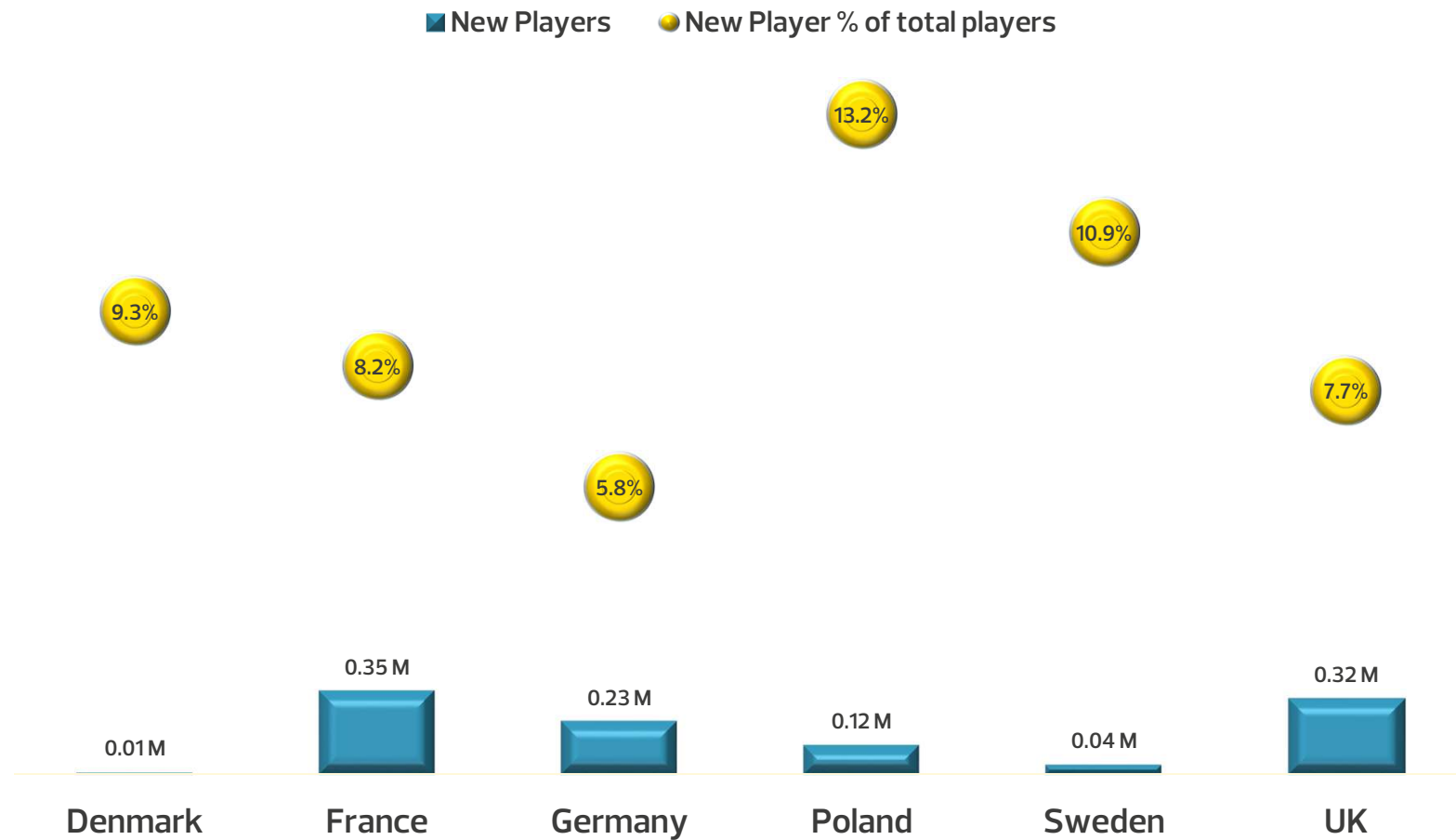
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PLAYERS & FREQUENCY

ITF/TIA Participation Survey 2014



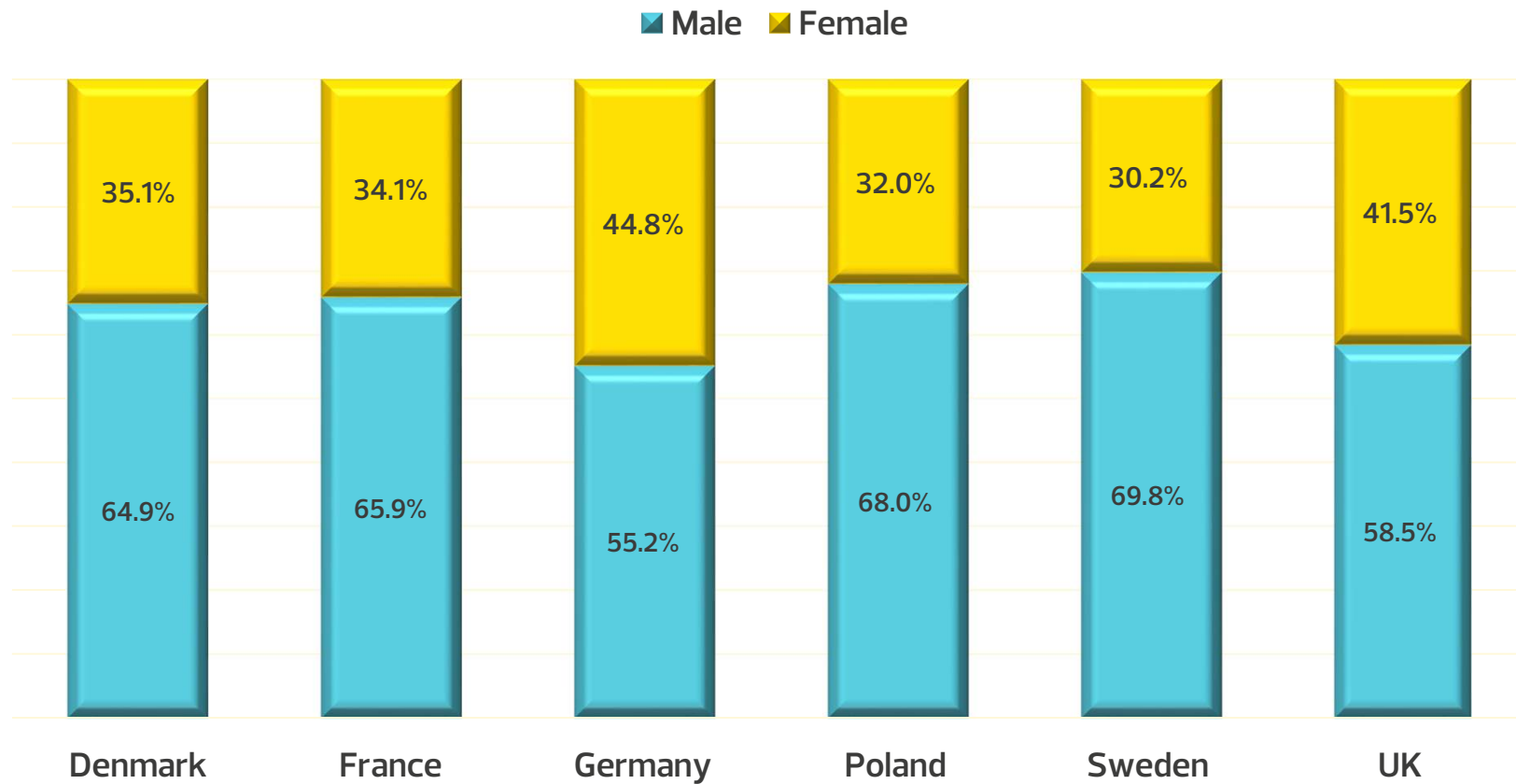
New Players | All Markets



A New Player is defined as someone who has started playing tennis in the last 12 months

Tennis Players by Gender | All Markets

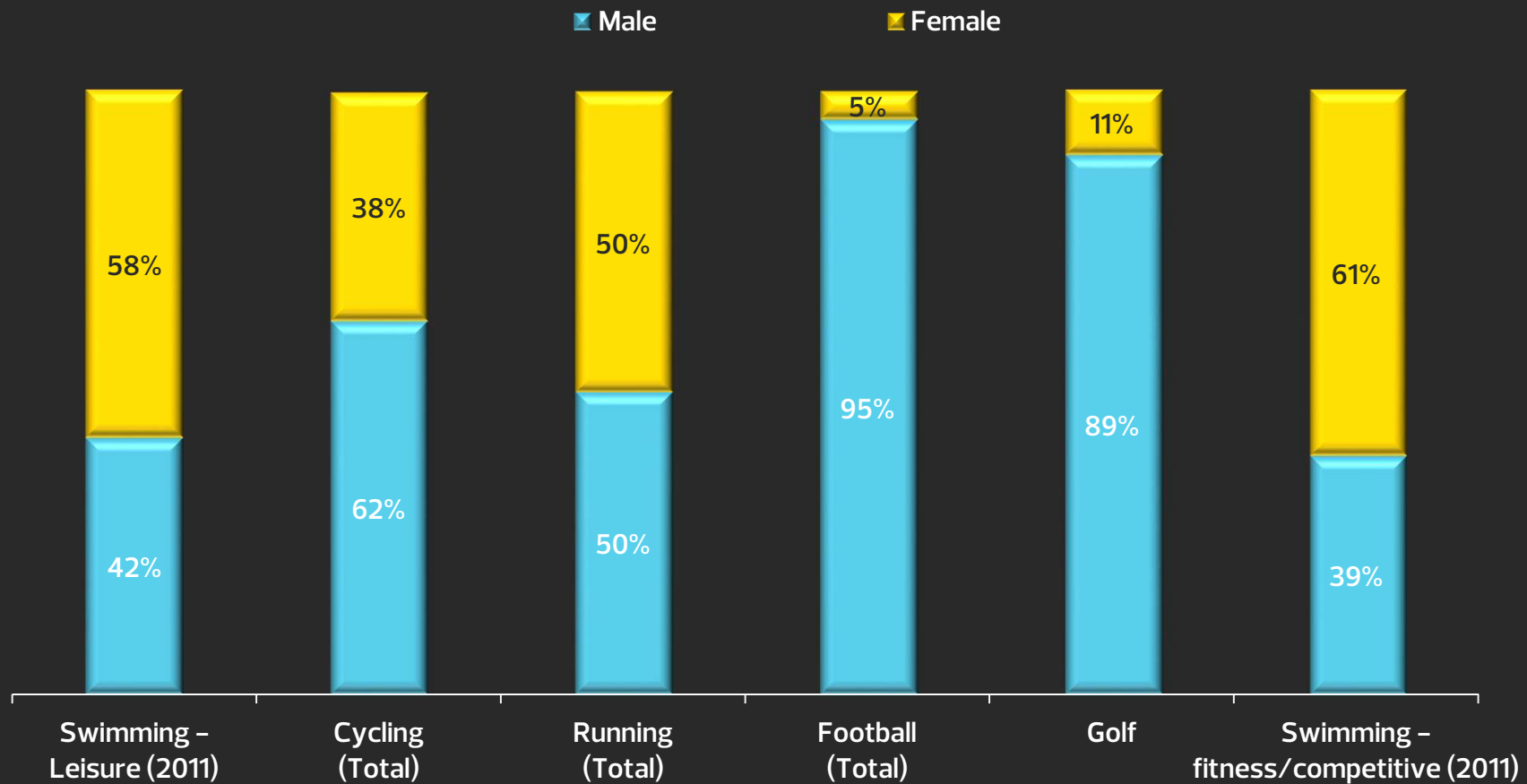
% of Tennis Players Age 6+





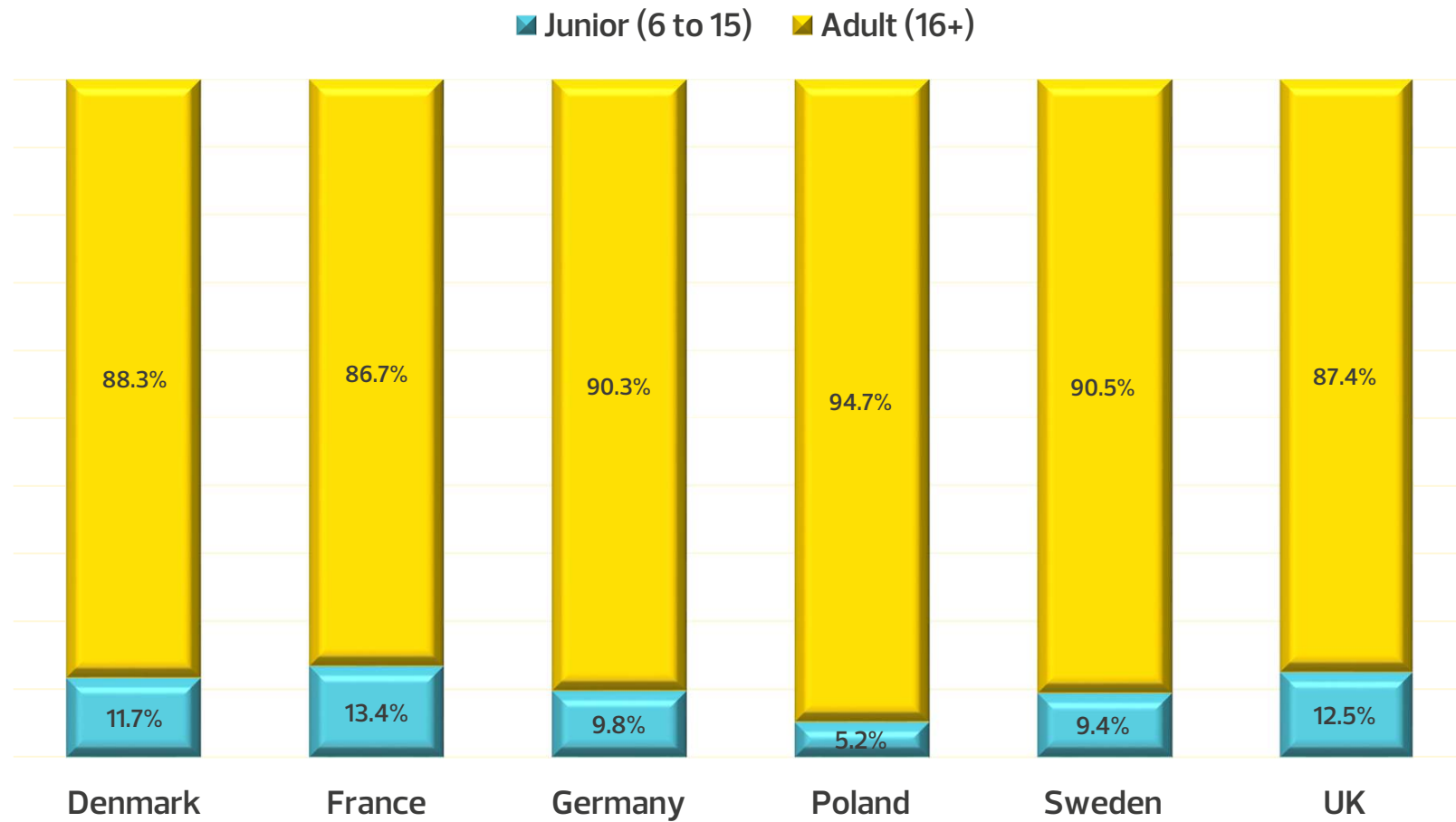
Gender of participants

SMS INC. PARTICIPATION STUDY – 2013: Adults who have participated at least once in the last 12 months.



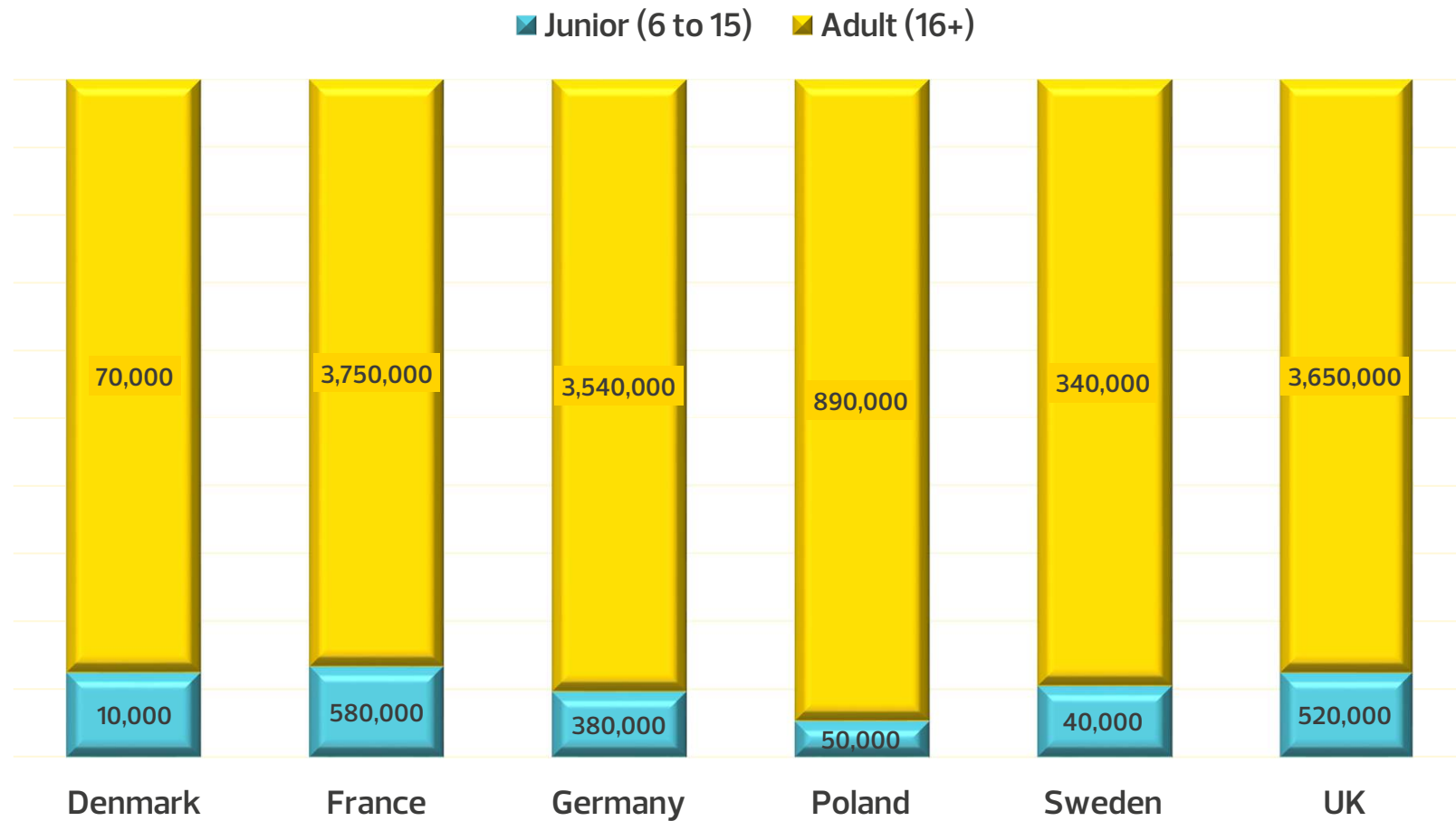
Tennis Players by Age Group | All Markets

% of Tennis Players Age 6+



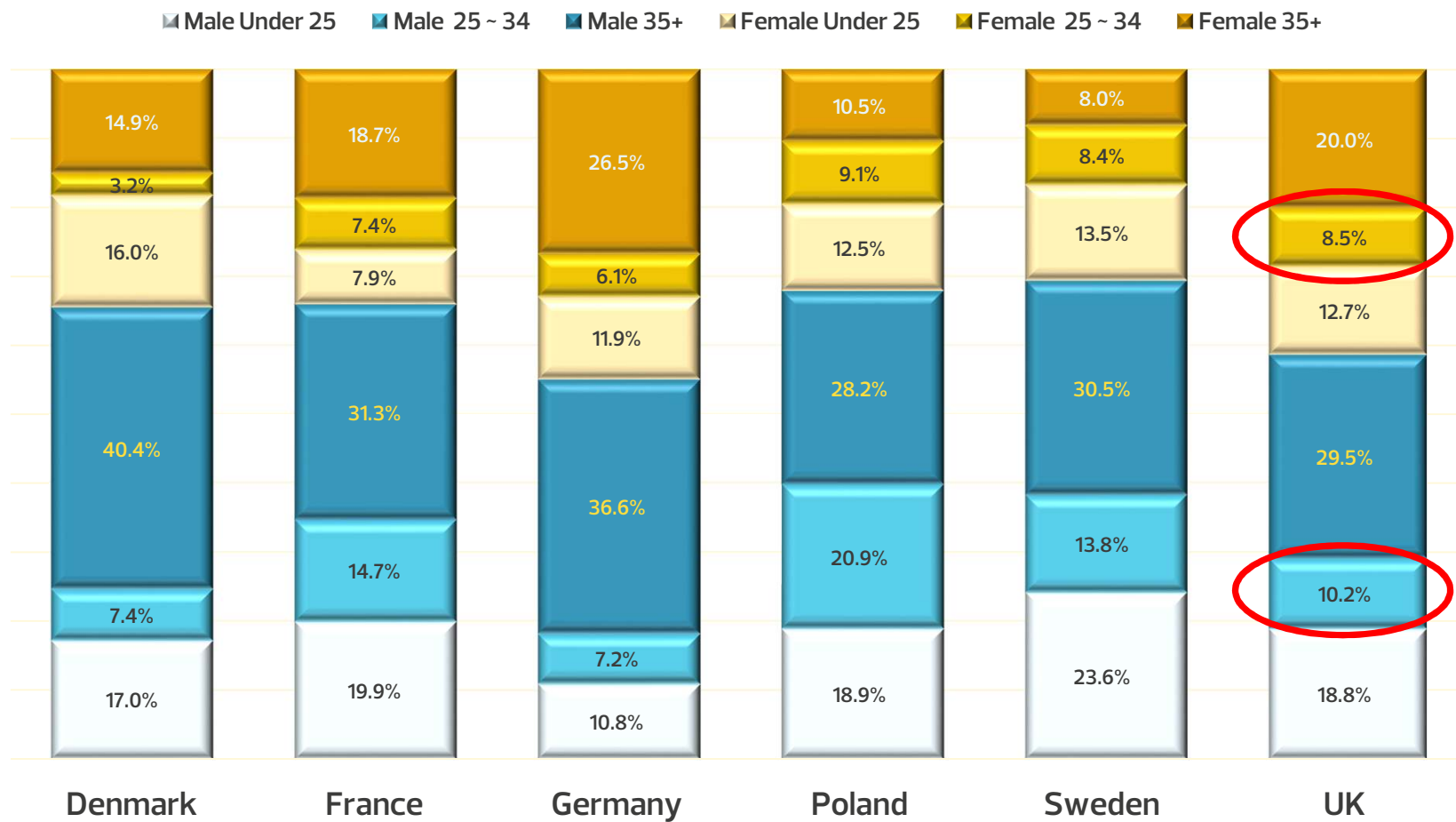
Tennis Players by Age Group | All Markets

No. of Tennis Players Age 6+



Tennis Players by Age/Gender | All Markets

% of Tennis Players Age 6+



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KEY PERFORMANCE INDICATORS 2: TENNIS EQUIPMENT SALES

SMS INC. TENNIS SHIPMENT SURVEYS 2005-2014



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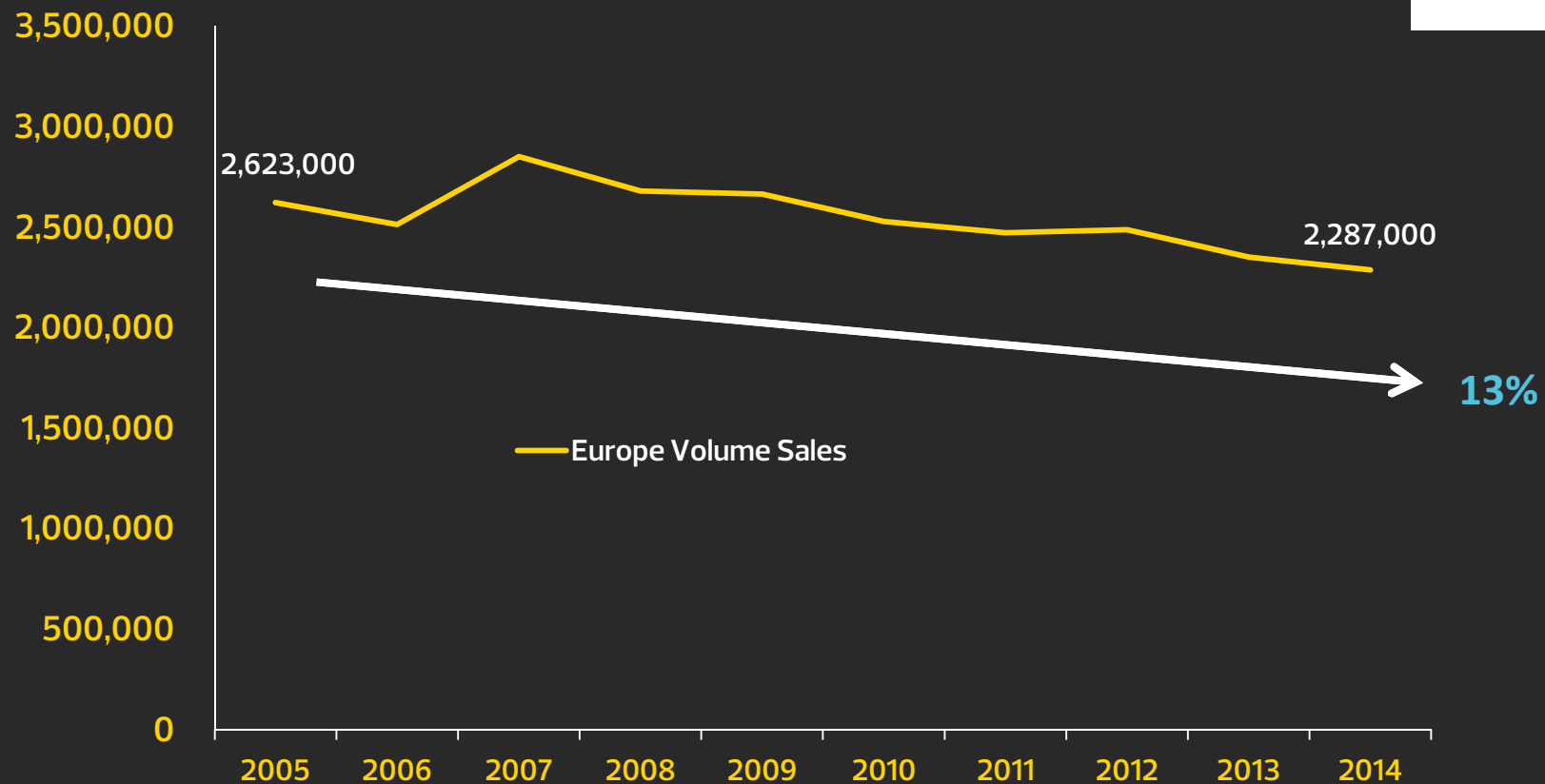
EUROPEAN SHIPMENT | RACQUETS

SMS INC. TENNIS SHIPMENT SURVEYS 2005-2014

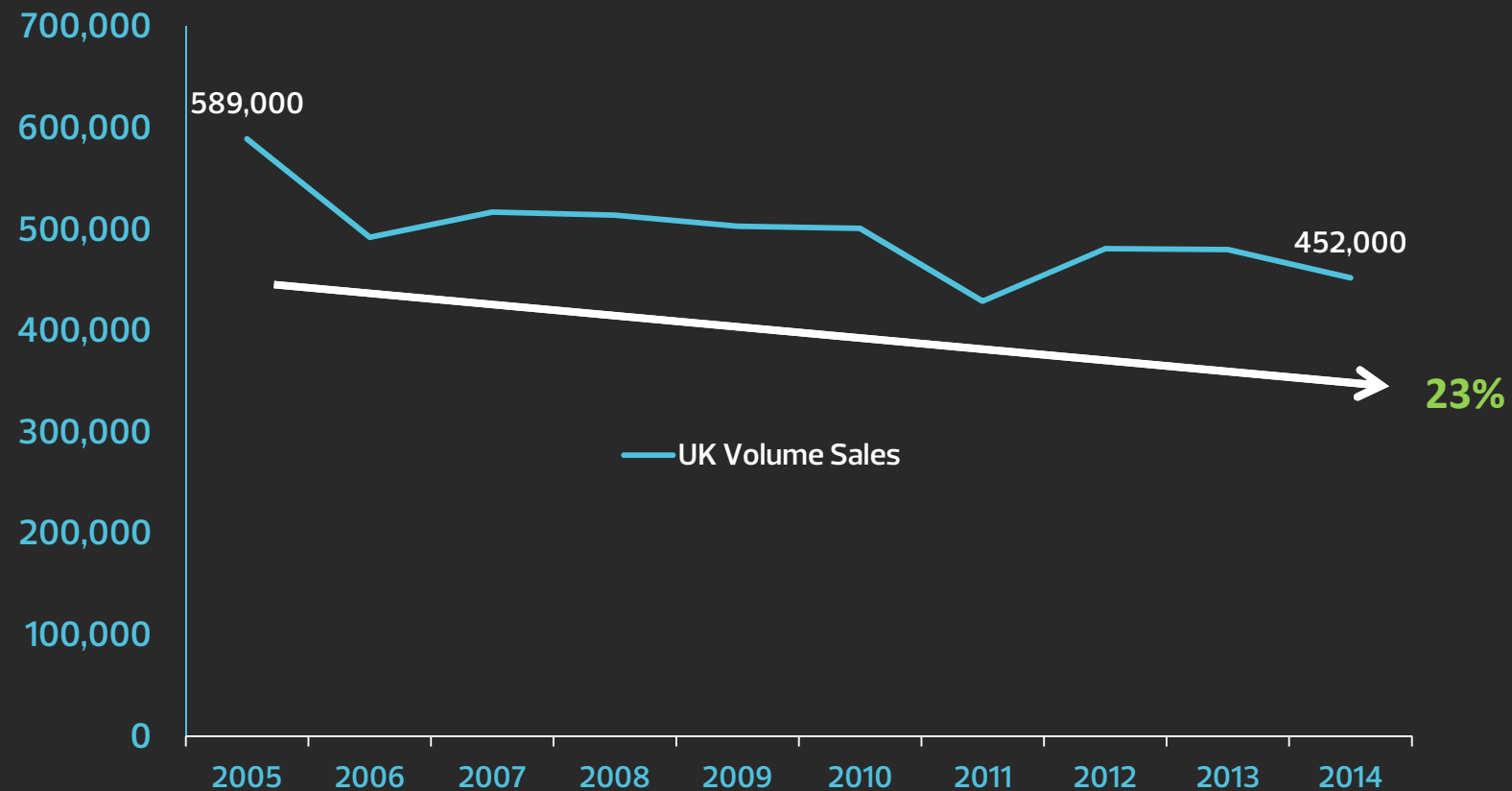


Europe Racquets | Total Sales Volume

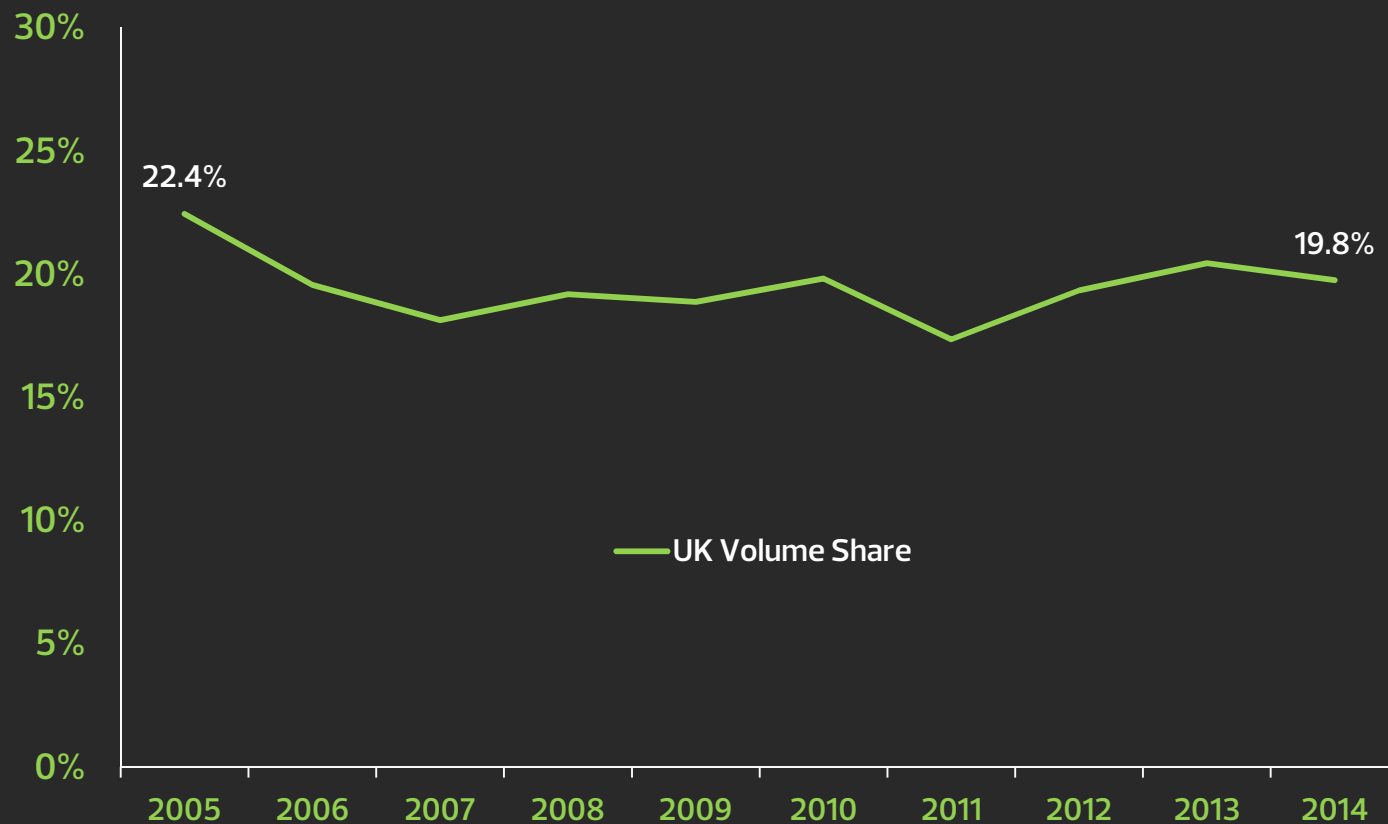
Total Market



UK Racquets | Total Sales Volume



UK Racquets | Volume Share of Europe



SPORTS MARKETING SURVEYS INC.

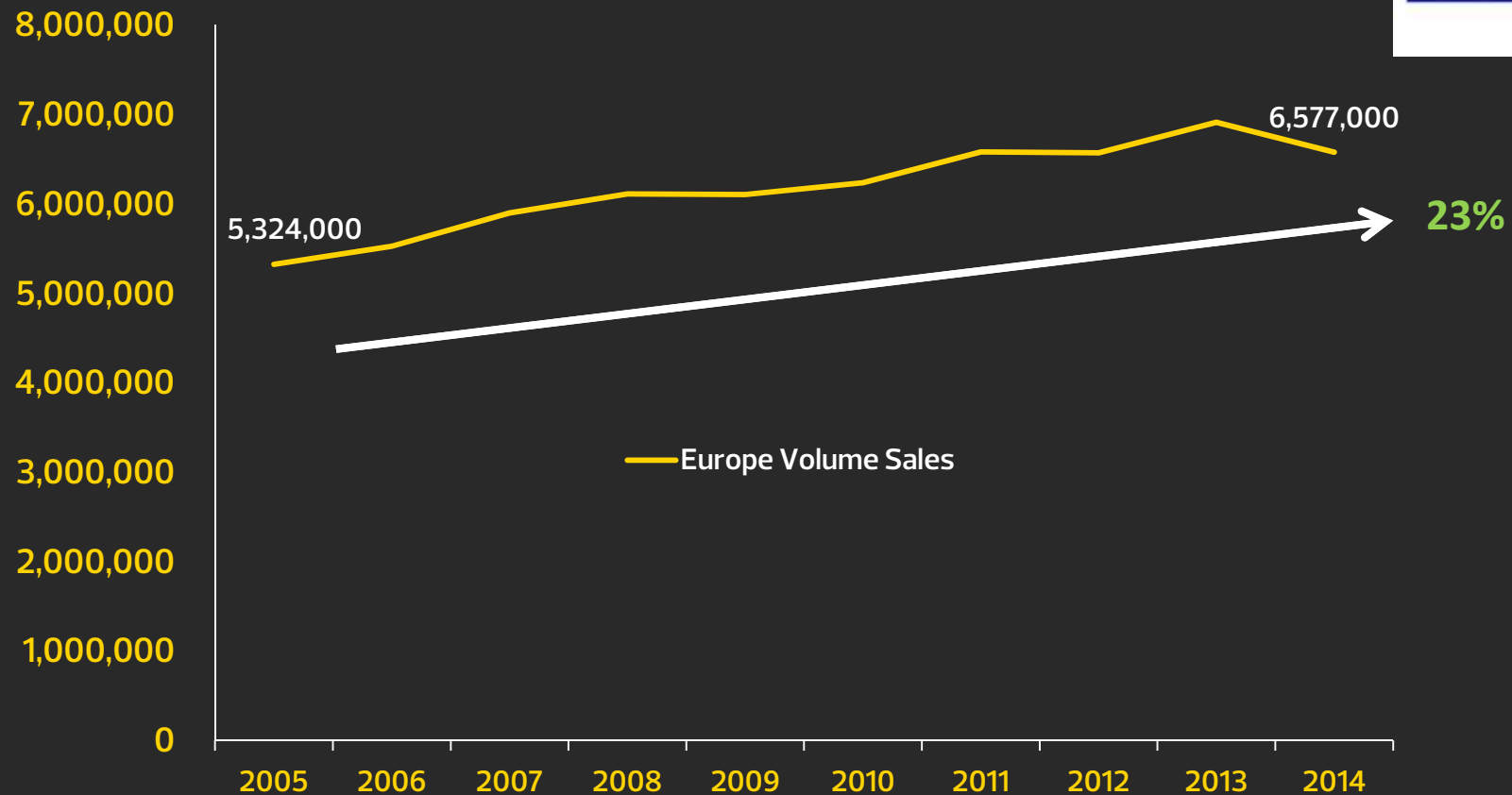
EUROPEAN SHIPMENT | BALLS

SMS INC. TENNIS SHIPMENT SURVEYS 2005-2014

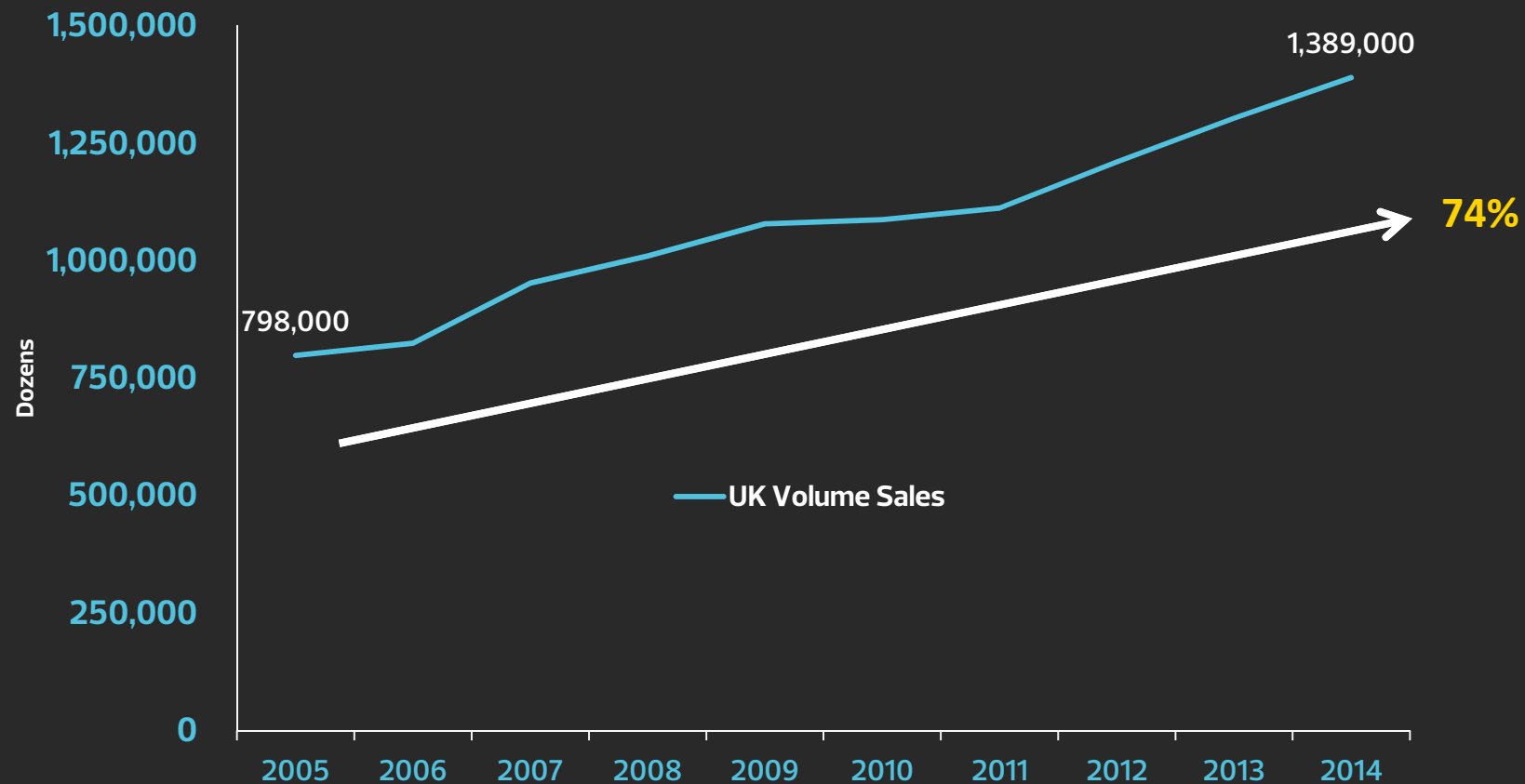


Europe Balls | Total Sales Volume

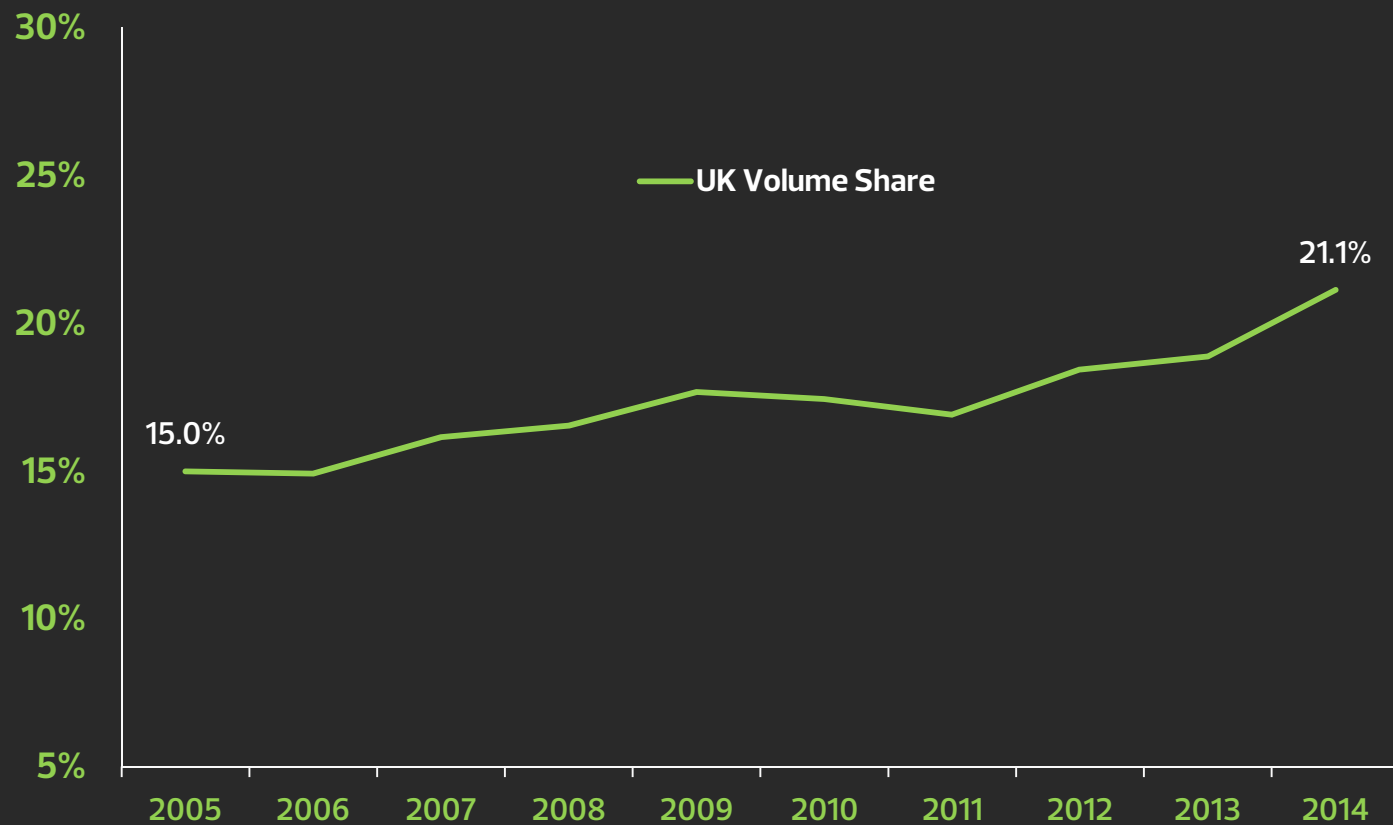
Total Market



UK Balls | Total Sales Volume



UK Balls | Volume Share of Europe



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KEY PERFORMANCE INDICATORS 3: BEHAVIOUR: THE CORE PLAYER

Tennis Consumers Study 2014

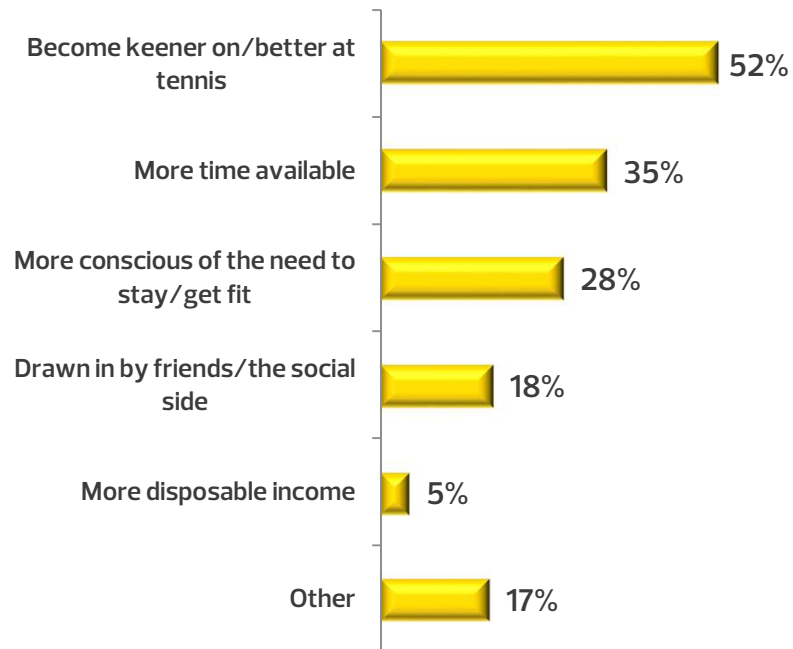


Tennis Participation | Play Frequency vs. Previous

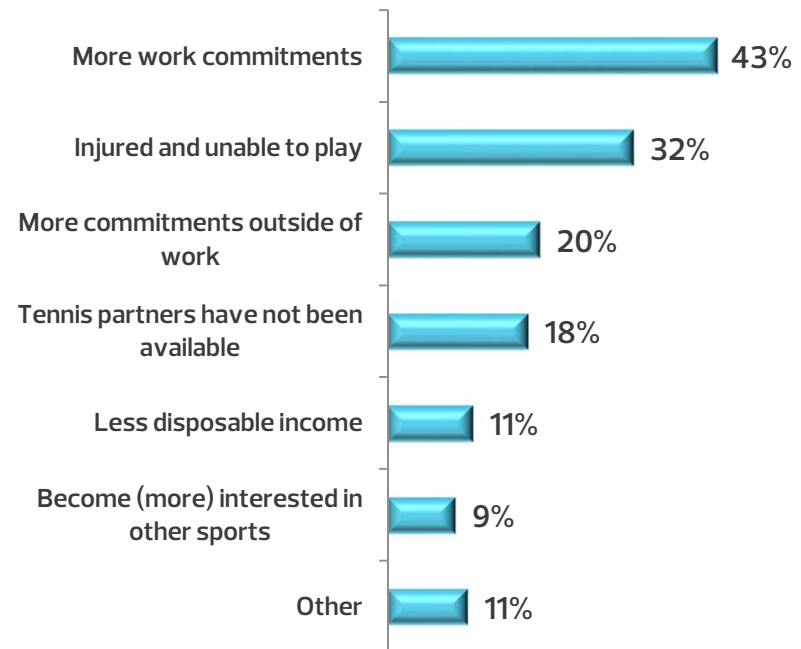
Tennis Playing Frequency vs. Last 12 months



What has led to you playing MORE tennis in the last 12 months?



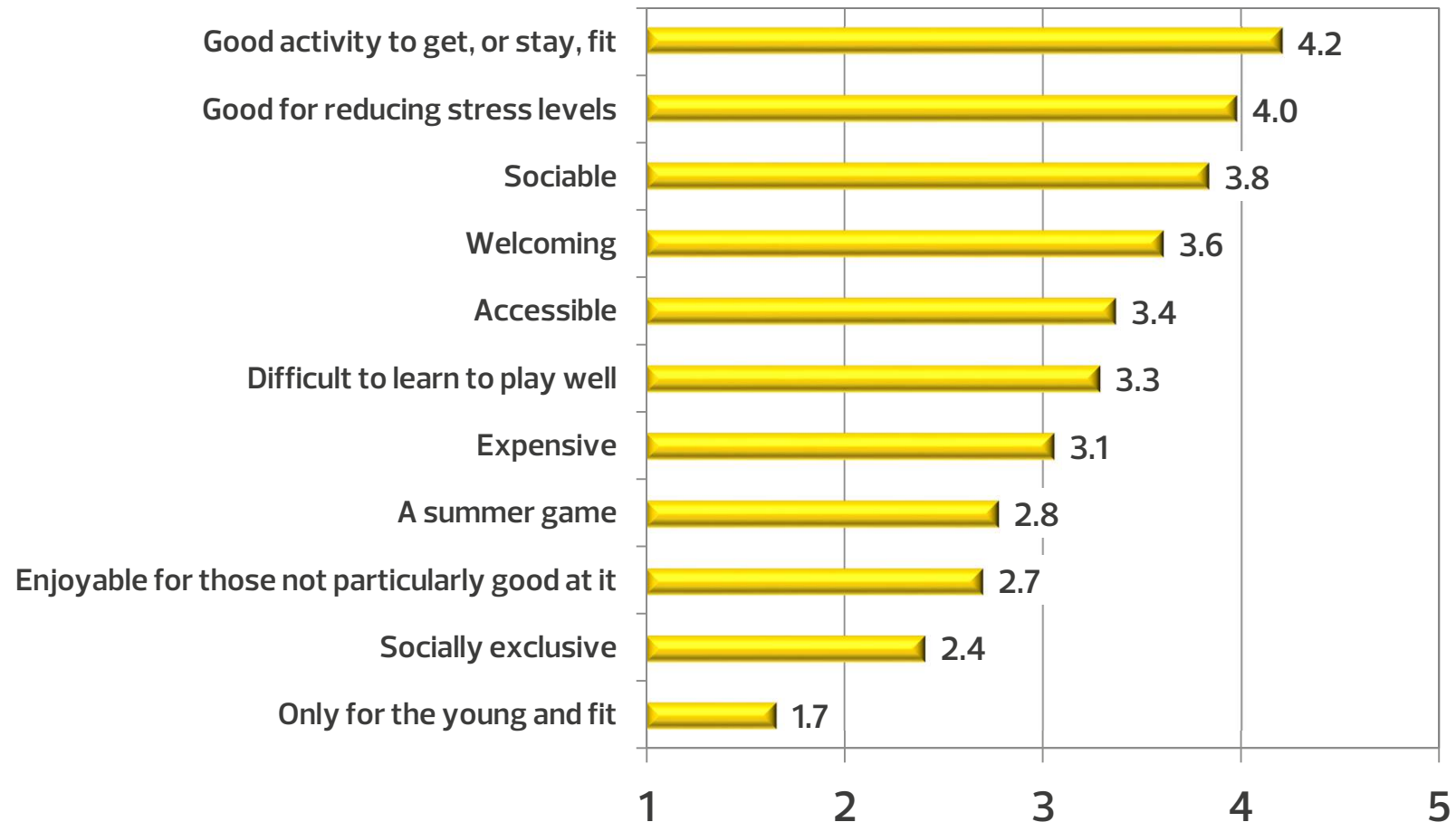
What has led to you playing LESS tennis in the last 12 months?



Base: All respondents that played tennis (6,549); All those playing more tennis vs. last 12 months (2,326); All those playing less tennis vs. last 12 months (1,095).

Image of Tennis | Tennis is...

On a scale of 1 to 5 where 1 is 'does not describe it at all well' and 5 is 'describes it very well', please indicate how well, in your view, each phrase describes the game of tennis.



Base: All respondents who played tennis (6,549)

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KEY PERFORMANCE INDICATORS 3: BEHAVIOUR: THE ELITE JUNIOR – FEELINGS TO THE GAME

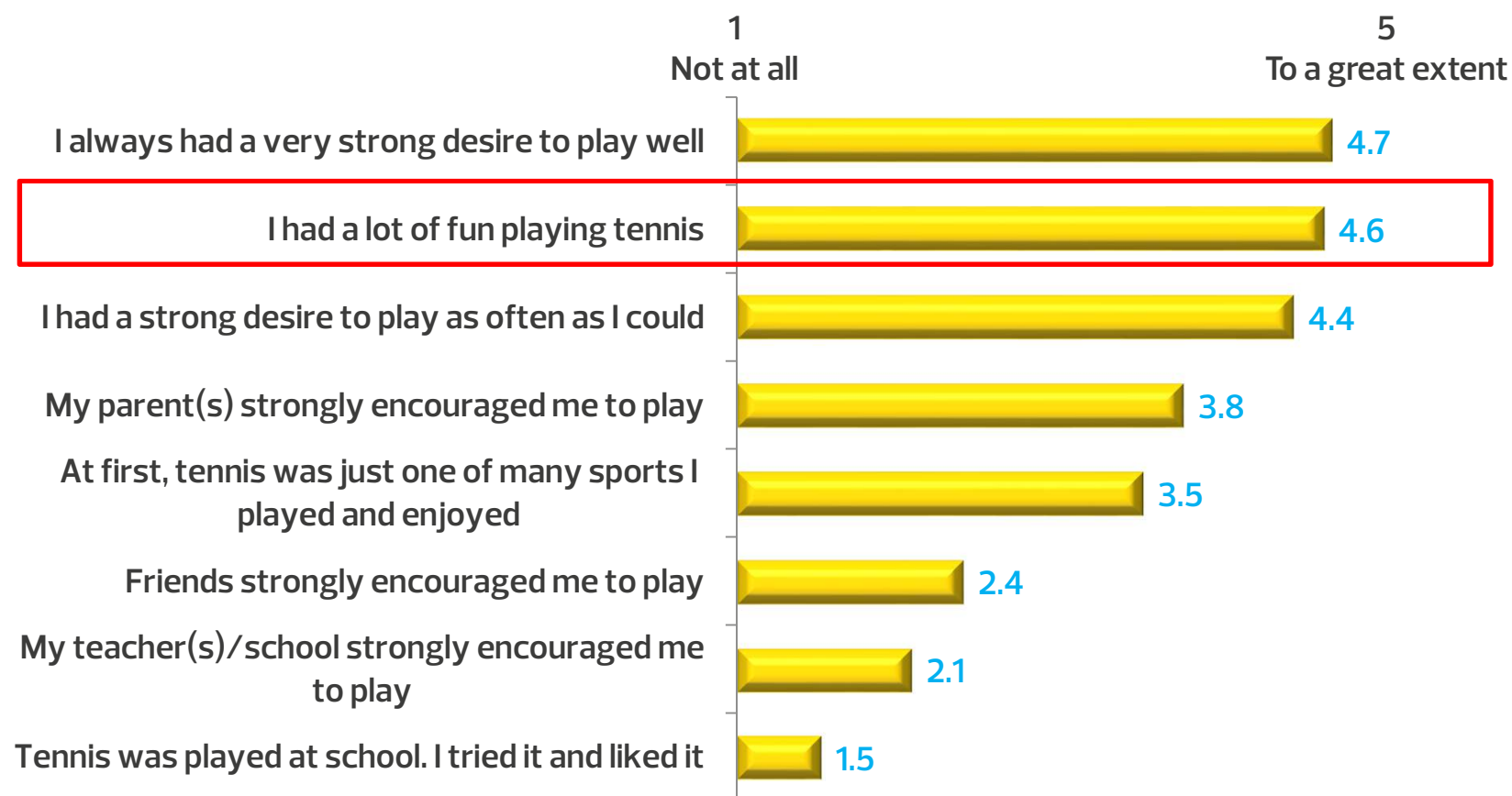
TENNIS EUROPE – ELITE JUNIOR PLAYER SURVEY 2014



EARLY Tennis Playing



To what extent are the following applicable to your early tennis playing?

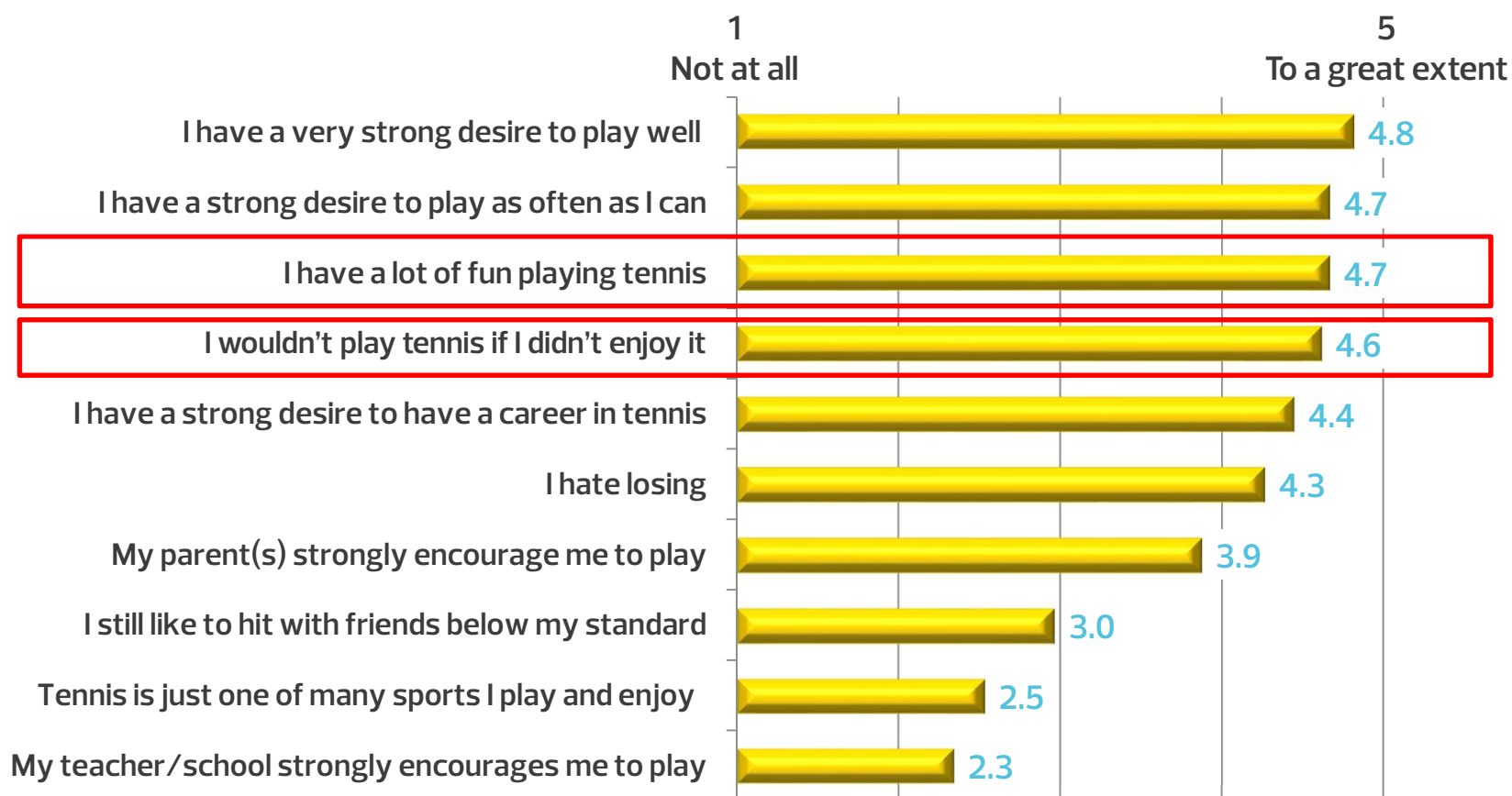


Base: All respondents (1,427)

CURRENT Tennis Playing

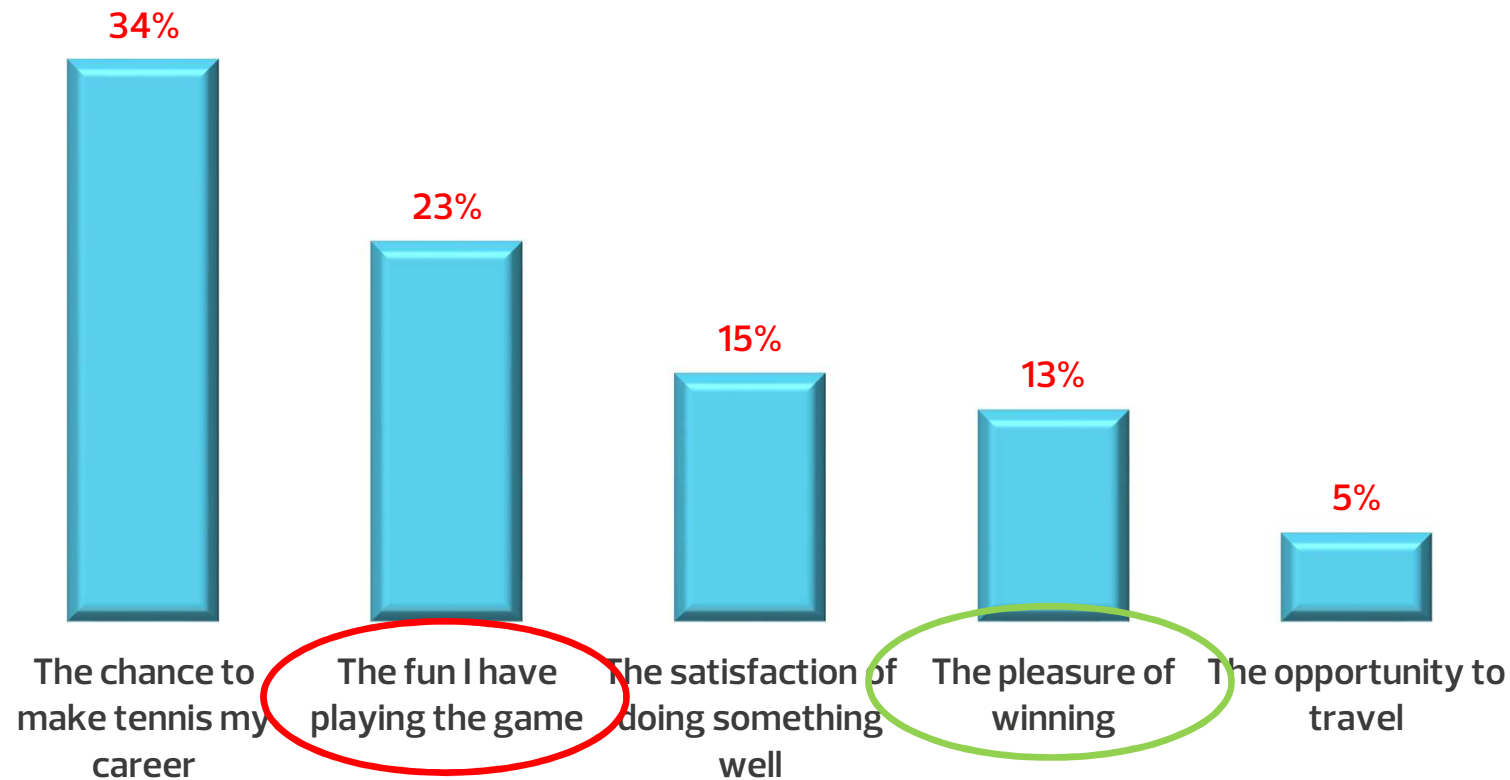


To what extent are the following applicable to your tennis playing today?



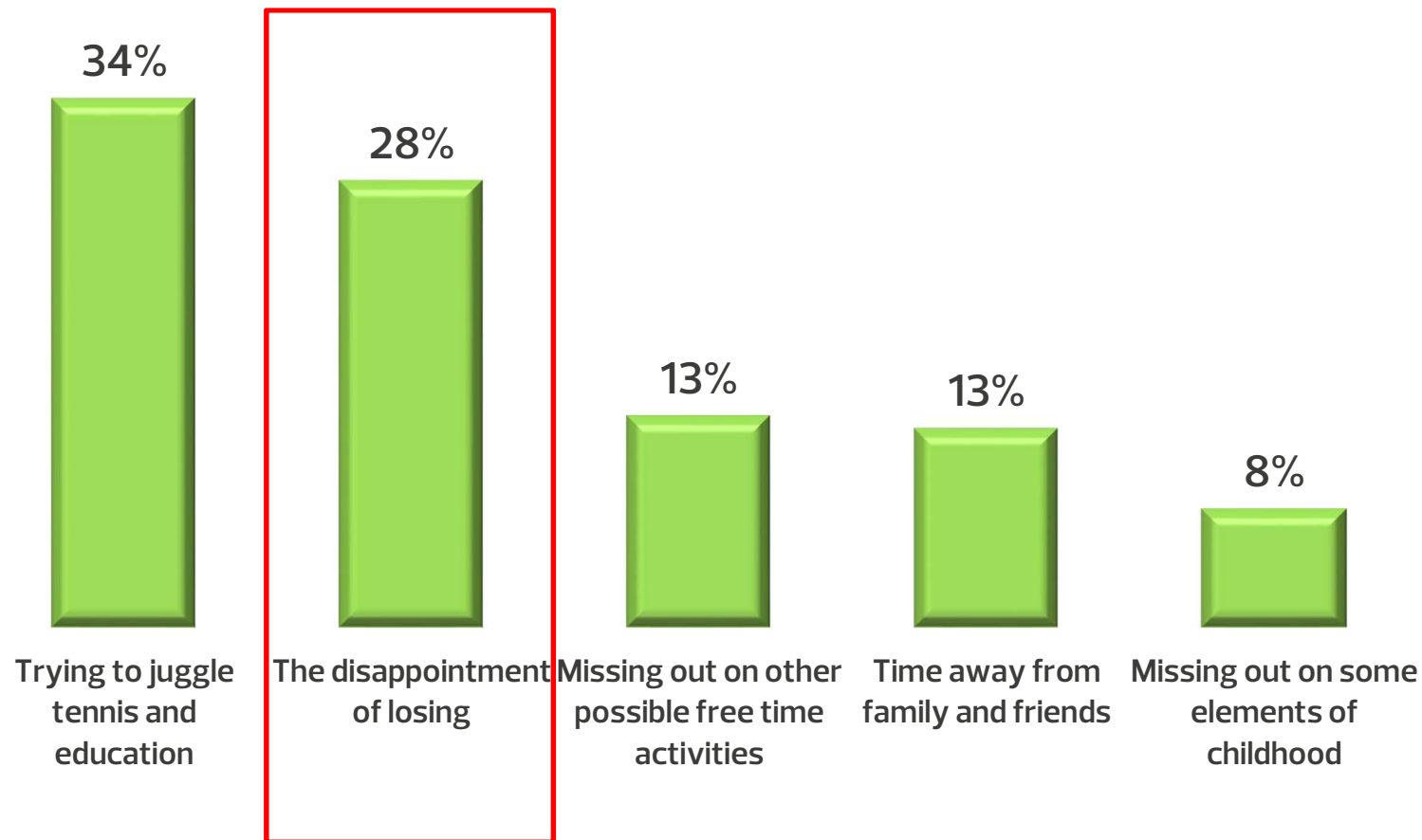
Base: All respondents (1,427)

Top 5 BEST Things about being an Elite Junior



Base: All respondents (1,427)

Top 5 WORST Things about being an Elite Junior



Base: All respondents (1,427)

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IN SUMMARY

TRENDS IN TENNIS



ISSUES

- Available leisure time – with work & education commitments;
- Keeping the youth playing – encourage families;
- Mobile communication for Millennials – it is the power;
- Commitment issues – players not joining clubs
- Access: Park Courts / Tennis For Free



TENNIS HAS GREAT VALUES – FUN, FITNESS, FAMILY & COMPETITION

MESSAGES THAT TENNIS COULD COMMUNICATE:

- Fun
- Inclusive
- Playable by all ability levels
- Affordable
- Accessible
- Challenging
- Good for health & fitness
- Welcoming



IF WE SAY EACH OF THESE THINGS, WE NEED TO MAKE SURE THAT WE HAVE DONE ALL WE CAN TO ENSURE THAT EACH IS TRUE.

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INVESTIGATION

INSIGHT

ACTION

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