Fieldwork dates:
25th April - 1st August 2022

TENNIS INDUSTRY ASSOCIATION UK

TIA TENNIS CLUB BUSINESS SURVEY 2022

BACKGROUND

The TIA Club Business Survey was launched at the end of April, and was available for clubs to complete until the 1st August. The survey was built for the TIA by Sports Marketing Surveys and it was available for completion through an online link.

In total 29 responses were received. 27 of the respondents were individual-site clubs, however two were clubs that operated multiple sites through a single membership. All responses have been treated equally in this analysis.

In total, 46% of responding clubs had a total membership base (including juniors) of more than 1,000. A further 32% had 500-1000 members. Tennis accounted for more than 80% of the membership for 52% of responding clubs.

SUMMARY OF RESULTS

MEMBERSHIP

On average, 16.5% of members were identified as being new (joining within the last 12 months) and 81% were identified as being established in their membership. 9.5% were identified as potentially at risk of not renewing their membership.

IMPACT OF COVID-19

Encouragingly, memberships were generally seen as stable or increasing since the year before Covid-19 - 59% said their membership had increased and 31% said it had remained the same as before Covid.

Two thirds of clubs have offered a reduction in membership fees or a refund in light of Covid restrictions. These actions are seen as having been beneficial in retaining member levels this year.

TENNIS ACTIVITY

In the last two years, the greatest growth areas for tennis activity were identified as adult tennis (59%) followed by group coaching (34%) and social sessions (34%).

The majority had not successfully initiated any specific activity to boost footfall during weekday afternoons, although a quarter had successfully done so.

69% identified that they did offer tennis courts to non-members on a 'pay and play' basis. For 55% of those who did make their courts available to non-members, this was for more than 30 hours a week.

The majority were interested in new ideas for increasing social tennis activity (66%) and maximising the use of their tennis courts (59%).

21% did offer padel to their membership. Although this is only 6 clubs, all 6 identified some kind of benefit from offering padel. For the majority this was an improvement in social activity at their club.

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COACHING

The majority (62%) of coaches were self-employed and none of the responding clubs employed all of their coaches. Most clubs delivered their coaching in-house and the Head Coach was generally responsible for coach recruitment at the club. Just under a third ran some form of coaching apprenticeship scheme.

Generally the Head Coach was responsible for developing and managing the coaching programme in conjunction with club administrators and there was a similar collaborative approach in evaluating its value and success.

Coaching courses were generally paid for in advance with debts for courses chased and managed by club administrators. 79% used an online booking system for tennis lessons.

Generally there was not a lot of outstanding debt on coaching fees, with 89% of responding clubs estimating that debt represented 0%-5% less than expected income.

FACILITIES

Provided by more than half of responding clubs were: outdoor tennis courts (100%), changing facilities (93%), bar, (79%), function room (69%), café or restaurant (66%) and a club shop (52%).

79% of responding clubs said they were planning to improve their facilities in the next 2-3 years, and a further 14% said this was possible. Just 3% actively identified that they would not be making any improvements during this time.

Clubhouse improvements, court resurfacing and installation / improvements to floodlighting were the main areas of consideration for improvement.

The majority of clubs (62%) did online research to select a supplier for equipment, furniture, court maintenance items, etc . 34% identified that they would be interested in a central resource to aid this process, with a further 55% saying they would possibly be interested in this.

In considering a contractor for major tennis court works, past experience at the club was the most significant factor (72%), followed by price (41%).

GROUNDS MANAGEMENT

79% of responding clubs did employ, contract or use volunteer ground staff at their club all year round, and 83% had someone who was appointed or viewed in the role of Head Groundsman.

34% believed that more grounds management training was required by staff or volunteers, and 41% agreed that their club would benefit from additional grounds management support.

MANAGEMENT SYSTEMS

93% used an online system for court bookings, and for 62% the court booking system formed part of a wider club management system.

ClubSpark and MyCourts were the two most-used systems.

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SUSTAINABILITY

41% of responding clubs have a sustainability strategy, with a further 34% considering the implementation of such a strategy. Reducing energy costs and system efficiency were the two main elements of focus.

55% had already undertaken an energy audit at their club. Of those that had not, a free-of-charge energy audit was of interest to 73%.

72% had a plan in place to help reduce energy costs at their club and the use of LED lighting was the most common area to be considered (62%) amongst this group.

86% were interested in receiving more advice on sustainability.

INSURANCE

62% agreed that their insurance policy had protected their club as they expected during the pandemic and a further 17% were unsure.

11% said that they may be areas for improvement of their cover at renewal time, and 21% said they were aware of new or emerging risks that could threaten their club in the future; cyber attacks and rising costs were mentioned as threats.

FUTURE OF THE CLUB

On the whole, feelings towards the future of clubs were positive, with 69% indicating that they felt very positive towards the future of their club and a further 28% indicating that they felt quite positive about it.

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