

Fieldwork dates:  
17th August - 16th October 2023



## TIA TENNIS CLUB BUSINESS SURVEY 2023

### BACKGROUND

The TIA Club Business Survey was launched on the 17th August, and was available for clubs to complete until the 16th October. The survey was built for the TIA by Sporting Insights (previously Sports Marketing Surveys) and it was available for completion through an online link. In total 35 responses were received.

In total, 37% of responding clubs had a total membership base (including juniors) of more than 1,000. A further 26% had 500-1000 members. Tennis accounted for more than 80% of the membership for 51% of responding clubs.

### SUMMARY OF RESULTS

#### **MEMBERSHIP**

On average, 13.1% of members were identified as being new (joining within the last 12 months) and 84.7% were identified as being established in their membership. 10.3% were identified as potentially at risk of not renewing their membership.

Compared to the previous membership year, 32% of clubs identified that their membership has increased.

#### **REVENUES**

Total turnover for the last financial year was below £200,000 for 43% of clubs, and above £500,000 for 29% of clubs. The majority of gross income was derived from membership fees (58.7% on average). Padel fees accounted for 1.1% of gross income on average.

46% of clubs had increased their tennis fees by between 5% and 10% since the previous membership year. For 23% of clubs, tennis fees had stayed the same and none of the clubs surveyed had decreased their tennis fees.

71% had or were planning to take measures to raise additional income for the club - mostly through sponsorship income, social activities, tennis operations or F&B sales.

#### **TENNIS ACTIVITY**

In the last two years, the greatest growth areas for tennis activity were identified as adult tennis (57%) followed by group coaching (37%) and LTA Youth Tots tennis (29%).

71% identified that they did offer tennis courts to non-members on a 'pay and play' basis. For 56% of those who did make their courts available to non-members, this was for more than 30 hours a week.

49% were considering introducing Padel courts at their club and 14% had already installed Padel courts. Although this is only 5 clubs, all 5 identified some kind of benefit from offering padel. For the majority this was an increase in overall membership at the club.

46% of responding clubs were considering Pickleball or had already introduced Pickleball at the club.

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### **COACHING**

The majority (80%) of coaches were self-employed and just two clubs employed all or most of their coaches. Most clubs delivered their coaching in-house (80%) and the Head Coach was generally responsible for coach recruitment at the club (71%).

Two thirds did not pay for tennis coaches to undertake appropriate professional development training, with the onus on coaches themselves to pay for this themselves.

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.

Generally there was not a lot of outstanding debt on coaching fees, with 66% of responding clubs estimating that debt represented 0%-5% less than expected income.

77% of clubs agreed that their club had an adequate number of coaches with the appropriate skills for the club's needs.

### **FACILITIES**

Provided by more than half of responding clubs were: outdoor tennis (100%), changing facilities (91%), bar, (80%), function room (74%), practice wall (66%), café or restaurant (60%), club shop (51%) and conference / meeting facilities (51%).

74% of responding clubs said they were planning to improve their facilities in the next 2-3 years, and a further 17% said this was possible. Just 3% actively identified that they would not be making any improvements during this time.

Court resurfacing, Padel courts and clubhouse improvements were the main types of works that were planned or envisaged.

The majority of clubs (54%) did online research to select a supplier for equipment, furniture, court maintenance items, etc. 51% identified that they would be interested in a central resource to aid this process, with a further 40% saying they would possibly be interested in this.

In considering a contractor for major tennis court works, price was the most significant factor (60%), followed by past performance at the club (34%).

### **WORKFORCE**

59% of clubs did pay a fee or salary to someone to manage or administer the club's affairs. For half of clubs, 1-3 people received a fee / salary for this, and for 35% of clubs more than five people received a fee / salary for this.

88% did not organise or fund any type of training scheme for club managers or administrators. 34% would be interested in this kind of training scheme, with a further 43% possibly interested.

71% of responding clubs did thank or reward volunteers for their efforts on a regular / annual basis. For many this was shown through an annual dinner or by giving vouchers or club-based benefits.

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### OPERATING SYSTEMS

All of the responding clubs used an online system for booking courts. ClubSpark was the most-used system. For 69% of clubs the court booking system was part of a wider club management system, and again ClubSpark was the most-used.

77% of clubs said they undertook profiling and reviews of their membership - this was most likely to be an occasional rather than a regular process. 31% were interested in having a profiling review of members carried out and a further 57% were possibly interested in this.

71% of clubs had not replaced elements of human or manual work with technology. For the 10 clubs that had done so, this was most likely to be the implementation of a booking system or accounting tools.

### RISK

37% of clubs had encountered issues requiring legal advice in the last 12 months. These issues were most likely to relate to employment (46%) and property (38%).

17% have protected or have considered protecting their intellectual property rights, and 66% would consider commercialising their intellectual property rights (e.g. through club-branded merchandise).

Just three clubs said there were areas for improvement for their insurance cover, mostly relating to buildings cover.

17% were aware of any emerging risks, regulatory issues or liabilities that may impact their business in the future.

### SUSTAINABILITY

37% of responding clubs have a sustainability strategy, with a further 26% considering the implementation of such a strategy. Reducing energy costs (92%) and system efficiency (85%) were the two main elements of focus.

83% would be interested in receiving more advice on sustainability and how their club may address the issue.

### ENERGY

51% have recently undertaken an energy audit to help assess where savings can be made, and a further 17% have such an audit planned. For those who have not done this, a free-of-charge independent energy audit would be of interest.

77% have a plan to help reduce energy costs at their club and LED lighting (63%) and solar or wind power (56%) are the areas most likely to be considered to reduce costs.

### FUTURE OF THE CLUB

On the whole, feelings towards the future of clubs were positive, with 51% indicating that they felt very positive towards the future of their club and a further 37% indicating that they felt quite positive about it.