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TIA UK TENNIS CLUB BUSINESS REPORT 2022



TENNIS INDUSTRY ASSOCIATION UK

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Gen2 Sport

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In association with
Sports Marketing Surveys



INTRODUCTION

The 2022 TIA UK 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 TIA UK by Sports Marketing Surveys and was available for completion through an online link.

In total 29 responses were received. 27 of the respondents were single-site clubs, however two were clubs that operated multiple sites through a single membership. The 29 clubs represent approximately 28,000 club members. All responses have been treated equally in this analysis. Clubs submitting data for this report are classified by the LTA as 'large' i.e. venues with 8 or more tennis courts.

This is the third such report produced by TIA UK. The 2022 report follows on from reports published in 2019 and 2020 the data of which was supplied by 23 'major' tennis clubs representing some 20,000 tennis players. The report planned for 2021 was not undertaken due to the pandemic.

- Annual survey to benchmark tennis club businesses and identify ways to grow the sport and individual clubs
- A focus on business performance to identify the factors that impact on sustainability and growth
- This is long-term measurement
- A five-year project
- Measurement becomes more powerful over time
- Target is to get 100 tennis clubs participating in the project by year five

The LTA reports that in 2018/19 there were 24,046 tennis courts at 5,273 tennis clubs and venues in England and Wales.

In terms of LTA registered tennis clubs, 17% in England and Wales have more than 8 tennis courts. Scotland has 8%. The LTA classifies clubs and venues with more than 8 courts as 'large'.

3120 registered clubs in GB

- | | | | |
|--|-----|------------|-----|
| • 14% of clubs with more than 8 courts located within: | | • Midlands | 53 |
| • London / South East | 132 | • North | 77 |
| • South / South West | 52 | • Wales | 15 |
| • Central / East | 86 | • Scotland | 20 |
| | | • Total | 435 |

Source: LTA 2018/19

Summary - Membership

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.

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.

Summary - 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.

Summary - 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.

Summary - 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 mainly 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 predominantly paid for in advance with debts for courses chased and managed by club administrators. **79%** used an online booking system for tennis lessons.

Overall, 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.

Summary - 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%**).

Summary - 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.

Summary - Risk

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.

Summary - 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.

Summary - 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.

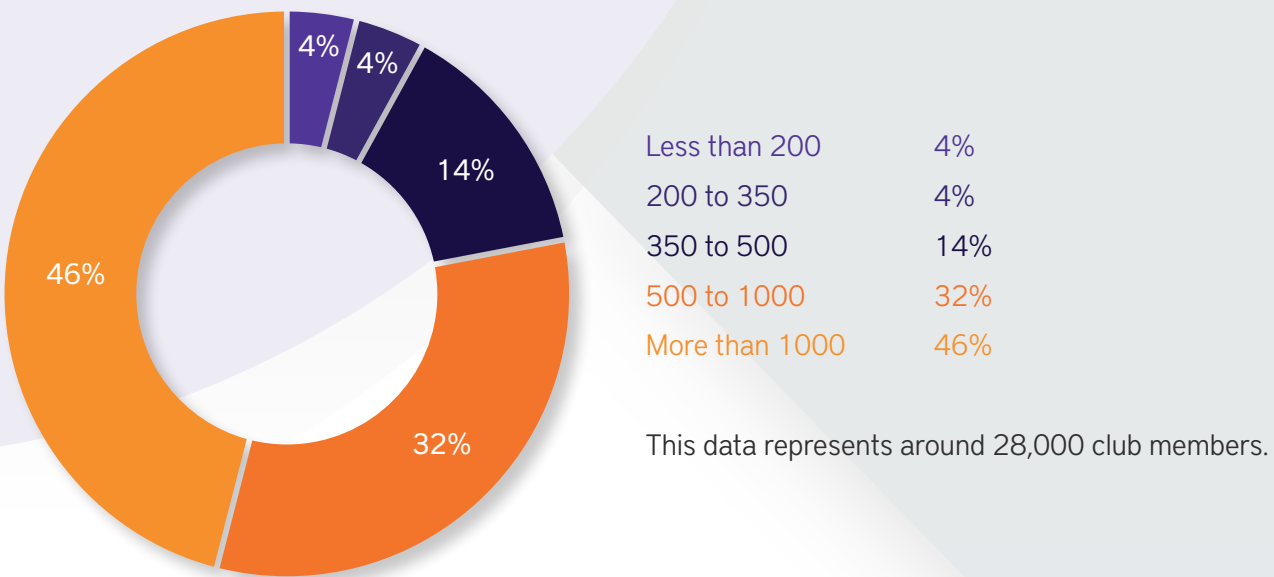
Summary - Club Future

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.

Please note that some figures may not add to 100% due to rounding, or clubs picking multiple answers, all charts and graphs within this report are accurate to the data collected from the clubs.

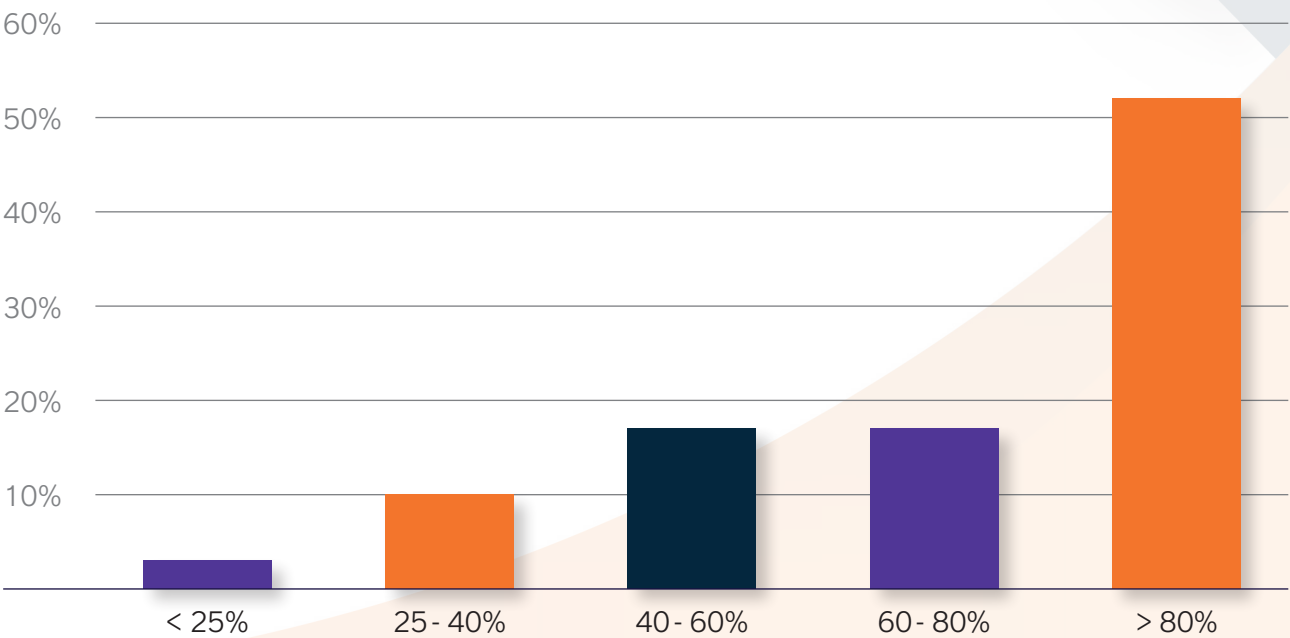
Membership - Based on 28 clubs

What is the total number of members (including juniors) in all categories of membership at your club?



Membership - Based on 29 clubs

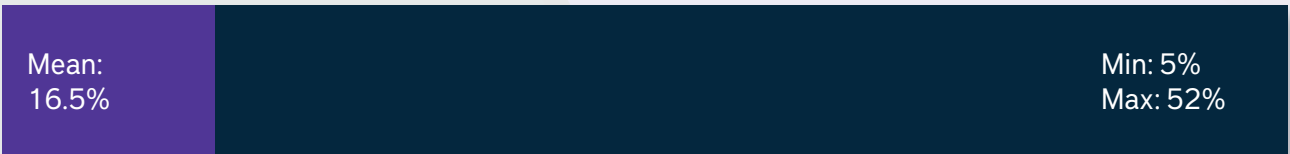
Approximately, what percentage of total club membership does tennis account for?



Membership - Based on 29 clubs

Approximately, what percentage of your tennis members fall under the following categories?

New members (less than 12 months in membership):



Existing members (more than 12 months in membership):

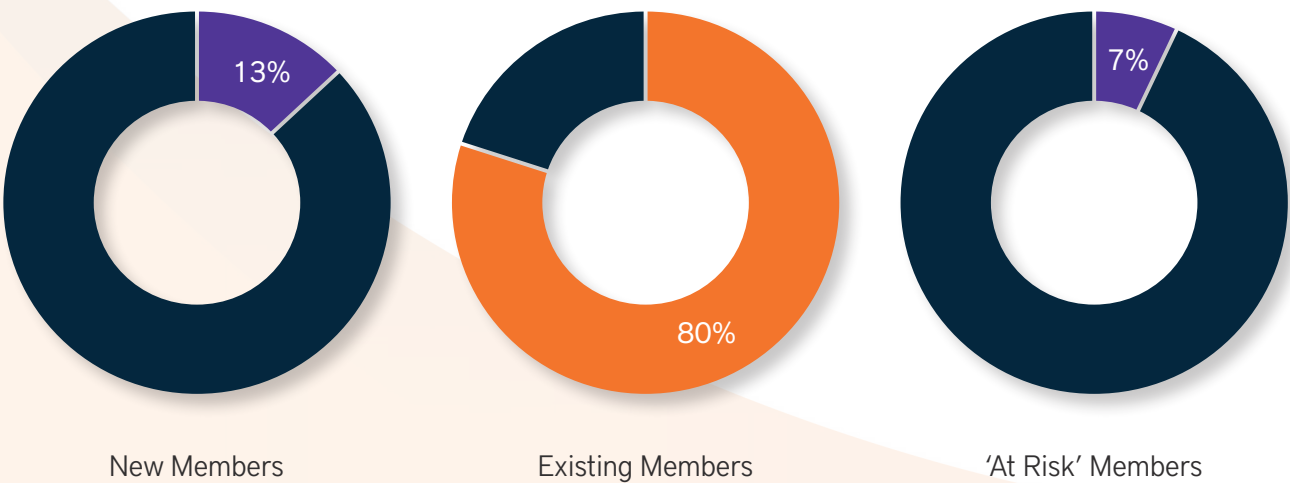


Potentially 'at risk' of not renewing (i.e. frequency of play has declined / heard playing at another club):



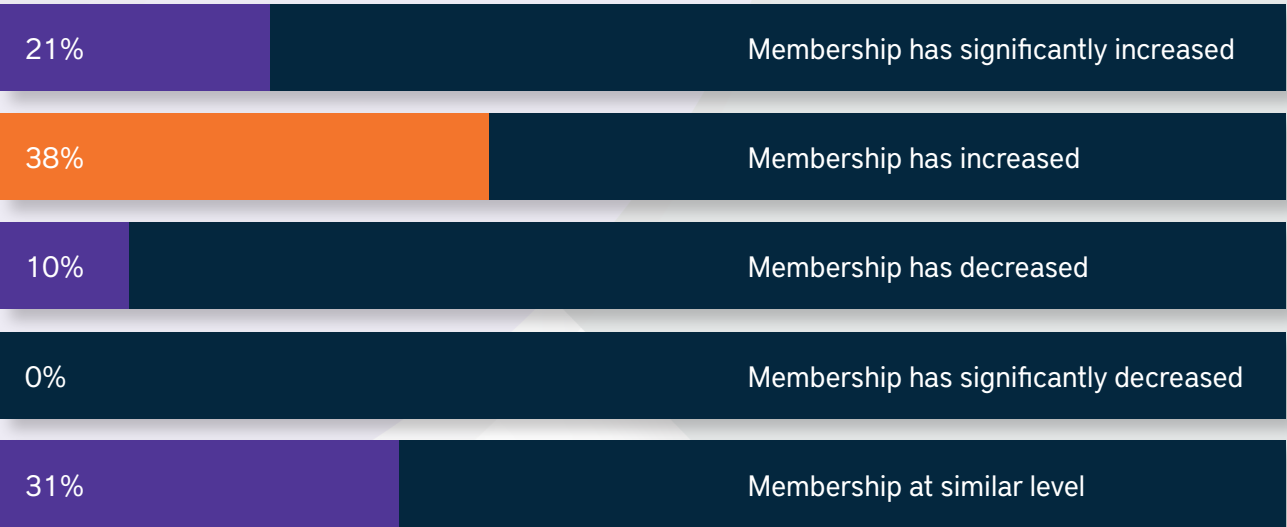
Membership - Based on previous numbers

How do these figures compare to those pre-pandemic?



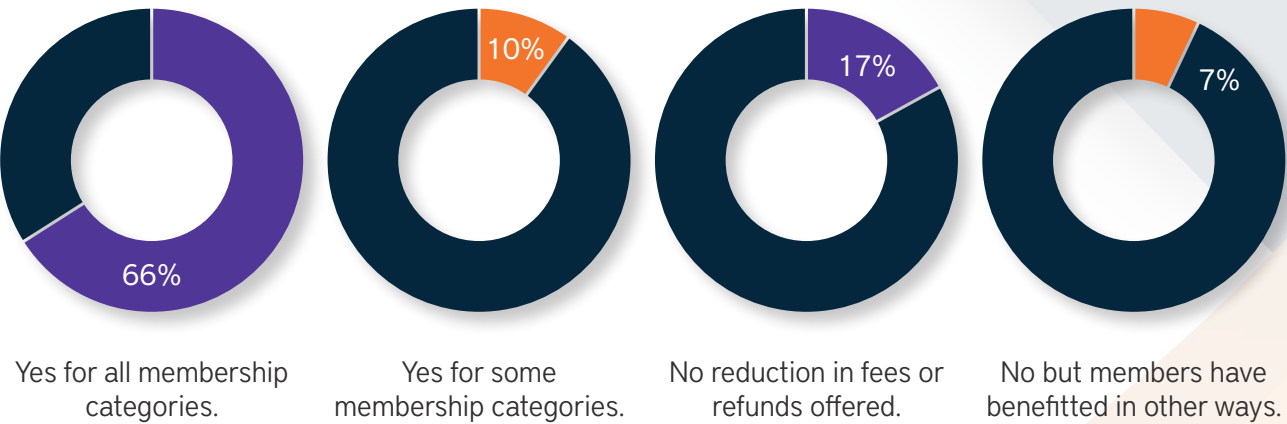
Impact - Based on 29 clubs

Compared to the year prior to Covid, how is your overall club membership this year?



Impact - Based on 29 clubs

Has your club offered a reduction in membership fee or a refund as a result of Covid restrictions either for this year or last year?



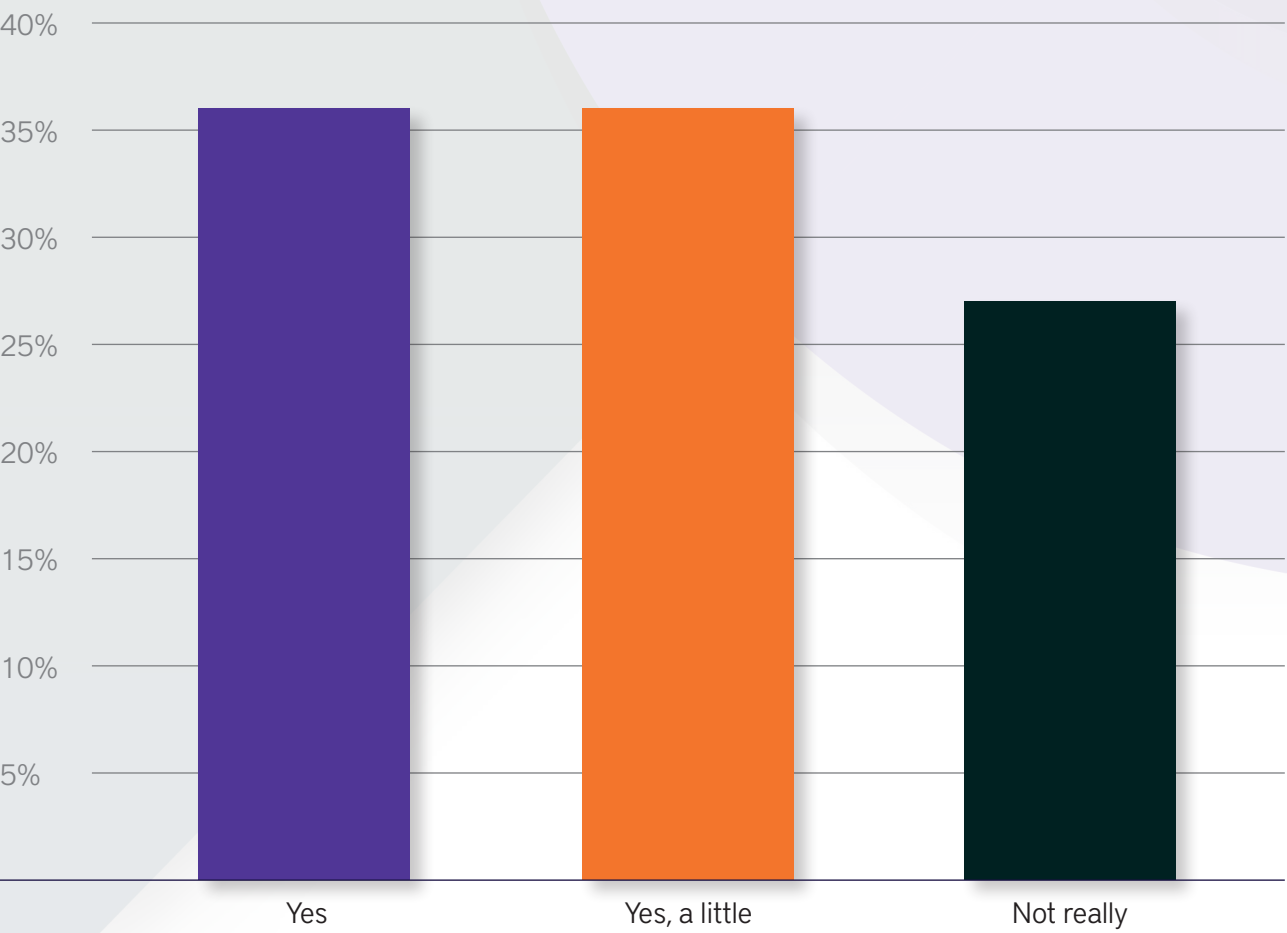
Impact - Other benefits

How else have members benefited?



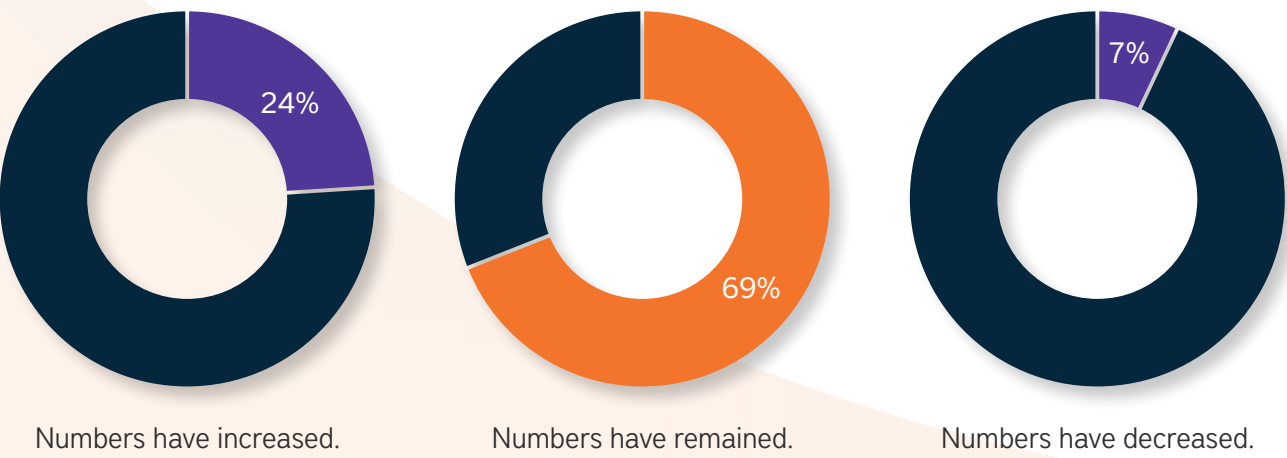
Impact - Based on 22 clubs

Has the reduction in membership fee or refunds you offered assisted with retaining member levels for this year?



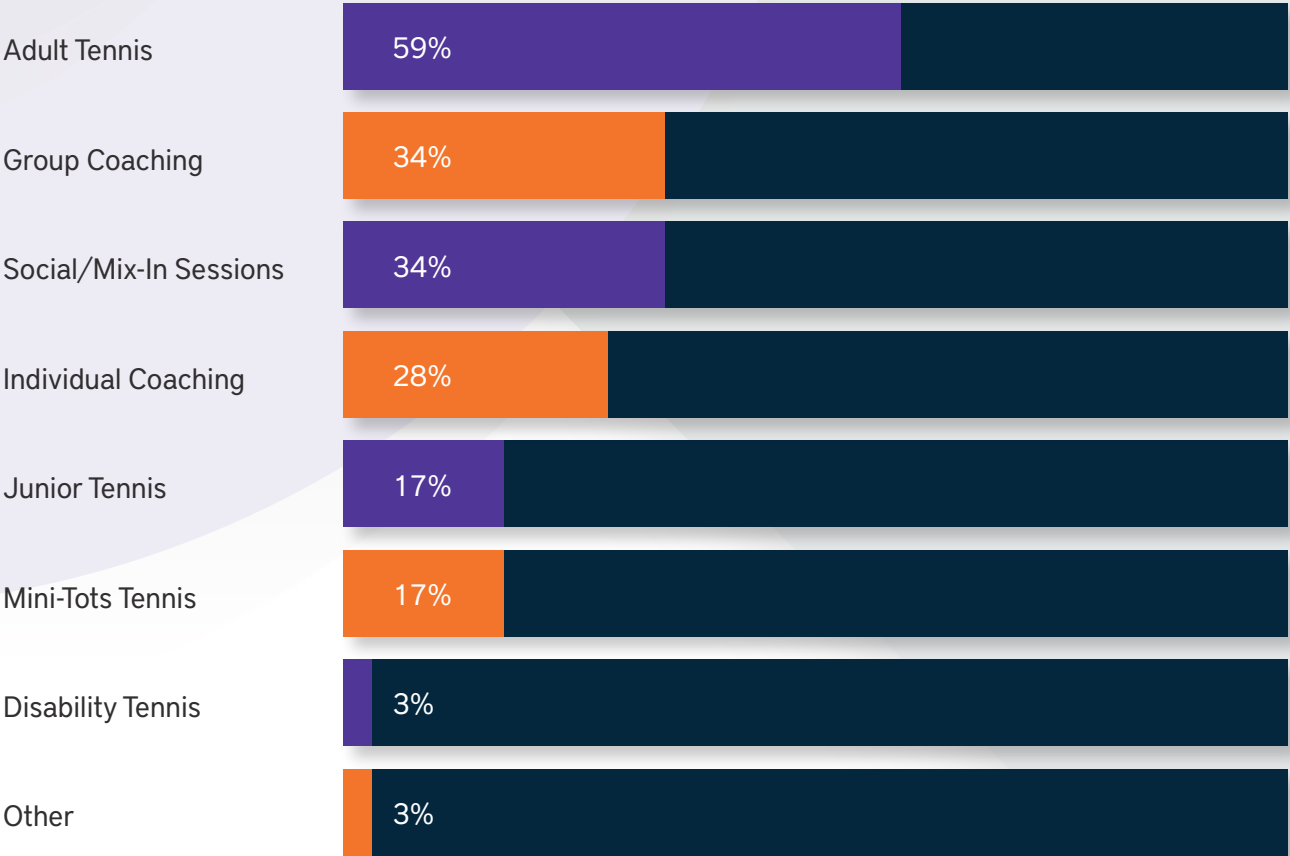
Impact - Based on 29 clubs

Compared to the year prior to Covid, has the number of coaches at your club changed?



Activity - Based on 29 clubs

Over the past 24 months, which sectors / activities have seen the most growth in tennis activity?



Activity - Based on 28 clubs

Increasing court usage and footfall during weekday afternoons appears to remain a challenge for many tennis clubs. Have you successfully initiated any specific activity aimed to increase afternoon court usage or footfall at your club?



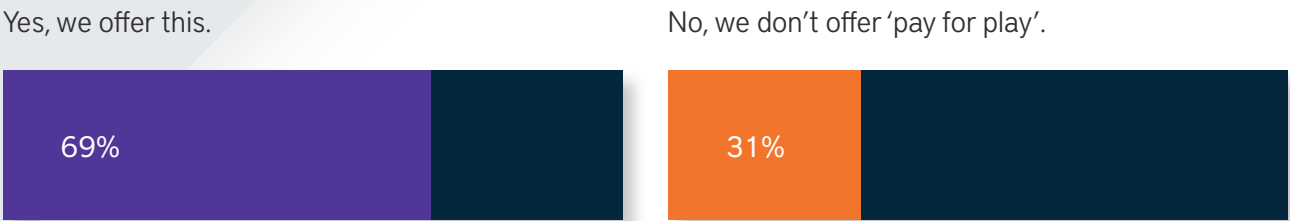
Activity - Other activities

What other types of activity have you tried initiating?



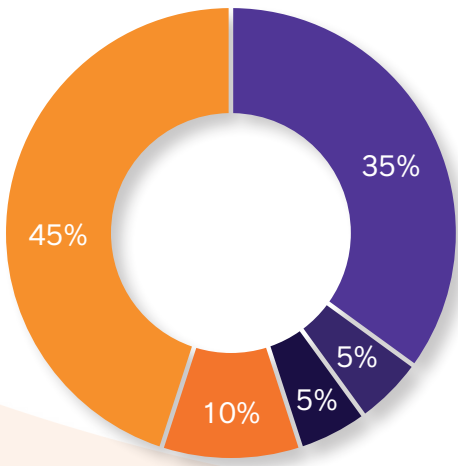
Activity - Based on 29 clubs

Do you offer any of your tennis courts to non-members on a 'pay and play' basis?



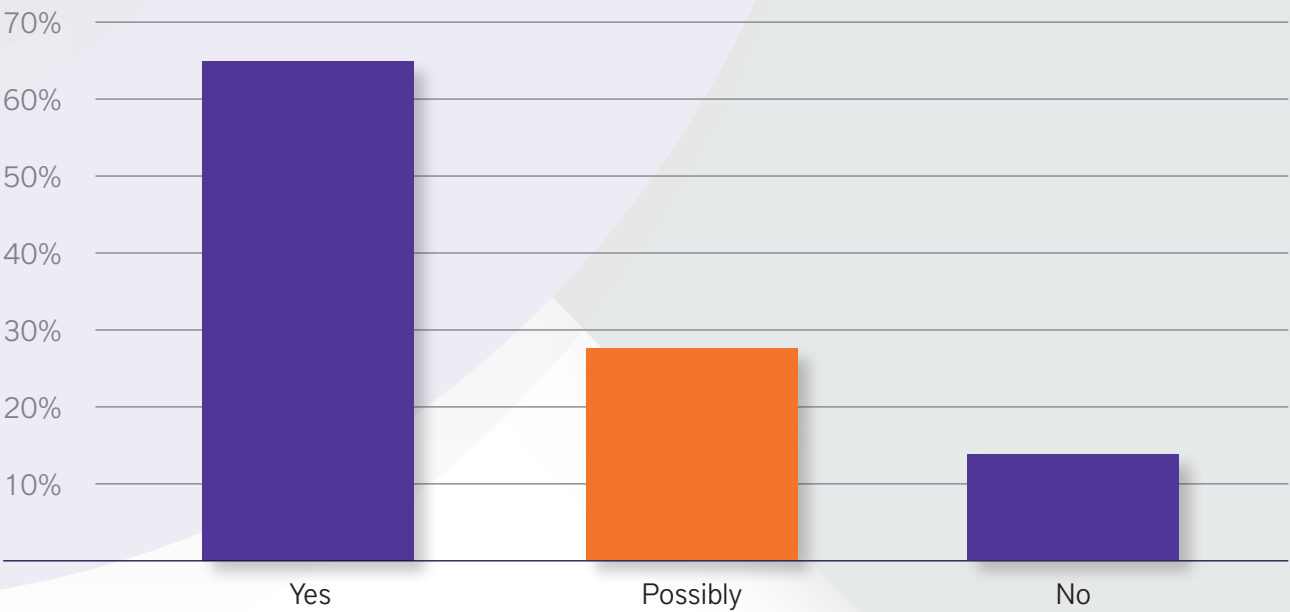
Activity - Based on 20 clubs

Approximately how many court hours per week on average across the year are offered / available on a 'pay and play' basis for non-members?



Activity - Based on 29 clubs

Would your club welcome ideas to help increase numbers participating in social tennis activity?



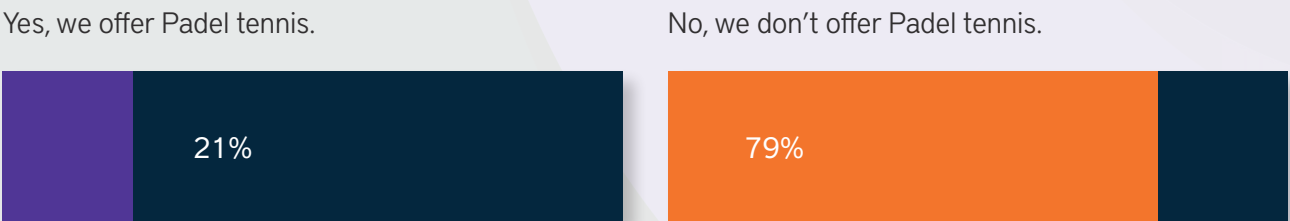
Activity - Based on 29 clubs

Would your club welcome ideas on how to maximise the use of your tennis courts?



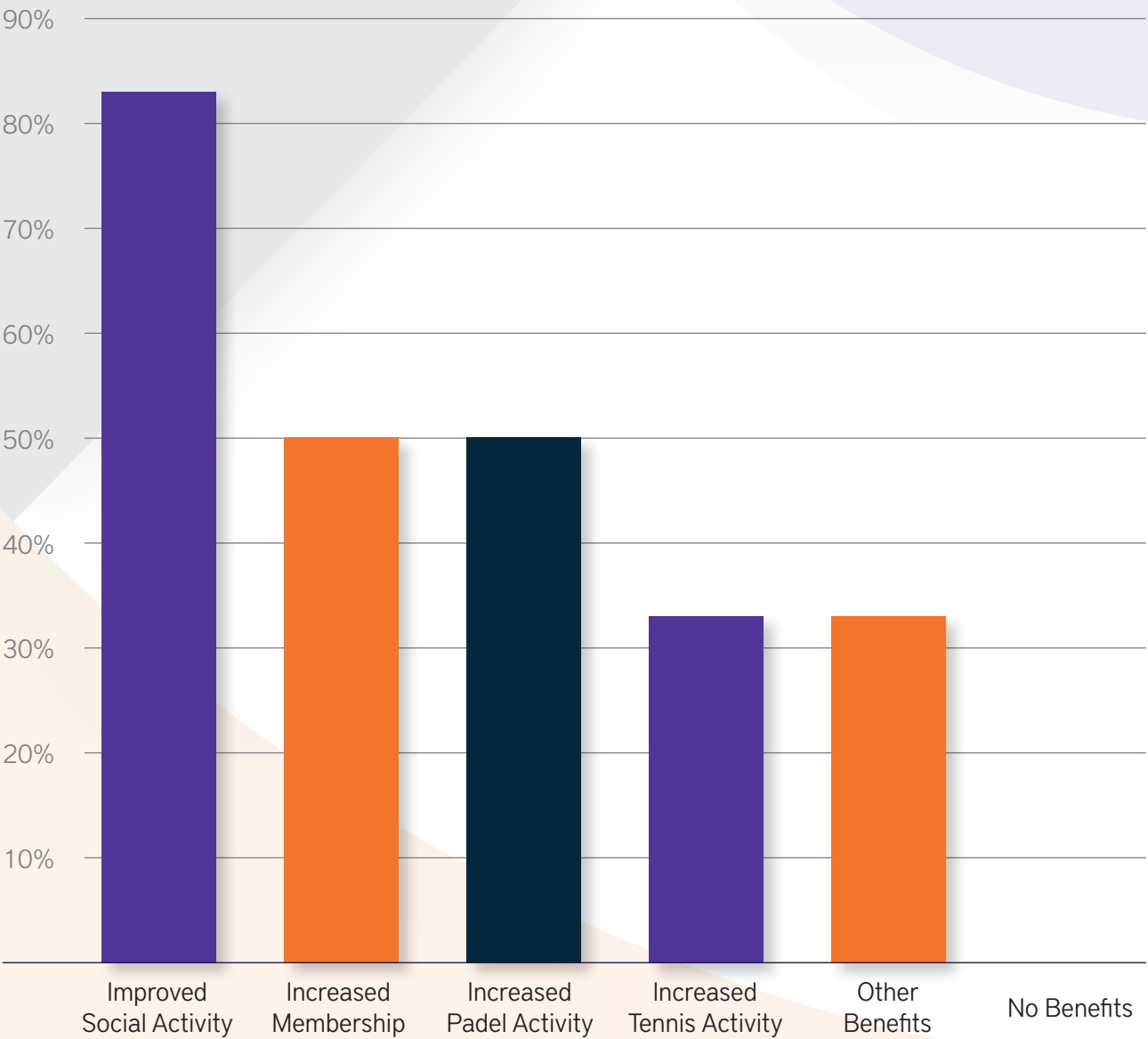
Activity - Based on 29 clubs

Does your club offer Padel tennis to the membership?



Activity - Based on 6 clubs

Have you seen any of these benefits to your club since Padel tennis was introduced to the membership?



Coaching - Based on 29 clubs

Are your tennis coaches employed or self-employed?



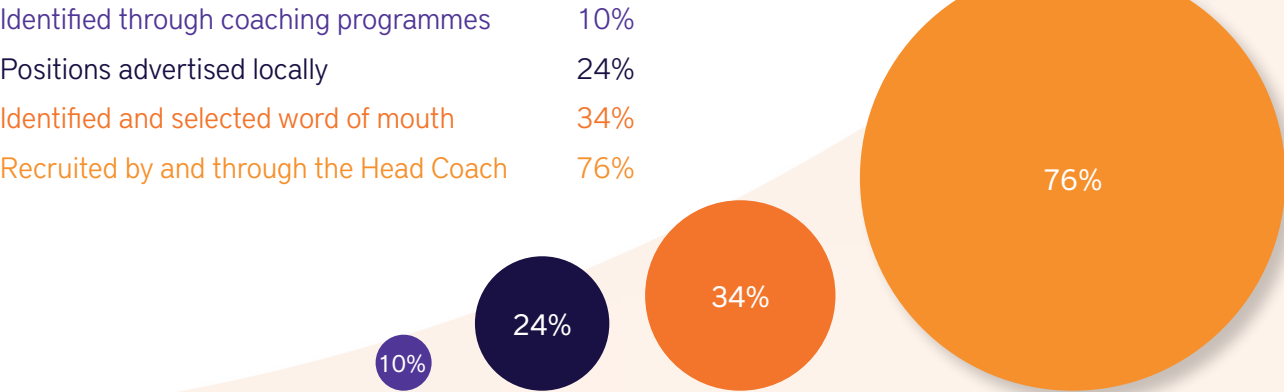
Coaching - Based on 29 clubs

Does the club pay an external company to deliver any coaching activity?



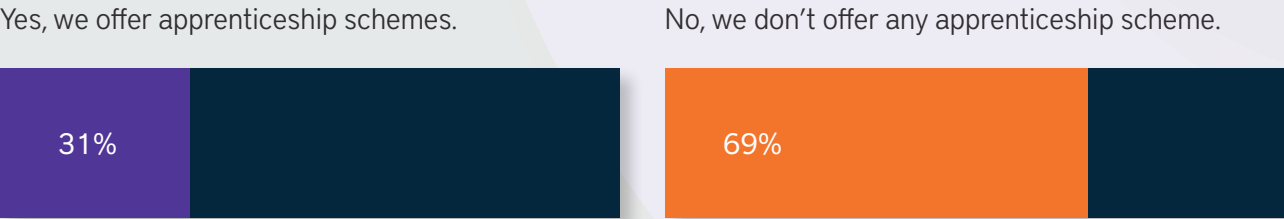
Coaching - Based on 29 clubs

How do you recruit coaches for your coaching programmes?



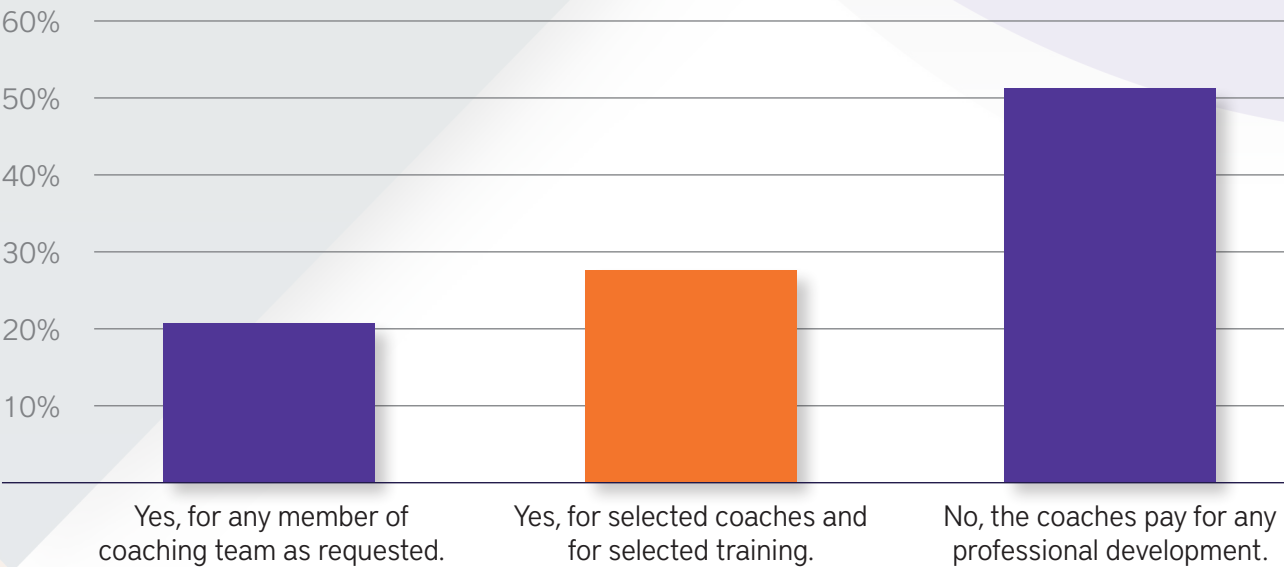
Coaching - Based on 29 clubs

Do you run any form of apprenticeship scheme for coaches?



Coaching - Based on 29 clubs

Does the club pay its tennis coaches to undertake appropriate professional development training?



Coaching - Based on 29 clubs

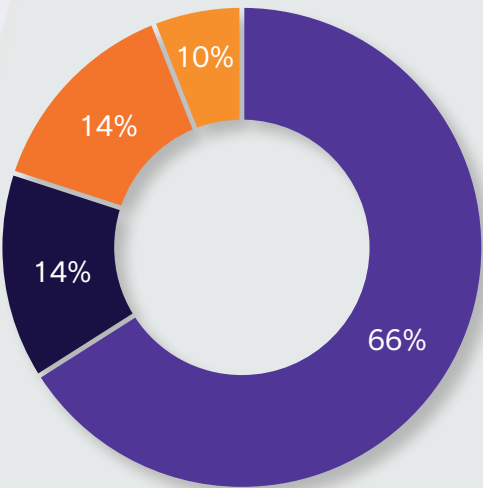
Is the Head Coach solely responsible for developing and managing the coaching programme?



Coaching - Based on 29 clubs

Who is responsible for monitoring the coaching programme to assess value and success?

Head Coach and Administrator together	66%
Head Coach	14%
Club Administrator	14%
Other	10%



Coaching - Based on 29 clubs

How is the delivery of the junior coaching programme structured?

Programme normally delivered 50 weeks across the year (24%).



Programme normally delivered to reflect the three school terms (69%).



Other (7%).



Coaching - Based on 29 clubs

Do you use an online system for booking private and group tennis lessons?

Yes, we use an online system.

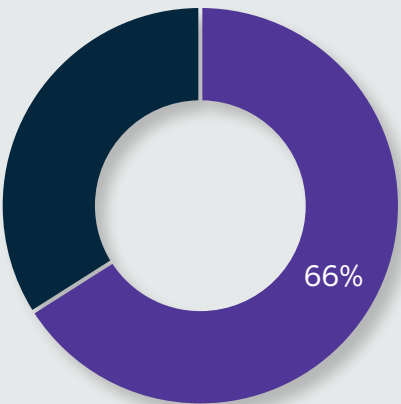


No, we don't use an online system.

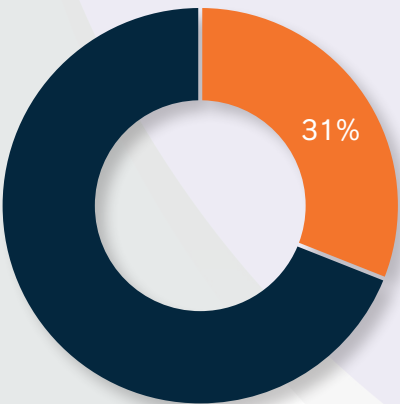


Coaching - Based on 29 clubs

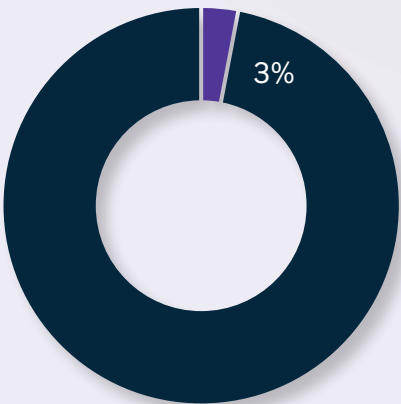
Are coaching courses (groups and individuals) paid for in advance?



Yes



Sometimes



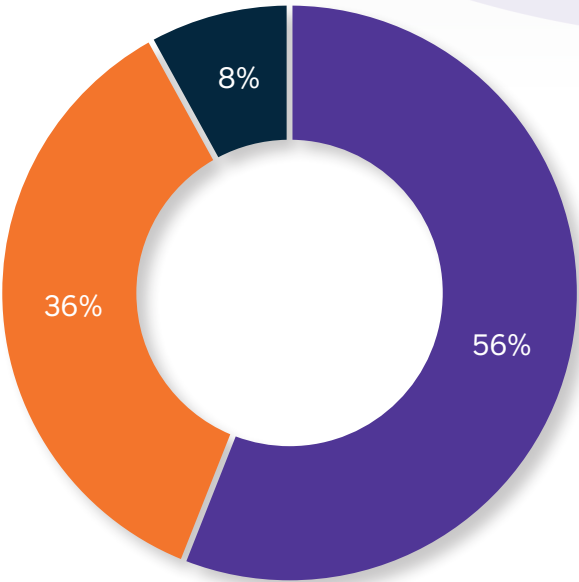
No

Coaching - Based on 25 clubs

How are debts for courses chased and managed?

For the majority of clubs, debtors were contacted by a club administrator (56%), with some having a member of the coaching team contact debtors for payment (36%).

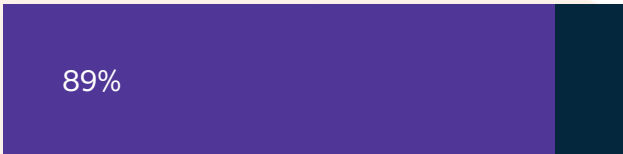
Around 8% of clubs had another method for handling debt payments.



Coaching - Based on 27 clubs

What would be your estimate of overall debt on coaching fees (i.e. money outstanding) as a percentage of coaching programme income received?

0% - 5% less than expected income



















5% - 10% less than expected income




Facilities - Based on 29 clubs


What facilities are provided on site?


Outdoor Tennis Courts		29 Clubs
Changing Facilities		28 Clubs
Bar		23 Clubs
Function Room		20 Clubs
Cafe or Restaurant		19 Clubs
Club Shop		15 Clubs
Conferencing Facilities		14 Clubs
Indoor Tennis Courts		13 Clubs
Gym		12 Clubs
Sports Injury Suite		12 Clubs
Squash Courts		11 Clubs
Racketball Courts		9 Clubs
Padel Courts		6 Clubs
Wellness Suite		4 Clubs
Swimming Pool		3 Clubs
Snooker Room		2 Clubs


Facilities - Other facilities


What other facilities do you provide?


 Table Tennis Room


 Petanque Terrains


 Croquet Lawns


 Studios and Workshop Areas

 Creche

 Hockey Astro Pitch

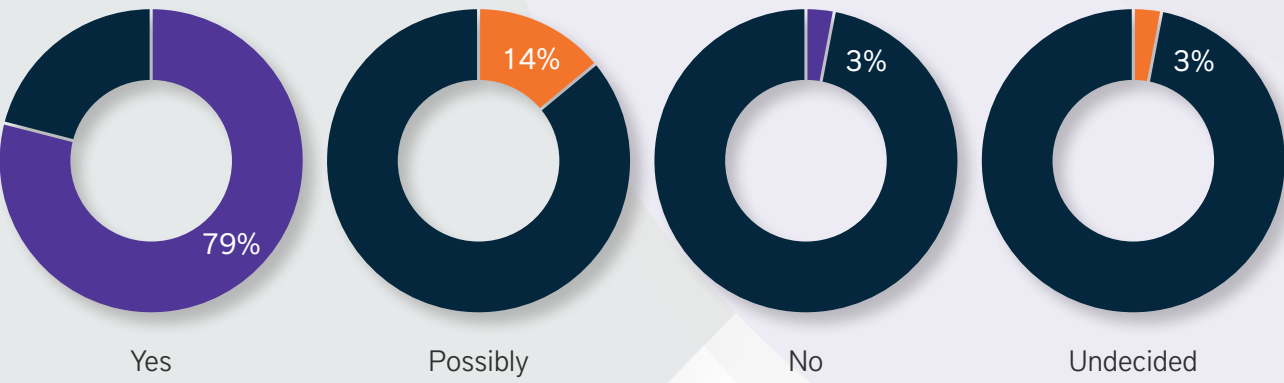
 Netball Courts

 Cinema

 Golf Course

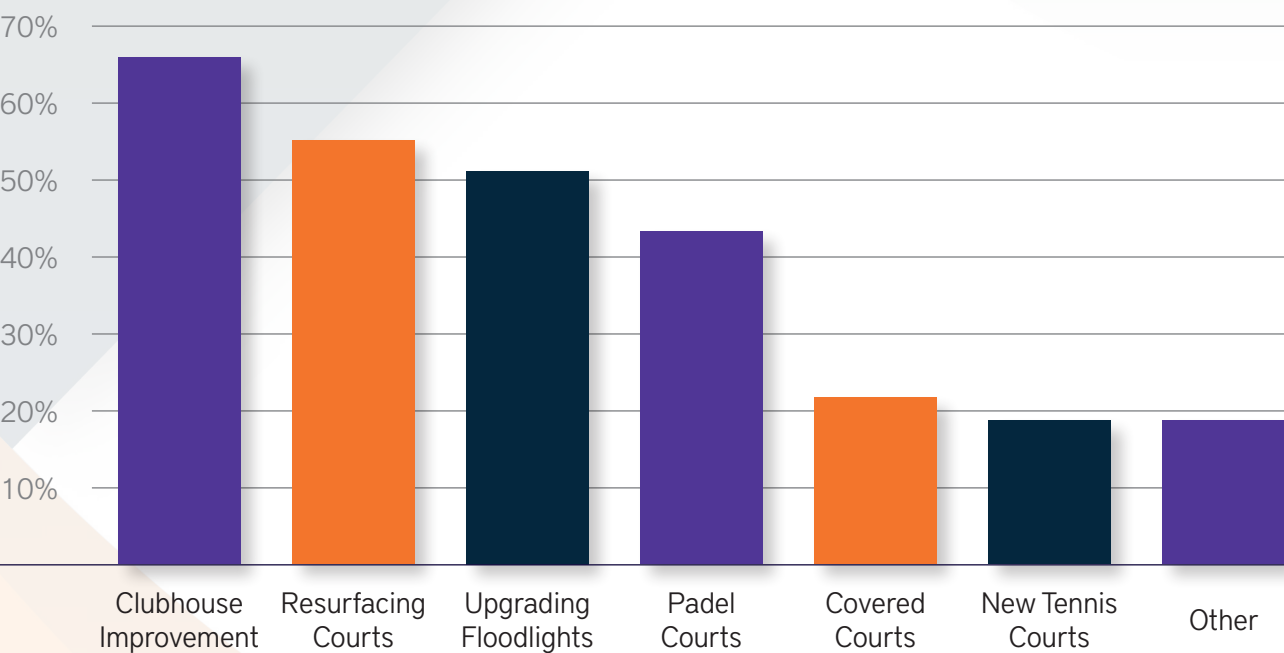
Facilities - Based on 29 clubs

Are you planning to improve your facilities in the next 2-3 years?



Facilities - Based on 27 clubs

What type of works are planned or envisaged?



Facilities - Other works

What other types of works are planned or envisaged?

Clubhouse New-build

Landscaping

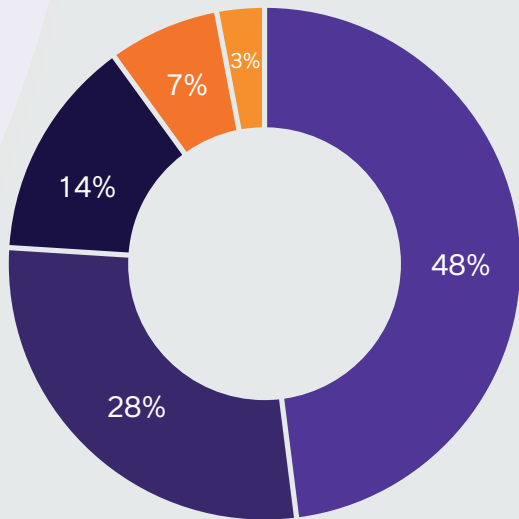
Additional Squash Facilities

Pickleball Courts

Facilities - Based on 29 clubs

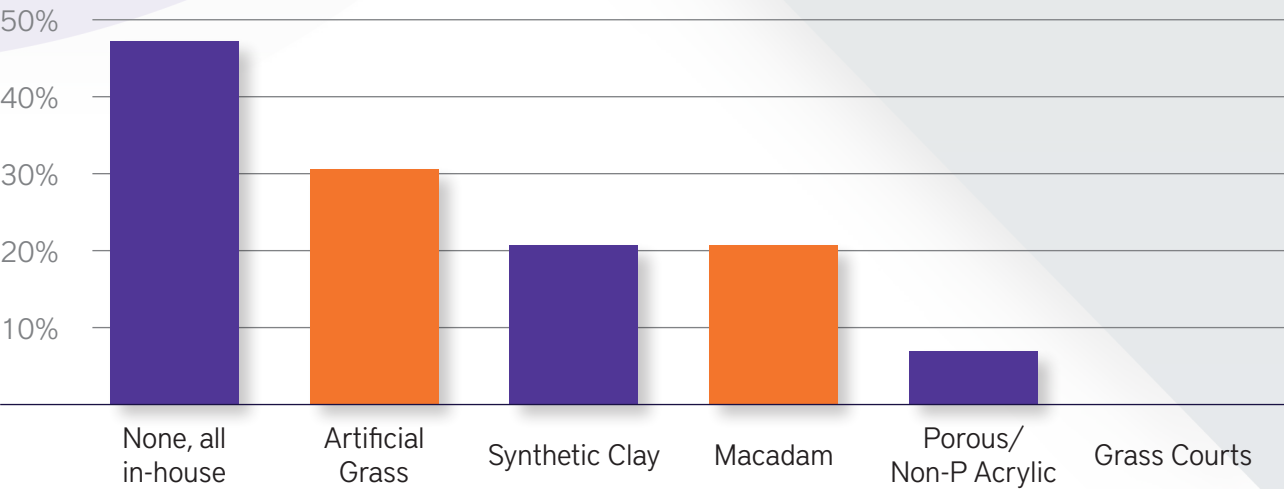
In relation to tennis courts, what type of court appears to be the most popular for your membership?

Artificial Grass	48%
Synthetic Clay	28%
Macadam	14%
Porous / Non-Porous Acrylic	7%
Other	3%



Facilities - Based on 29 clubs

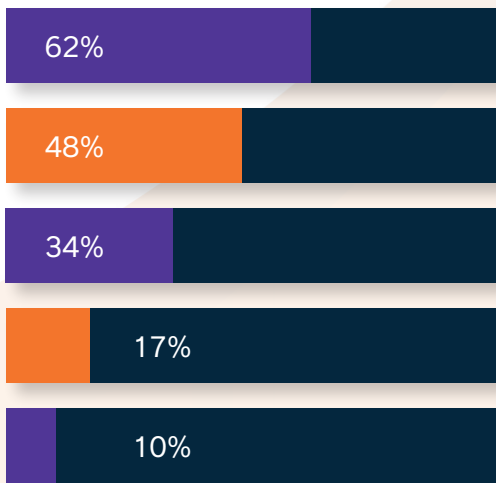
Which of the following types of courts do you outsource for annual maintenance work?



Facilities - Based on 29 clubs

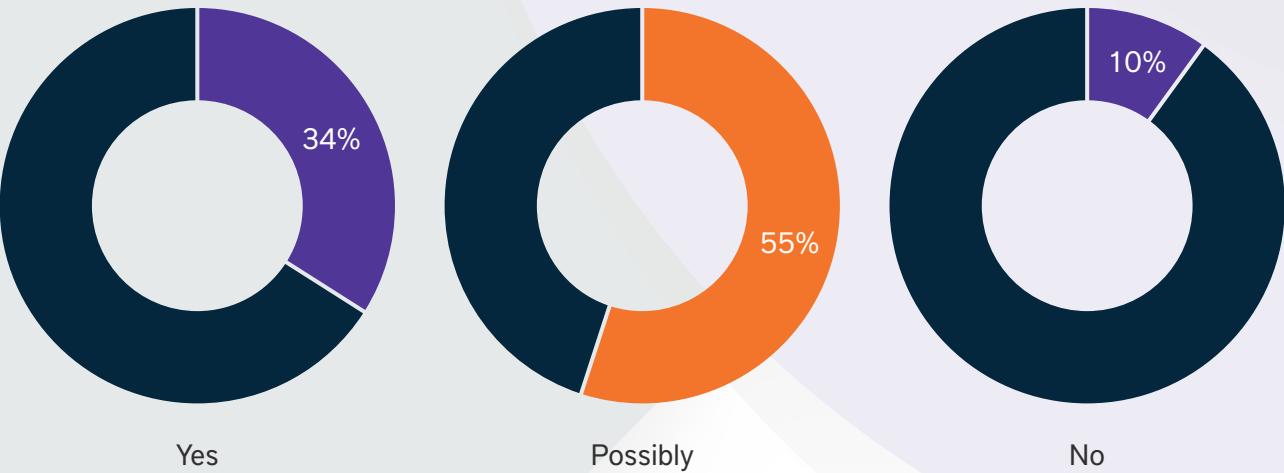
When purchasing court equipment and furniture, court maintenance items etc, how is your supplier selected?

Research online	62%
Current or previous court contractor	48%
Known supplier with long term links	34%
In discussion with LTA/County LTA	17%
Other	10%



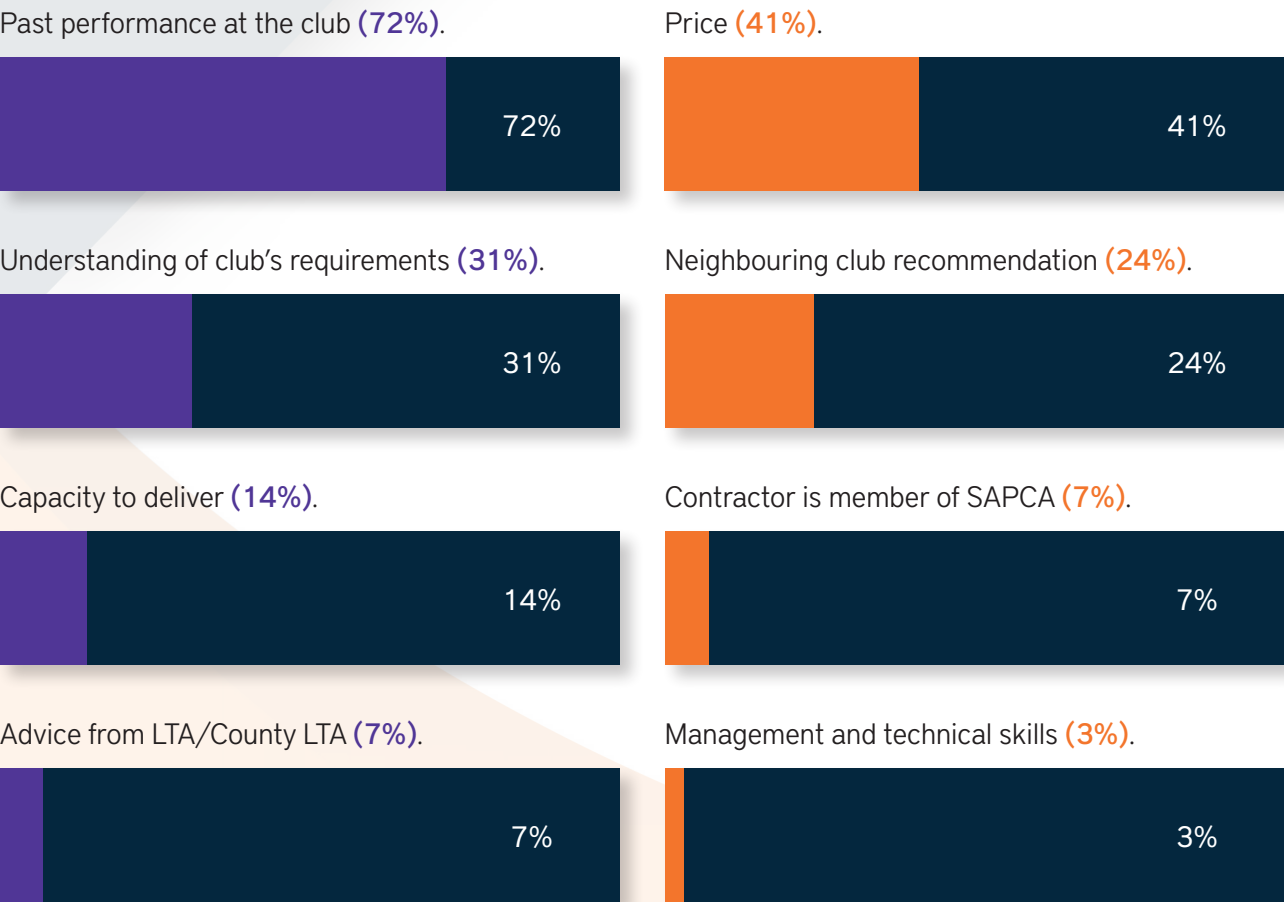
Facilities - Based on 29 clubs

Would you be interested in a central resource to select and purchase items of court equipment?



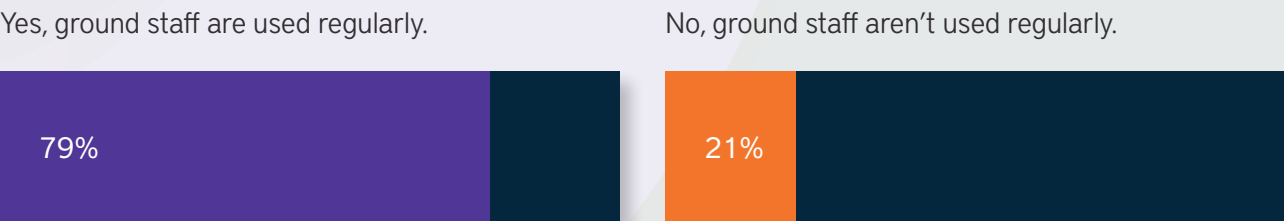
Facilities - Based on 29 clubs

When you are looking to undertake major tennis court works, what are the two most important factors in selecting a contractor?



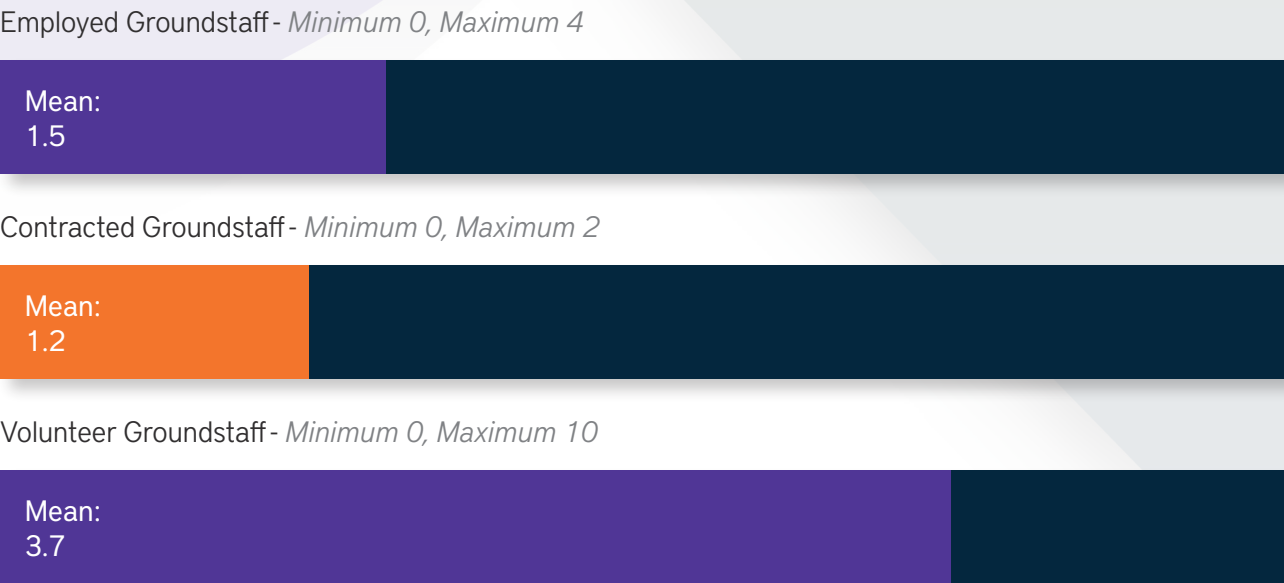
Grounds Management - Based on 29 clubs

Do you employ, contract or use volunteer ground staff at your club on a regular (throughout the year)?



Grounds Management - Based on 29 clubs

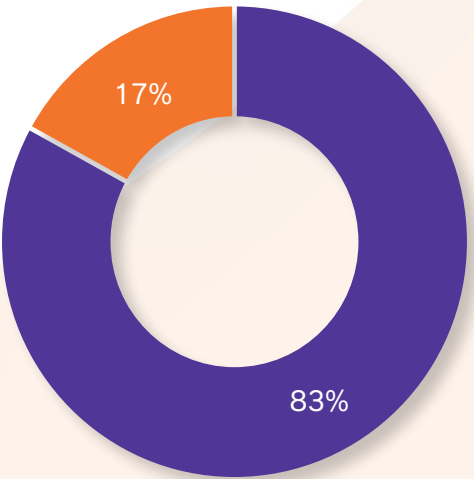
How many of each type of ground staff do you use regularly?



Grounds Management - Based on 29 clubs

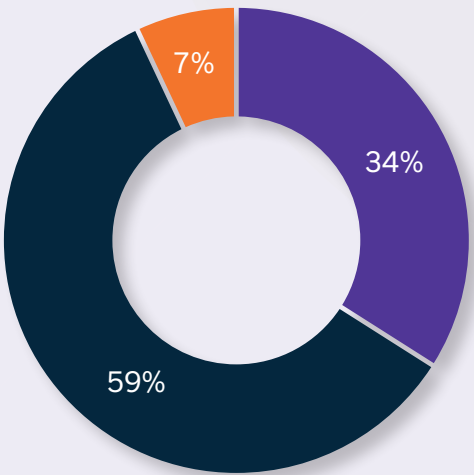
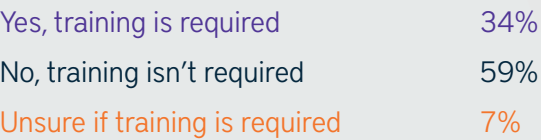
Do you have someone who is appointed or viewed in the role of Head Groundsperson?

Around 83% of clubs responded saying they had someone appointed or viewed within the role of Head Groundsperson, whilst only 17% said they haven't got someone seen to be in that role at the club.



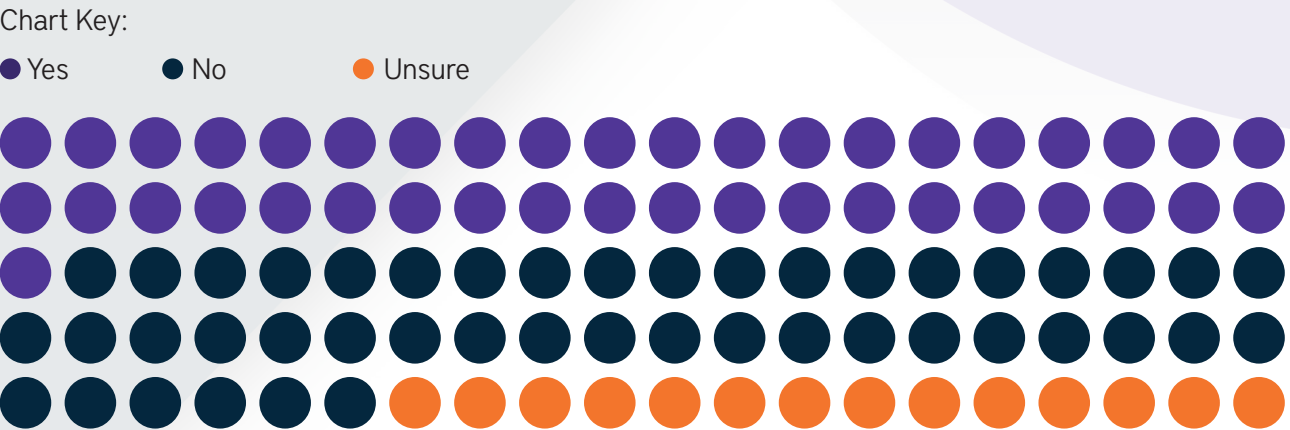
Grounds Management - Based on 29 clubs

Is more grounds management training required by staff or volunteers?



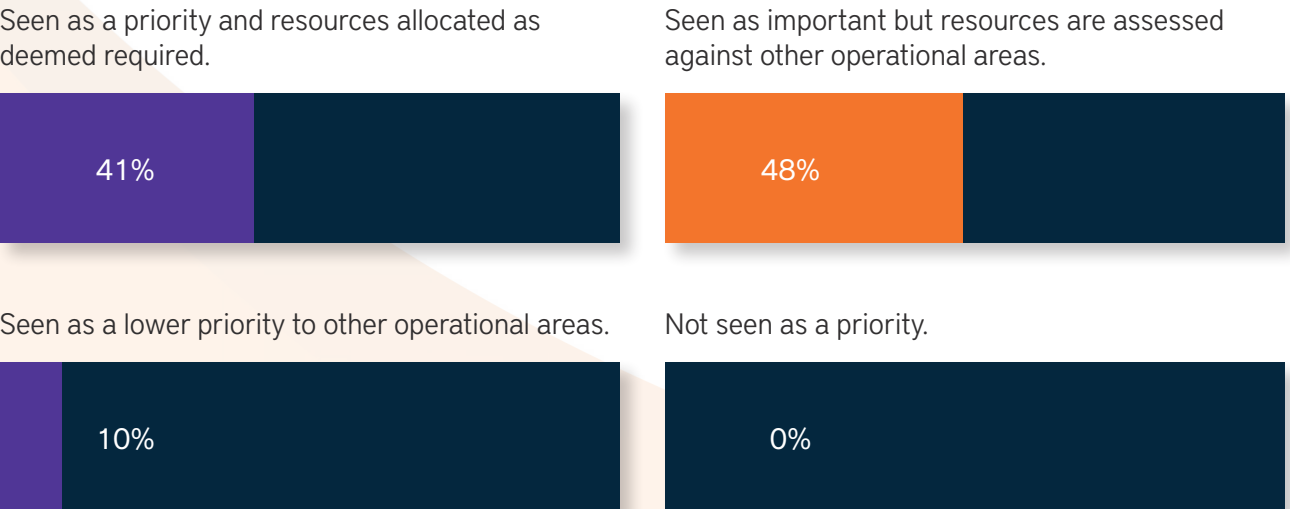
Grounds Management - Based on 29 clubs

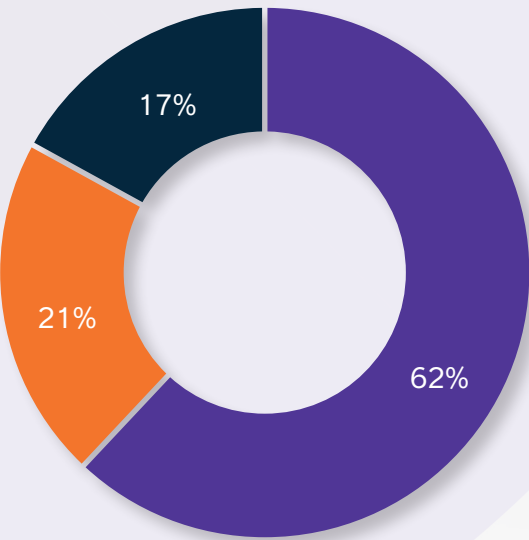
Would the club benefit from additional specialist or general grounds management support and advice?



Grounds Management - Based on 29 clubs

How does the club assess the value of grounds management to the operational well-being of the club?





Risk - Based on 29 clubs

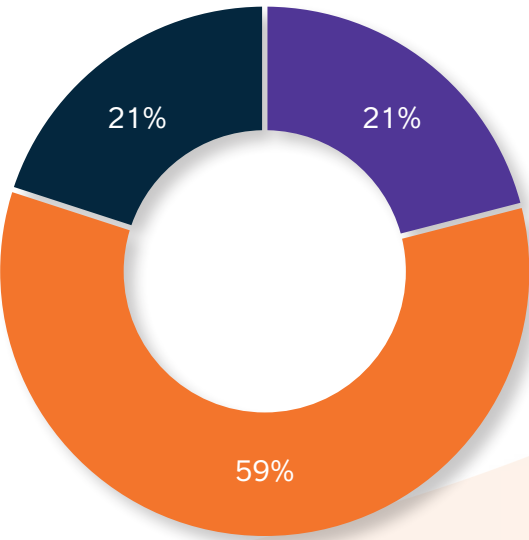
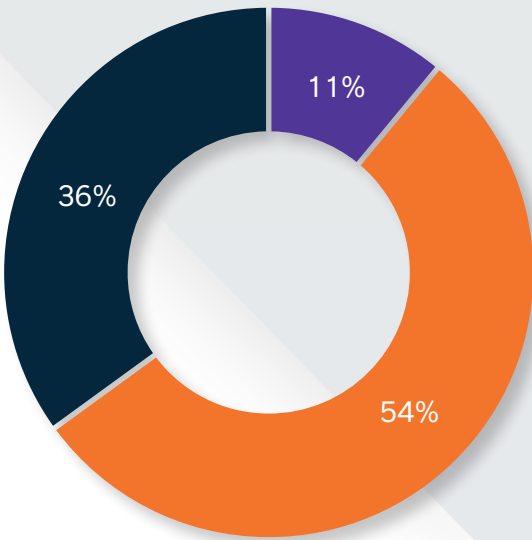
Did your insurance cover policy protect your business / club as you expected it to during the pandemic?

For **62%** of clubs, their insurance did protect their business as expected during the pandemic. However, **21%** of clubs were not covered, and a further **17%** were unsure if they were covered or not.

Risk - Based on 28 clubs

Are there any areas for improvement of insurance cover that you may be looking for at policy renewal time?

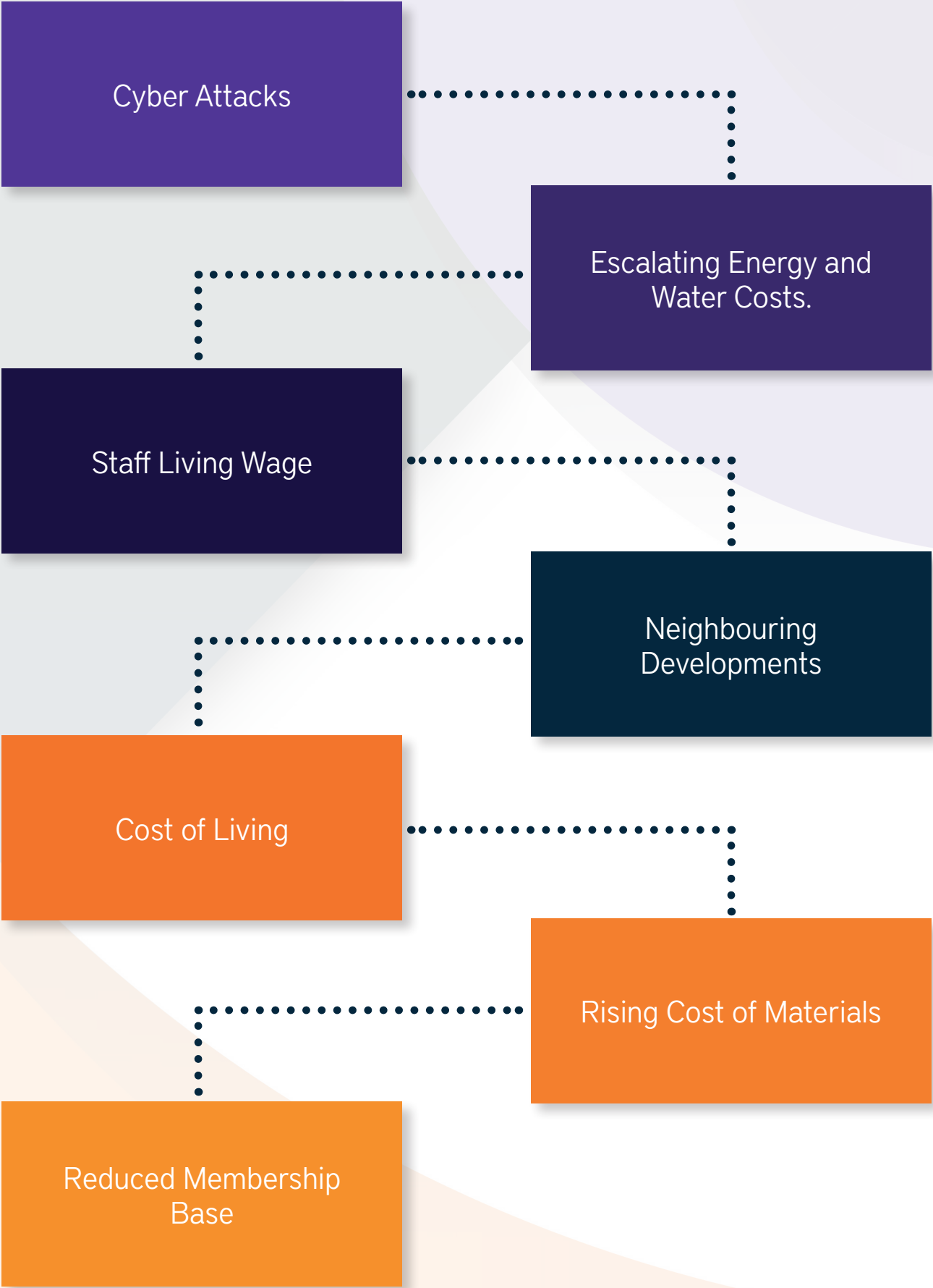
11% of clubs identified there were areas of improvement, **54%** didn't believe any improvement was necessary, and **36%** of clubs were unsure if their insurance covered needed improving.



Risk - Based on 29 clubs

Are you aware of any new or emerging risks that could threaten your business/club in the future?

21% of clubs were aware of new or emerging risks, with around **59%** saying they weren't aware. **21%** of clubs were unsure about any such threats to their clubs in the future.



Management Systems - Based on 29 clubs

Do you have an online system for booking courts?

Yes

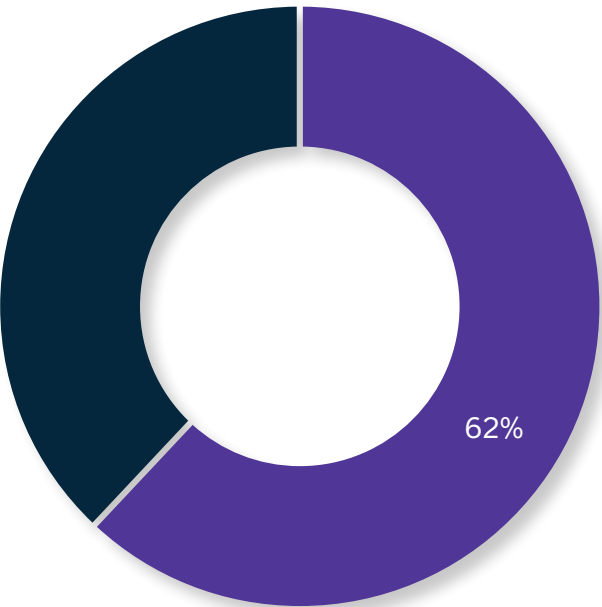


No

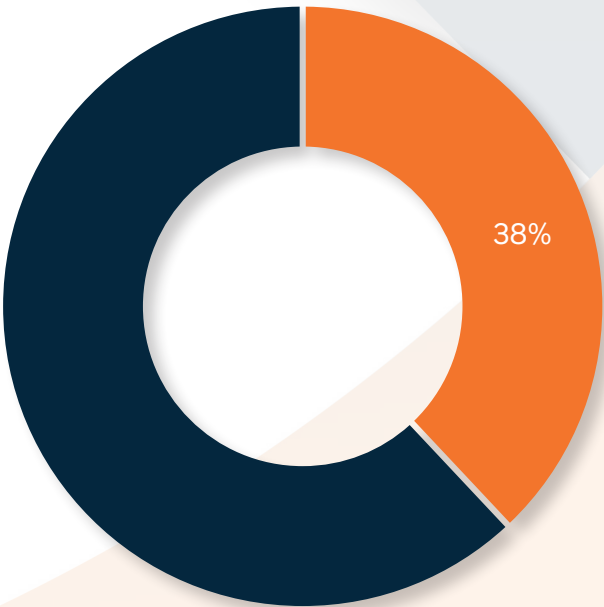


Management Systems - Based on 29 clubs

Is the court booking system part of a wider club management system for membership data, fees, analytics, other club operations etc?



Yes, we use our court booking system for wider club management as well.



No, we don't use our court booking system for anything else.

Management Systems - Based on 29 clubs

What is the name of the system used?

System/Supplier	Court Booking System		Wider Management Sysem	
ClubSpark		12 Clubs		9 Clubs
MyCourts		5 Clubs		3 Clubs
Ebookingonline		2 Clubs		1 Club
Open Play		1 Club		0 Clubs
In-House System		1 Club		0 Clubs
ASP Systems (Payne Automation) Mindbody		3 Clubs		1 Club
Clubnet		1 Club		1Club
Perfect Gym		1 Club		1 Club
Globus Data Solutions		1 Club		1 Club
Club Solution		1 Club		0 Clubs
Clubsys		1 Club		0 Clubs

Some clubs use a combination of two systems for wider club management areas.

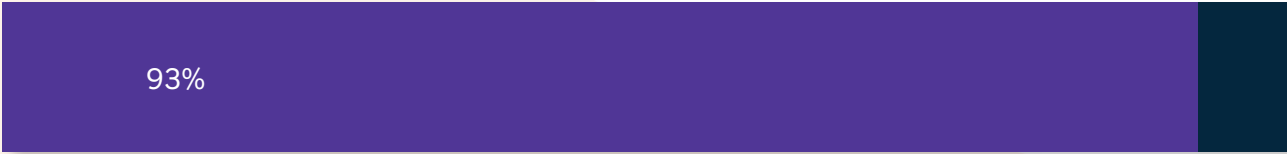
Management Systems - Based on 29 clubs

Do you run any form of apprenticeship scheme for club administrators?

Yes, we run some form of apprenticeship scheme to help grow / develop club administrators.



No, we don't currently run any apprenticeship scheme for this.



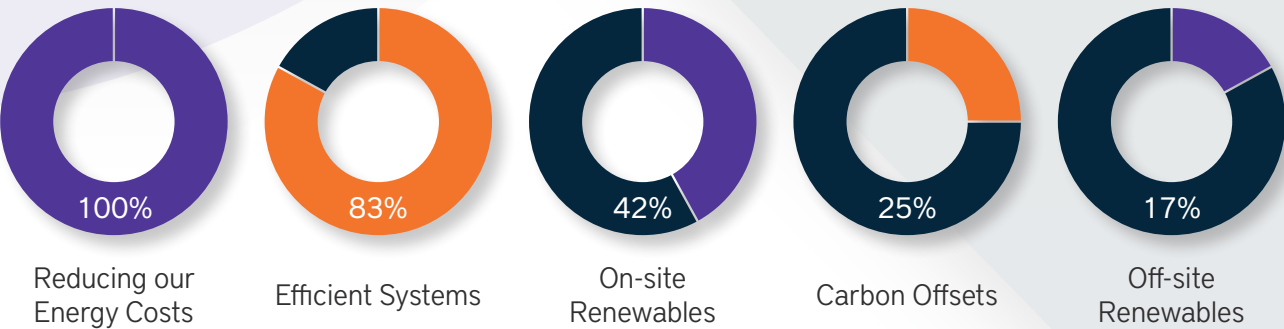
Sustainability - Based on 29 clubs

Has your club developed a Sustainability Strategy?



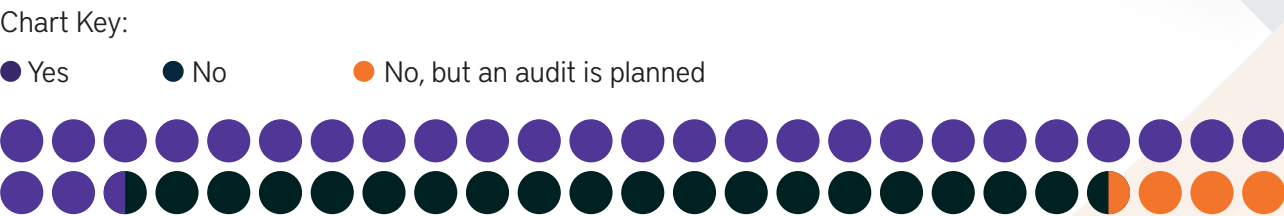
Sustainability - Based on 12 clubs

Which of the following has been included or considered as part of the Sustainability Strategy?



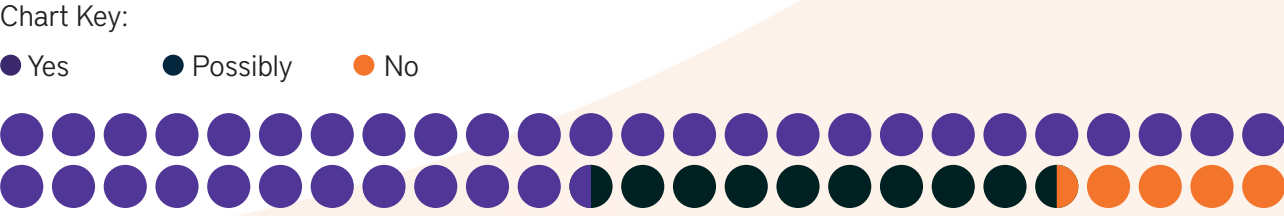
Sustainability - Based on 29 clubs

Have you recently undertaken an energy audit to help assess where savings can be made?



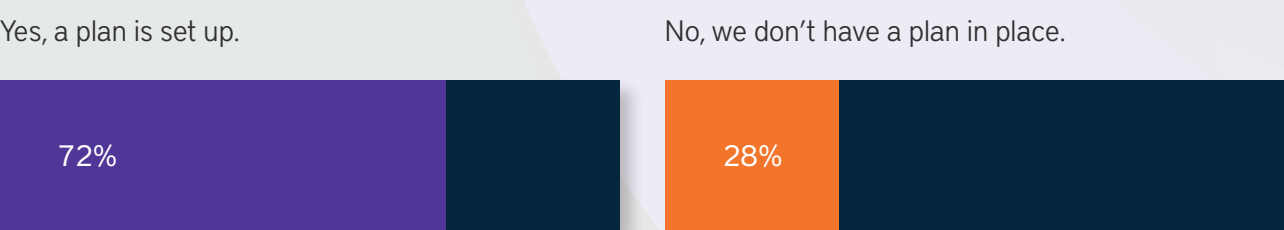
Sustainability - Based on 11 clubs

Would a free-of-charge independent energy audit of interest to your club?



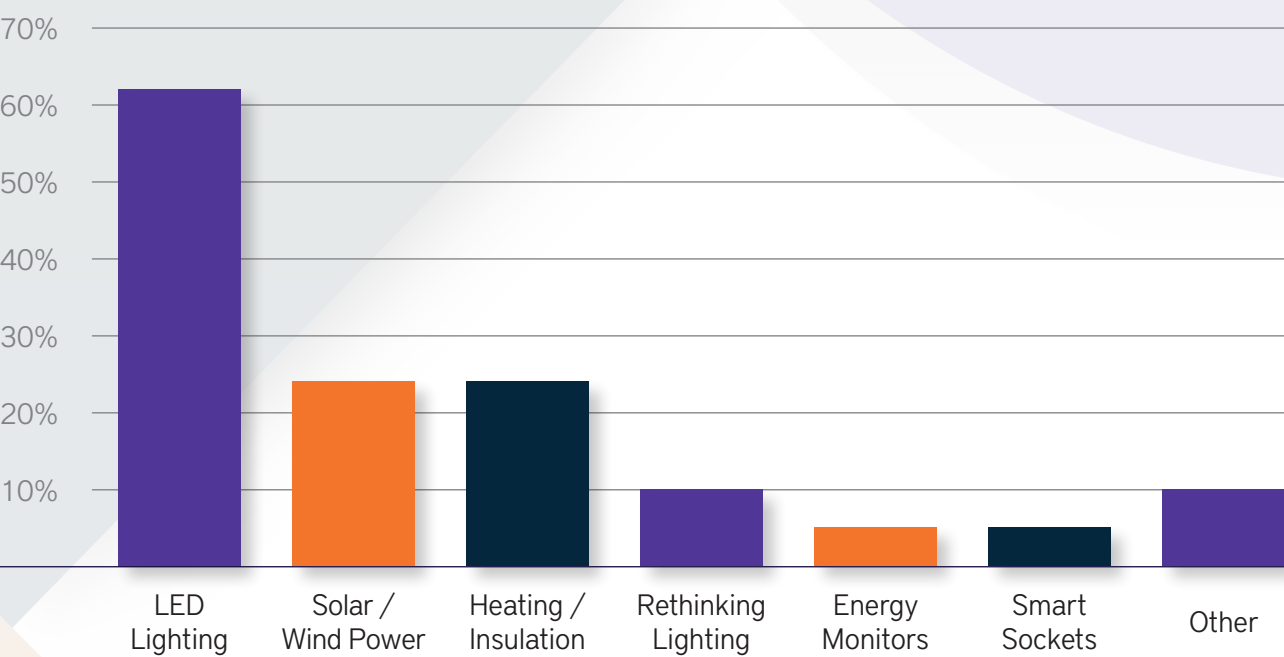
Sustainability - Based on 29 clubs

Do you have a plan to help reduce energy costs at your club?



Sustainability - Based on 21 clubs

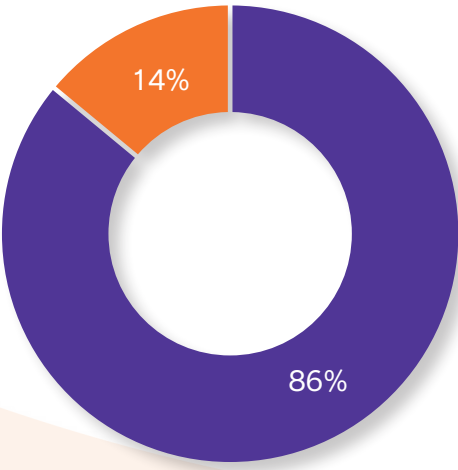
What areas are being considered / evaluated to reduce costs?



Sustainability - Based on 29 clubs

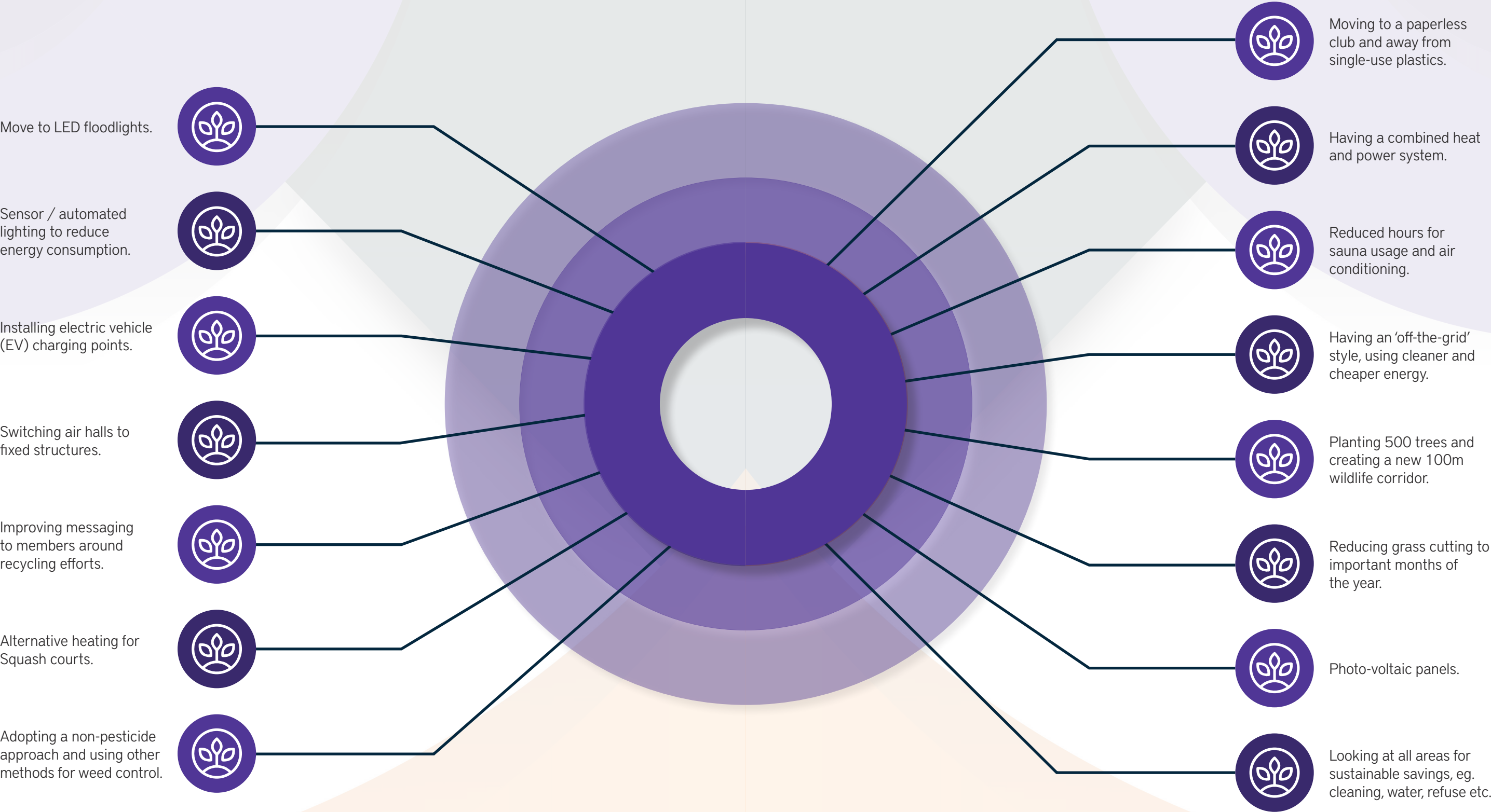
Would you be interested in receiving advice on Sustainability and how your club can address this issue?

When asked, approximately 86% of all participating clubs showed interest in gaining more advice surrounding sustainability, with only 14% of clubs not showing interest.



Sustainability - Based on 29 clubs

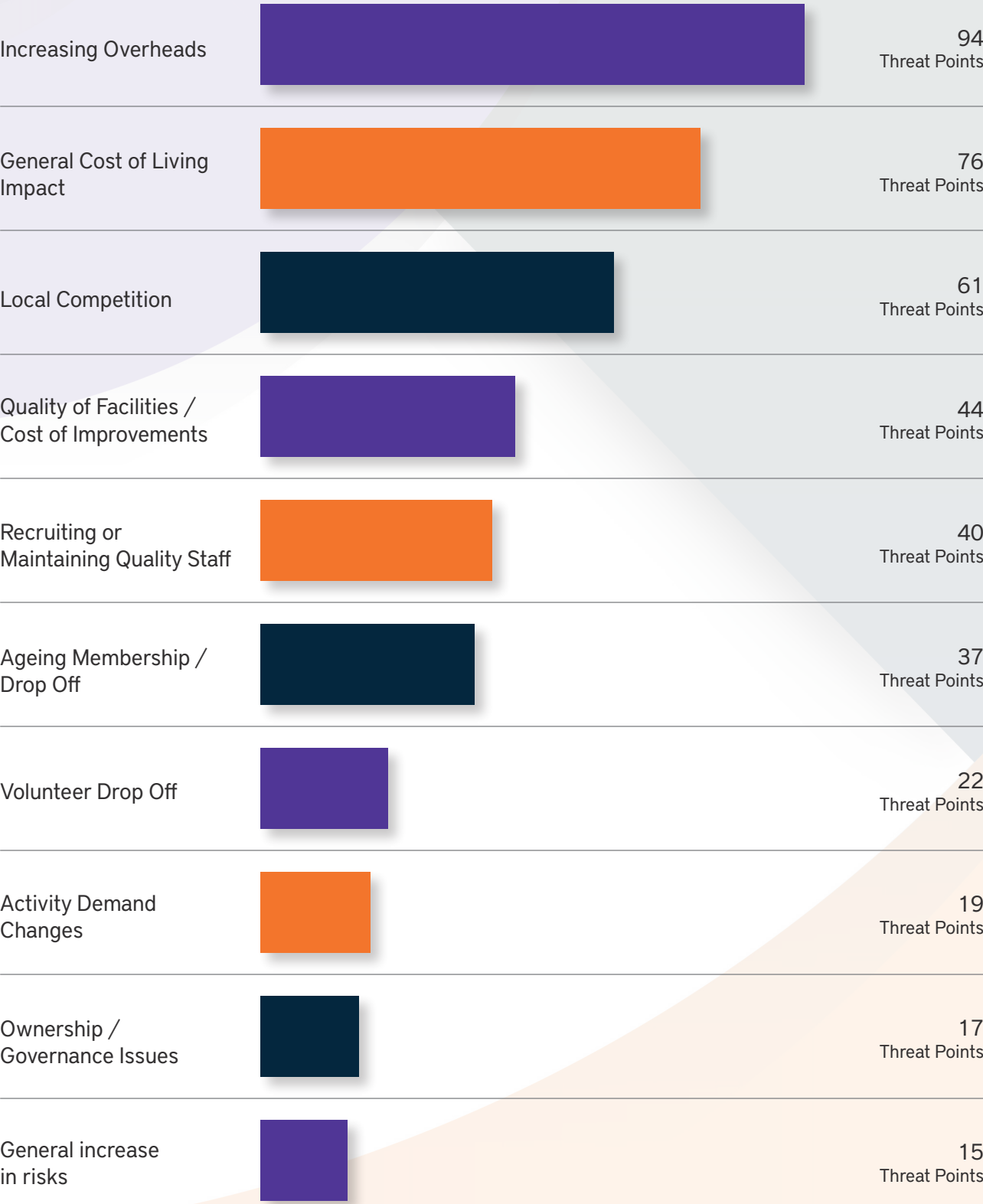
Are there any areas being considered to make your club more sustainable?



Club Future - Based on 29 clubs

What are the top 3 **THREATS** to your business in the next 2-3 years?

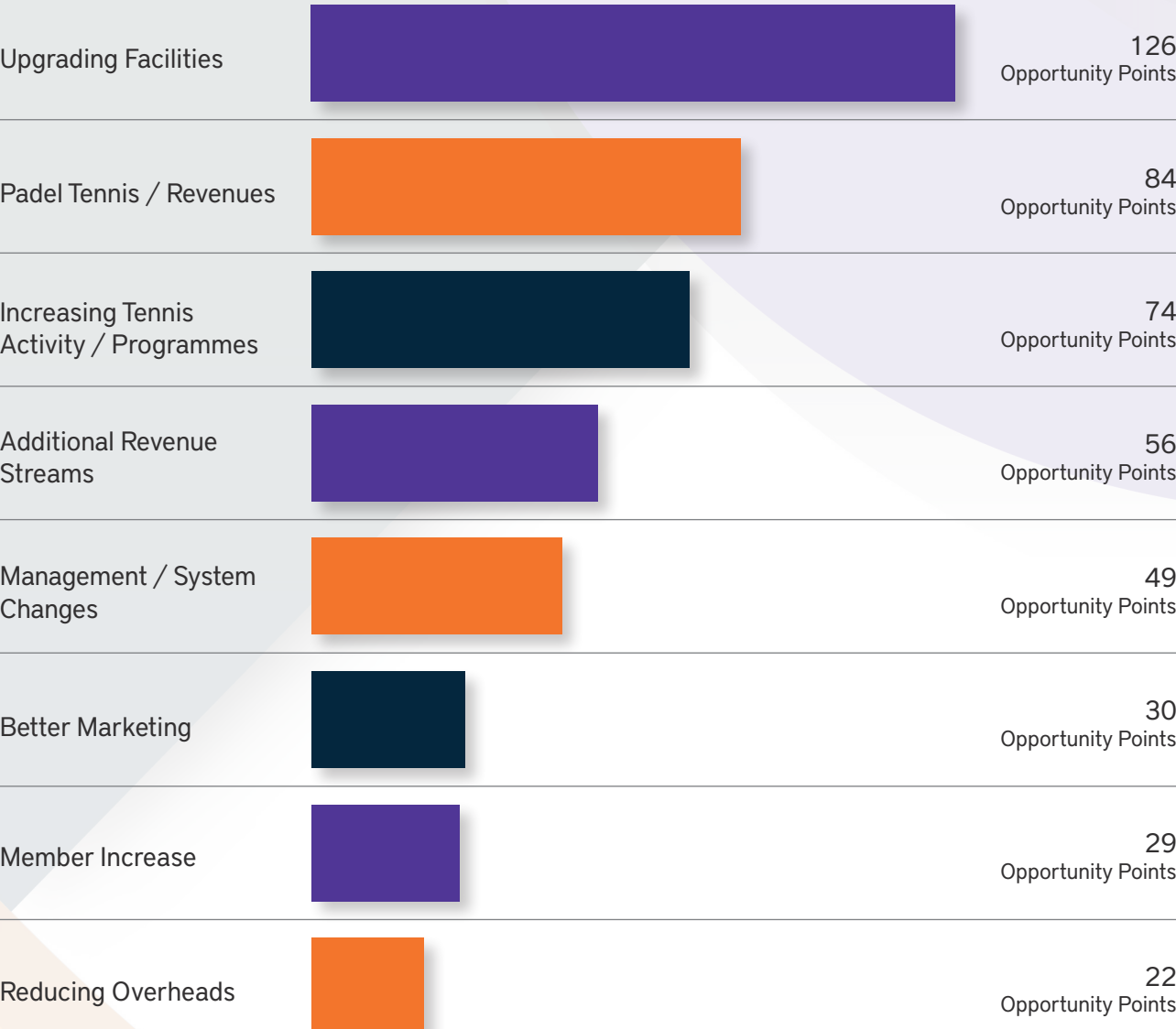
(Top threats given 10 points / second top given 5 points / third top given 2 points)



Club Future - Based on 29 clubs

What are the top 3 **OPPORTUNITIES** to improve your business in the next 2-3 years?

(Top opportunities given 10 points / second top given 5 points / third top given 2 points)

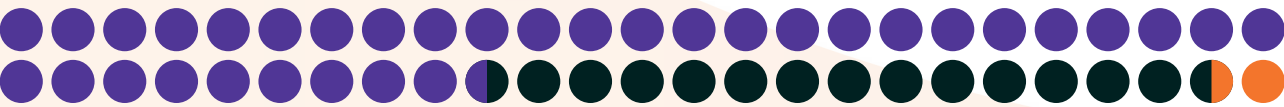


Club Future - Based on 29 clubs

How positive or negative do you feel about the future of your tennis club?

Chart Key:

● Very Positive ● Quite Positive ● Neither positive or negative



Notes

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Get in Touch

If you have any queries or would like your club to be invited to participate in the 2023 survey, please contact:

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Thank You




To all the **clubs** that contributed to the report’s findings.
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Gen2 is delighted to be the TIA UK’s appointed insurance partner and to sponsor the Tennis Club Business Report 2022.

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