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Tennis Talking Points

These recent highlights cover a broad spectrum of topics regarding the tennis industry, with a focus on key messaging points and industry efforts. The Tennis Industry Association is the No. 1 research source for the tennis industry, tracking participation numbers along with tennis equipment sales, tennis retail and facility trends, and additional market intelligence.

TIA STATE OF THE INDUSTRY

The TIA recently released its fifth annual “State of the Industry” report, which compiles key findings from the trade association’s more than 70 annual research studies and surveys into a top-line document for the past year.

TENNIS INDUSTRY AT A GLANCE

Total Tennis Economy	\$6.06 billion (year-end 2017)
Total U.S Tennis Participation	17.84 million (year-end 2018)
Core Tennis Players (10+ times/year)	9.67 million (2018)

(Note: Participation data is from the annual Physical Activity Council Study, which is a different methodology from pre-2013 participation reports.)

Manufacturer Wholesale Shipments (Units)	Year-End 2018
Tennis Racquets	2.23 million
Tennis Balls*	103.6 million
Red, Orange, Green Balls*	4.40 million
Tennis Strings	2.75 million
(*Unit = 1 ball)	

THE TENNIS ECONOMY

- The total U.S. tennis economy showed a 1.1% increase to \$6.06 billion in 2017, from \$5.99 billion in 2016.
- Facility revenue, lesson revenue, ad revenue, and sponsor revenue showed positive growth in 2017.

TENNIS PARTICIPATION

- Total tennis players: 17.84 million
- Play occasions: 383.9 million
- Core tennis players: 9.67 million
- Youth tennis players: 4.64 million
- Cardio Tennis players: 2.50 million

“Core” tennis players are defined as playing 10 or more times a year. This is a shift from our past focus from “frequent” players (21+ times a year). Core players account for 94% of play occasions and nearly 90% of spend in the tennis economy. It is also more in line with the focus of other sports in the Physical Activity Council.

Youth Participation

- 4.64 million youth tennis players hit the courts in 2018, up 1.6% from 2017. Core youth players saw a significant increase in 2018 at 6.7% for the year.
- As of the December 2018, more than 34,000 providers including certified tennis professionals, teachers, community partners and volunteers were registered on NetGeneration.com, with more than 4 million page views from over 630,000 unique visitors.
- More than 18,300 providers have been verified by the USTA by completing the Safe Play Program, which includes an NCSI background check.
- Verified providers have access to a curricula library developed by leading industry experts in collaboration with the USTA. These curricula accommodate players no matter their age or skill level with lessons designed for Red, Orange and Green ball players. For teachers, the PE Tennis Curricula spans from kindergarten through 12th grade.
- As part of Net Generation, PE teachers are encouraged to partner and connect to local tennis programs outside of schools. In 2017, there were more than 300 School Partnerships, and by the end of 2018, there were 1,947 School Partnerships, which have connected about 1,384,431 schoolchildren to external programs in their community (with an average enrollment of 711 students per school).
- In 2017, there were 1,700 unique teachers who registered for Net Generation and were NCSI background-screen approved. By the end of 2018, there were 5,310 unique teachers registered for Net Generation and have been NCSI background-screen approved.
- In 2018, there were 96,765 unique participants in a total of 12,071 Net Generation tournaments nationwide.
- In 2018, there were 98,058 unique participants in USTA Junior Team Tennis.
- 1,606 courts for youth tennis (36' and 60') were built or lined to date in 2018.
- As of December 2018, there are 22,960 permanent or lined 36' and 60' courts in the U.S.
- Red, Orange and Green ball wholesale shipments were down 1.6% in 2018, but up 34% since 2011.

Adult Competitive Tennis/Recreational Programs

- A total of 81,042 unique participants competed in adult/senior NTRP and Age Group tournaments in 2018.
- Overall participation in USTA Leagues is 944,817, while the number of unique players in USTA Leagues was flat at 310,007 in 2018.
- For 18- to 39-year-old players, there are currently 153 young adult social leagues, as of December 2018.
- The number of unique players ages 18-40 in adult tournaments is up through December 2018, to a total of 33,963, a 3% increase from the same period last year.
- The USTA's Tennis On Campus Program continued its growth, with 751 colleges and universities participating, with a total of more than 46,000 students.

Participation Opportunities/Challenges/Initiatives

- Grassroots initiatives sponsored and supported by the USTA, TIA, and industry partners such as Net Generation (a new platform designed to bring 6- to 18-year-olds into tennis in a safe environment), League Tennis, and Cardio Tennis aim to increase the core-player base.
- In 2018, 14 million people considered themselves tennis players but haven't played in the last year.
- 16.3 million non-players in 2018 indicated they are interested in playing tennis.
- Cardio Tennis participation grew to 2.5 million players in 2018, up 201% since program participation was first measured in 2008 and 12.6% from 2017.
- Play occasions fell to 383.9 million in 2018, down 3.3%.
- The sport attracted 4 million new players on 2017, but the leaky bucket continues as another 4.5 million players left the game.
- Since 2009, the number of core players has decreased by 15%, while non-core (casual) participation increased 14%—leading to more “samplers” of a number of sports.

EQUIPMENT

- For 2018, manufacturers' wholesale shipments for racquets (in units) were down 4.9%. Dollar racquet shipments increased 2.5% relative to 2017. The average wholesale price for racquets increased 7.7%.
- Youth tennis racquet wholesale shipments were down 5.6% in units and 5% in dollars for 2018 vs. 2017.
- Racquet unit sales at tennis pro/specialty dealers were down 2% through Q3 2018 relative to the same period in 2017, with dollar sales increasing 2%. Through Q2 2018, unit sales were down 1.3% and dollar sales were up by 3% from the same period in 2017.
- Wholesale ball shipments through 2018 were down 7.4%, with dollar shipments down 5.8%.
- In 2018, wholesale shipment units of Red, Orange, and Green tennis balls were down 1.6% with a dollar shipment value that was 0.6% higher than 2017.

- Equipment Spending Breakdown for **Core Players** at retail for 2017:
 - **Shoes:** \$211.7 million
 - **Apparel:** \$163.9 million
 - **Racquets:** \$134.5 million
 - **Balls:** \$80 million
 - **Strings:** \$37.8 million
 - **Other (bags, grips, accessories, etc.):** \$84.1 million

Total Core Player spend for 2016: \$712.1 million
Total Player Spend for 2017: \$830 million

TENNIS TEACHING PROFESSIONALS/COACHING EDUCATION

- In 2017, the average number of private lessons taught per week grew 1% compared to 2016.
- Average number of group lessons taught per week by teaching pros decreased 8% from 2016 to 2017. On average in 2017, teaching pros taught nearly 16 group lessons and 13 private lessons a week.
- In 2017, the average price for a private lesson increased 3.0% to \$65, from \$63 in 2016.
- 37% of teaching pros reported an increase in on-court business over the past 12 months compared to the previous 12 months, while 35% said it remained the same.

TENNIS FACILITIES

- 44% of facilities estimate an increase in revenue for 2018 compared to 2017, while 34% said it would stay the same.
- Of the 89% of tennis facilities offering Youth Tennis programs, 52% said the number of hours offered per week has increased over the past year and 26% stated the numbers of hours offered per week stayed the same.
- Facilities are somewhat less optimistic about the future of the tennis industry, with a mean rating in 2017 of 3.27 —indicating an “average” outlook. This is down from an average of 3.6 in 2016.

COURT CONSTRUCTION/FACILITY ASSISTANCE

- The percentage of court contractors indicating the industry was “very strong” grew from 20% in 2016 to 27% in 2017.
- Since 2005, the USTA has completed over 4,000 facility projects totaling more than 40,000 courts and issued over \$14 million in grants, which have resulted in a half-a-billion dollars of tennis infrastructure.
- More than 100 collegiate projects have been supported through the USTA Facility Assistance Program.
- In 2017, 92% of court contractors installed 10 and Under Tennis lines on existing courts.

MEDIA AND PRO EVENTS

- The total prize money for the 2018 US Open increased to a record \$53 million.
- The 2018 US Open delivered coverage from 16 broadcast courts to more than 200 countries.
- In the fourth edition of the USTA’s 11-year media partnership with ESPN, the 2018 US Open on ESPN/ESPN2 averaged more than 1,000,000 viewers and achieved a total audience reach of nearly 44 million viewers across 156 live hours.
- The 2018 US Open Women’s Singles Final between Naomi Osaka and Serena Williams was the most-viewed ever on ESPN, averaging 3.1 million viewers, and the Men’s Singles Final between Novak Djokovic and Juan Martin del Potro was the most-viewed on ESPN since 2015, averaging 2.1 million viewers.

TENNIS AND HEALTH

- Tennis is the ultimate exercise both mentally and physically. A typical tennis match can last from 30 minutes to several hours. Over the course of the match, a tennis player can run 3 to 5 miles. (Dr. Jack Groppel & Dr. Nicholas DiNubile, The Physician and SportsMedicine)
- Playing racquet sports such as tennis regularly may be the best sport to protect against early death, according to a study by Oxford University and researchers in Finland and Australia that followed more than 80,000 people for an average of nine years. People who played racquet sports regularly were least likely to die over the study period, the report found, reducing their individual risk by 47% compared to people who did not exercise, and by 28% over swimmers, 27% over aerobics participants, and 15% over cyclists.
- Playing tennis burns fat, improves cardiovascular fitness, and helps the body maintain higher energy levels. Playing tennis builds muscle power and improves physical capacity. (Dr. Jack Groppel & Dr. Nicholas DiNubile, The Physician and SportsMedicine)
- People who participate in tennis three hours per week (at moderately vigorous intensity) cut their risk of death in half from any cause. (Dr. Ralph Paffenbarger, Harvard University School of Public Health)
- Exercise such as playing singles tennis briskly for 30 minutes or longer, 3 to 4 times a week, can help condition the heart and lungs. (American Health Association)
- Tennis outperforms all other sports in developing positive personality characteristics and physical fitness development. (Dr. Jim Gavin, Concordia University, author of The Exercise Habit)
- Competitive tennis burns more calories (528 to 610 for an hour of singles) than aerobics, inline skating, or cycling, according to studies on caloric expenditures.
- Tennis participation has tremendous physiological and psychological benefits for older individuals. (Dr. James Rippe, Rippe Lifestyle Institute)
- Tennis players scored higher in vigor, optimism and self-esteem while scoring lower in depression, anger, confusion, anxiety and tension than other athletes or non-athletes. (Source: Dr. Joan Finn, et al., Southern Connecticut State University)

GROWING THE GAME—BY THE NUMBERS

- *Cardio Tennis: 2,050 Registered Sites, 5,162 coaches and 570 in the global Cardio Tennis Instructor Network*
- *Online Court Reservations via TennisConnect: 1.93 million*
- *More than 2,300 tennis events in 32 states were registered as part of official Play Tennis Month activities during the month of May, all searchable on PlayTennis.com.*
- *The TIA Webinar Learning Series had nearly 1,000 attendee registrations for the first 8 months of 2018. More than 6,700 individuals have replayed past TIA Webinars, with over 9,100 total plays of TIA Webinar videos.*
- *CareersInTennis.com, has 3,320 registered jobseekers and 565 tennis industry employers with nearly 230,000 job views since launching in 2010. Annually, the site averages more than 120 new job opportunity postings by industry organizations and businesses.*
- *The USTA's Tennis on Campus continued its growth, with 732 colleges and servicing 45,000 student athletes.*

MOVING FORWARD — TIA FOCUS AREAS FOR 2019 & BEYOND, together with our partners!

- Enhanced research and market intelligence to help strengthen the Business of Tennis.
- Working together with our industry partners to support USTA's youth tennis efforts to "fill the future pipeline."
- Providing more platforms for networking and shared best business practices for tennis owners and managers.
- Supporting collaborative efforts to attract and retain players and new short-court alternatives for adult play.
- Highlighting important technology trends to help attract and grow more players, fans and consumers