GROWING TENNIS Through Teamwork

New TIA initiatives offer more services—for tennis facility operators, retailers, teaching pros, manufacturers, reps, court contractors and pro shop managers—to keep your business moving forward.

- Growing the Game
- Tennis and Technology
- Your Research Source
- Increasing Your Profits
- Online Access
- Support Your Industry
From the TIA Executive Director

Let’s Keep This Sport Moving Forward!

Tennis’ unparalleled growth among traditional sports is the result of many people in this industry working toward a common goal. The Tennis Industry Association and all its partners—from major manufacturers and organizations to facilities, retailers, and individual supporters—are committed to “Growing Tennis Through Teamwork.”

In this special section, you’ll learn more about the TIA and what we do, including the services and tools we offer to help your business grow.

Founded more than 30 years ago as the American Tennis Industry Federation, the TIA is the not-for-profit trade association representing tennis. We provide the industry with research, administer grassroots initiatives, deliver industry news, maintain databases that connect all parts of the industry, and focus on technology and services to help the industry—and your business—grow.

Our dedicated Board of Directors and Executive Committee, including new President Dave Haggerty, represent all areas: major manufacturers, organizations, retailers, court contractors, teaching pro groups, pro tennis groups, and more. We have a great support team that provides valuable services, and a service-oriented staff to assist you.

At the TIA, we’re strongly focused on using technology to help your business. In 2006, more than 6 million people tried tennis for the first time, and 2 million logged-on to find a place to play, programs to learn tennis, and people to play with. If you’re at a tennis facility, you can list your programs and information with us for free so consumers can find you (see page 13). And with support from our partners, you also receive free product to use and marketing support to attract new players when you become a Tennis Welcome Center or Cardio Tennis site (see page 5). Plus check out the grant and co-op funding opportunities available to you.

Want to run your business online? TennisConnect (see page 9) provides all you need. Last year, more than 790,000 courts were booked online through TennisConnect—up 300 percent from 2005.

Want to save money on credit card processing fees, shipping, insurance, and advertising? See page 12. Want to compare your business operation to others? See the market intelligence the TIA provides on pages 10 and 11.

Finally, visit TennisIndustry.org to see how all areas of the industry are connected and how you can get involved. Your comments and ideas are welcomed.

Through your continuing support, we can keep the momentum strong for a healthy sport.

Jolyn de Boer

Meet the TIA President & Board of Directors

The 22 individuals who make up the Board of Directors of the Tennis Industry Association represent 500 years of work experience in the tennis business. Some of them started in the business with an after-school job in a tennis shop or as an assistant pro during the summer season. All of them play the game. All of them are passionate about working together for the good of the game. And all of them carry a certain perspective on the TIA’s goal to promote and grow the economic vitality of the sport.

“In the TIA, we’re dedicated to working together—with our colleagues and competitors—to make sure that the sport remains healthy and continues to grow,” says Dave Haggerty of HEAD/Penn, who started a two-year term this past January as the volunteer president of the TIA and is also on the USTA Board of Directors. “This spirit of cooperation is paying dividends for everyone in the tennis business.”
What Drives You?

Every one of the TIA Board Members has passion for the game, and the business of tennis. Here is a sample of what fires them up.

“I’ve seen hundreds of examples of how tennis has helped kids find the right path, adults take control of their health and fitness, and families bond. The physical, mental and social benefits of the sport are unsurpassed. My passion is bringing new people into the game.”

—Kurt Kamperman, USTA

“To me it’s continuing the growth of any sport with today’s technology and giving the end-user an opportunity to compete at a higher level every day.”

—Steve Dunlap, Sports Authority

“The No. 1 focus should be growing the game. The more participation, the more business for all of us.”

—David Bone, USRSA

“I get excited about tennis products that make the game easier to play and more enjoyable for the average club player, whether that’s technical innovations in racquets, balls or accessories.”

—Kai Nitsche, Dunlop Sports Group

“What excites me most are programs that introduce the game to kids, because that’s the future of the game.”

—Jeff Williams, Miller Sports Group

“We get to help people have fun playing tennis and staying healthy at the same time. How great a job is that.”

—John Welborn, Lee Tennis

“The people in this industry are probably the most friendly and cooperative in doing what’s right in the sport that I’ve ever met. You just don’t run into that often.”

—John Graham, DecoTurf
A Unified Effort

Together with the USTA and industry partners, the TIA is helping to drive tennis forward, for the benefit of all.

Over the last three years, thanks to the unified efforts of many people and organizations in tennis, we’ve seen growth in participation, equipment sales, pro tournament attendance, and much more. All of this has led to an increased awareness of tennis—both on the recreational level and at the pro level.

The popularity of the pro game is clearly helping draw in viewers and fans. We’ve seen increased air time on TV; well-known stars such as Roger Federer, Maria Sharapova, and James Blake generating new interest; and an exciting lineup of tournaments in the summer-long US Open Series, capped by the US Open itself.

The various organizations and companies involved in tennis—the USTA, manufacturers, teaching pro groups, retailers, tournament directors, media, and others—are continuing to come together to develop and support the sport with a variety of initiatives designed to generate more interest in tennis, get more people playing, retain them in the game, and, importantly, bring more business to retail shops, facilities, and all parts of our industry. The USTA in particular has stepped up key grassroots funding over the last four years, and that’s continuing to pay dividends with successful programs such as Tennis Welcome Centers, CardioTennis, Tennis in the Parks, and many more.

The TIA, with key support from the USTA, manufacturers, and others, is a driving force behind many of these cooperative initiatives. “Because of our position as the industry’s trade organization where companies and people all come together for the good of the game, the TIA truly belongs to everybody,” says TIA Executive Director Jolyn de Boer. “We’re here to serve as the vehicle to help drive growth in all sectors.” Together with the USTA, the TIA is involved in the planning, development, marketing, and research for both the tennis trade and the consumer.

“The TIA is an organization that builds consensus,” adds TIA President Dave Haggerty. “And the streamlined nature of the TIA, along with its focus on technology, allows it to be flexible, adjust fast, and get things done quickly.” That’s important in this industry, because programs, priorities, and campaigns that worked great a year ago may need to be adjusted today to continue to make an impact.

GrowingTennis.com

The umbrella for a lot of programs that can really help your business is the GrowingTennis.com website. And it’s easy for facilities to go onto the site to keep their information up to date and manage their program details.

Through GrowingTennis.com, the TIA delivers the Tennis Welcome Center, Cardio Tennis, and Growing Tennis 50/50 programs and initiatives, among others.

“Importantly, we maintain the databases, communications with the facilities, and information for the seven websites we manage in-house,” says de Boer. “Not only can we make changes instantly to a website, but also, all facilities in our databases have 24/7 access to the system to update their own information.”

The seven TIA-maintained websites are:

• GrowingTennis.com
• TennisIndustry.org
• Partners.TennisWelcomeCenter.com
• TennisWelcomeCenter.com
Part of the TIA’s major outreach is to get facilities to go to www.GrowingTennis.com to input their information, programs, facility details, and so forth. The information can be accessed at any time and is managed “live” on TennisWelcomeCenter.com, CardioTennis.com, and other industry sites, including Tennis.com, TheTennisChannel.com, and USTA.com.

Consumers can find a place to play, players to play with, and program offerings. The TIA has been constantly making improvements to its technology since these systems were added in 2003. All facilities have the opportunity to get their message out with a free web presence on these sites to connect with the tennis marketplace.

Tennis Welcome Centers

One excellent example of evolving programs and approaches is with the Tennis Welcome Center and Cardio Tennis initiatives.

After a few years of running separate programs, the TIA and industry partners recognized the advantages to be gained by combining resources and synergies with both the TWC and CT initiatives. Now, all Cardio Tennis sites are required to be Tennis Welcome Centers, too.

The push for quality Tennis Welcome Centers continues through the TIA and the USTA. Currently, there are more than 2,000 TWCs in the U.S., with 800 of those located at public parks. Pro sensation Maria Sharapova continues as the spokesperson for TWCs, appearing in advertisements and promotional materials for facilities to use.

The TWC program continues to receive support from manufacturers. In 2006 there were more than 2.5 million special hangtags on beginner racquets, along with 25 million special labels on ball cans, and inserts in tennis shoe boxes. More than 2,000 banners are up inside and outside facilities around the country, supported by 5,900 Maria Sharapova posters.

As a result of these industry efforts and TWC target market advertising, page views on www.TennisWelcomeCenter.com in June and July 2006 increased from an average of 40,000 per month to 150,000 per month. Also, the target market initiative in 2006 included Tennis Block Parties and Business Development Workshops held throughout the USTA sections.

And TWCs are receiving support from the USPTA and PTR, along with the media and U.S. tennis writers. The TIA and USTA recently recognized the Top 50 TWCs across the country. Recipients, who were listed in various publications, received wall plaques to display at their facilities.

TWCs also receive a boost from the “Growing Tennis 50/50” program—a joint effort by the TIA and USTA that provides more than $200,000 in matching funds for facilities and programs to use for advertising and promotional efforts to attract new adult and junior players. These funds are only available for TWCs, which can receive up to $2,500. (For more information, and an application for funding and sample ads you can run, visit www.GrowingTennis.com.) There also is a new TWC electronic newsletter and a new internet-based community site under development for sharing practices and event searches.

Target marketing through TWCs is focused on providing resources and support to individual facilities that are committed to promoting entry-level programs and transition programs for new players. And workshops for TWCs include the Cardio Tennis model.

Through surveys and follow-up calls to facilities, TWCs have consistently improved
over the last few years. "Staff is much more aware that programs for new players are going on at their own facilities, and they are handling these first-time callers more effectively," says de Boer. Other quality assurance programs include TWCS receiving automated feedback from their websites if information is not available when consumers are searching for a place to play tennis.

Cardio Tennis

Cardio Tennis, officially launched a year and a half ago, continues to gain momentum throughout the country—and, in fact, the world—as more and more people realize that they can’t take their health for granted. Cardio Tennis is a fun, active way to get in shape, and to help hone tennis skills.

And the popular demand for a fitness program such as Cardio Tennis is certainly prevalent. Take, for instance, the phenomenal growth of the fitness chain Curves. In just seven years, Curves opened more than 7,800 locations in the U.S., and 10,000-plus worldwide, answering a demand for programs that lead to improved fitness and lifestyles. By comparison, it took fast-food giants McDonald’s and Subway more than 25 years to open the same number of locations.

Cardio Tennis, which includes both drill-based and play-based exercises, is designed to keep the heart rate in the ideal zone, giving players of all skill levels a healthy workout in a fun environment. “Cardio Tennis is all about variety, and that’s what I love about it,” says fitness guru Denise Austin, who will continue as the Cardio Tennis spokesperson. Currently, there

The Team Behind Cardio Success

The National Cardio Tennis Speakers team was formed at the inception of the Cardio program in early 2005 to help educate the industry and serve as the official National trainers. Today the team consists of a diverse group of 24 who are some of the most well-respected tennis teaching pros in the U.S.

The volunteers who make up the team are certified pros from both the PTR and USPTA. Each member runs a successful Cardio Tennis program and exemplifies the qualities of an outstanding Cardio Tennis pro, such as passion, energy, great feeding skills, and a strong belief in the program.

Team members work with TIA Cardio Tennis Manager Michele Krause (above) to promote the program. Their contributions take on many forms, such as writing articles, education and training through Cardio Tennis workshops and at industry events.

Most important, they play an ongoing role in the continuous development and direction of the program. "The Speakers Team is an amazing group of people," says Krause. "Cardio Tennis would not be where it is today without their dedication to the program."

Besides Krause, the National Cardio Tennis Speakers Team consists of:

Katrina Adams
Eric Alexson
Jorge Andrew
Samantha Ardenfriend
Jorge Capestany
Ken DeHart
Lee DeYoung
Carmen Garcia
Feisal Hassan
Luke Jensen
Whitney Kraft
Greg Moran
Ted Murray
Ajay Pant
Greg Patton
David Robinson
David Schwartz
Heather Silvia
Butch Staples
J. Webb Horton
Mike Woody
Sophie Woons-Johnson
Rosie Baries (not pictured)
are 1,600 Cardio Tennis sites in the U.S.

And new this year to the Cardio Tennis National Speakers Team is Luke Jensen, former pro player and current ESPN tennis analyst. “Cardio Tennis is a perfect fit to grow tennis among the fitness crowd,” says Jensen. “The program, in my opinion, is what needs to happen for people who take step aerobics and kickboxing and want to try something new and get fit.”

Data from surveys of Cardio Tennis sites and customers prove the effectiveness of the program, and show that facilities are realizing increases in lesson revenue, program fees, pro shop sales, court bookings, memberships, and participation. There is also increased interest in delivering Cardio Tennis to kids, through schools and other programs.

But most important for your business, Cardio Tennis can be a huge moneymaker for facilities and pros running the program. “People just can’t wait to get into classes,” says Hector Mendoza of the Vancouver Tennis Center. “They get a great workout and they have fun.”

In addition to the interest generated by sites and players within the U.S., Cardio Tennis has also garnered a large following overseas. At the request of Tennis Europe, Cardio Tennis Manager Michele Krause, along with members of the Cardio Tennis Speakers Team, have given well-attended seminars to spread the word globally about the health benefits of the program.

Cardio Tennis is also gaining exposure nationwide through participation in Better Your Body fitness expos. In 2007, the TIA will feature Cardio Tennis in at least three of these fitness-related sports shows.

A recent survey of Cardio Tennis providers shows that:

- Lesson revenue increased at 71 percent of facilities.
- Program fees increased at 47 percent of facilities.
- Pro shop sales increased at 23 percent.
- Court bookings increased at 22 percent.
- Membership sales increased at 18 percent of facilities.
- On average, facilities said Cardio Tennis caused about 20 players to play tennis more frequently.
- 15.4 new players came to the average facility because of Cardio Tennis.
- On average per facility, Cardio Tennis attracted 15.1 former players back to the game.

As part of the target market campaign, these images will be used in 500,000 newspaper inserts and counter card displays for facilities and retailers.
Better Your Business Workshops
Cardio Tennis will also gain a boost through the TIA’s new Better Your Business Workshops. These daylong seminars—focusing on helping teaching pros, facility managers, retailers, and others to boost their business overall—will also spend time on the Cardio Tennis model and how to implement a successful Cardio program.

The BYB Workshops go beyond Cardio, too. They offer tips to improve customer service, deliver effective tennis programming, p.r. and marketing to gain and retain players, reach out to the community, deal with the media, and much more. The workshops, presented by seasoned industry presenters, deliver the best practices from proven sources to improve your business. The goal, of course, is to help you improve your business.

Mike Woody, tennis director at the Midland Community Tennis Center in Midland, Mich., will be one of the main facilitators for the BYB Workshops.

“I recently attended the first Better Your Business Workshop on Hilton Head Island,” says John Hill of Raintree Club in Virginia. “Although I’ve been in this business for 30 years and have owned my own facilities, I was impressed with the new ideas that I took away. Also through the training offered, I gained the confidence to start Cardio Tennis at my club.”

Sign Up to Better Your Business
Take advantage of all that the Better Your Business Workshops have to offer. (To sign up for a BYB Workshop, visit www.GrowingTennis.com.) For the remainder of 2007, the schedule includes:

- May 4, San Antonio Country Club, San Antonio, Texas
- May 18, Las Vegas Hilton Resort & Tennis
- May 20, El Conquistador Hilton, Tuscon, Ariz.
- May 21, Meadow Creek Tennis & Fitness Club,Denver
- June 9, Center Court Tennis Club, Fond du Lac, Wis.
- June 24, Lexington Tennis Club, Lexington, Ky.
- Oct. 1, MidTown Tennis Club, Chicago

Also, Cardio Tennis will be featured at three “Better Your Body” fitness expos in the U.S., each of which attracts more than 12,000 consumers:

- May 5-6, Dallas
- Sept. 29-30, Chicago
- Nov. 3-4, New York

Currently, the TIA has scheduled 10 Better Your Business workshops in 2007. For more information, visit www.GrowingTennis.com.

The workshops are also geared toward building your business via technology. Everyone who attends a BYB Workshop will receive a free website builder through TennisConnect, which also includes TennisCollect, a new payment system that allows you to get paid faster and easier by your customers when they sign up for court time or clinics online.

Tennis In Public Parks
One key to growing the game in the U.S. involves building—and rebuilding—tennis in the public parks. The USTA, together with the National Recreation and Park Association and other groups, is continuing with its Tennis in the Parks Initiative to enhance public tennis facilities and improve their program offerings.

Research shows that parks are by far the No. 1 place where Americans play tennis, followed by play on courts at schools and colleges. More than 70 percent of all tennis played in the U.S. is played at public facilities.

Through its public facility funding effort in 2005 and 2006, the USTA awarded grants totaling more than $3.5 million to help build new or renovate existing public facilities. These grants benefited over 85 public facilities and 700-plus tennis courts. And, more importantly, the USTA’s investment was a catalyst for an additional $30 million in public facility funding from other sources.

“Our public facility funding grants have been a huge success,” says Kurt Kamperman, the USTA’s chief executive of Community Tennis. “Not only can we effectively leverage our dollars, but in providing these grants, we require that all recipients follow through with sound local tennis programming. The end result is better public facilities, offering local grassroots programs that will attract and retain more players.”
Growing at the Grassroots

Serving as a national sales force for tennis, the Tennis Service Representative (TSR) program has proven to be a great success in helping to connect local tennis providers with the resources needed to grow the game at the grassroots level.

“The TSRs are helping facility operators to see what opportunities might exist to help them develop their businesses,” says Mark McMahon, the USTA’s national coordinator for TSRs. “And importantly, they’re not just pushing USTA programs, but the brand ‘tennis.’”

Currently, there are 90 TSRs, which are employees of their respective USTA sections, with support from the USTA national office. In 2006, TSRs visited thousands of facilities, helping them connect with programs, possible funding sources, and more to keep the game growing.

A new way to deliver tennis to kids 10 and under is being developed by the USTA and is tentatively called “Project 36/60.” The numbers refer to the size of different “courts” for kids to play on when they’re first introduced into the game (and these “courts” can be set up on parking lots, in driveways, in gyms, etc.). But the project involves more than just mini-courts; it includes using appropriately sized racquets, along with foam “transition” balls, to help kids realize immediate success in the sport, helping to ensure that they’ll stay with tennis.

“The buzz has been incredible about this,” says Kirk Anderson, the USTA’s director of recreational coaches and programs. “Everybody’s talking about it.” Look for much more on this program in the future, as the USTA and industry partners begin a rollout in the fall.

This transition equipment is also helping the USTA revamp its school tennis program, including a new “in-school curriculum” designed to make it easier for physical education teachers to deliver tennis to their students.

Connecting With Your Business

Throughout all of these areas, and much more, the TIA remains committed to not only helping you boost your business, but also elevating your position within this industry and with your customers. And one of the main tools the TIA is using to do this continues to be its focus on technology.

Recently, the TIA revamped its website (www.tennisindustry.org) to better serve your business and you and your customers.

TennisConnect.org

With TennisConnect, facilities can create and manage their own websites, web hosting included, with features to promote and support their business, such as an Online Tennis Court Scheduler, a Player Match feature, a Group Email Engine, an eCalendar feature, and TennisConnectForums, a learning tool that allows facilities to ask questions and share ideas.

So far, more than 400 facilities have purchased and used the TennisConnect.org software. For consumers, the number of visits to facility websites using the software has been growing—from about 80,000 unique visits in the month of January 2006 to nearly 300,000 per month by year-end, with nearly 9 million page views. For the past four years, court reservations using TennisConnect were in the millions, says Charlie Ruddy, developer of TennisConnect.org.

“We will be using this impressive database as part of the new Court Monitor System to analyze play habits and court usage for the research provided in the Tennis Health Index report,” adds the TIA’s de Boer.

Research on Block Parties in Tennis Welcome Center target markets indicates:

- 90 percent of consumers
gave Block Parties the highest rank in terms of enjoyment, which is key, because the TWC initiative is designed to be welcoming and fun for new players.
- More than two-thirds of the participants said they would play more tennis as a result of participating in a Block Party.
- 48 percent said they would likely participate in future programs.
- 19 percent signed up for programs on the spot.

“All areas of this industry need to be connected,” says de Boer, “and our website is doing this.” Key in this effort, as mentioned, is the comprehensive www.GrowingTennis.com website. There, you’ll not only find information on Cardio Tennis, Tennis Welcome Centers, Growing Tennis 50/50 Co-op Funding, and Better Your Business Workshops, but also a link for your free listing that will enable thousands of players to find your facility.

The website also has links to one of the most powerful online tools for businesses through TennisConnect.org. This product has transformed the way hundreds of facilities do business by offering a website presence, interactive calendar, player matching, court scheduler, group email system, and more. Last year, 790,260 online court reservations were made through TennisConnect, and the testimonials from both facilities and their members support the benefit of this innovation.

Another technology advancement is the service provided by TennisWire.org. Industry “Newsmakers” can upload their press releases to the site, where they are categorically displayed and archived. A bi-monthly newsletter generates the features and is distributed to more than 12,000 industry contacts, including the media.

But the TIA’s main connection is in providing the online research tools that makes information about the tennis marketplace easily accessible (see page 10). The TIA, along with its research partner, Sports Marketing Surveys, produces 70 research reports and surveys annually. In addition, quarterly census reports are also generated (through W & W Services Inc.) that show shipment and sales for tennis racquets, strings, and balls, a leading indicator of recreational play.

More than ever, the TIA is focused on finding ways to help the industry’s vitality by working together toward growth, prosperity, and fitness to keep tennis No. 1.
**Know Your Market**

The extensive research available from the TIA will help you increase your business, and your profits.

Whether you operate a retail shop, tennis facility, or manufacturing operation, one of the key things you need to be able to run your business successfully is market research. And providing that research has long been a strength of the Tennis Industry Association.

Soon, though, you’ll have a powerful new research tool to help you spread the word about tennis. The TIA with support from the USTA is finalizing plans for a “Tennis Health Index.” Much like the Consumer Confidence Index, the new THI will be designed to give an accurate measure on an annual basis of the state of tennis in the U.S.

Through the TIA, you and your business can have the market intelligence that you need to maintain a competitive edge that will help you prosper. As the research source for every type of facility or retail shop, the information you can receive from the TIA—in conjunction with Sports Marketing Surveys USA, one of the leading market research firms in the country—will give you the tools to help you increase your business profits.

In addition to the Tennis Health Index, more than 70 tennis-specific research reports and surveys are available each year. The amount and type of research available to TIA members varies with the membership level and type of business.

“We interview thousands of recreational tennis players, facility owners, and tennis retailers throughout the year,” says TIA Executive Director Jolyn de Boer. “Our research and market intelligence reports will help tennis businesses of all sizes determine what they need to do to stay profitable, and to help increase their business.”

All levels of TIA membership include either overviews or executive summaries of all TIA research. The TIA can also run customized research to fit the specialized needs of any business.

Here’s a quick overview of some of the research available to members:

**Tennis Health Index**

This new measure of tennis in the U.S. will take the place of the U.S. Tennis Participation Study, which the USTA and TIA have been doing for the last five years. The Tennis Health Index will include seven different components that will give a measure of the state of U.S. tennis.

“By combining different elements, we’ll introduce a series of checks and balances and not be over-reliant on a single measure,” says Keith Storey, vice president of research for Sports Marketing Surveys USA, which partners with the TIA in providing research data.

Indicators that will make up the THI include:

- **Phone Survey of Tennis Participation.** This is a continuation of the USTA/TIA survey, but going forward there will be a reduced sample size. The sample size could be reduced to 4,000 households (9,500 individuals), which would still provide a robust national participation figure.

- **Online Survey of Tennis Participation.** This will be a new U.S. sports participation study of 60,000 individuals.

- **Mail Panel Survey of Tennis Participation.** This survey is from the NSGA’s participation survey.

- **Ball Shipments.** Tennis ball units have historically been a good indicator of the level of play in the U.S. The TIA has tracked tennis ball shipments for more than 20 years.

- **Grassroots Monitor.** This will be a national facility audit that would supplement participation data by monitoring key operational data. “The aim is to produce a ‘courts books’ or ‘games played’ figure that is a monthly indicator of playing trends, similar to what the National Golf Foundation does with its ‘Rounds Played’ data,” says de Boer. “And the TIA will provide software tools to help facilities supply this data.” To determine this grassroots monitor, a website will be developed for data entry by facilities. Initially, the TIA is looking for at least 555 facilities from the 53 most important metropolitan areas to contribute data on a regular basis.

- **Tennis Player Survey.** As part of both the phone and online participation surveys, interviews with an additional 500 to 1,000 tennis players will be conducted.

- **Annual Facility Survey.** This will be in addition to the Grassroots Monitor and provide extra data from 500 to 1,000 facilities.

**Cost of Doing Business Report**

For Retailers, Facilities & Court Contractors

The Cost of Doing Business Report, which tells businesses how they compare to facilities or retail shops of similar size and type, is an essential reference tool for both tennis facility and tennis retailer members. For your business, you can use this data to benchmark key operating areas.

- **For Facilities:** The report provides a comprehensive study of operational data by region and type of facility, including range
of revenue expectations, expenditures, and business ratios, such as revenue per court, percent of gross revenue spent on rent, utilities, salaries/wages, insurance, repairs and maintenance. It also includes capital expenditure plans.

*For Retailers:* A comprehensive study of operational data for tennis retailers by region and type of store, including range of revenue expectations and expenditure. The report also includes amount of floor/wall space allocated to racquets, footwear, apparel, and accessories. Business ratios provided include revenue per square foot, stock turns by product group, capital expenditure plans, and pay structure for staff (employed, contract, hourly, etc.).

*For Court Contractors:* This comprehensive report provides key operating data, such as net profit and loss, revenue, cost of goods sold, and expenses. Also, it provides a breakdown of business expenses (i.e. percent going to raw materials, wages, equipment, insurance, marketing, etc.), along with capital expenditure plans and a compensation study. In addition, the survey will cover renovation and construction plans for the next two years by category (such as court surface, lights, fencing, buildings, etc.).

**Tennis Facilities Database and Operational Analysis**
The TIA compiles and maintains the most comprehensive and accurate record of tennis facilities in the U.S. Database contents includes: address, contact names (pro, manager), telephone, fax, e-mail, number of courts by type, type of facility (private, commercial, etc.), tennis retail space, and volume. From this, the TIA conducts cost of doing business surveys (such as marketing, maintenance, utility costs, etc.) and establishing tennis operation benchmarks (such as the number of members per court, dollars generated per court, etc.) and industry standards.

**For Manufacturers**

**Specialty Retail Audit**
These quarterly reports monitor racquets, footwear, and strings through the pro/specialty channel and tell what is selling at the brand and model levels. The TIA compiles data monthly from more than 75 retail outlets that are representative of the country by region and store size. For racquets, monthly reports are available that include brand share and best-selling models, plus full quarterly reports that include brand share by product attribute (such as head size and composition). Quarterly reports for footwear and strings include brand share and best-selling SKUs.

Dealers who contribute to the audit receive a monthly price-check report and a quarterly summary of the pro/specialty tennis market.

**Dealer Trend Surveys**
The Dealer Trend Survey evaluates manufacturers’ performance among pro/specialty dealers, tracking dealers’ attitudes toward their suppliers and telling what dealers really are thinking. Each biannual report is from mail and telephone interviews with 100 dealers, representative by region and store size. The reports include a Dealer Confidence Index, dealers’ verbatim comments, and forecasted sales changes by brand, along with ratings of suppliers for sales reps, customer service, product delivery, product innovation, and advertising promotion.

Dealers who respond to the survey receive a summary of the results to see how their industry experience compares to the marketplace.

**Consumer Reports**
Early- and late-season Consumer Reports on racquets, footwear, strings, and apparel evaluate buying and playing habits, brand strength, and brand image among frequent players. The report defines attitudes and habits of the most avid tennis players, who are the heart of your market.

Each year the TIA conducts more than 2,500 in-depth, face-to-face, and online interviews with avid players. The data consists of playing characteristics, buying habits and motivations, brand strength (including awareness and propensity to buy), brand image, sources of information, and influences at point of purchase.

*Do you have an issue you want to know more about?* The TIA, in conjunction with Sports Marketing Surveys, can design and create tennis consumer research studies to investigate any marketing issue. They have access to tennis players online and at events, and a custom tennis consumer panel is being developed.

**Distribution Study**
This report gathers retailer information from manufacturers to produce an in-depth analysis of the size of the pro/specialty tennis racquet and footwear market by region. The database can now be used to produce custom studies such as: allocation of sales territories, market size for sales territories, analysis by drive-times and smaller geographical areas of the U.S.

**Census Reports**
The quarterly census reports conducted on racquets, balls, and strings define the total size of the U.S. market. These reports enable participating companies to track market changes and determine their own market share. Ball shipments are also closely correlated to tennis participation.

The reports consist of confidential quarterly reports provided by all manufacturers on wholesale shipments (units and dollars). The surveys are conducted by an independent third-party accounting firm, W&W Services Inc. ©
Economic Leverage

Through benefits with TIA affinity partners, you can reduce costs and expenses, and boost your bottom line.

Are you losing too much money every time you process a credit-card transaction? Are you tired of paying hefty shipping charges when you need to send product? Are you worried your insurance isn’t covering your business adequately? Well, the TIA is working to help you reduce your expenses and gain more value for your dollar.

Through an expanded list of partnerships, TIA members can benefit from a wide variety of money-saving initiatives and services. “We’ve put together a quality roster of benefits and services, and we’re always looking to expand our offerings to members,” says TIA Executive Director Jolyn de Boer. “Together with our affinity partners, we’re reaching out to the entire industry—retailers, pros, facility operators, manufacturers, associations, and more. And we’re going to continue to add value to TIA membership.”

Shipping Discounts

Need to ship product? As a TIA member, you can enjoy discounts with some of the country’s premier shipping companies. To receive any of the program discounts below, call 800-MEMBERS.

- DHL offers rates as low as $12.95 for overnight shipping, with no weight limits for DHL’s ShipReady Package service.
- Airborne Express offers savings from 20 percent to 40 percent to TIA members, based on shipping volume.
- Menlo Worldwide, which provides heavy-weight air freight delivery, offers up to 45 percent savings.
- Roadway Express & Yellow Freight System offers up to 52 percent savings on LTL (“less than truckload”) services.

Travel Discounts

The TIA Advantage Card offers hotel, air, car rental, event, and other discounts for all TIA members through the Active.com network. Enjoy savings when you travel on airlines such as American Airlines or America West, or rent cars through Budget or Avis, or stay at hotels such as the Comfort Inn, Quality Inn, Clarion, and many others.

TIA Advantage Card discounts also extend to dining and entertainment, event tickets (including with TicketMaster), savings at Barnes & Noble, travel assistance programs, and much more.

Insurance Discounts

The TIA Sports N’ Sure program, provided by Stratus Insurance, is designed to meet your general and/or product liability needs. For TIA members, it’s solid, affordable insurance coverage at competitive rates.

As a bonus, Sports N’ Sure is available through your current insurance agent—there’s no need to switch agents or companies. A new program for 2007 is being tailored for TIA retail and facility members.

Publication & Media Discounts

TIA members can receive a 25 percent discount on advertising rates from Racquet Sports Industry magazine. Plus, members can receive In-Tenn online magazine and Bob Larson’s Tennis News at additional savings. For members looking to advertise and market nationally or locally, the TIA’s partnership with Blue Plate Media will help you get the most from your marketing dollars.

For more information about these membership benefits and services through TIA Affinity Partners, contact the TIA at 843-686-3036, email info@tennisindustry.org, or visit www.TennisIndustry.org.
Net Advantages
Enhanced websites for the tennis industry provide news, trends, and information to help you build your business.

Easily accessible information has been a key factor in helping this sport to grow, and the internet has certainly become a key in terms of keeping TIA members, and the industry as a whole, informed about what’s going on in the business of tennis.

TennisIndustry.org
The newly revamped, interactive TIA website, TennisIndustry.org, is the information source for the whole industry. You can find all sorts of research on trends in tennis, details on grassroots programs, links to industry resources and more. A dynamic, multimedia introduction to the site reflects the TIA’s mission—to promote the growth and economic vitality of tennis.

A new feature on the site is the detailed searches (via city and state or ZIP code) of retailers, facilities, court contractors, manufacturers, media, and organizations. For instance, facilities can be searched by the type of court surface, number of courts, whether courts are lighted, whether there is a pro shop, and much more. Likewise if searching for a retailer, you can search by type of retailer and also by services offered.

Through the TIA’s extensive research partnership with Sports Marketing Surveys USA, current TIA members can access key information that can greatly influence their business. And if you’re not yet a TIA member, the website’s easy-to-navigate design gives you access to information to help you discover the benefits of membership.

As the No. 1 research source in tennis, dozens of tennis-specific reports are available online for TIA members, such as the Market Intelligence Reports, which contain vital research on every aspect of the Tennis Marketplace. It’s all just a click away with streamline secure online access.

“Our website describes all the tools and services available so that large and small businesses can continue to grow and profit, which in turn will help grow the sport,” says Jolyn de Boer, executive director of the TIA.

Prospective members can review the benefits of each of the levels of membership, and sign up online through a secure payment page. Just go to TennisIndustry.org and click on “Membership.”

TennisWire.org
Stay on top of all the industry news and product releases from top manufacturers and companies in tennis by visiting www.TennisWire.org. This searchable database provides the latest press releases, stories, and more from tennis manufacturers, suppliers, and organizations. A new service added to TennisWire.org in 2007 is a list of jobs available in the industry.

Press releases are submitted by TIA members at the Supporting Member level and above and are searchable by company, category and date. The releases also are distributed via the TennisWire.org newsletter to tennis writers and newspapers across the country, as well as to 12,000 industry contacts. Visitors to TennisWire.org can sign up for a free email newsletter that summarizes news and provides insight.

Find a Game, Find a Facility, Find a Program
Facilities can list their information and program details for consumers to find on major tennis websites - 24/7

Tennis facilities have an easy way to get their important facility and program information out to the public: Just go to GrowingTennis.com.

GrowingTennis.com is the main portal for facility managers to log onto and to place all their facility and program information. Those details will then automatically be displayed on key consumer websites—TennisWelcomeCenter.com, CardioTennis.com, TheTennisChannel.com, Tennis.com, MyTennisCenter.com, and most recently, USTA.com—enabling consumers to find everything they need quickly and easily.

Since 2004, this listing has been a free service offered to facilities that has helped hundreds of thousands of people to find exactly what they’re looking for in tennis—an easy way to get out onto the court and enjoy the sport. Whether looking for a place to play, a game, or an appropriate program, players can search using a wide variety of criteria.

And search they did—last year, there were more than 2 million visits. Every day, more consumers are hopping on the internet to find information, and it’s becoming more important for facilities to keep their information up to date. And that’s the beauty of GrowingTennis.com—it’s easy to update your own information. In fact, the site receives 1,200 log-ins per month by facility managers who are updating their listings, so the public has the most complete information.

For tennis facilities, going to GrowingTennis.com is a quick, easy—and free—way to increase your business.
Support Your Industry

The TIA puts your membership dollars to work. Over the past 12 years, nearly 80 percent of TIA revenue—$17 million—has gone to supporting grassroots programs and research.

<table>
<thead>
<tr>
<th>Member Levels:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Individual ~ Industry Supporters</td>
</tr>
<tr>
<td>2 Associate ~ Retailers, Facilities, Court Contractors</td>
</tr>
<tr>
<td>3 Tennis Connect ~ Facilities, Retailers ~ Manage Business Online</td>
</tr>
<tr>
<td>4 Supporting ~ Businesses, Companies, Major Retailers</td>
</tr>
<tr>
<td>5 Affiliate ~ Organizations, Federations, Groups</td>
</tr>
<tr>
<td>6 Participating Partner ~ Manufacturers and Contributors</td>
</tr>
</tbody>
</table>

Support Your Industry!

Step up to Participating Partner
- Every benefit and service in all levels below, plus…
- Specialized reports in all areas of manufacturing
- Greater visibility on website and acknowledgement that tennis campaign support is at highest level of return

Step up to Affiliate Member ($3000)
- All below, plus…Newsmaker status on TennisWire.org
- Access to TWC/CT/TIA facilities / sponsor offers
- Cardio Tennis special distinction for federations, organizations
- 25% off ad rates in RSI / BluePlate Media Specials
- All CODB reports / Full report Tennis Index

Step up to Supporting Member ($1000+)
- All below, plus…Newsmaker status on TennisWire.org
- Access to TWC/CT/TIA facilities/sponsor offers
- 25% off ad rates in RSI / BluePlate Media Specials
- All CODB reports / Full report Tennis Index

Step up to Tennis Connect ($595)
- All below, plus…court scheduler, player matching, Calendar
- Cost of Doing Business – Retailer and Facility reports

Step up to Associate Level ($295)
- All below, plus…website builder, group email, contact manager
- Cost of Doing Business Research for area of interest

Individual Level ($100 / $500 lifetime)
- Tennis Marketplace Reports (2x year)
- Overview of the Tennis Health Index
- Industry newsletters and communication
- All levels include TIA Affinity Benefits
## The Benefits of TIA Membership

<table>
<thead>
<tr>
<th>TIA Affinity Benefits</th>
<th>Individual Members</th>
<th>Associate Members</th>
<th>Tennis Connect Members</th>
<th>Supporting Members</th>
<th>Affiliate Participating Members</th>
<th>Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TIA Merchant Card Services</strong></td>
<td>●</td>
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<td><strong>TIA Advantage/Shipping/Insurance</strong></td>
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<td><strong>Advertising/Media Discounts</strong></td>
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### WEBSITES (secure research access and industry news)
- TennisIndustry.org: ● ● ● ● ● ●
- TennisConnect.org (lite version): ● ● ● ● ● ●
- TennisConnect.org: ● ● ● ● ● ●
- CardioTennis.com: ● ● ● ● ● ●
- Partners.CardioTennis.com: ● ● ● ● ● ●
- TennisWire.org (Contributing Newsmakers): ● ● ● ● ● ●
- GrowingTennis.com: ● ● ● ● ● ●
- TennisWelcomeCenter.com: ● ● ● ● ● ●
- Partners.TennisWelcomeCenter.com: ● ● ● ● ● ●

### Research

#### Tennis Health Index
- Full Report/CD annual: ● ● ● ● ● ●
- Executive Summary annual: ● ● ● ● ● ●

#### The Tennis Marketplace
- Executive Summary bi-annual: ● ● ● ● ● ●

#### Cost of Doing Business Reports
- Tennis Retailers annual: ● ● ● ● ● ●
- Tennis Facilities annual: ● ● ● ● ● ●
- Tennis Courts annual: ● ● ● ● ● ●

#### Specialty Retail Audit
- Full Report-Racquets quarterly/monthly: ●
- Full Report-Footwear/Strings quarterly: ●

#### Retailer Satisfaction & Brand Perception
- Full Report-Racquets/Footwear early/late season: ●
- Full Report-Strings/Apparel annual: ●

#### Consumer Reports
- Full Report-Racquets/Footwear/Strings/Apparel/Balls mid-year/year-end: ●

#### Census Reports
- Racquets/Balls/Strings quarterly: ●

#### Facilities Database
- TWC and CT sponsor offers: ● ● ● ●
- U.S. Tennis Facilities: ● ● ● ●
- Media/Retailers/Industry Contacts: ●
Join the TIA Today!

Become a Partner for Profitable Growth

Contact Name: ___________________________ Title: ___________________________
Company Name: ___________________________________________________________________
Address: ___________________________________________________________________
City: ___________________________ State: ___________ Zip: ___________________
Phone: __________________ Fax: __________________
Country: __________________ Email: __________________
Company Web: ___________________________________________________________________

Membership Levels:

___ Individual Membership - $100
___ Individual Lifetime Membership - $500
___ Associate Member - $295
___ TennisConnect Member - $595
___ Supporting Member - $1000+
___ Affiliate Member - $3000
___ Participating Partner
(please contact me)

Apply online at TennisIndustry.org

Please mail or fax credit card information to 843-686-3078 or mail check (payable to the TIA) to:
Tennis Industry Association
P.O. Box 7845
Hilton Head Island, SC 29938

[ ] Check Enclosed  [ ] Pay by Credit Card
Card #: ___________________________
Expiration Date: ___________________
Name on Card: ___________________

Service
• Research
• Cost of Doing Business Reports
• TennisConnect.org
• Tenniswire.org
• Facilities Database
• Marketing & Advertising Discounts

Benefit to YOU
• Know what consumers, competitors, and the industry are doing
• Know what your peers are doing
• Better communication and service to your members
• See all the latest news and press releases at one site
• Know the economic makeup of facilities throughout America
• Get matching $’s to invest in YOUR marketing

TIA Affinity Benefits
• Merchant Card Services
• Travel and Hotel Discounts
• Shipping Discounts
• Insurance Discounts
• Reduce your credit card transaction fees
• Reduce travel costs
• Reduce freight charges
• Reduce business costs

Support for the Tennis Campaign
• Increase participation and our sport’s revenues

Call 843-686-3036 or visit www.TennisIndustry.org