Among the bright spots in the Tennis Industry Association’s 2015 “State of the Industry” report are a slight rise in overall tennis participation, growth in the number of youth tennis players, and 14.6 million Americans who, while not tennis players currently, express an interest in playing the sport.

But the annual report also indicates the industry faces a number of challenges, including declining levels of consumer spending on equipment, a lower “core player” participation level, and an aging base of core players.

The TIA’s 2015 annual report, based on year-end 2014 research and data, puts the overall “tennis economy” at $5.73 billion, up 3.2% from a year earlier, and giving the sport a 104 on the TIA Economic Index scale, which is determined by factors such as expenditures for participation, facilities, programs, equipment, ad revenue, sponsorships, etc.
Participation

Overall U.S. tennis participation is at 17.9 million players, up 1% from 2013, according to data from the Physical Activity Council (PAC) 2015 Participation Study, the largest single-source independent sports participation project in the U.S.

However, “core” tennis players, who play 10 or more times a year, dipped 1% to 9.91 million in 2014. Core tennis players account for an estimated 90% of total expenditures in the sport. Also, the percentage of adult core players in the 18-to-24 age segment dropped nearly 3%, while core players ages 55-plus increased 1%.

A significant opportunity exists for the industry to convert a “latent demand” by 14.6 million Americans who indicate they are interested in playing tennis. Plus, another 12 million consider themselves tennis players, but haven’t played in the last year. “As we move ahead with our collaborative efforts to grow this sport, we’re looking

For full report contact the TIA at info@tennisindustry.org or call 866-686-3036.
Equipment

Shipments of ROG tennis balls to retailers remains a positive, up 4% to 5.54 million units in 2014. However, while ROG ball shipments have risen 393% from 2008 to 2014, the rate of growth is slowing, as retailers, facilities and teaching professionals better understand their ROG tennis ball needs.

Overall, the wholesale tennis equipment market in the U.S. has been flat. The TIA’s “Tennis Industry Equipment Index” (going back to data from 2003, where the base index is 100) gauges the performance of the wholesale distribution of racquets, balls and strings.

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Teaching Pros, Facilities and Court Builders

In 2014, about 52% of teaching pros rated their business as “strong” or “very strong,” the highest since the survey began five years ago. Teaching professionals reported a 10% increase in the cost of private lessons, while the average group lesson and clinic charges increased 25% and 24%, respectively.

Overall, the average number of private lessons taught each week rose 4% in 2014, while the number of weekly group lessons surged 34%. For 2015, more than half of all tennis-teaching pros project their business to increase.

The TIA's Court Activity Monitor (CAM) surveys 500 bellwether facilities across the country, and from late-season 2014 results, nearly 60% of facilities saw an increase in new 10U players. All other CAM components—including total courts used/book, new first-time adult players, rejoining adults, youth and adult tournament play and league play—also showed net gains.

Court builders also are optimistic about the current and future states of their business, with 44% rating it “strong” or “very strong,” and 65% expecting business to increase in 2015. For 2014, 65% of court contractors reported increased business, vs. 57% in 2013.

Pro/Specialty Retailers

Pro shop and specialty tennis retailers saw a drop in overall racquet unit sales of 1.9% in 2014, after a particularly tough 7% drop in the third quarter, which in part can be attributed to a work slowdown in West Coast ports that resulted in major delays in about 70% of U.S. imports from Asia.

While specialty retailers continue to express concerns over competition from online-only retailers, there is optimism over new “smart” technology which uses sensors in the racquet. “Players, coaches and teaching professionals can use this data to facilitate tennis instruction and improvement,” says TIA Executive Director Jolyn de Boer. “It can make tennis more enjoyable for players at all levels.”