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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* research source for the tennis industry, tracking participation numbers (together with the USTA) along with tennis equipment sales, tennis retail facility retail trends, and additional market intelligence.

TIA STATE OF THE INDUSTRY

In May 2012, the TIA released its second annual “State of the Industry” report, which compiles key findings from the trade association’s dozens of in-depth annual research studies and surveys into a top-line document for the past year that shows how interconnected the industry is. Much of the data here are highlights from the “State of the Industry.”

TENNIS INDUSTRY AT A GLANCE – 2011

Total Tennis Economy	\$5.4 billion
Total Tennis Participation	27.1 million
Total Youth Tennis Participation	3.2 million
Frequent Tennis Players (21+ times/year)	4.81 million

Manufacturer Year-End Wholesale Shipment, in Units

Tennis Racquets	3.4 million
Tennis Balls*	123.6 million
Transition Balls*	3.3 million

(*Unit = 1 ball)

THE TENNIS ECONOMY

- The total tennis economy measured \$5.4 billion in 2011, vs. \$5.6 billion in 2010.

TENNIS PARTICIPATION

Overall

- Total tennis participation in 2011 was 27.1 million players, down slightly from 27.8 million in 2010. (52% of tennis players overall were male and 48% female.)
- 6.84 million “new” players tried tennis in 2011.
- Tennis maintains the top spot as the fastest growing traditional sport in America, up 37% from 2000-2011, according to data from the Physical Activity Council.

Frequent Players

- In 2011, “frequent” players (who play 21 times or more a year) increased slightly, to 4.81 million of total participants, vs. 4.77 million in 2010. It was the first increase in frequent players since 2008. (52% of frequent players were female and 48% male.)
- Frequent player “play occasions” increased to 390 million in 2011, vs. 361 million in 2010.
- Frequent players account for more than 70% of total expenditures in the tennis industry.
- Of frequent players who played more tennis in 2011, the top reasons were: 1) Found someone/someone new to play with, 2) Had more time to play this year, 3) Joined a tennis league, 4) Took tennis lessons.

Youth Participation

- In 2011, players ages 6-11 declined slightly, to 3.2 million from 3.5 million in 2010.
- 65% of facilities surveyed in late season 2011 said they've had increased 10 and Under Tennis activity.
- Youngsters in 10 and Under Tennis competitive events (USTA tournaments, USTA Jr. Team Tennis, PlayDays) increased 320% in 2011.
- 3,444 courts for 10 and Under Tennis (36' and 60') were built or lined in 2011.
- Nearly 3,000 people became qualified, registered 10 and Under Tennis providers in 2011.

Competitive Tennis/Recreational Programs

- Team Tennis continues to grow, up 9% from 2010 to 2011 and up 43% since the program began in 2004.
- Participation in USTA Leagues in 2011 registered a 1% drop from 2010; Tournament participation grew less than 1%. Long-term growth, however, has been positive, up 39% for Leagues and up 14% for Tournaments from 2003 to 2011.
- The USTA's Tennis On Campus continued its solid growth, with 578 colleges and universities participating, a 10% increase from 2010 to 2011. Total participants rose 11% year-over-year to 35,000 students.

Participation Challenges/Initiatives

- In 2011, the industry stopped the 2-year decline in frequent players, which are the key revenue-generators for tennis, accounting for more than 70% of expenditures. The industry's goal is to increase the number of frequent players to 10 million by 2020, which would add about \$3.9 billion to the tennis economy.
- Grassroots initiatives sponsored and supported by the USTA, TIA, and industry partners such as 10 and Under Tennis, League Tennis, and Cardio Tennis, aim to increase the frequent player base. Also to be rolled out in 2012 is a new centralized web portal, PlayTennis.com, a one-stop site to connect potential and current players to all things tennis.
- In 2011, the industry made good progress in bringing in new players, with 6.84 million trying the sport. However, new players were offset by a decrease in continuing/regular players.

EQUIPMENT

- Racket sales at tennis pro/specialty dealers were flat in 2011 relative to 2010 in units and dollars.
- Overall, tennis specialty retailers forecast 2012 to be mostly the same, or slightly better than, 2011.
- In 2011, manufacturers' wholesale shipments (in units) were down for rackets (-10%), strings (-6%) and balls* (-3%), as tennis specialty dealers appeared to be operating their businesses with less inventory in stock.
- Wholesale shipments of transition balls*, used for 10 and Under Tennis, saw a significant increase, up 62% in units in 2011 vs. 2010, and up 192% since the category was first measured in 2008 (*unit = 1 ball). In a TIA "quick-pulse" survey of pro/specialty tennis retailers, about a third saw increases in sales of all three stages of transition balls.
- Nearly two-thirds of specialty tennis retailers are optimistic about the 10 and Under Tennis equipment market and said it will gain traction.
- Equipment Spending Breakdown for Frequent Players for 2011:
 - **Rackets:** \$124 million
 - **Balls:** \$80 million
 - **Shoes:** \$148 million
 - **Strings:** \$56 million
 - **Apparel:** \$120 million
 - **Other:** \$56 million
- Since 2003, youth racket shipments are up 27% in units—highlighting higher participation rates from a younger demographic.

TENNIS TEACHING PROFESSIONALS

- In 2011, the average number of private lessons taught per week rose to 12.2, from 10.5 in 2010.
- The average number of group lessons rose to 12.4, from 12.3.
- The average price for a private lesson rose 6% in 2011.

TENNIS FACILITIES

- Public tennis facilities remained the top spot where people play tennis, with 49.2% of players in 2011. Schools/colleges had 20.8%, private clubs were at 12.9% and commercial clubs at 2.2%.
- According to the TIA's Court Activity Monitor, 54% of tennis facilities indicated an increase in the "new players" category in 2011, with only 9% indicating a decrease (for a net increase of 45%).
- 51% of facilities saw an increase in total courts booked/used, vs. 11% indicating a decrease (for a net increase of 40%).
- 43% saw an increase in league play, vs. 14% noting a decrease.
- 22% indicated an increase in tournament play, vs. 19% saying they saw a decrease.

COURT CONSTRUCTION

- In positive news, the percentage of court contractors indicating the industry was "weak" in 2011 dropped significantly, while those indicating the industry was "average" or "strong" rose.
- Since 2005, the USTA has issued over \$7 million in grants, which has leveraged local investment and helped to build or refurbish more than 25,000 courts.
- In 2011, over 70% of court contractors installed 10 and Under Tennis lines on existing courts and 38% built 10 and Under Tennis courts, which is up 2% from the late season of 2010 and up 31% from the early season of 2010.
- The USTA invested more than \$1.3 million in 2011 to assist communities to create over 3,000 10 and Under Tennis Courts.

MEDIA AND PRO EVENTS

- The number of unique viewers who watched tennis on TV in 2011 topped 83 million in the U.S., which is 27% of the U.S. population—and a 2% increase over 2010.
- Total hours of TV coverage for tennis (live and taped) continued its strong growth in 2011, up 17% over 2010, to 5,261 hours.
- While 2011 US Open attendance slipped 7.5% in 2011 vs. 2010, the tournament set a Labor Day Weekend attendance record of 186,186, in addition to an all-time record of 24,713 on the grounds of the National Tennis Center during the men's final.
- Over 53 million viewers watched all or part of the 2011 US Open on CBS Sports, a 17% increase from the previous year.

TENNIS AND HEALTH

- 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 builds strength in upper body, legs, hips and abdomen and improves speed and overall flexibility. (Vitality Magazine)
- Since tennis requires alertness and tactical thinking, it may generate new connections between nerves in the brain and thus promote a lifetime of continuing development of the brain. (Scientists at the University of Illinois)
- 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)

EFFORTS TO GROW THE GAME

10 and Under Tennis

- Consumer-focused TV, print and online advertising campaign.
- Strategic partnership with Nickelodeon for advertising and messaging on Nickelodeon and Nicktoons, including leveraging the stars of the new show “How to Rock” in appearances at key USTA events throughout the year.
- Launch of “Nickelodeon Tennis Really Rocks Sweepstakes.”
- SmashZone Mobile Tour to build awareness for 10 and Under Tennis at large-scale consumer events and festivals.
- Organization of 1,000 free Play Days to take place throughout the U.S. in the month of September; large USTA and 10 and Under Tennis presence at Nickelodeon’s Worldwide Day of Play in September.

PlayTennis.com

- Simple, brand-neutral message and website designed to get consumers in the game and playing more.
- Consumers can search for partners, programs, courts and teaching pros.
- Gear reviews and instruction videos contributed by Tennis Magazine and Tennis Channel.

Tennis Retailer Efforts via TennisRetailers.org

- Register to become a Participating 10 and Under Tennis Retailer at tennisindustry.org/retail and appear on the 10 and Under Tennis Retail Locator (Retail Locator on 10andUnderTennis.com).
- TIA Retail Webinars and Retail Tips, in conjunction with retail consultants Gluskin Townley Group.
- Counterfeit Racquet Campaign (www.KeepTennisReal.com)
- TennisConnect, Careers In Tennis, Discount Shipping Program and other benefits available.
- Consumer Study at Retail

Health Messaging and Cardio Tennis

- In a strong showing for tennis as part of a health and fitness regimen, Cardio Tennis, created in 2005, topped 1 million U.S. participants for the third straight year and is up 56% since 2008.
- “Cardio Tennis Interactive” is a new web-based health and fitness experience to give participants a complete wellness program and increase the enjoyment of the health benefits of Cardio Tennis.
- “Authorized Providers” now receive expanded benefits and services to help bring more people into Cardio Tennis.
- “Cardio Tennis–Get Fit Challenge!” enables participants to stay engaged with the program and get even better results.
- The new TRX Cardio Tennis, partnering with TRX Suspension Training, offers a comprehensive full-body workout.

Growing the Game–By the Numbers

- *Cardio Tennis*: 1,860 sites and 1.3 million participants
- *10 and Under Tennis Sites*: 2,967
- *10 and Under Tennis Retailers*: 4,000
- *Tennis Welcome Centers*: 2,825
- *Online Court Reservations*: 1.92 million
- *Registered PlayTennis.com Users*: 325,000
- *Consumer Queries to TIA Database Searches*: 2 million monthly
- *CareersInTennis.com* has over 1,000 tennis-specific job listings, over 30,315 views of listed jobs, and 1,335 registered jobseekers – and interest in the industry continues to increase.
- *The USTA’s Tennis on Campus program* is offered at 578 colleges and services over 35,000 students.

MOVING FORWARD

TIA Focus Areas in 2012

- Increasing frequent play. The TIA has established a goal of 10 million frequent players by 2020, which would result in an estimated industry economic impact of \$3.9 billion.
- Promoting the consumer portal PlayTennis.com, to bring in more players, and increase play frequency.
- Supporting growth in the youth market with 10 and Under Tennis.
- Supporting and developing further tools for retailers, facilities, certified tennis instructors, and others across our industry's provider network.
- Creating more awareness for tennis as a healthy lifestyle choice and promoting the reasons to play and stay in our sport.

The Tennis Industry Association, the not-for-profit trade association for tennis, is THE unifying force in the tennis industry whose mission is to promote the growth and economic vitality of tennis by working closely with the U.S. Tennis Association and industry partners to develop and implement initiatives to increase tennis participation and improve the health of industry businesses. Core TIA activities include TIA/USTA Annual Participation Study, Consumer and Trade Research, GrowingTennis System™ including Tennis Welcome Centers, Cardio Tennis, 50-50 Co-op Program, 10 and Under Tennis, Careers in Tennis and TennisConnect.com. Visit TennisIndustry.org or call 866-686-3036.

The USTA is the national governing body for the sport of tennis in the U.S. and the leader in promoting and developing the growth of tennis at every level -- from local communities to the highest level of the professional game. A not-for-profit organization with more than 785,000 members, it invests 100% of its proceeds in growing the game. It owns and operates the US Open, the highest attended annual sporting event in the world, and launched the Emirates Airline US Open Series linking 10 summer tournaments to the US Open. In addition, it owns approximately 90 Pro Circuit events throughout the U.S, and selects the teams for the Davis Cup, Fed Cup, Olympic and Paralympic Games. The USTA philanthropic entity, USTA Serves, provides grants and scholarships and helps underserved youth and people with disabilities. For more information on the USTA, log on to usta.com, "like" the official Facebook page facebook.com/usta or follow @usta on Twitter.