

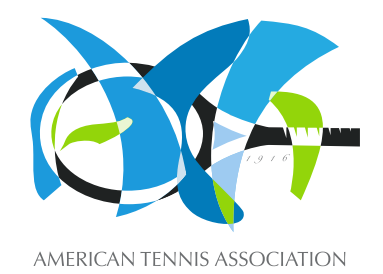


HEALTH OF TENNIS

Tennis Industry United (TIU) has partnered with key stakeholders across the industry to identify key metrics defining the health of the tennis industry. This report tracks progress against these key metrics and provides insights to the industry on key trends, growth opportunities, challenges and risks.

TENNIS INDUSTRY UNITED TOGETHER, FOR TENNIS.

FOUNDING MEMBERS



KEY INSIGHTS

Despite the immense challenges in 2020, the industry came together to support one another and protect the long-term health of tennis. This resulted in a boom in participation and racquet sales, with tennis perfectly positioned as a sport that enables physical distancing while also providing a great form of exercise.

[For key definitions, see page 8.](#)

PARTICIPATION

Pandemic Participation Boom—overall participation grew **22%** given tennis' position as the perfect sport during the global pandemic. Nearly 3M new players participated in 2020, a **44% YOY increase.**

The industry now must come together to identify opportunities to better understand the needs of these new / returning players and engage them with appropriate programs and value propositions.

EXPLORE

FACILITIES

66% of play occasions occurred at public parks, schools and community centers.

Public facilities present a significant opportunity to capture new/casual players and engage them with additional programming to continue their tennis journey.

EXPLORE

TENNIS DELIVERY

The number of unique providers engaged with the USTA **grew 20% YOY** with the number of diverse providers also **increasing 20%.**

Given the influx of new and returning players, it will be critical to adapt certification standards in order to recruit an army of young, diverse providers to deliver positive customer experiences.

EXPLORE

EQUIPMENT

Unit wholesale sell-in of racquets **grew 22% YOY** while wholesale revenue remained relatively flat indicating significant growth in sales of racquets under \$50 to new/casual youth & adult players.

The USTA partnered with key racquet manufacturers to implement Net Generation hang tags with QR codes on youth racquets which will be shipped to retail in Spring 2021. The goal of the hang tags is to capture data on new / casual players and develop strategies to engage this audience.

EXPLORE

FAN ENGAGEMENT

DIGITAL & SOCIAL

Digital traffic and social interactions suffered in 2020 due to cancellation / postponement of key events and programming during the pandemic.

PROFESSIONAL PLAYER HIGHLIGHTS

Sofia Kenin won her first major championship at the 2020 Australian Open.

Serena Williams and Jennifer Brady both reached the 2020 US Open women's singles semifinals.

EXPLORE



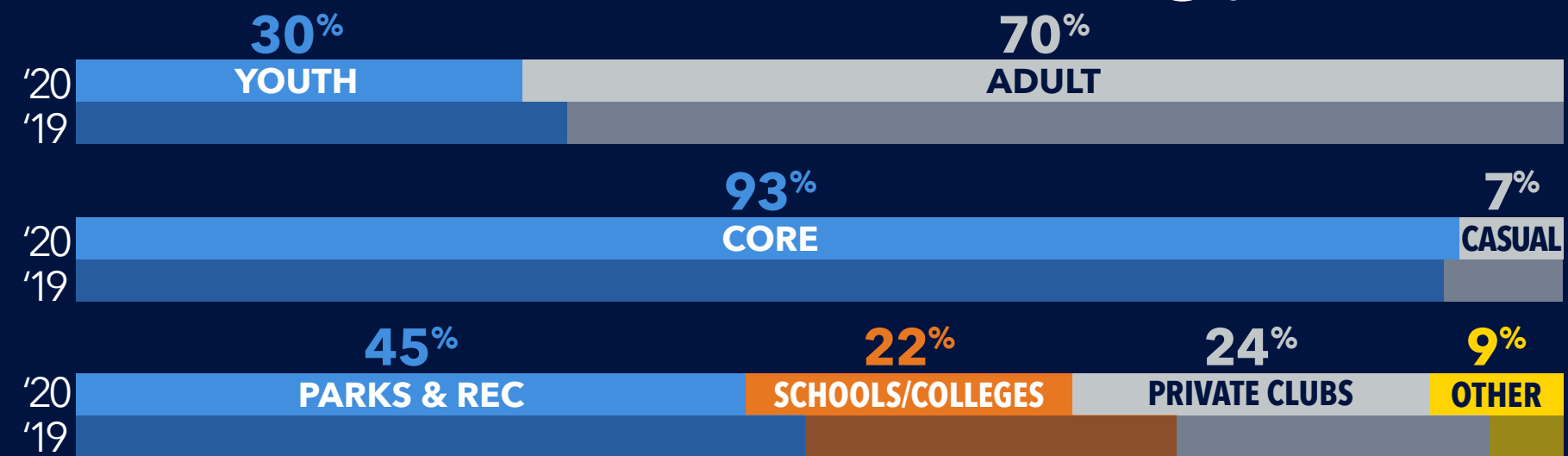
PANDEMIC PARTICIPATION BOOM

Participation grew **22%** as a result of tennis' position as the perfect sport during the global pandemic.

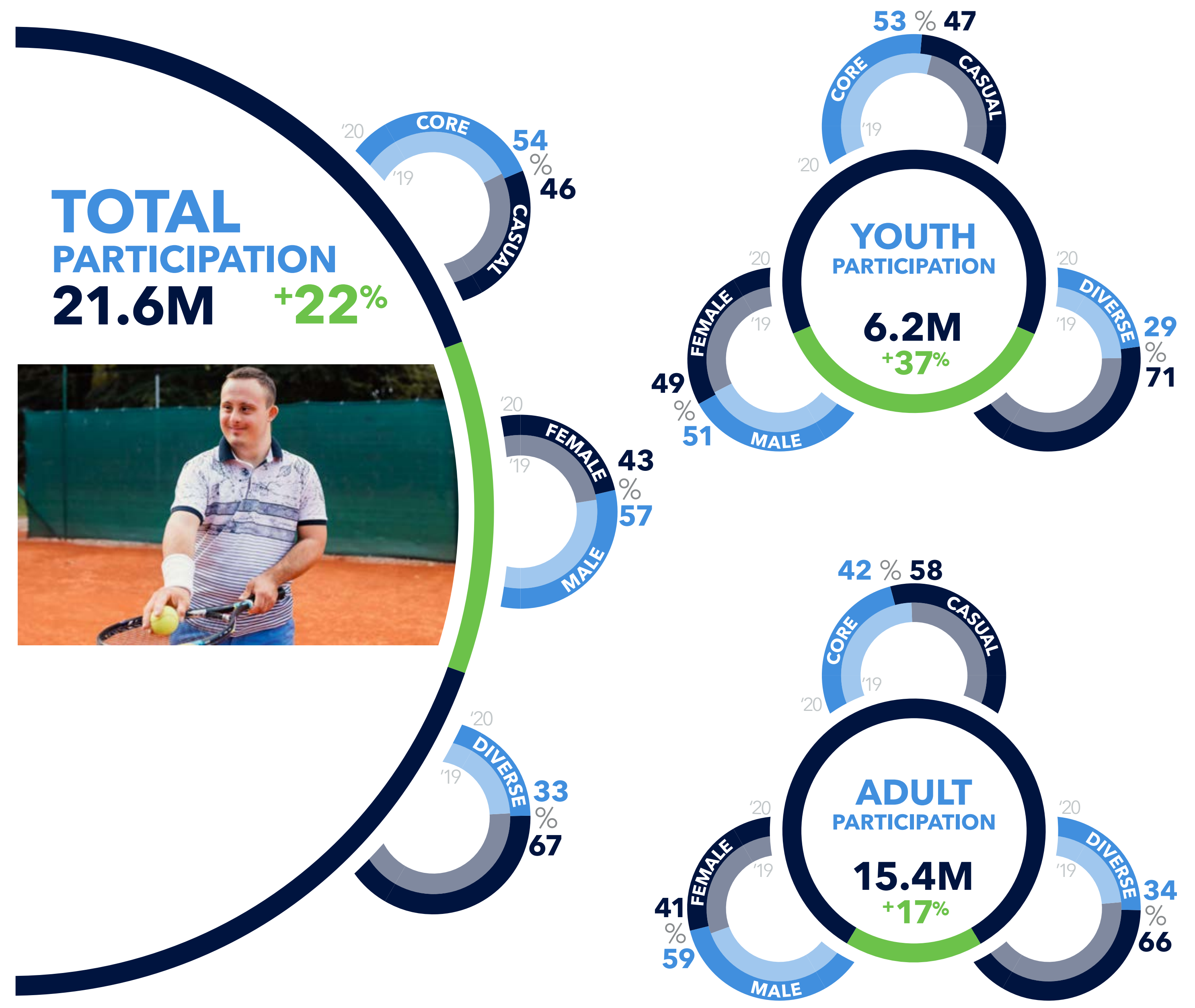
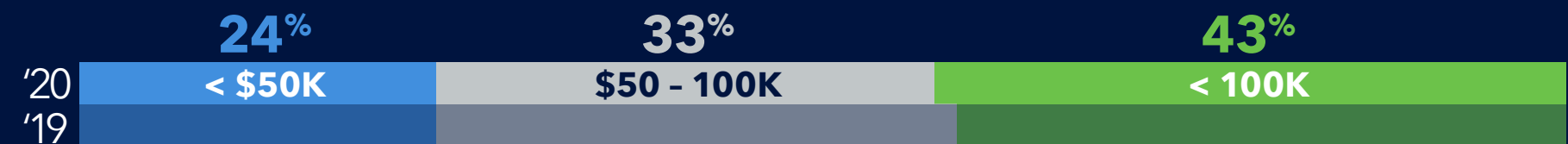
Nearly **3M** new players **(+44%)** and over **3.8M** returning players **(+40%)** participated in 2020.

Given the influx of new players at park & rec facilities, the industry must develop tools to capture these players' data and develop touchpoints to engage and grow play occasions.

TOTAL PLAY OCCASIONS **495.1M** +28%

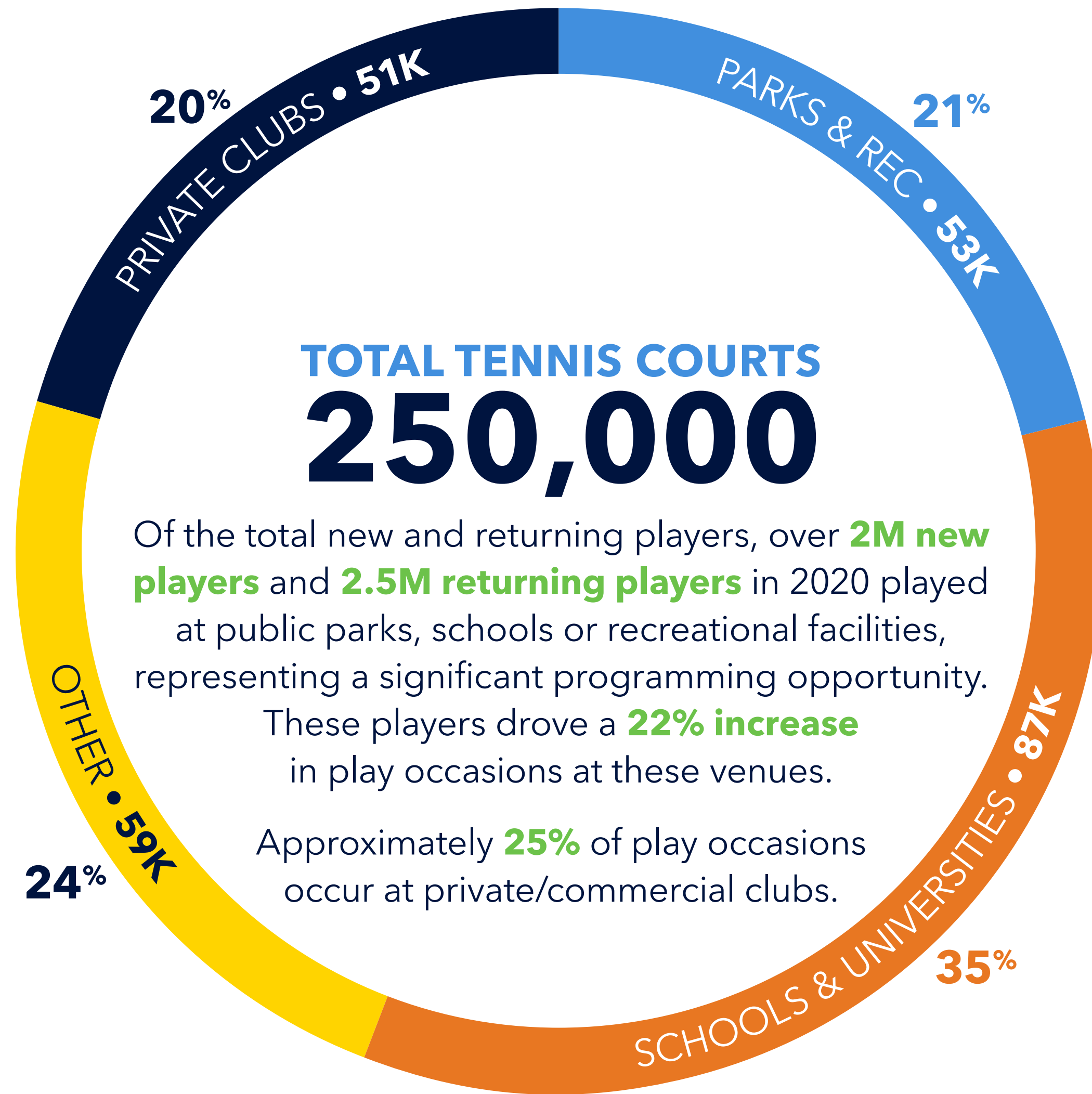


INCOME LEVELS · ALL PARTICIPANTS



SOURCE: PAC

FACILITIES



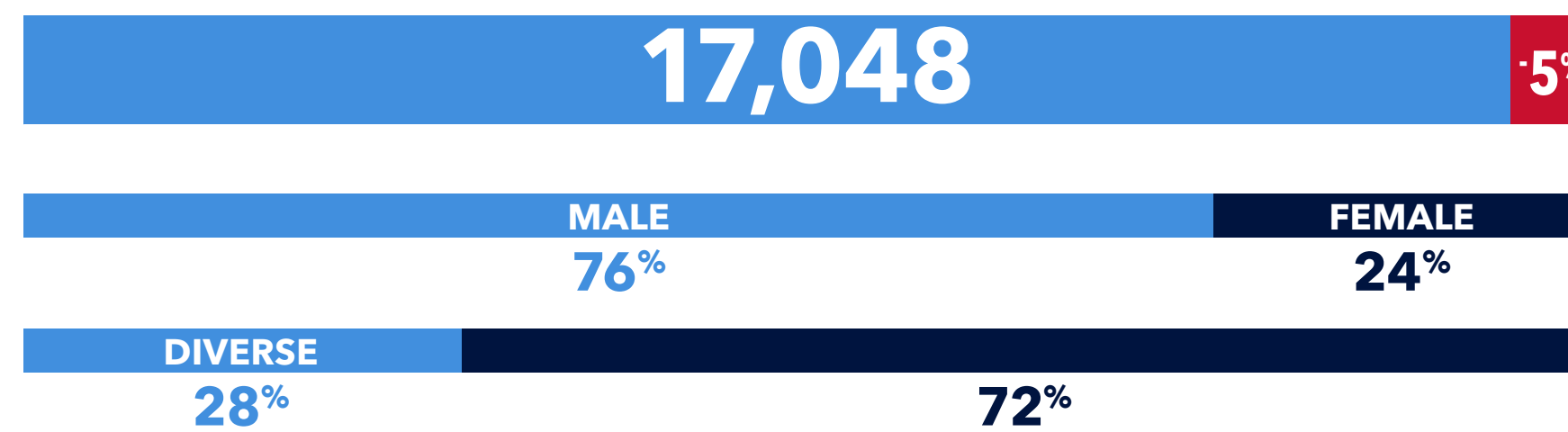
TENNIS DELIVERY

There are over 17,000 certified coaches in the U.S. with **24% female** and **28% diverse**. The industry must now put significant focus and investment on recruitment of a new, young, diverse army of providers in order to deliver positive customer experiences. These providers will play a critical role in engaging the nearly 3M new participants to the game and driving these players to additional programming.

The increase in unique providers engaged with the USTA was primarily due to growth in Safe Play certification, new categories of providers in Serve Tennis and new school teachers/coaches.

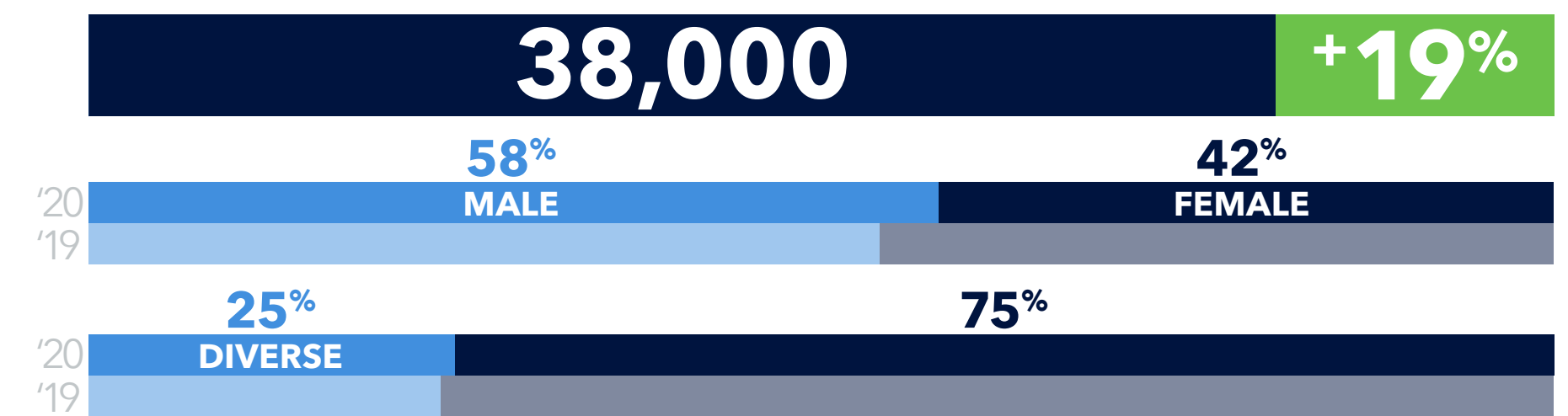
UNIQUE CERTIFIED COACHES

SOURCE: USPTA + PTR



UNIQUE PROVIDERS ENGAGED WITH USTA

SOURCE: USTA

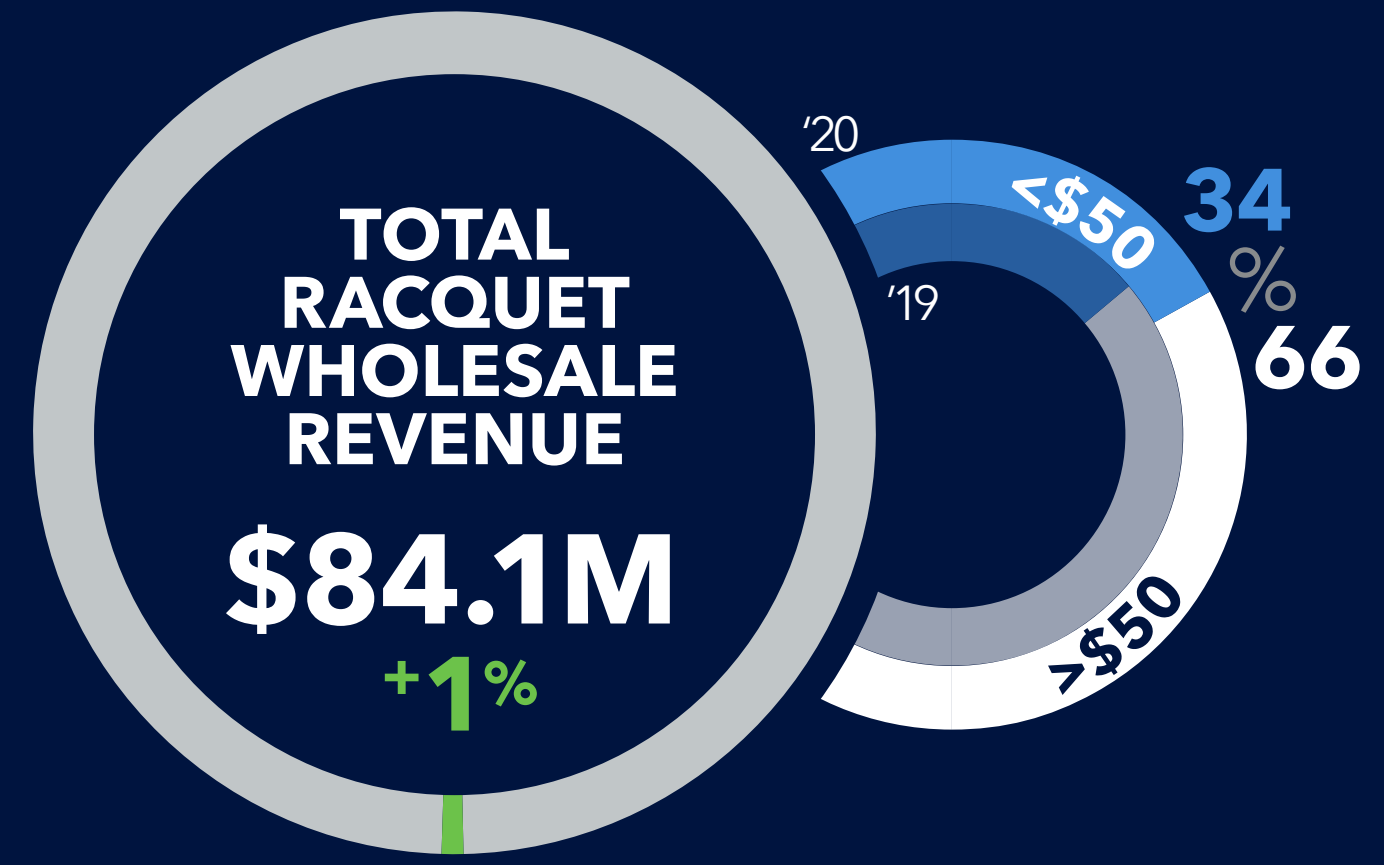
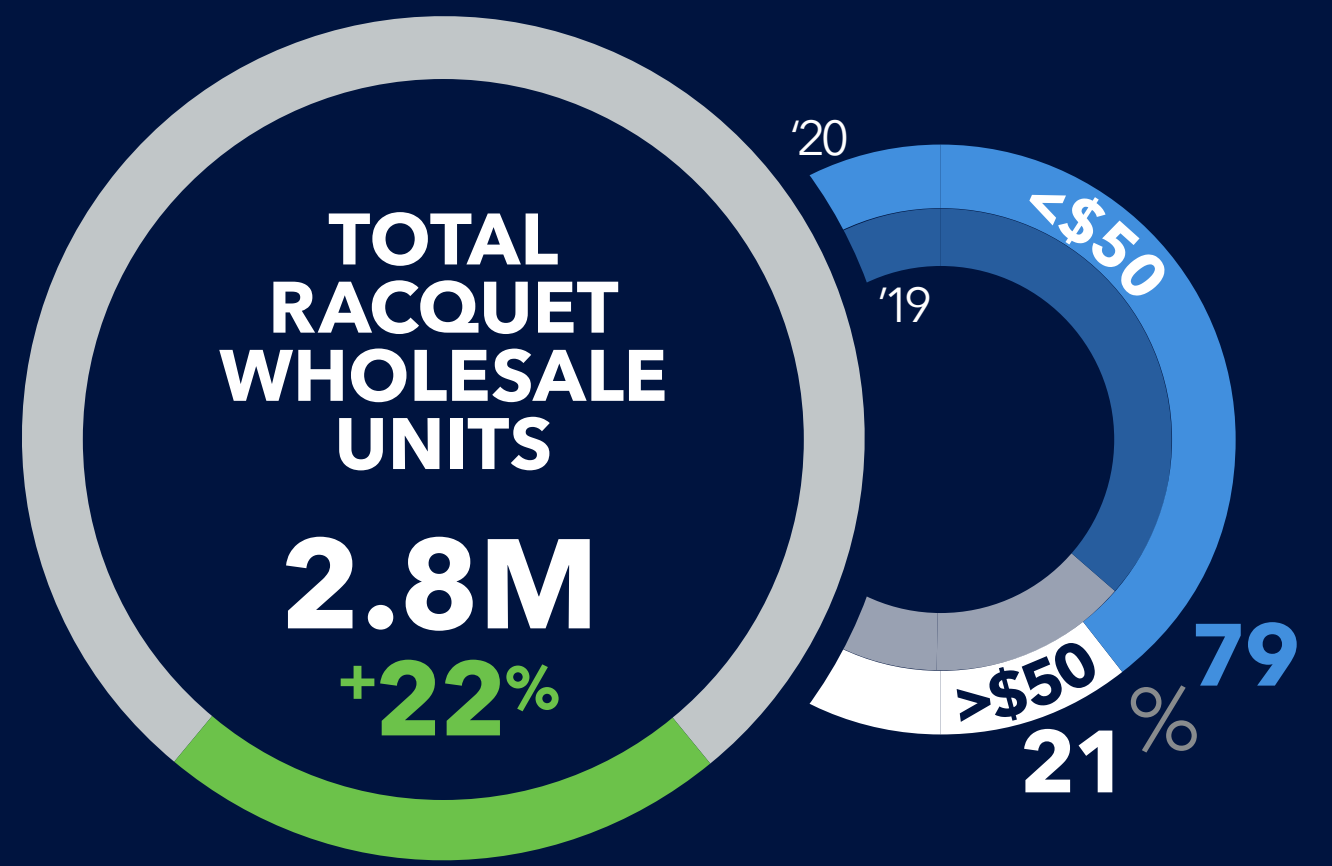




EQUIPMENT

SOURCE: Tennis Industry Association

Unit wholesale sell-in of racquets grew **22% YOY** while wholesale revenue remained relatively flat, indicating significant growth in sales of entry-level racquets.



BALL WHOLESALE

UNITS
106.8M +2%

REVENUE
\$75.4M +2%

Ball sales remained flat YOY due to supply chain issues—manufacturing plants in Asia closed for 6+ months due to COVID.



RACQUET SELL-THRU IN SPECIALTY RETAIL

UNITS
600K

REVENUE
\$93M -9%

Racquet sell-through in specialty retail was flat YOY, indicating significant growth in sales within large format & value retailers to **new/casual** youth & adult players.



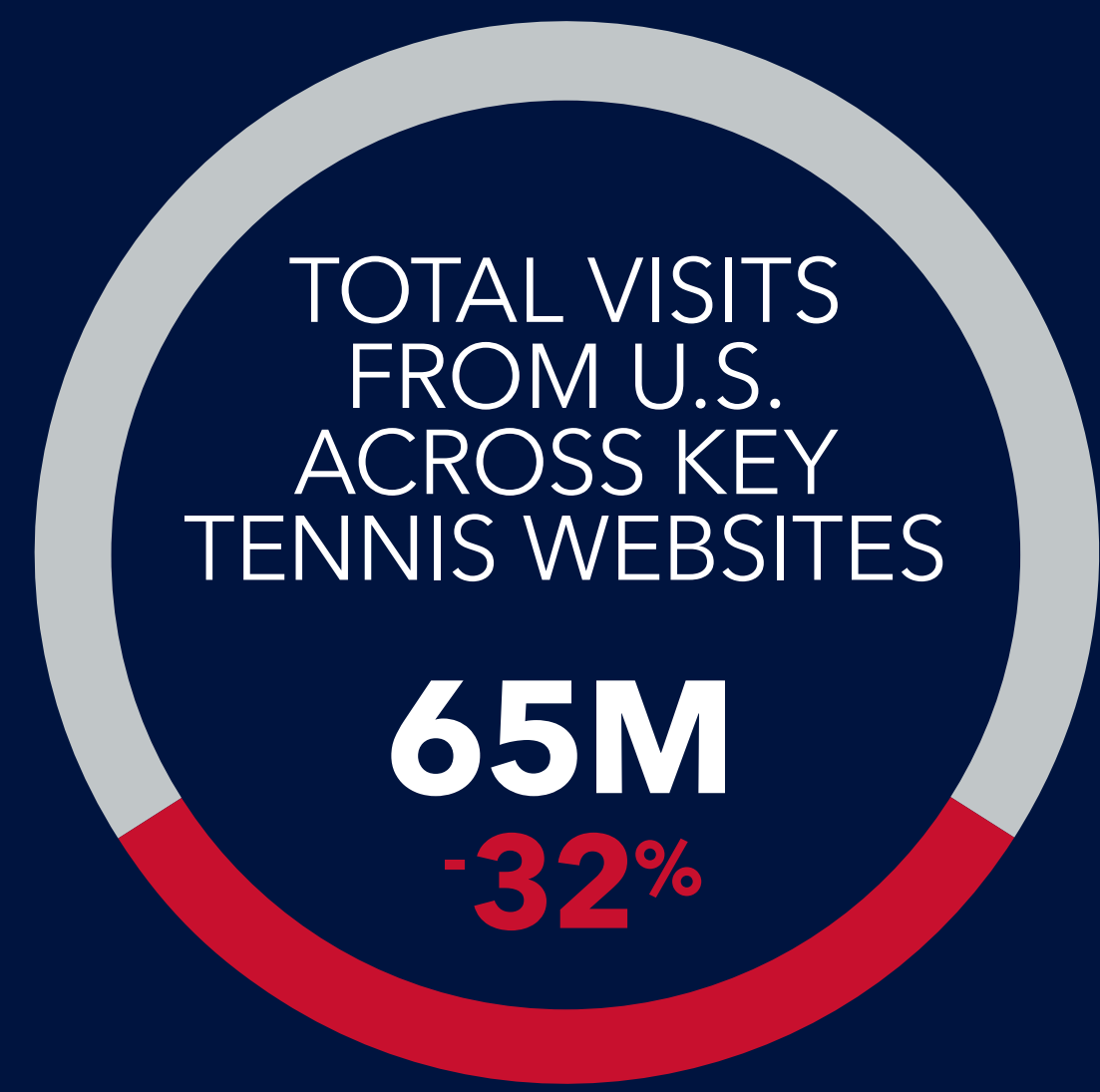


FAN ENGAGEMENT

83M US OPEN FANS IN THE UNITED STATES

SOURCE: YouGov

DIGITAL



Digital traffic across all key tennis websites decreased significantly due to cancellation/postponement of key events.

SOURCE: SimilarWeb

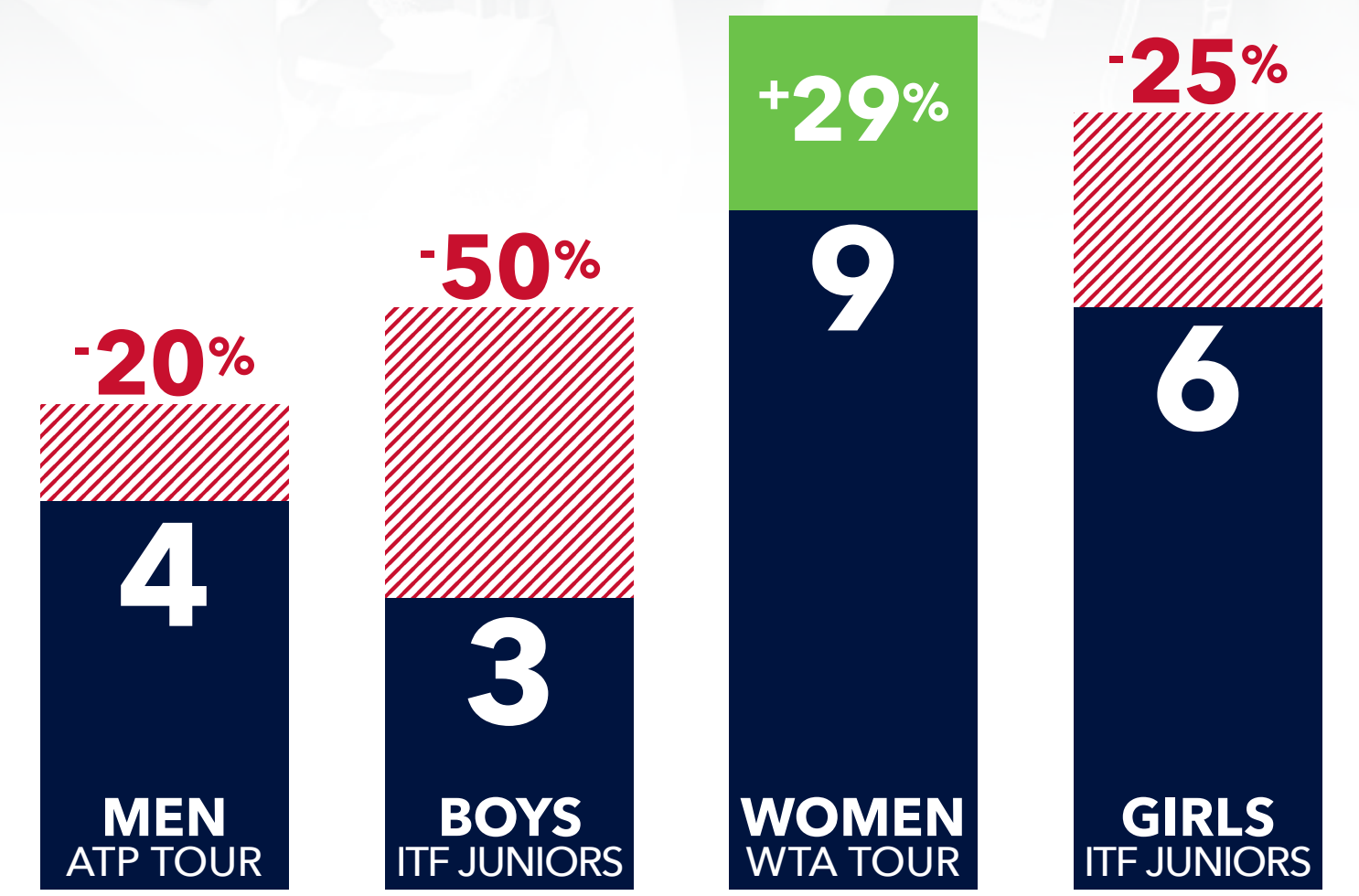
SOCIAL



Social interactions across all channels decreased significantly due to cancellation/postponement of key events and grassroots programming.

SOURCE: Trackmaven (Skyword) for Total Interactions (Facebook, Instagram, Twitter, YouTube) + Total Video Views (Facebook & YouTube); CrowdTangle for Total Video Views (Instagram)

PROFESSIONAL PLAYER HIGHLIGHTS



TOTAL AMERICANS RANKED IN TOP 50

Sofia Kenin won her first major championship at the 2020 Australian Open

Taylor Fritz reached third round of Australian Open, Roland Garros, and first ATP 500 final, achieving a career-high ranking of ATP #24

Coco Gauff reached the round of 16 at the 2020 Australian Open with a 3rd round win over world #3 Naomi Osaka

Sebastian Korda fought through the Qualifying at Roland Garros in 2020 as a 19 year-old to reach the round of 16

David Wagner (Quad Wheelchair) rose to #4 in the world and was the only American to compete in the Australian, US Open and Roland Garros.





KEY DEFINITIONS

Casual Player

A player that has played tennis between 1-10 times annually

Core Player

A player that has played tennis 10+ times annually

Diverse Player

Players of non-white ethnicity

Diverse Coach

Coaches of non-white ethnicity

Unique Providers Engaged with USTA

Unique providers that served any of the following roles:
Serve Tennis Administrator, League Coordinator, Junior Team
Tennis Captain, Engaged School Teacher/Coach, Safe Play
Approved Provider

Certified Coaches

Coaches that have been certified by either USPTA or PTR

Wholesale Balls/Racquets Revenue/Units

Equipment that has been sold into retail points of sale

Specialty Retail Racquet Sell Thru Units/Revenue

Racquets that have been sold to consumers via specialty retail

Social

Aggregate total interactions (Facebook, Instagram, Twitter, YouTube) + total video views (Facebook, Instagram, Twitter) for all tennis majors, NGBs in countries which host majors, ATP, WTA



THANK YOU

TENNIS INDUSTRY UNITED
TOGETHER, FOR TENNIS.

FOUNDING MEMBERS



For any questions, please contact info@tennisindustryunited.org