

TPA Indoor Club Survey Results: 2018-19 Season

September 2019

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Key Findings

MEMBERSHIP

- » Two-thirds (67%) of clubs are over 80% full when it comes to membership.
- » 40% of clubs have 500 or more adult members and 71% have 250 or more adult members.
- » 56% of clubs have 100 or more junior members and 76% have 50 or more junior members.
- » On average indoor facilities have 76% adult members and 24% junior (U18) members.
- » On average indoor facilities have 138 members per indoor court (median = 98 per court).

COURT BOOKING

- » 70%+ of clubs had over 80% court utilization during weekday evenings and weekend daytime.
- » 63% of clubs had over 70% court utilization during weekend daytime and 47% during weekend evenings.
- » 69% of clubs state that they can use more indoor courts, with a majority suggesting they need 2 or more additional courts.
 - » Further analysis showed that there was no distinct relationship between the members per court and the need for more courts.
- » During the indoor season, on average facilities charge \$30/hr during prime hours and \$24/hr during non-prime hours.

PROGRAMMING

- » 75% of clubs program over 40% of their total available court hours. Court hours allocated to programming continue to increase.
- » 57% of clubs are able to earn at least double the court fee revenue through programming.
- » On average 51% of court hours are reserved for programming - junior programs lead the way with 29% followed by adult programs at 22%.
- » 60%+ of clubs had over 80% program enrollment across all age categories.
- » 39% of clubs reported an increase in junior female players, 56% of clubs remained the same and 4% decreased.

PICKLEBALL

- » 45% of clubs offer pickleball. Amongst the clubs that offer Pickleball:
 - 59% have less than 50 pickleball players and 31% have 50 to 100 pickleball players.
 - 55% use tennis courts with temporary lines to play Pickleball
 - 90% believe the sport will to continue to grow at their facility
- » Amongst clubs that currently do not offer Pickleball, approximately one third (28%) are likely to offer Pickleball in the next two years.

Methodology

- » Invitations to complete the TPA indoor survey were sent to **141 TPA member indoor facilities** across Canada through SurveyMonkey.
- » We received a **total of 79 survey responses** (59% response rate).
- » After removing incomplete responses, **72 survey responses were used to complete further analysis.**
- » Completed surveys were entered into a draw to win a \$300 Gamma Ball Cart.
- » Following the TPA Indoor Survey, additional questions surrounding Pickleball were sent to all 141 TPA member indoor facilities. We received 65 completed responses for the Pickleball questions.

A majority of the analysis in this report was conducted through the following two methods:

[1] GROUPING: numerical variables such as members and court utilization rates were organized into ranges and then the percentage of clubs belonging to each range was identified.

[2] YEAR-OVER-YEAR CHANGE: for several variables, clubs were asked to report their change relative to the 2017-18 indoor season. The report shares the percentage of clubs that increased, stayed the same or decreased for certain variable.

Respondents

RESPONSE RATE

141 Clubs Contacted

72 Completed Responses

51% Response Rate

REGIONAL REPRESENTATION

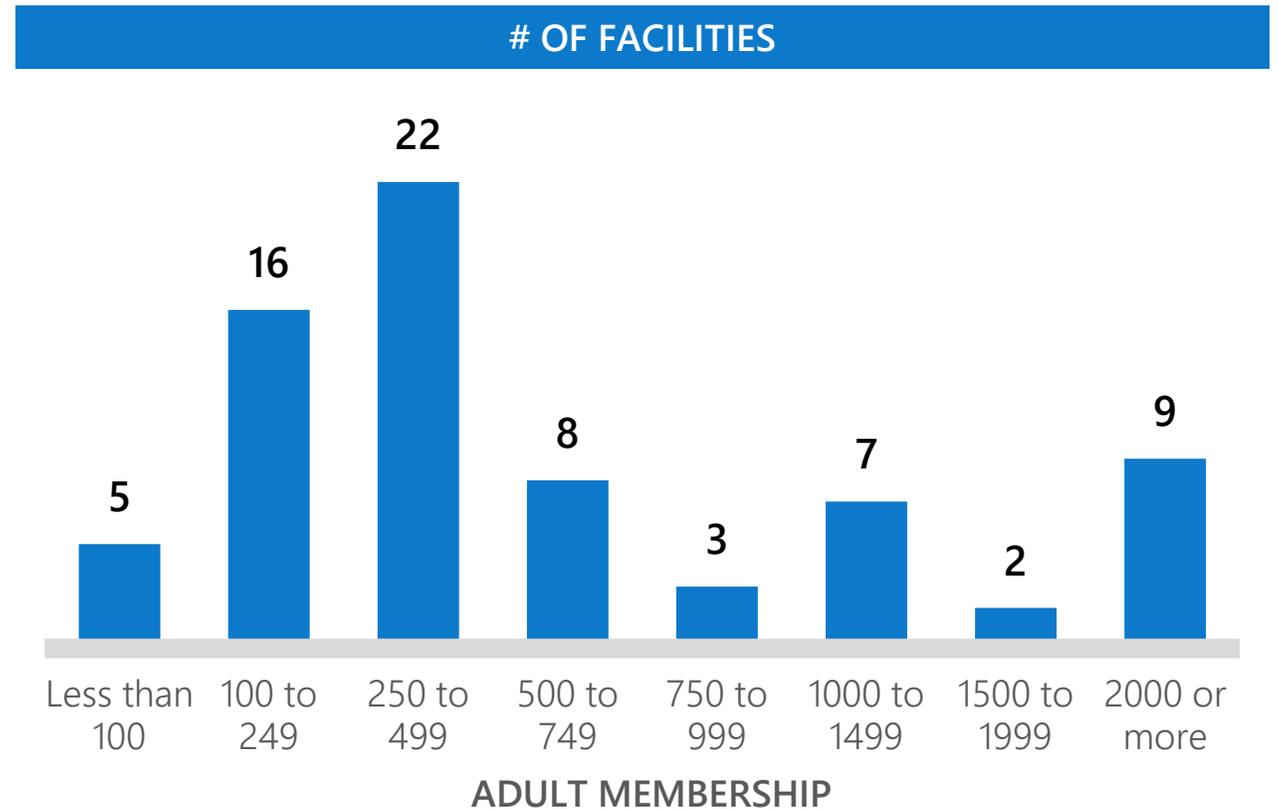
Ontario	31
British Columbia	17
Quebec	13

Alberta	5
Nova Scotia	4

Manitoba	1
Newfoundland	1

Adult Members at Indoor Facilities

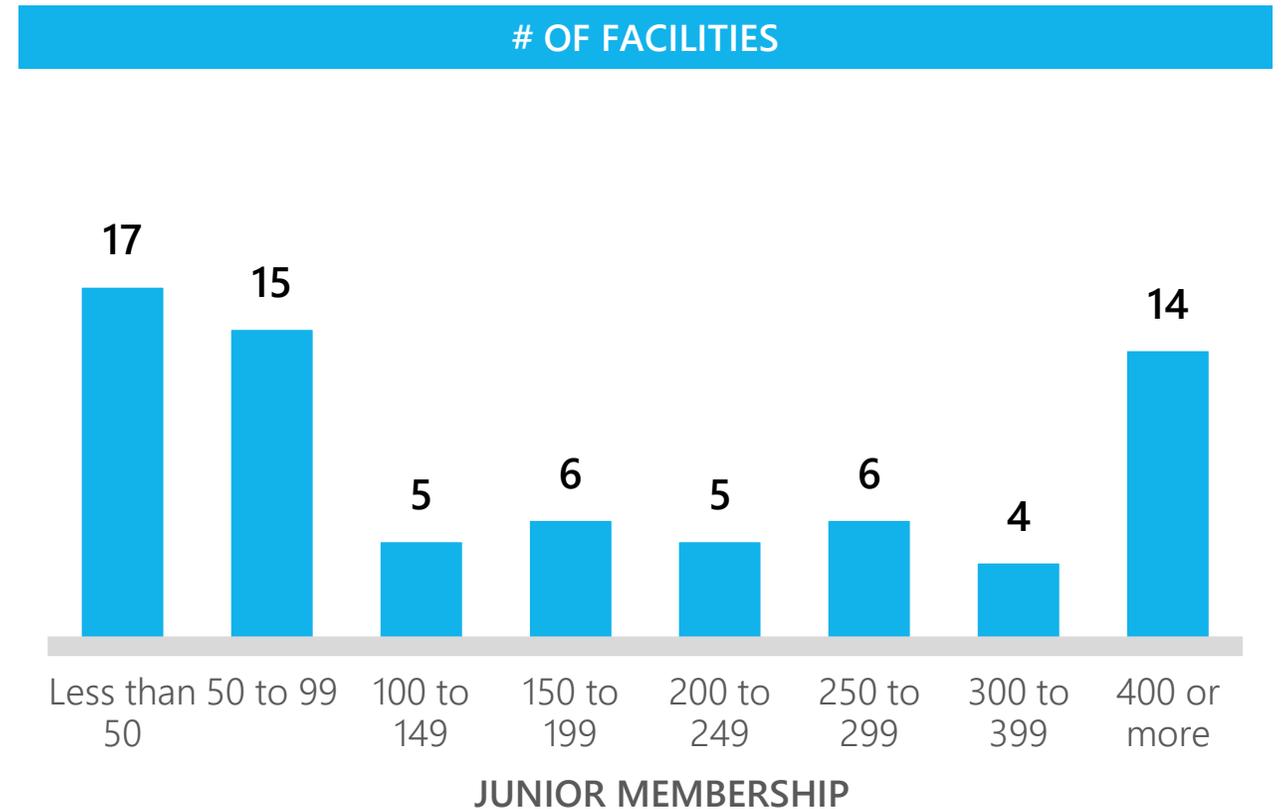
NUMBER OF ADULT MEMBERS	% OF FACILITIES	CUMULATIVE %
2000 or more members	13%	13%
1500 to 1999 Members	3%	15%
1000 to 1499 Members	10%	25%
750 to 999 members	4%	29%
500 to 749 Members	11%	40%
250 to 499 Members	31%	71%
100 to 249 Members	22%	93%
Less than 100 Members	7%	100%



71% of facilities have 250 or more adult members.
40% of facilities have 500 or more adult members.

Junior Members at Indoor Facilities

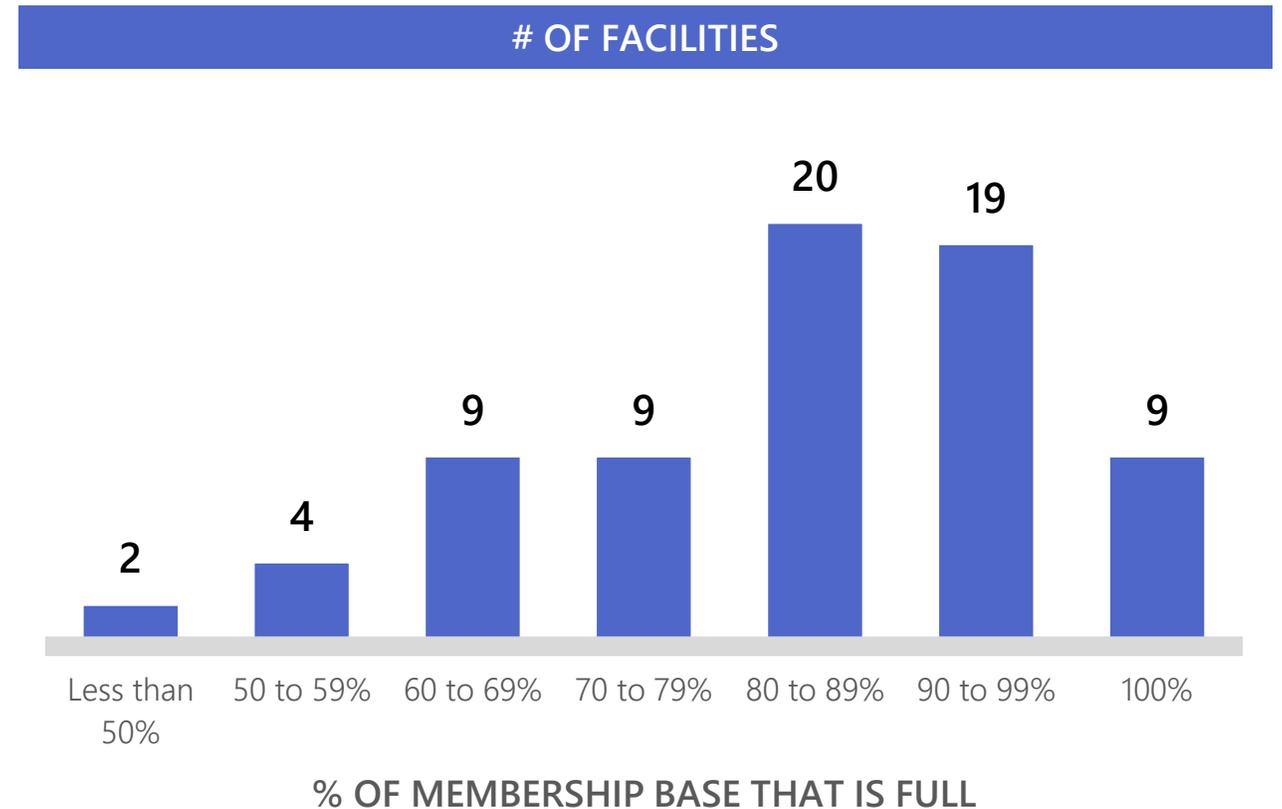
NUMBER OF JUNIOR MEMBERS	% OF FACILITIES	CUMULATIVE %
400 or more members	19%	19%
300 to 399 Members	6%	25%
250 to 299 Members	8%	33%
200 to 249 members	7%	40%
150 to 199 Members	8%	49%
100 to 149 Members	7%	56%
50 to 99 Members	21%	76%
Less than 50 Members	24%	100%



76% of facilities have 50 or more junior members.
56% of facilities have 100 or more junior members.

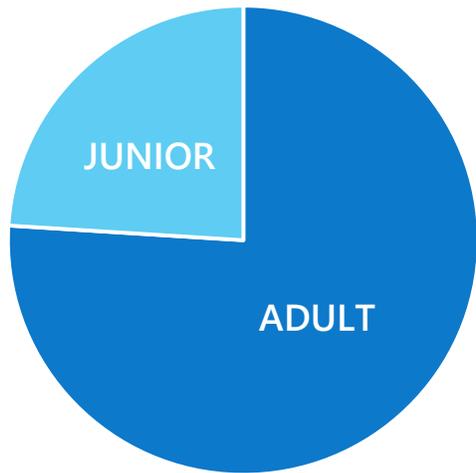
Membership Capacity

HOW FULL IS YOUR MEMBERSHIP BASE?	% OF FACILITIES	CUMULATIVE %
100%	13%	13%
90 to 99%	26%	39%
80 to 89%	28%	67%
70 to 79%	13%	79%
60 to 69%	13%	92%
50 to 59%	6%	97%
Less than 50%	3%	100%



Two-thirds (**67%**) of indoor facilities are 80% or more full when it comes to membership.

Adult vs. Junior Members



On average indoor facilities have...

76% Adult Members

24% Junior Members

Change in Adult Membership



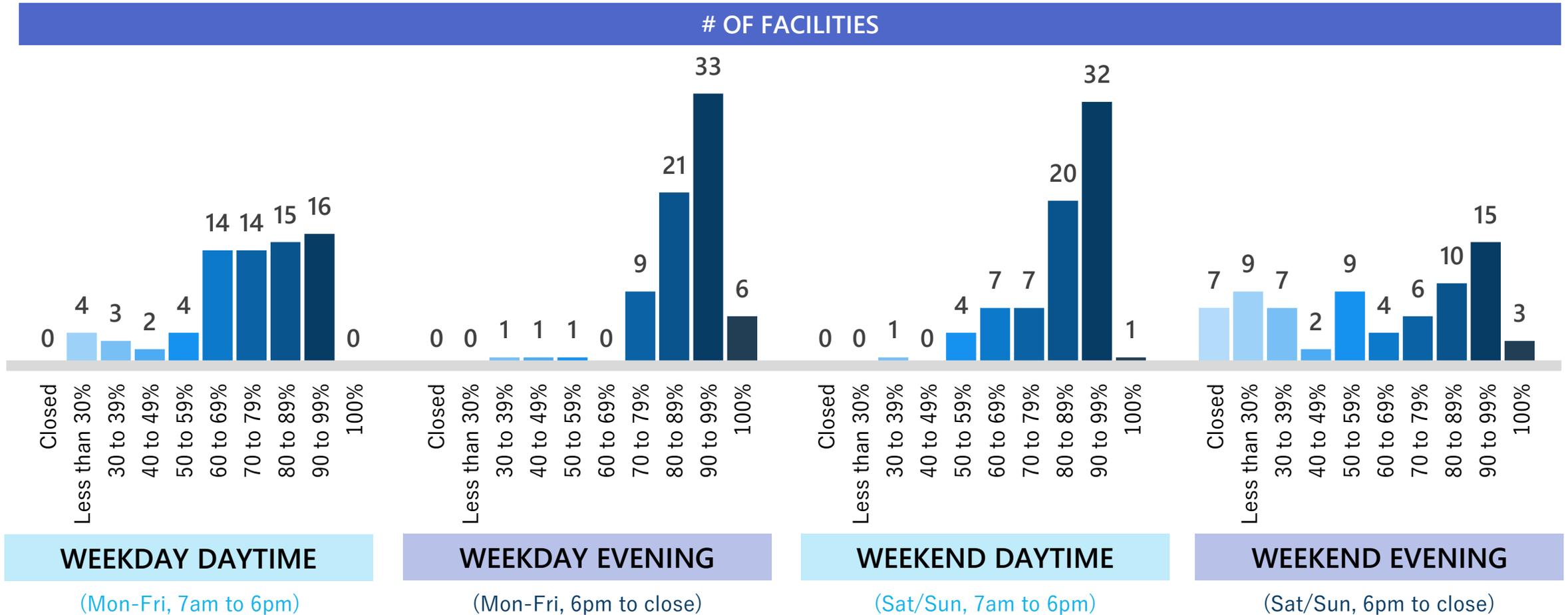
43% of indoor facilities saw an **increase** in adult membership.

Change in Junior Membership



43% of indoor facilities saw an **increase** in junior membership.

Court Utilization by Time of Day

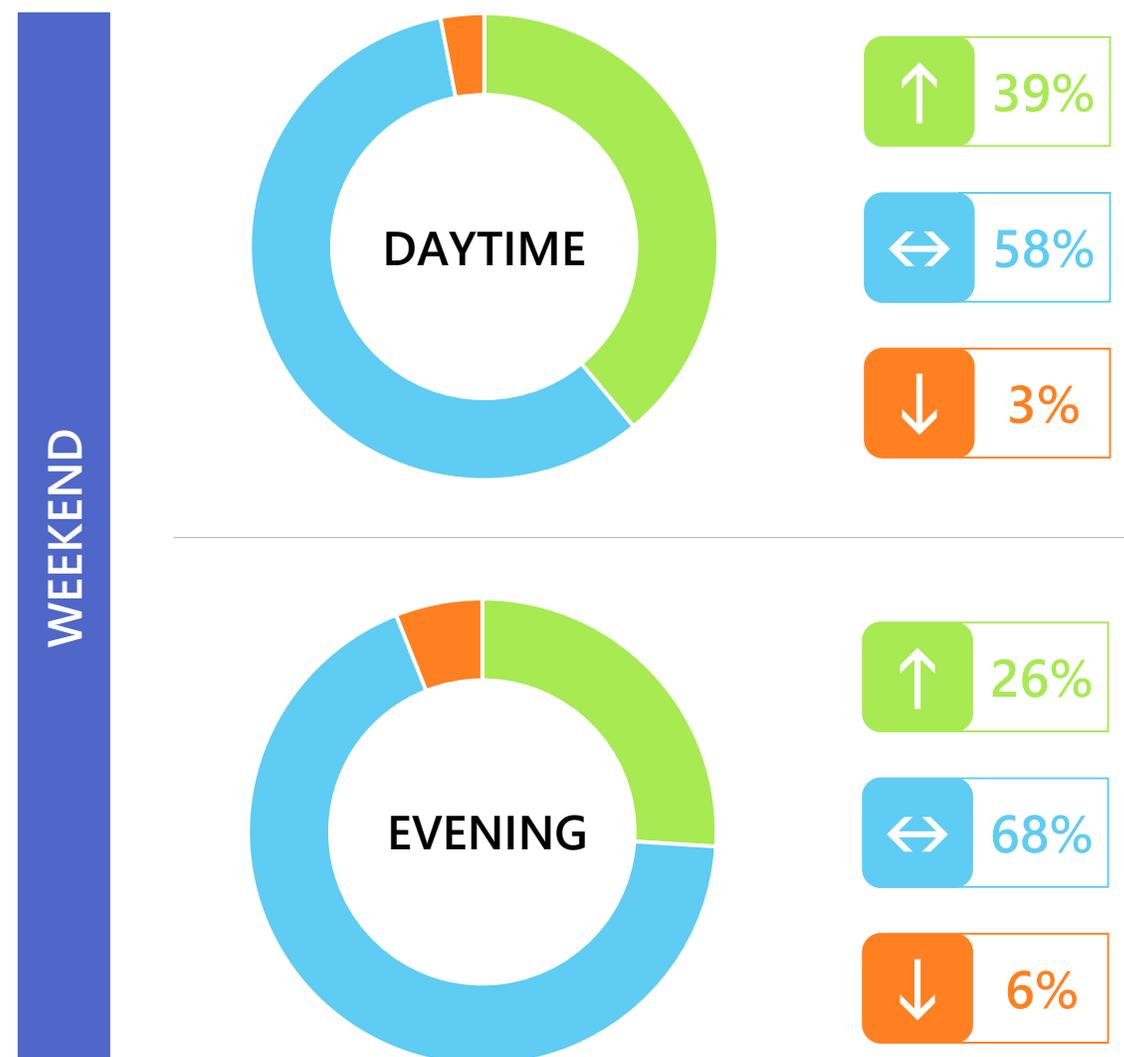
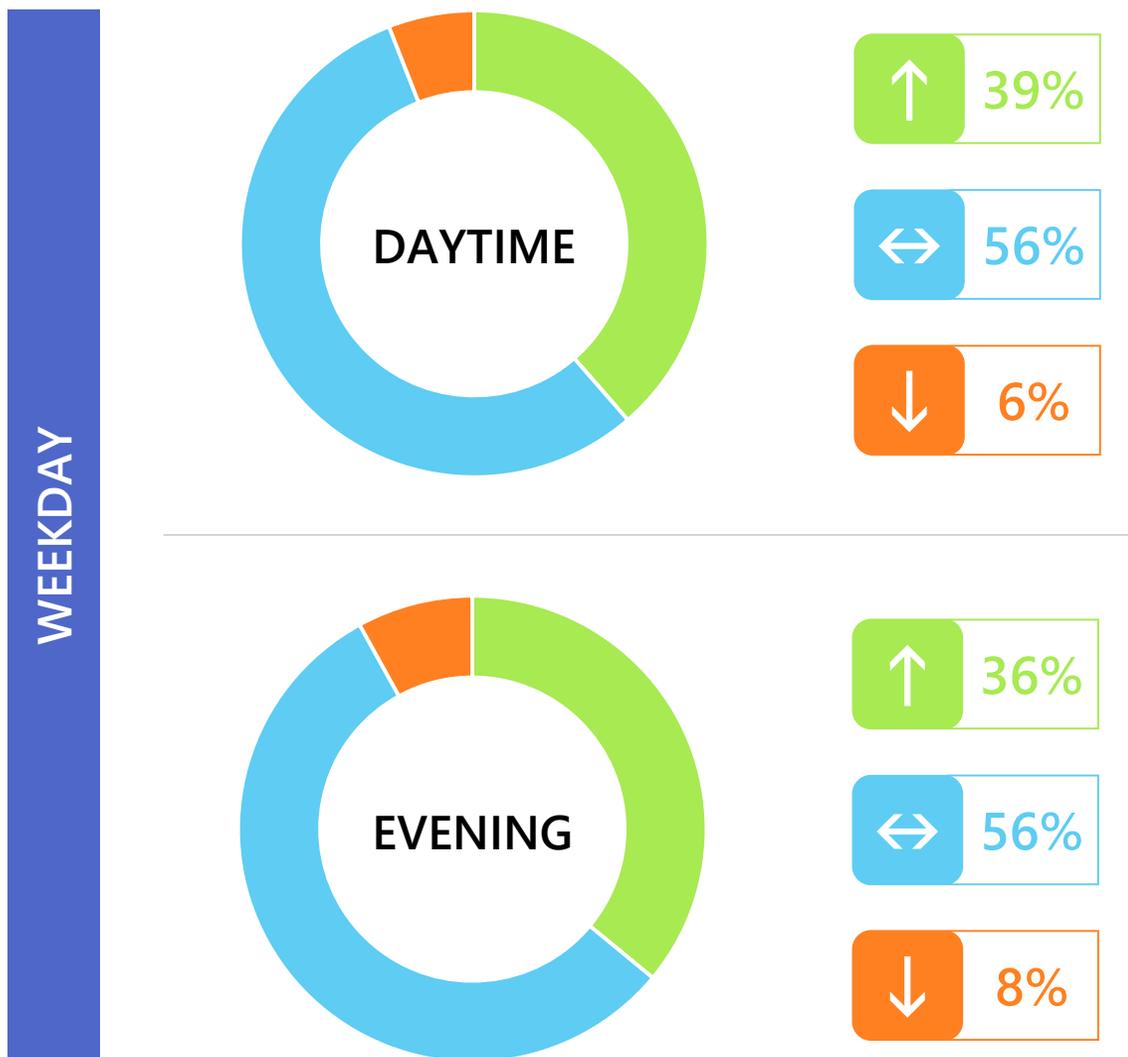


A significant portion of facilities are close to capacity during most operating hours. Weekend evenings appear to be the only difficult time period to fill.

Court Utilization by Time of Day

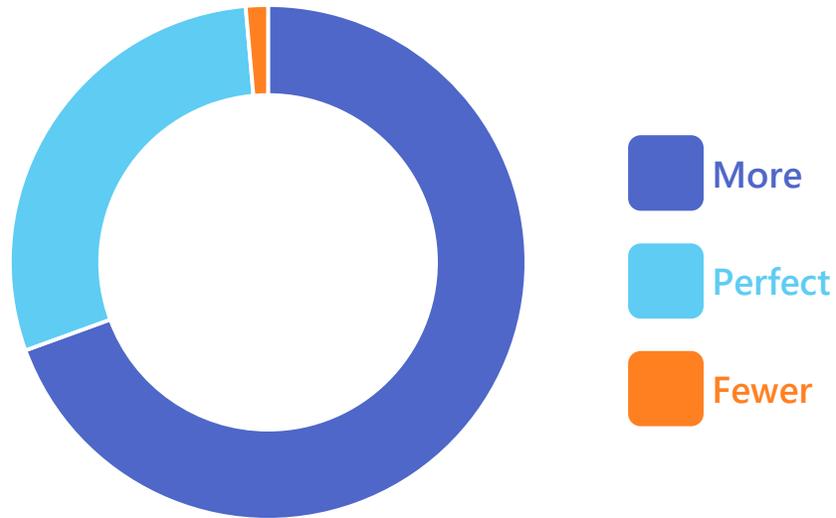
COURT UTILIZATION	WEEKDAY DAYTIME		WEEKDAY EVENING		WEEKEND DAYTIME		WEEKEND EVENING	
	% of facilities	Cumulative %						
100%	0%	0%	8%	8%	1%	1%	4%	4%
90 to 99%	22%	22%	46%	54%	44%	46%	21%	25%
80 to 89%	21%	43%	29%	83%	28%	74%	14%	39%
70 to 79%	19%	63%	13%	96%	10%	83%	8%	47%
60 to 69%	19%	82%	0%	96%	10%	93%	6%	53%
50 to 59%	6%	88%	1%	97%	6%	99%	13%	65%
40 to 49%	3%	90%	1%	99%	0%	99%	3%	68%
30 to 39%	4%	94%	1%	100%	1%	100%	10%	78%
Less than 30%	6%	100%	0%	100%	0%	100%	13%	90%
Closed	0%	100%	0%	100%	0%	100%	10%	100%

Change in Court Utilization



Demand for Indoor Courts

Does your club need more or fewer indoor courts?



69% “We could use **more** indoor courts”

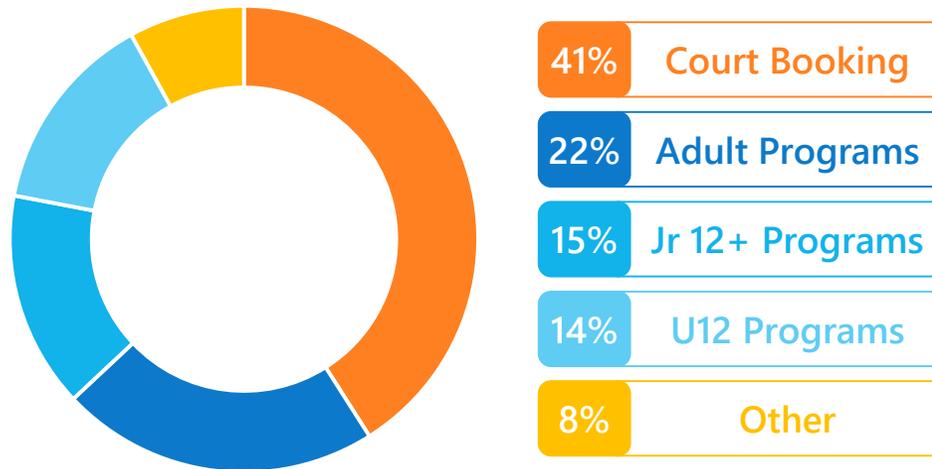
29% “We have the **perfect** number of courts”

1% “We could use **fewer** indoor courts”

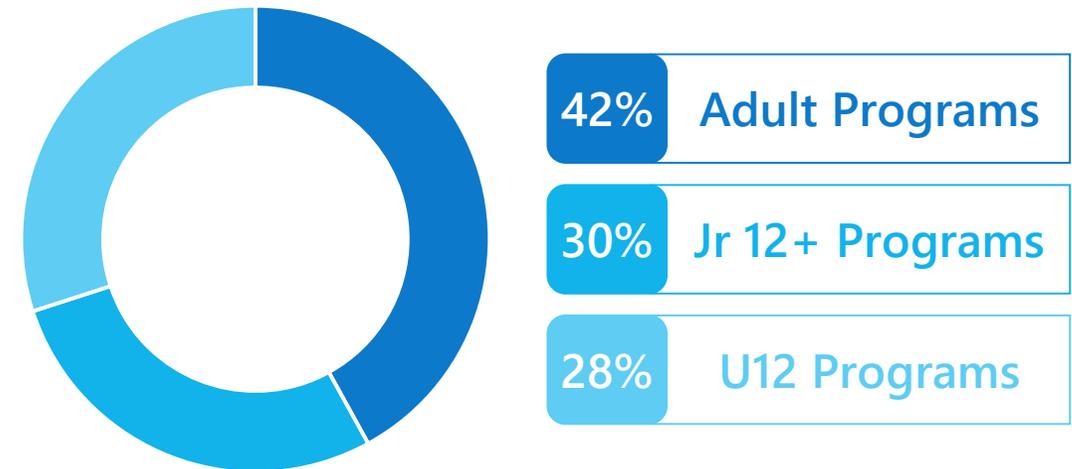
How many more courts should your club have?

ADDITIONAL COURTS NEEDED	# OF FACILITIES	% OF FACILITIES
1 more indoor court	3	4%
2 more indoor courts	19	26%
3 more indoor courts	8	11%
4 more indoor courts	10	14%
5 or more indoor courts	10	14%
Total	50	69%

Average Distribution of Total Hours

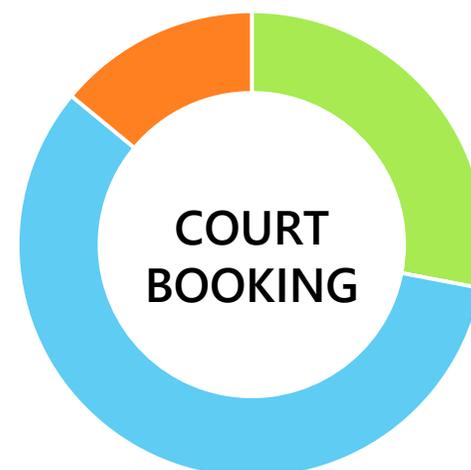


Average Distribution of Programmed Hours



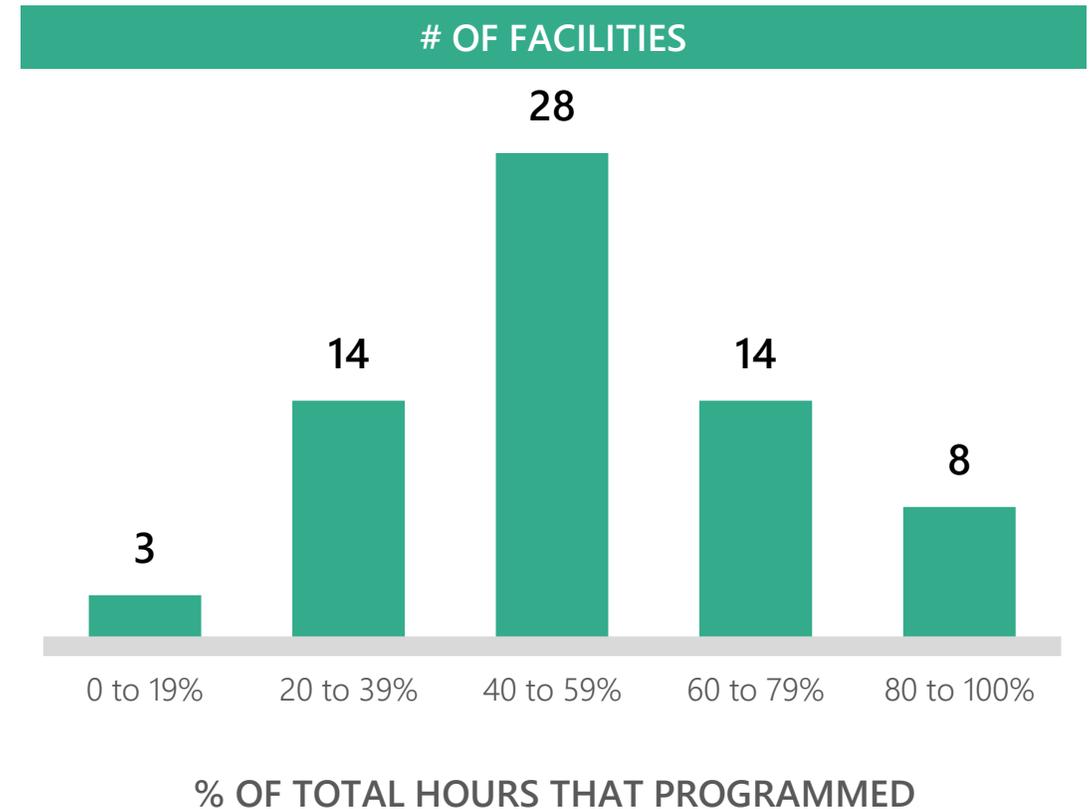
On average indoor facilities program **51%** of their total court hours.
On average **41%** of total courts are available for court booking.

Changes in Court Hour Allocation



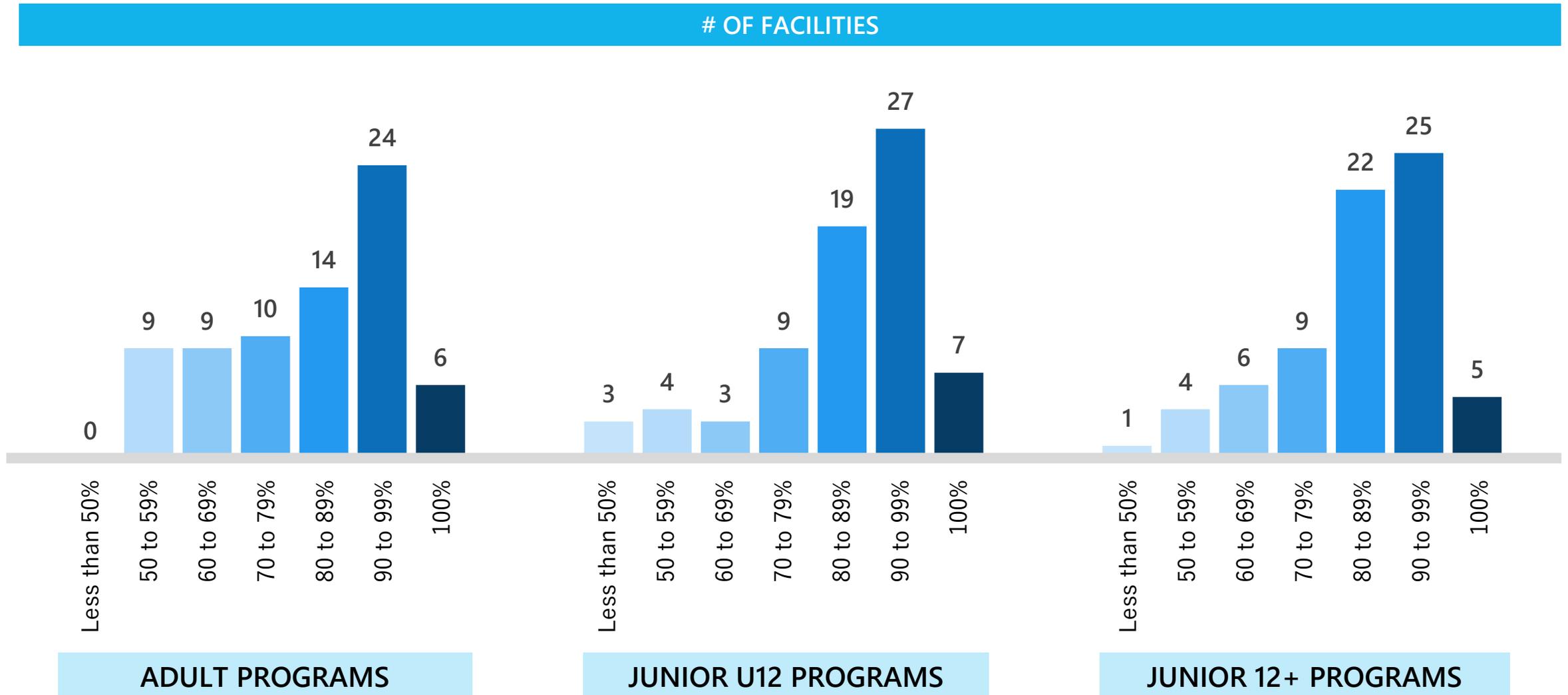
Programmed Court Hours

% OF TOTAL HOURS THAT ARE PROGRAMMED	% OF FACILITIES	CUMULATIVE %
80 to 100% of total hours	12%	12%
60 to 79% of total hours	21%	33%
40 to 59% of total hours	42%	75%
20 to 39% of total hours	21%	96%
0 to 19% of total hours	4%	100%



75% of indoor facilities program **40% or more** of their total available court hours.

Program Enrollment Rates

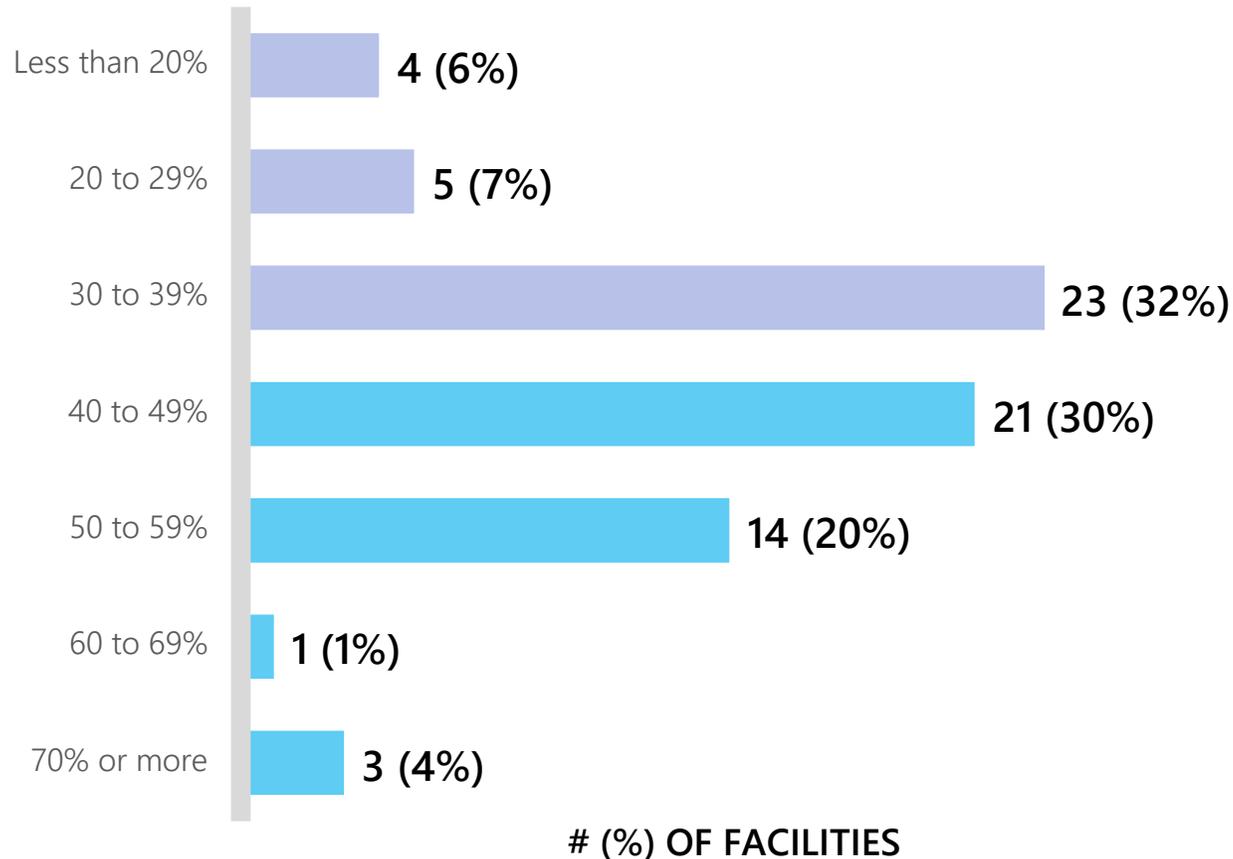


Program Enrollment Rates

PROGRAM ENROLLMENT RATE	ADULT PRORAMMING		JUNIOR U12 PROGRAMMING		JUNIOR 12+ PROGRAMMING	
	% of facilities	Cumulative %	% of facilities	Cumulative %	% of facilities	Cumulative %
100%	8%	8%	10%	10%	7%	7%
90 to 99%	33%	42%	38%	47%	35%	42%
80 to 89%	19%	61%	26%	74%	31%	72%
70 to 79%	14%	75%	13%	86%	13%	85%
60 to 69%	13%	88%	4%	90%	8%	93%
50 to 59%	13%	100%	6%	96%	6%	99%
Less than 50%	0%	100%	4%	100%	1%	100%

Junior Female Player Participation

% OF JUNIOR PLAYERS THAT WERE FEMALE



CHANGE IN FEMALE JUNIOR PLAYERS



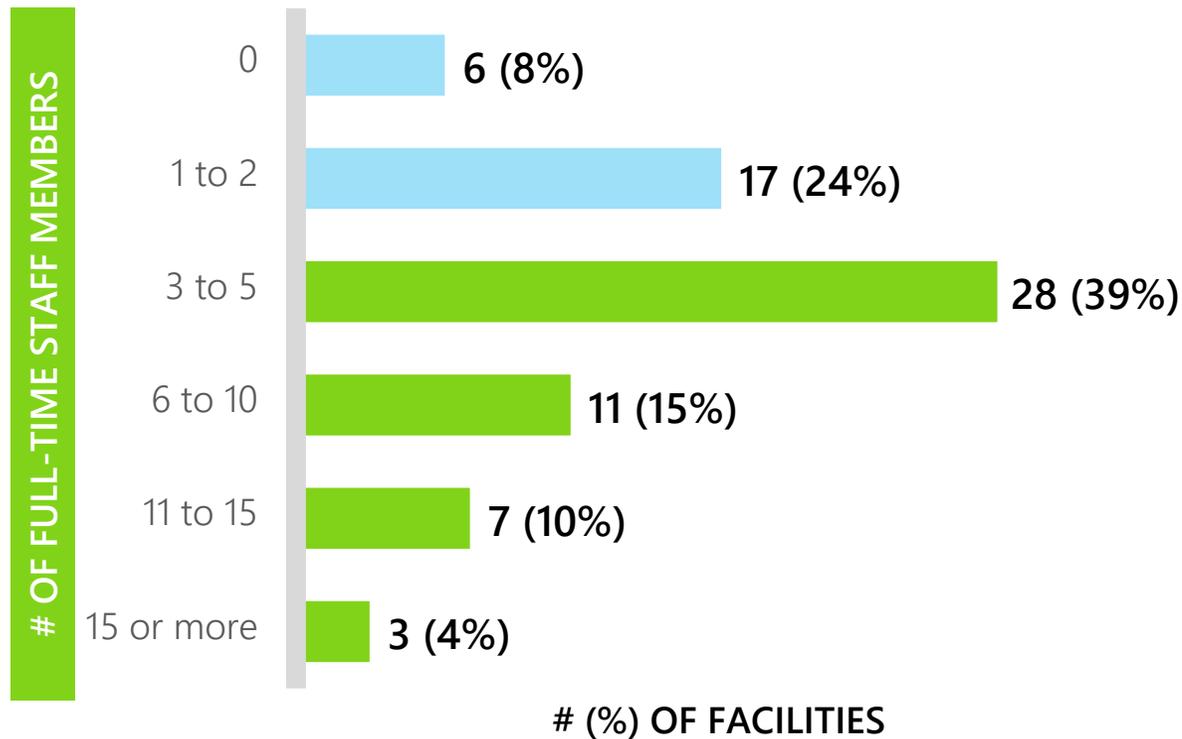
Although females are still under-represented compared to their male counterparts, female junior players increased at **39%** of indoor facilities. **54%** of indoor facilities have 40% or greater female representation in their junior programs.

Programming vs. Court Booking Revenue

When comparing different revenue streams at your facility, what statement below on average describes your net revenue related to court hours:	# OF FACILITIES	% OF FACILITIES
Program court hours generate the same amount of net revenue per court hour compared to regular bookings	12	17%
Program court hours generate the 1.5 times net revenue per court hour compared to regular bookings	14	19%
Program court hours generate the 2.0 times net revenue per court hour compared to regular bookings	10	14%
Program court hours generate the 2.5 times net revenue per court hour compared to regular bookings	8	11%
Program court hours generate the 3+ times net revenue per court hour compared to regular bookings	23	32%
Program court hours generate the less of net revenue per court hour compared to regular bookings	5	7%

More than half (57%) of indoor facilities are able to earn **at least double** the court fee net revenue through programming.

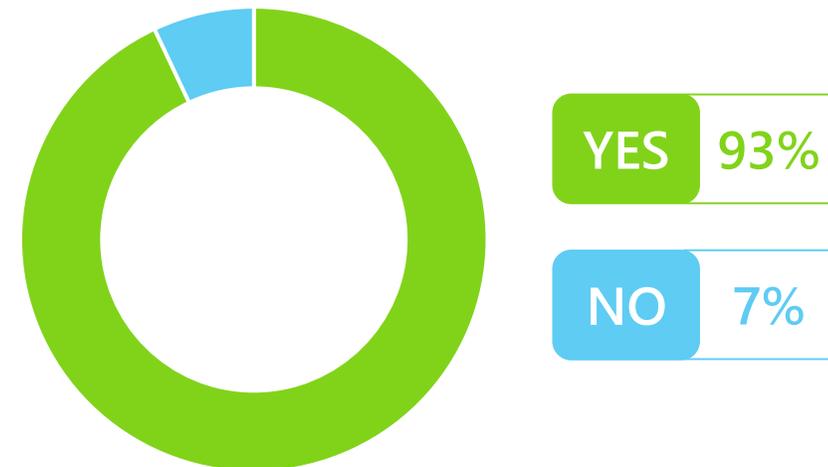
Full-time Tennis Staff



68% of indoor facilities employ 3 or more full-time tennis staff.

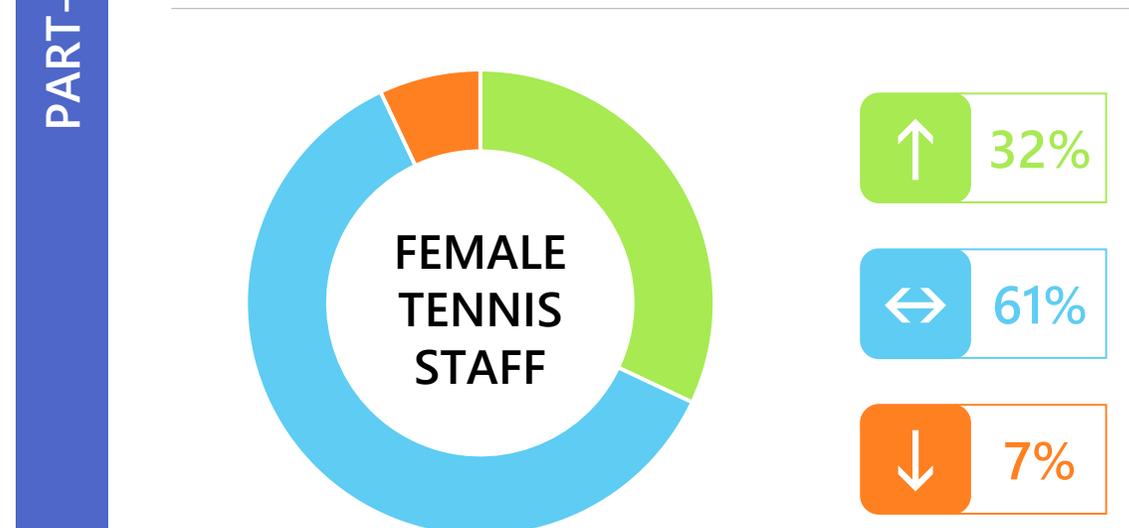
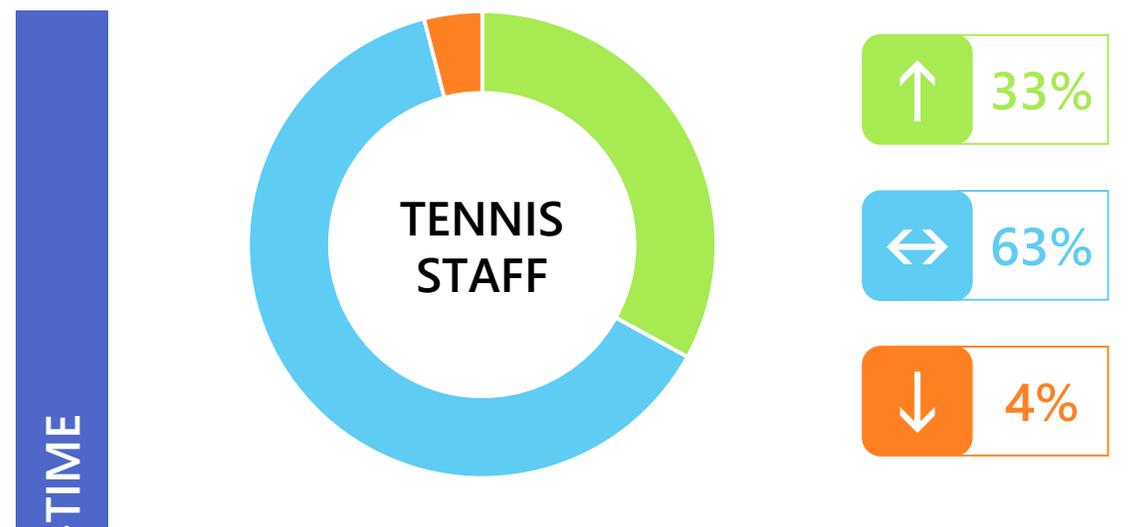
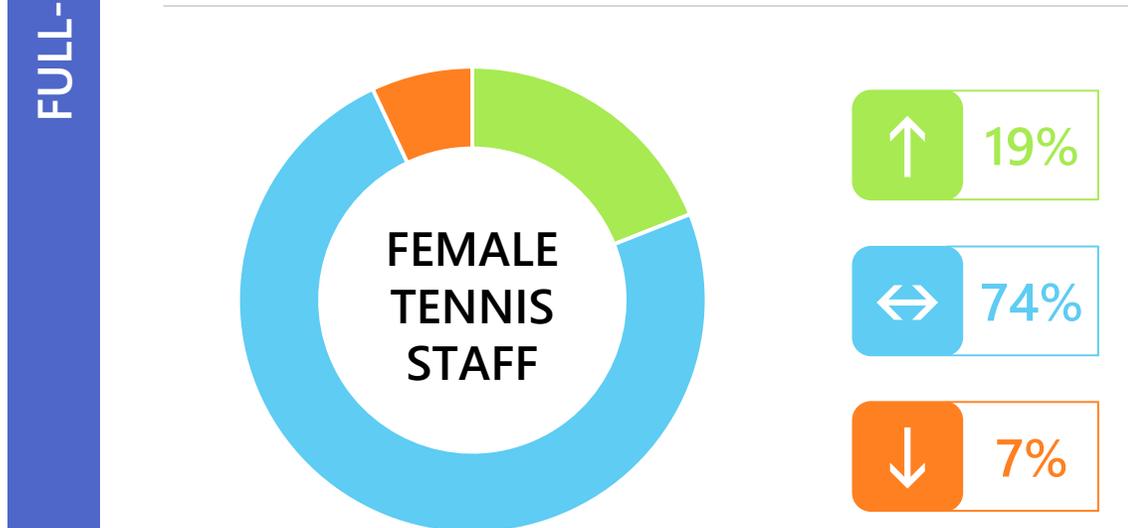
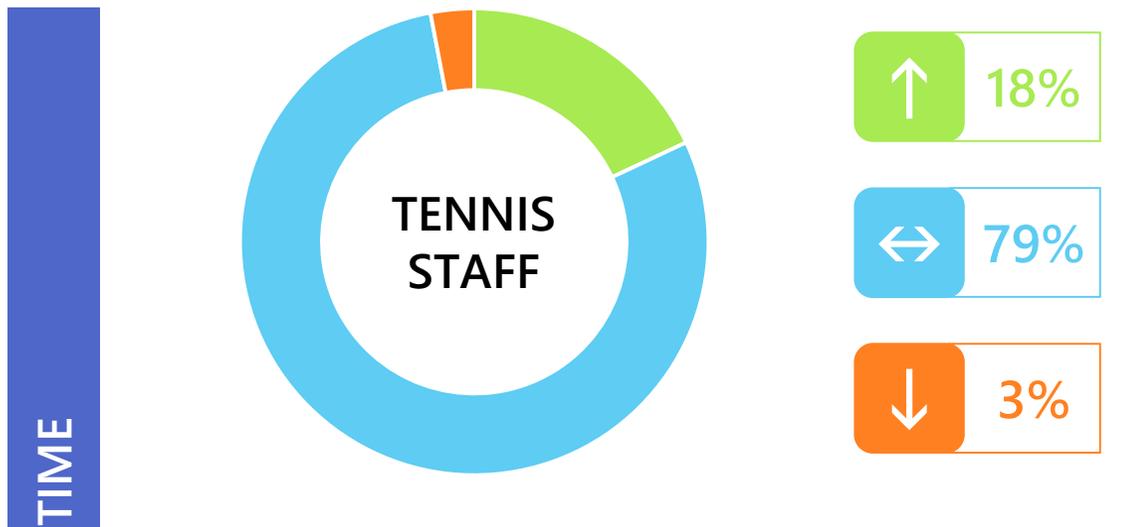
Safeguarding

Does your club have policies in place around safeguarding (i.e. background checks)?



93% of indoor facilities use background checks to safeguard our sport and its participants.

Changes in Staffing



Additional Operational Findings

INDOOR SEASON OPERATING HOURS

WEEKDAYS	Most clubs are open 6am to 11pm (17 operating hours per day)
WEEKENDS	Most clubs are open 7am to 10pm (15 operating hours per day)

INDOOR SEASON COURT FEE PER HOUR

	PRIME	NON-PRIME
Average	\$30/hr	\$24/hr
Highest	\$57.50/hr	\$48/hr
Lowest	\$20/hr	\$13.56/hr

PERMANENT OR CONTRACT FULL-TIME (FT) STAFF

% OF FT TENNIS STAFF THAT IS PERMANENTLY HIRED	# OF FACILITIES	% OF FACILITIES
0%	21	29%
1% to 19%	5	7%
20% to 39%	10	14%
40% to 59%	5	7%
60% to 79%	3	4%
80% to 99%	5	7%
100%	23	32%

At **32%** of indoor facilities all FT tennis staff were permanently employed. On average **48%** of FT tennis staff at indoor facilities are permanent (non-contract) staff.

About the Pickleball Survey

Following the annual TPA Indoor Club Survey, a number of club leaders expressed an interest in acquiring more information about Pickleball and whether (and to what extent) it was being integrated at tennis clubs across Canada.

In July 2019, 141 indoor tennis clubs across Canada were asked about the availability of Pickleball at their facility and their opinions on the future of Pickleball in Canada.



REGIONAL BREAKDOWN OF RESPONSES



General Findings

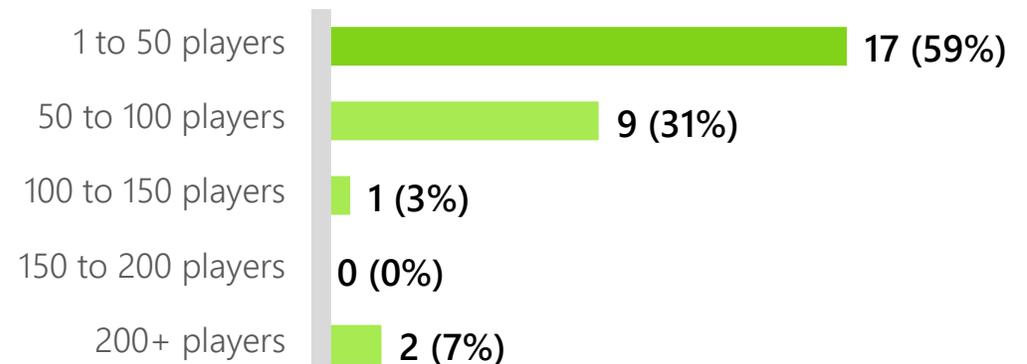
DO YOU OFFER PADEL TENNIS AT YOUR FACILITY?



DO YOU OFFER PICKLEBALL AT YOUR FACILITY?



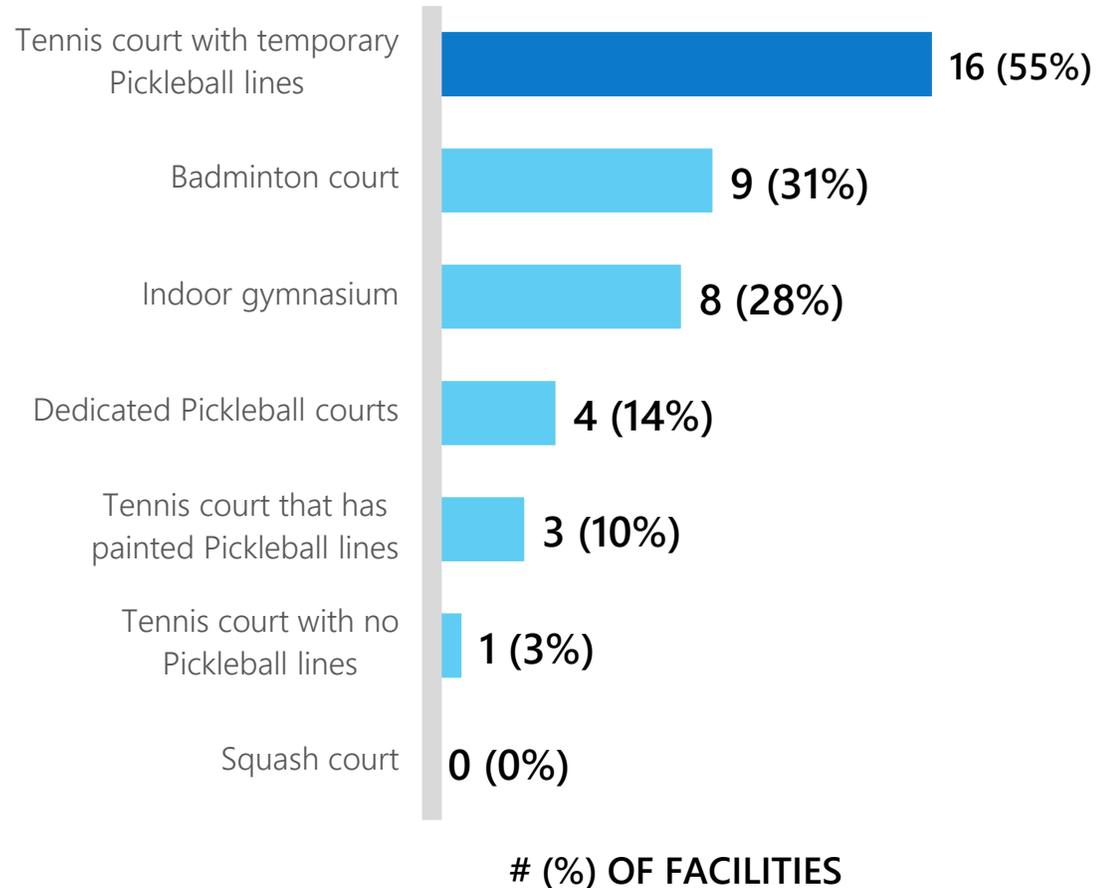
NUMBER OF PICKLEBALL PLAYERS



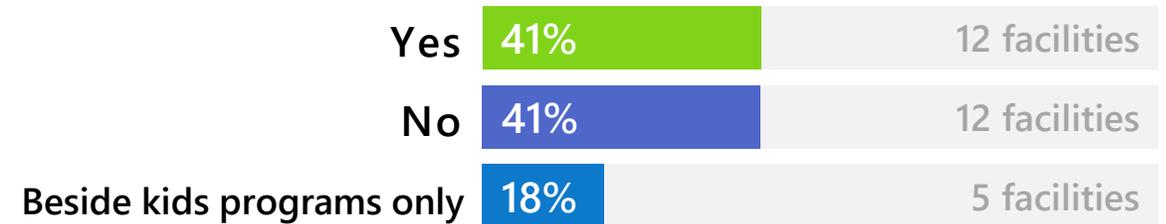
(%) OF FACILITIES

Tennis & Pickleball Courts

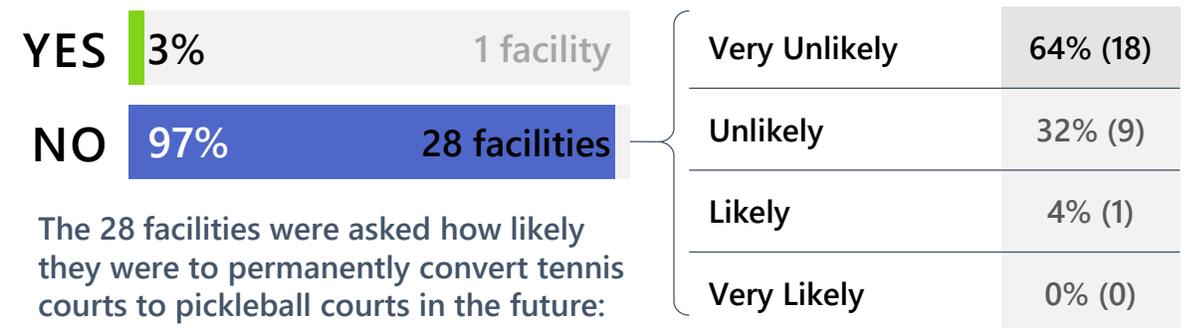
WHERE IS PICKLEBALL PLAYED AT YOUR FACILITY?
(Select all that apply)



Do you allow pickleball to be played immediately beside a court where tennis is being played?



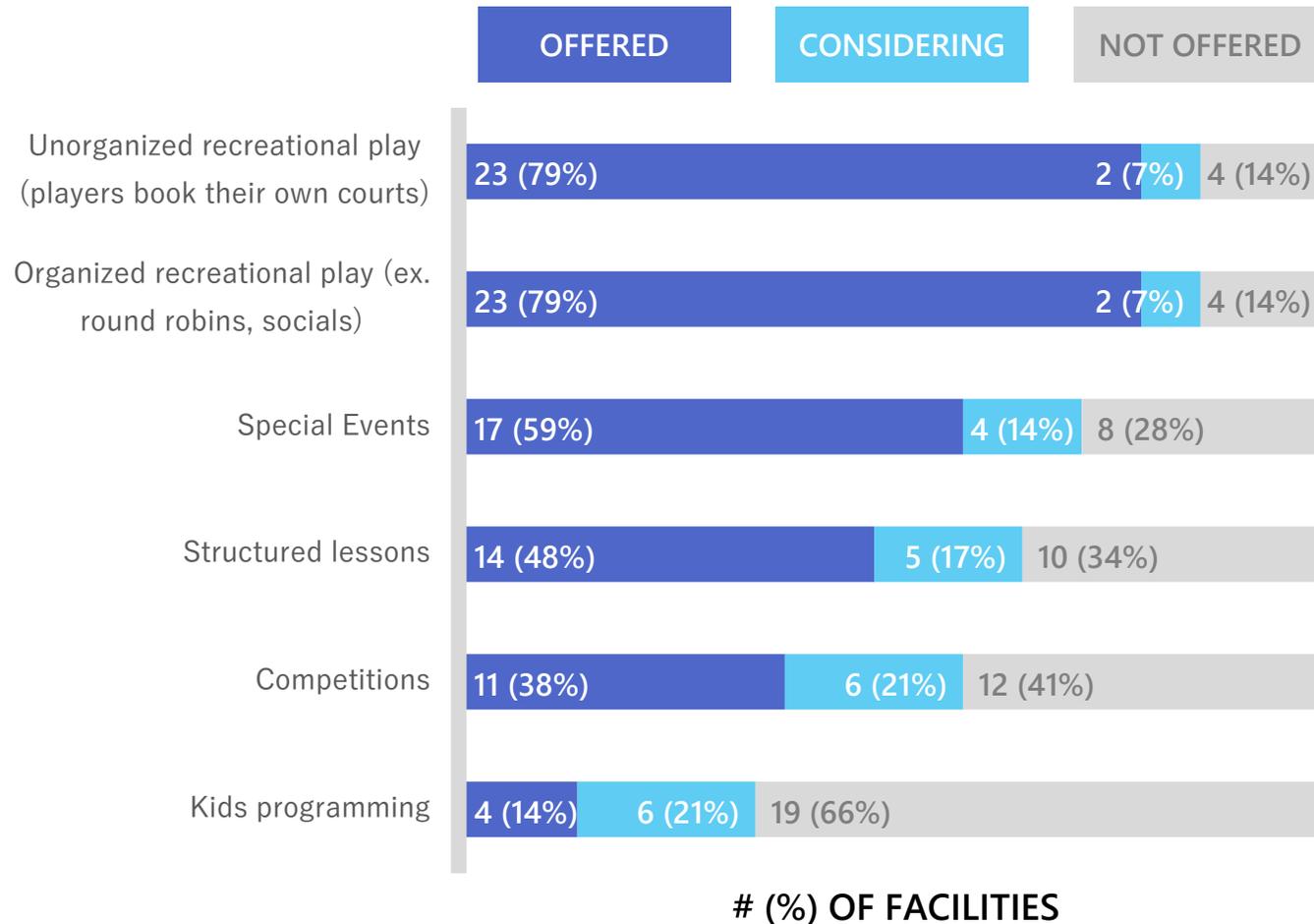
Have you permanently removed tennis courts to create Pickleball courts?



96% of facilities that currently offer pickleball were **unlikely to permanently convert** tennis courts to pickleball courts.

Pickleball Operations

WHAT TYPE OF PICKLEBALL PLAY IS OFFERED AT YOUR FACILITY?



WHAT STATEMENT BEST DESCRIBES THE YOUR PICKLEBALL MEMBERS?

Play Pickleball + Tennis	8 (28%)
Play Pickleball + Other Racquet Sport (other than tennis)	10 (34%)
Play Pickleball Exclusively (did not previously play tennis)	6 (21%)
Transitioned from Tennis to Pickleball (no longer play tennis)	5 (17%)

PICKLEBALL FEE STRUCTURE: (select all that apply)

Dedicated pickleball membership fee	4 (14%)
Pickleball membership included in other racquet sport membership	12 (41%)
Hourly court rental fees	11 (38%)
Charges for lessons/clinics	9 (31%)
No fees (benefit of general membership)	6 (21%)

Future of Pickleball

ARE YOU PLANNING ON ADDING PICKLEBALL OR PADEL TENNIS IN THE NEXT TWO YEARS?

(this question was answered by the 36 facilities that currently did not offer Pickleball)

	NO		NOT LIKELY		SOMEWHAT LIKELY		VERY LIKELY		YES	
	#	%	#	%	#	%	#	%	#	%
Pickleball Programming	19	53%	7	19%	6	17%	3	8%	1	3%
Pickleball Facilities	19	53%	8	22%	6	17%	2	6%	1	3%
Padel Tennis Programming	26	72%	5	14%	5	14%	0	0%	0	0%
Padel Tennis Facilities	26	72%	5	14%	5	14%	0	0%	0	0%

Approximately one third of facilities are likely to **add pickleball** programs in the next 2 years.

14% are somewhat likely to add Padel Tennis in the next 2 years.

Future of Pickleball

PICKLEBALL PLAYER BASE*

Please indicate whether you agree or disagree with the following statements:

	AGREE	DISAGREE
Pickleball will remain largely a sport played by seniors	38 (58%)	27 (42%)
Pickleball will broaden its reach to all ages of adult players	46 (71%)	19 (29%)
Pickleball will become popular amongst kids	18 (28%)	47 (72%)

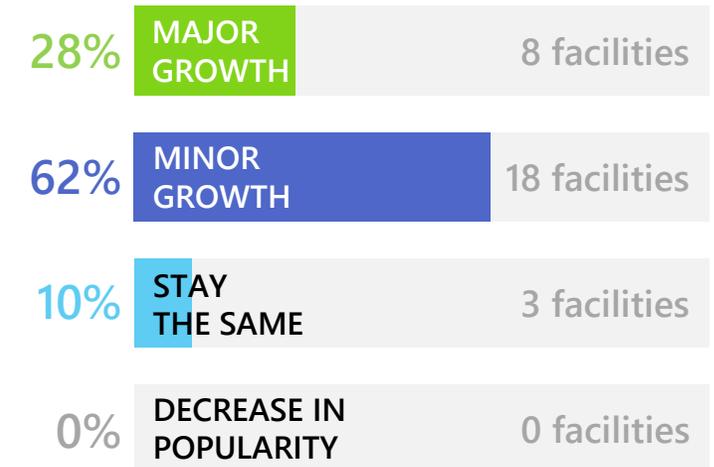
PICKLEBALL CULTURE*

Which statement best describes your view of the future of Pickleball:

Pickleball will remain largely a recreation sport	14 (22%)
Pickleball will remain largely a recreation sport with a small base of avid competitors	41 (63%)
Pickleball will develop a strong competitive structure	10 (15%)

PICKLEBALL GROWTH

Do you see pickleball growing at your facility?



90% of facilities that currently offer pickleball anticipate **continued growth** in the sport at their facility.

*answered by all respondents

Thank you!

The TPA and Tennis Canada would like to thank the over 80 club leaders that took the time out of their busy schedules to complete the Indoor Club and Pickleball surveys. Industry research similar to this report, would not be possible without their time and support.

Through research initiatives, the TPA and Tennis Canada aim to provide tennis organizations across Canada with valuable information to help with operational and managerial decision-making.

If you have any questions related to the findings presented in this report or have feedback and suggestions for future research please email tpa@tenniscanada.com.