



ITF Worldwide Participation Conference 2018

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Overall

Tennis worldwide in numbers

Globally Tennis is a growing sport and is doing well over the world. We are currently 3rd largest in the world in terms of “interest in the sport” which is a combination of playing and following the sport (digital channels and conventional channels like TV). The leader is Football followed by Basketball. The index values of the top 3 sports in the analysis are Soccer (67%), Basketball (60%), Tennis (56%).

Tennis worldwide in numbers

- a. 96% of players world wide come from 20 nations and we have 210 nations
- b. 79.5 million participants worldwide
- c. There are approx. 80,000 tennis clubs in the world. 67% of these (53,000) are affiliated to NSO's. Canada has approx. 700 clubs (0.9%).
- d. The ratio of Tennis Clubs / Player is 1:689.
- e. Total of 475,000 tennis courts in the world. 342,000 are outdoor and 67,000 are indoor. The rest are mixed for eg. Bubbles. Canada has 7,600 courts (1.6%).
- f. The ratio of Tennis courts / Player is 1:15,000. In Canada this ratio is 1:42,000.
- g. Total number of tennis coaches in the world are approx. 160,000. Canada has approx. 3,300 (2%).
- h. Tennis followers divide into 4 categories - 30% big eventers (casual fans who attend events), 18% evangelists (play, high income and have children); 17% enthusiasts (play less but it's their favourite sport) and 14% core viewers (older, don't play but watch)

ITF and participation

The ITF has made “Tennis Development” a strategic focus with a specific focus on increasing participation and Increasing the development of talented players. The ITF has increased their TD budget from \$8.4Million in 2017 to \$10.2Million in 2018. Of this the major chunk is for programmes to increase participation (\$5.23Million).

Participation

Use of data and technology to drive tennis participation

- 1- One of the key challenges was defined as “Mind the Gap”. This is outlining the growing gap between Sports and Business. To elaborate, a sport needs to adapt to the new digital age (in terms of making it convenient for end users. Accurate data leads to evidence-based platforms which is a “Culture Shift”. We need to hear from the users!
- 2- Examples of technologies to promote participation:
 - a. ClubSpark is a technology provider that provides a technological platform for Tennis Clubs. It caters to every need of a club from booking courts, managing websites to running events etc. ClubSpark looks like the leading technology provider in the REC space (club events, leagues, team tennis etc.) using which NA’s would like to grow participation. LTA and TA are already using the ClubSpark platform. USTA is currently in discussions with CS to implement this in the US. The French Federation has also expressed initial interest in CS.
 - b. Technology park at the Olympics: youth Olympics will be held in 4 urban centres. Fans can check in through Apps and access all feeds digitally.
 - c. The running community has come out with a “Runner App”. This allows users to connect digitally through an app to arrange “informal runs”. Their registered uses have increased by 400% due to this initiative.
 - d. eTennis: Probably the most revolutionary idea in tennis. The French ran an e-gaming pilot during 2018 Roland Garros (called RG e-series) and are planning a full launch at RG 2019. The 2018 pilot received 200 million views and 70 000 people watch the e-series final online. You can read more on this initiative by clicking the link below.

<https://www.rolandgarros.com/en-us/page/roland-garros-gaming-eseries-by-bnp-paribas>

Benefits of participating in sport

- 1- Study done by the Dutch federation on “Cardiovascular benefits on health” by Tennis. Tennis can potentially reduce the “Cardiovascular disease mortality rate” by 56%.
- 2- France has started a program with the health ministry where doctors prescribe series of tennis lessons. (done in 3 departments). Coaches are trained to work with patients.

Strategies to attract and retain more women in sport

- 1- There are 75.5 million tennis players. Of these 47% are females. However only 21% of the coaches are females.

- 2- NSO's around the world (USTA CEO Katrina Adams, Kate Sadler World Rugby Association and Kate Dale Sport England) emphasized the focus for attracting more women to participate in sport and physical activity. Key Strategies revolved around:
- a. Importance of celebrating active women (role models for inspiration).
 - b. Tailoring the product for women by making it flexible.
 - c. Implementing policies around gender equality.
 - d. Addressing judgment barriers (appearances, abilities and priorities)
 - e. Developing women in tennis and not women's tennis
 - f. Having a clear pathway for women, from player (not just star players) to CEO
 - g. Strategy to attract women: Inspire – Empower - Connect

Participation programs

Many countries are working towards increasing participation through various participation programs. Here is a list of initiatives and their targeted category:

Junior starter players:

USTA: Net generation

Tennis Australia: ANZ HOT SHOTS

Girls programs:

LTA: Miss Hits and She rallies

TRY programs:

Cambodia: Tennis on the street

Sweden: Tennis in the hood

Italy: Racquet sports in school - badminton, ping pong and tennis are delivered in PE classes in a station format

Adults 19-40:

Tennis South Africa: Top Guns

USTA: Tennis on Campus

Touch Tennis: This is an initiative that we looked for possibly senior players. However, their branding is towards the 19-40 <https://www.touchtennis.com/gb/>

All ages:

Japan: Soft Tennis <http://www.astf.asia/index.html>

There is a common trend that tennis needs to be more flexible and accessible. Rugby is a good example of flexibility with tag rugby, touch rugby, beach rugby etc.

Other on Participation

It was suggested to look at basketball, on how they've increased participation as they have had a lot of success.

LTA has created a workshop for parents called Optimal Competition parenting

School program from ITF to be launched soon

Some countries have concern for adult players aged 19-40 as numbers are dropping. They call the 19-40 the missing middle, they are the parent of young kids. Parents are the number 2 reasons why a kid chose a sport.

ITF rating

The ITF has started work on a new “Global Rating System” (comparable to the UTR ratings). They have solicited the support of the 4 GS nations and the other big Tennis NA’s around the world to help develop this product. They have also formed a “Tennis Advisory Group” which will play an important role in this project. Tennis Canada is one of the nations of this advisory group.

The ITF has identified some concerns with UTR regarding the current Tennis Business model in the world. Some specifics are:

- a. UTR would like to run “UTR Powered Events” around the world. This may conflict with National/provincial events as well as the ITF Junior tournaments and the new ITF Transition Tour.
- b. The UTR Ratings potentially conflict with ITF Junior Rankings as well as National Rankings and Ratings published by the NSO’s.

July 2018 Update - The Project team has been put in place and the larger NSO’s including the 4 Grand Slam Nations have pledged their support in the development of this new ITF Global Rating.