

# TPA Indoor Club Survey Results: 2017-18 Season

July 2018



# TABLE OF CONTENTS

**METHODOLOGY**

**2**

**KEY FINDINGS**

**3**

**RESPONDENTS**

**4**

**MEMBERSHIP RESULTS**

**5**

**COURT UTILIZATION RESULTS**

**9**

**DISTRIBUTION OF COURT HOURS**

**13**

**PROGRAMMING ENROLLMENT RESULTS**

**16**

**JUNIOR PROGRAMMING RESULTS**

**18**

**STAFFING RESULTS**

**21**

# METHODOLOGY

- Invitations were sent to **138 TPA member indoor facilities** across Canada through SurveyMonkey
- We received **79 total survey responses** (59% response rate)
- After removing incomplete responses and outliers, **71 survey responses were used to complete further analysis**
- Completed surveys were entered into a draw to win a \$500 TPA gift certificate

A majority of the analysis in this report was conducted through the following 2 methods:

**[1] Grouping:** Variables (ex. number of members, court utilization rates, etc.) were segmented into groups and then the percentage of clubs belonging to each group was identified

**[2] Year-over-Year Change:** The percentage of clubs that increased, stayed the same or decreased for a certain variable (ex. number of members, utilization rates etc.) compared to the 2016/17 indoor season were identified

# KEY FINDINGS

## MEMBERSHIP

- 73% of clubs state that they can use more courts
- 63% of clubs have increased junior membership from last year and only 3% have decreased junior membership
- On average clubs had 72% adult members versus 28% junior members

## COURT UTILIZATION

- 70% of clubs had over 80% court utilization during weekday evenings and weekend daytime and 61% of clubs had over 70% court utilization during weekday daytime

## PROGRAMMING

- On average clubs allocated 33% of total court hours to programming
- Programmed hours are split 44% adult and 56% juniors
- 72% of clubs state that junior programming is an important focus and they have dedicated substantial hours to junior programming
- 86% of clubs have a full pathway of red-orange-green-regular ball/court programs and 89% have dedicated junior programs focused on point play/match play

## STAFFING

- 90% of clubs have policies in place around safeguarding (ie. background checks)

## WOMEN & GIRLS IN TENNIS

- 41% of clubs have increased their number of female junior players; however most clubs still have fewer female juniors than males
- Female coaches on average only make up 17% of full time staff and 36% of part time staff

# RESPONDENTS

## RESPONSE RATE

**138** Indoor Clubs Contacted

**71** Respondents

**51% Response Rate**

## NUMBER OF RESPONDENTS BY PROVINCE

**1** Newfoundland

**11** Quebec

**1** Saskatchewan

**1** PEI

**32** Ontario

**5** Alberta

**1** New Brunswick

**2** Manitoba

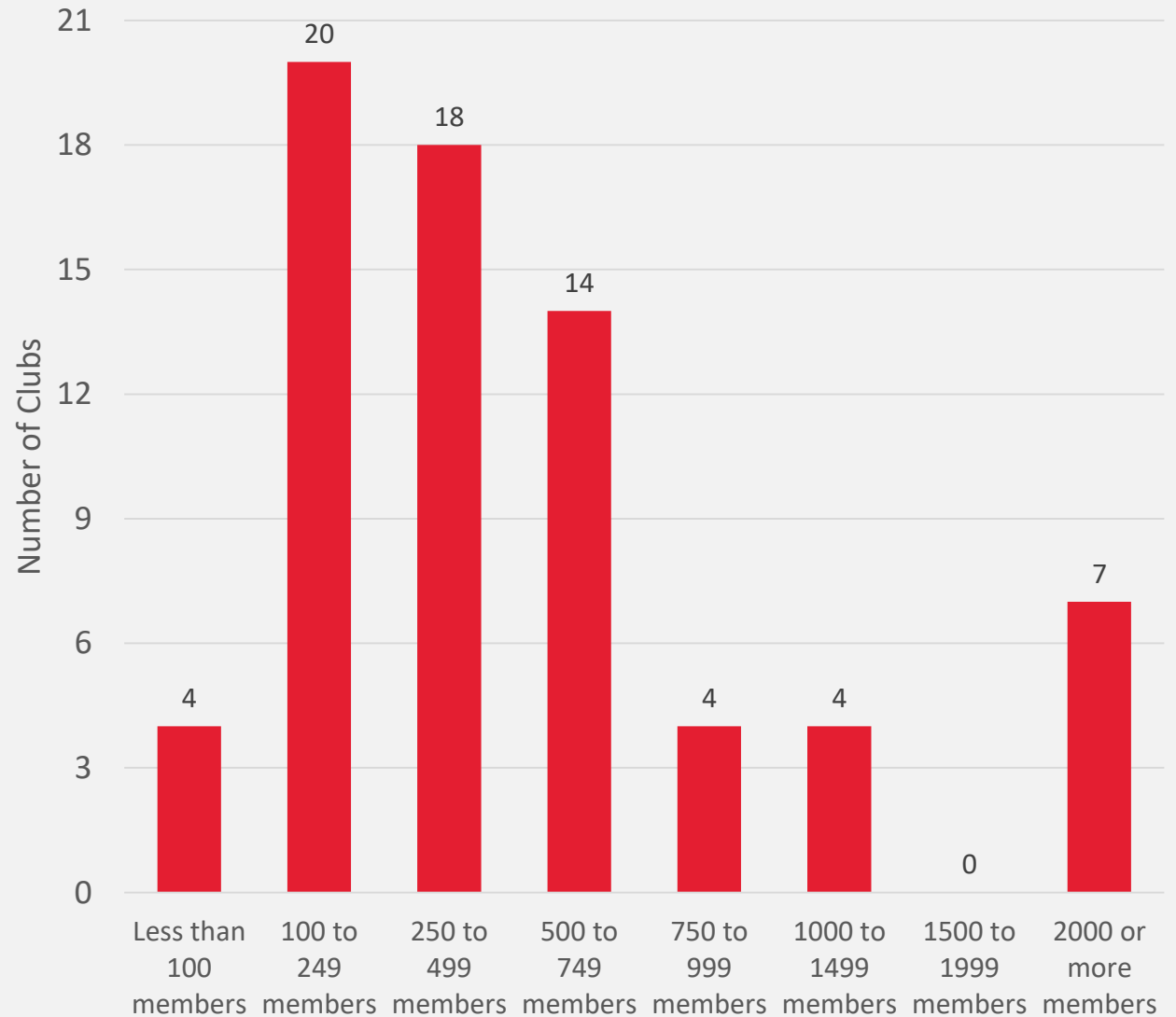
**14** British Columbia

**3** Nova Scotia

# ADULT MEMBERSHIP RESULTS

## DISTRIBUTION OF ADULT MEMBERS

| Number of Members     | % of Clubs | Cumm. % |
|-----------------------|------------|---------|
| 2000 or more members  | 10%        | 10%     |
| 1500 to 1999 members  | 0%         | 10%     |
| 1000 to 1499 members  | 6%         | 16%     |
| 750 to 999 members    | 6%         | 22%     |
| 500 to 749 members    | 20%        | 42%     |
| 250 to 499 members    | 25%        | 67%     |
| 100 to 249 members    | 28%        | 95%     |
| Less than 100 members | 6%         | 100%    |

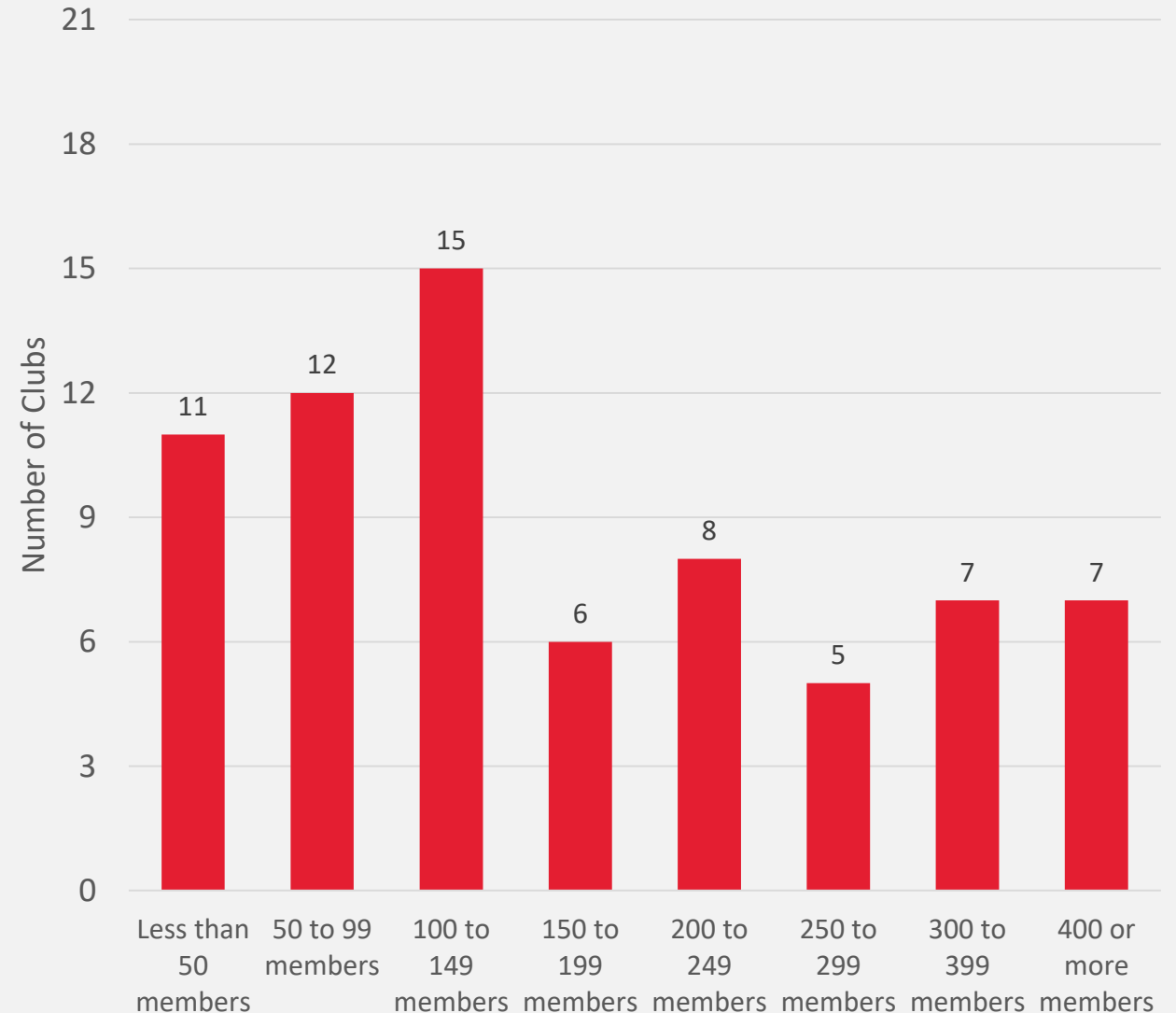


**67%** of clubs have 250 or more adult members.  
**42%** of clubs have 500 or more adult members.

# JUNIOR MEMBERSHIP RESULTS

## DISTRIBUTION OF JUNIOR MEMBERS

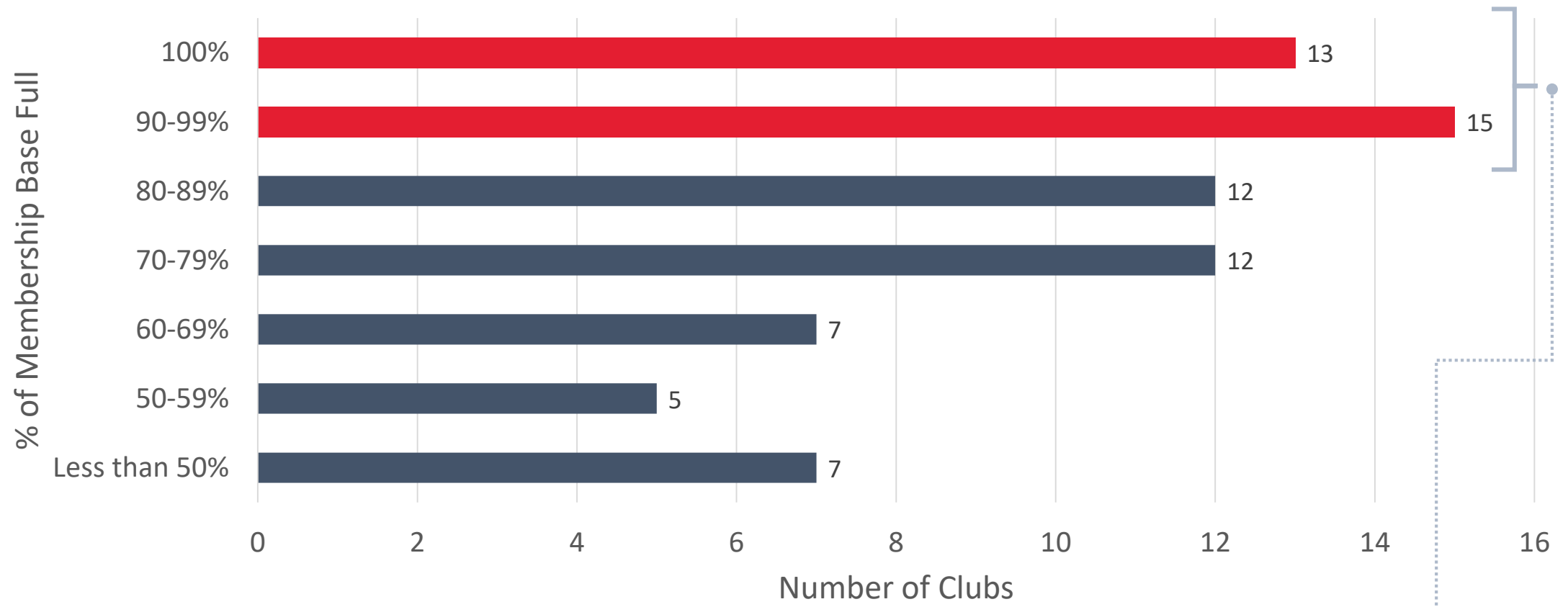
| Number of Members    | % of Clubs | Cumm. % |
|----------------------|------------|---------|
| 400 or more members  | 10%        | 10%     |
| 300 to 399 members   | 10%        | 20%     |
| 250 to 299 members   | 7%         | 27%     |
| 200 to 249 members   | 11%        | 38%     |
| 150 to 199 members   | 8%         | 46%     |
| 100 to 149 members   | 21%        | 67%     |
| 50 to 99 members     | 17%        | 84%     |
| Less than 50 members | 15%        | 100%    |



**67%** of clubs have 100 or more junior members.  
**38%** of clubs have 200 or more junior members.

# MEMBERSHIP RESULTS

How full is your membership base?



**39%** of indoor clubs' membership base was **over 90% full.**

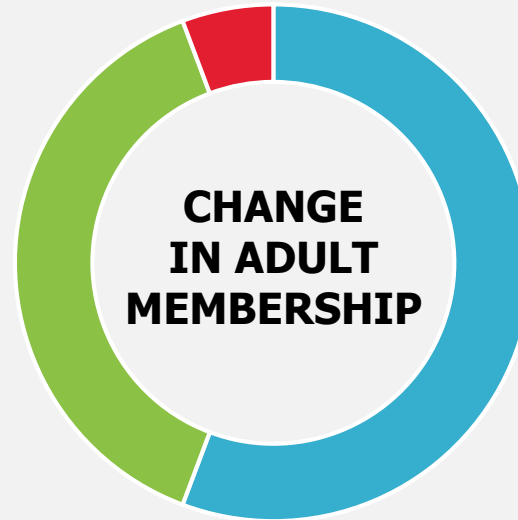
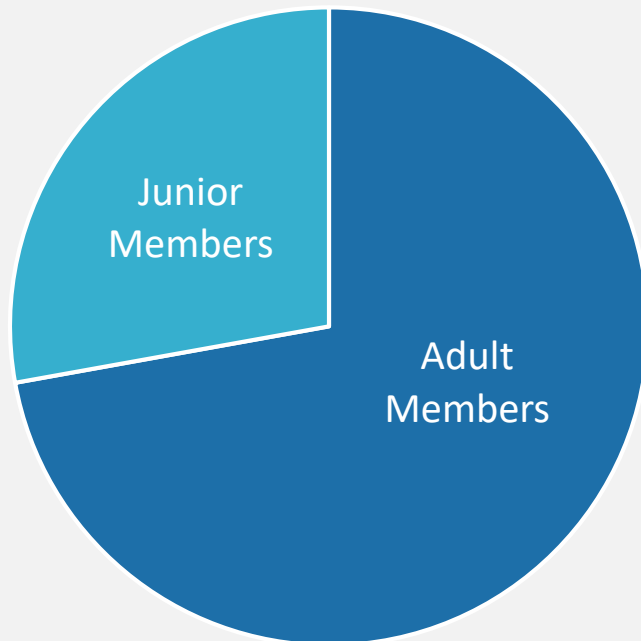


# MEMBERSHIP RESULTS

## % OF ADULT/JUNIOR MEMBERS

On average clubs had:

|            |                |
|------------|----------------|
| <b>72%</b> | Adult members  |
| <b>28%</b> | Junior members |

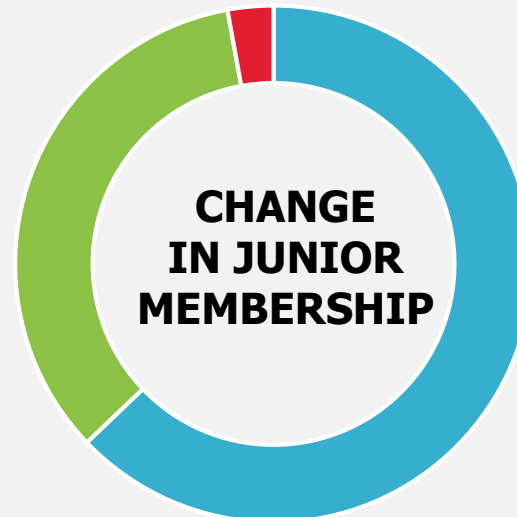


### Adult Members:

**Increased** for 55% of clubs

**Stayed the same** for 39% of clubs

**Decreased** for 6% of clubs



### Junior Members:

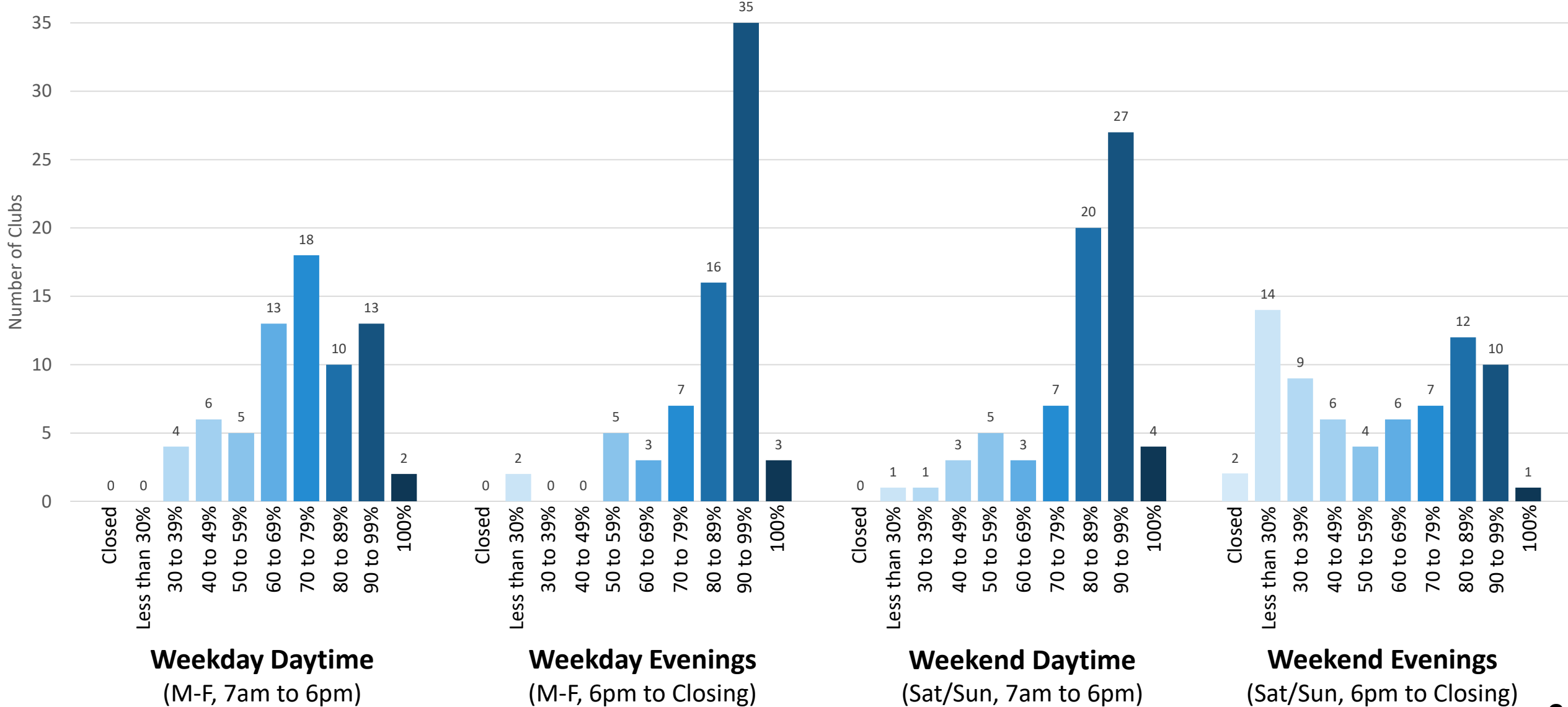
**Increased** for 62% of clubs

**Stayed the same** for 35% of clubs

**Decreased** for 3% of clubs

# COURT UTILIZATION RESULTS

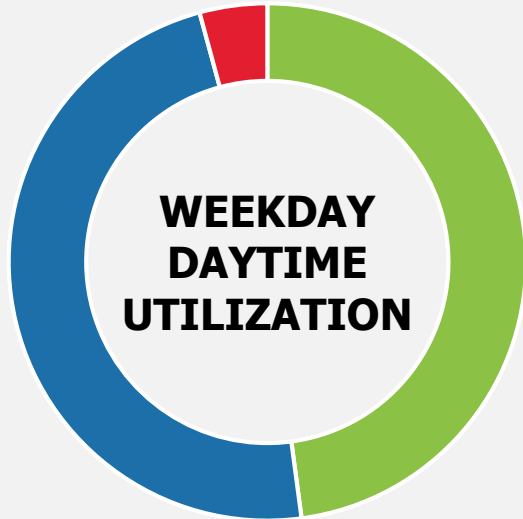
## Court Utilization by Time of Day



# COURT UTILIZATION RESULTS

| Court Utilization    | Weekday daytime |             | Weekday evenings |             | Weekend daytime |             | Weekend evenings |             |
|----------------------|-----------------|-------------|------------------|-------------|-----------------|-------------|------------------|-------------|
|                      | % of Clubs      | Cumm. %     | % of Clubs       | Cumm. %     | % of Clubs      | Cumm. %     | % of Clubs       | Cumm. %     |
| <b>100%</b>          | <b>3%</b>       | <b>3%</b>   | <b>4%</b>        | <b>4%</b>   | <b>6%</b>       | <b>6%</b>   | <b>1%</b>        | <b>1%</b>   |
| <b>90-99%</b>        | <b>18%</b>      | <b>21%</b>  | <b>49%</b>       | <b>54%</b>  | <b>36%</b>      | <b>44%</b>  | <b>14%</b>       | <b>15%</b>  |
| <b>80-89%</b>        | <b>14%</b>      | <b>35%</b>  | <b>23%</b>       | <b>76%</b>  | <b>29%</b>      | <b>72%</b>  | <b>17%</b>       | <b>32%</b>  |
| <b>70-79%</b>        | <b>25%</b>      | <b>61%</b>  | <b>10%</b>       | <b>86%</b>  | <b>10%</b>      | <b>82%</b>  | <b>10%</b>       | <b>42%</b>  |
| <b>60-69%</b>        | <b>18%</b>      | <b>79%</b>  | <b>4%</b>        | <b>90%</b>  | <b>4%</b>       | <b>86%</b>  | <b>8%</b>        | <b>51%</b>  |
| <b>50-59%</b>        | <b>7%</b>       | <b>86%</b>  | <b>7%</b>        | <b>97%</b>  | <b>7%</b>       | <b>93%</b>  | <b>6%</b>        | <b>56%</b>  |
| <b>40-49%</b>        | <b>8%</b>       | <b>94%</b>  | <b>0%</b>        | <b>97%</b>  | <b>4%</b>       | <b>97%</b>  | <b>8%</b>        | <b>65%</b>  |
| <b>30-39%</b>        | <b>6%</b>       | <b>100%</b> | <b>0%</b>        | <b>97%</b>  | <b>2%</b>       | <b>99%</b>  | <b>13%</b>       | <b>77%</b>  |
| <b>Less than 30%</b> | <b>0%</b>       | <b>100%</b> | <b>3%</b>        | <b>100%</b> | <b>2%</b>       | <b>100%</b> | <b>20%</b>       | <b>97%</b>  |
| <b>Closed</b>        | <b>0%</b>       | <b>100%</b> | <b>0%</b>        | <b>100%</b> | <b>0%</b>       | <b>100%</b> | <b>3%</b>        | <b>100%</b> |

# COURT UTILIZATION RESULTS

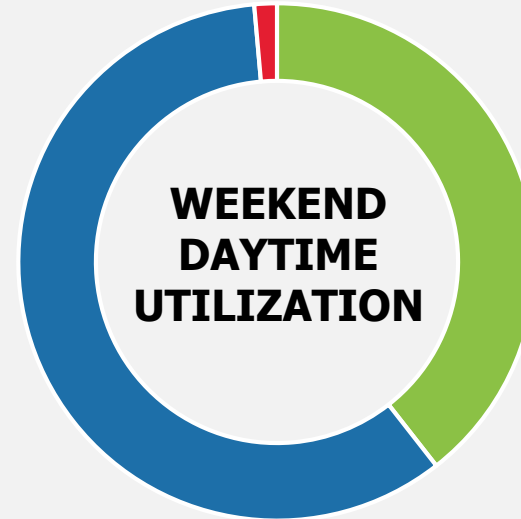


Court utilization for clubs during **weekday daytime**:

**Increased** for 48% of clubs

**Stayed the same** for 48% of clubs

**Decreased** for 4% of clubs

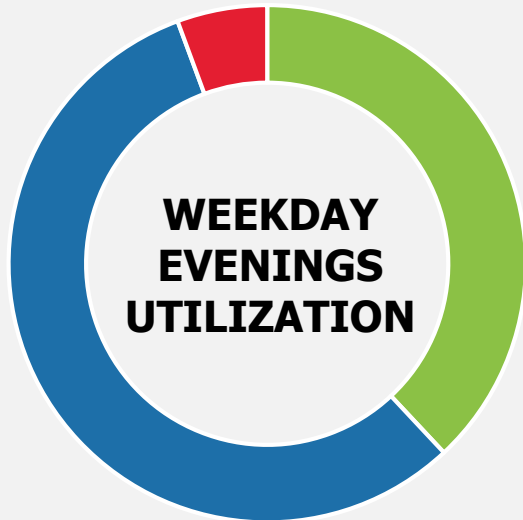


Court utilization for clubs during **weekend daytime**:

**Increased** for 39% of clubs

**Stayed the same** for 59% of clubs

**Decreased** for 1% of clubs

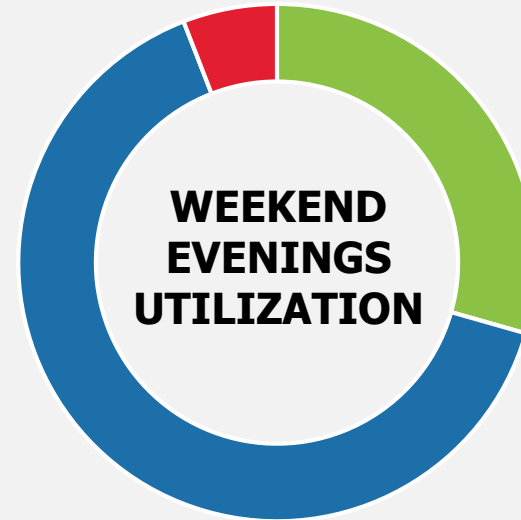


Court utilization for clubs during **weekday evenings**:

**Increased** for 38% of clubs

**Stayed the same** for 56% of clubs

**Decreased** for 6% of clubs



Court utilization for clubs during **weekend evenings**:

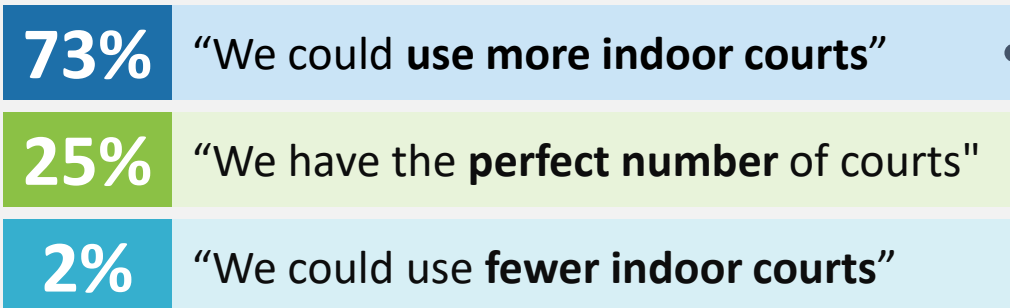
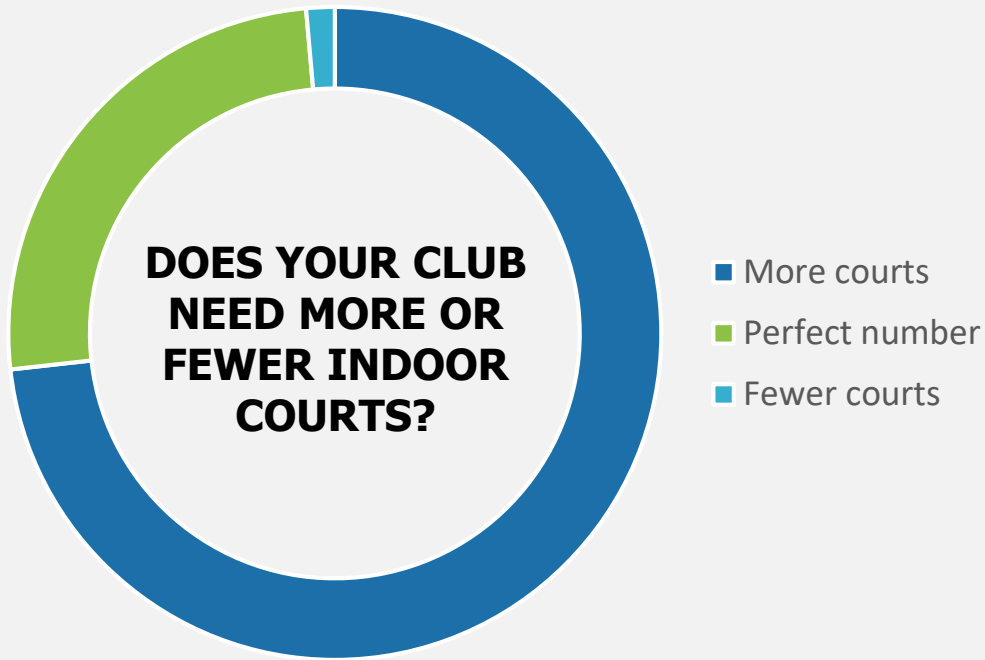
**Increased** for 28% of clubs

**Stayed the same** for 66% of clubs

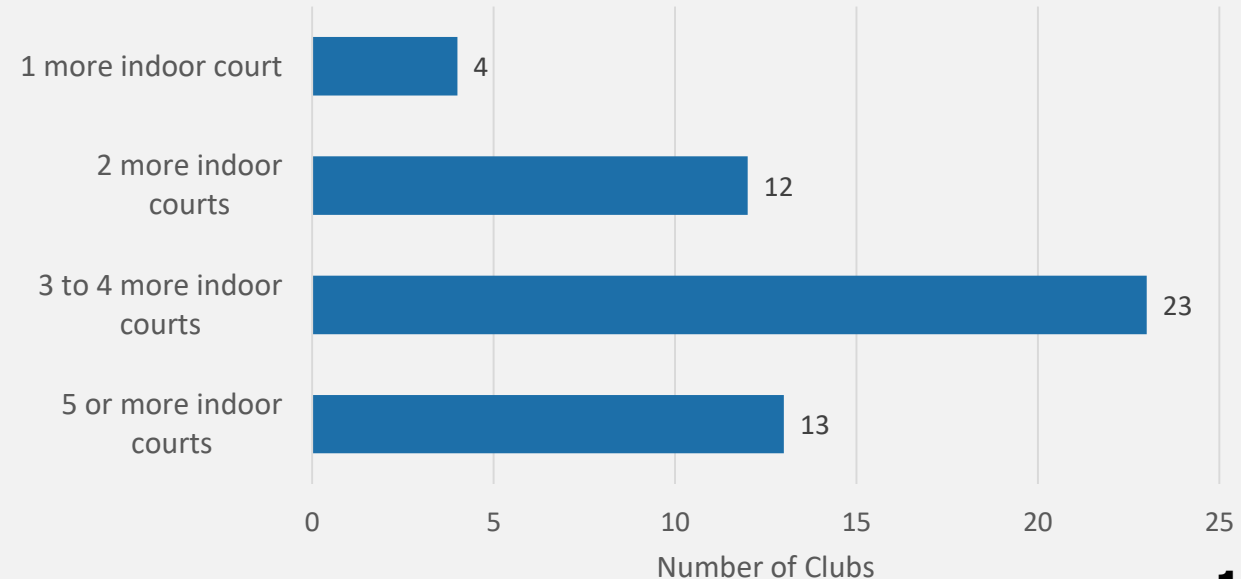
**Decreased** for 6% of clubs

# COURT UTILIZATION RESULTS

## DEMAND FOR COURTS



| How many more courts should your club have? | Number of Clubs | % of Clubs (Total = 73%) |
|---|-----------------|--------------------------|
| 5 or more indoor courts                     | 13              | 18%                      |
| 3 to 4 more indoor courts                   | 23              | 32%                      |
| 2 more indoor courts                        | 12              | 17%                      |
| 1 more indoor court                         | 4               | 6%                       |

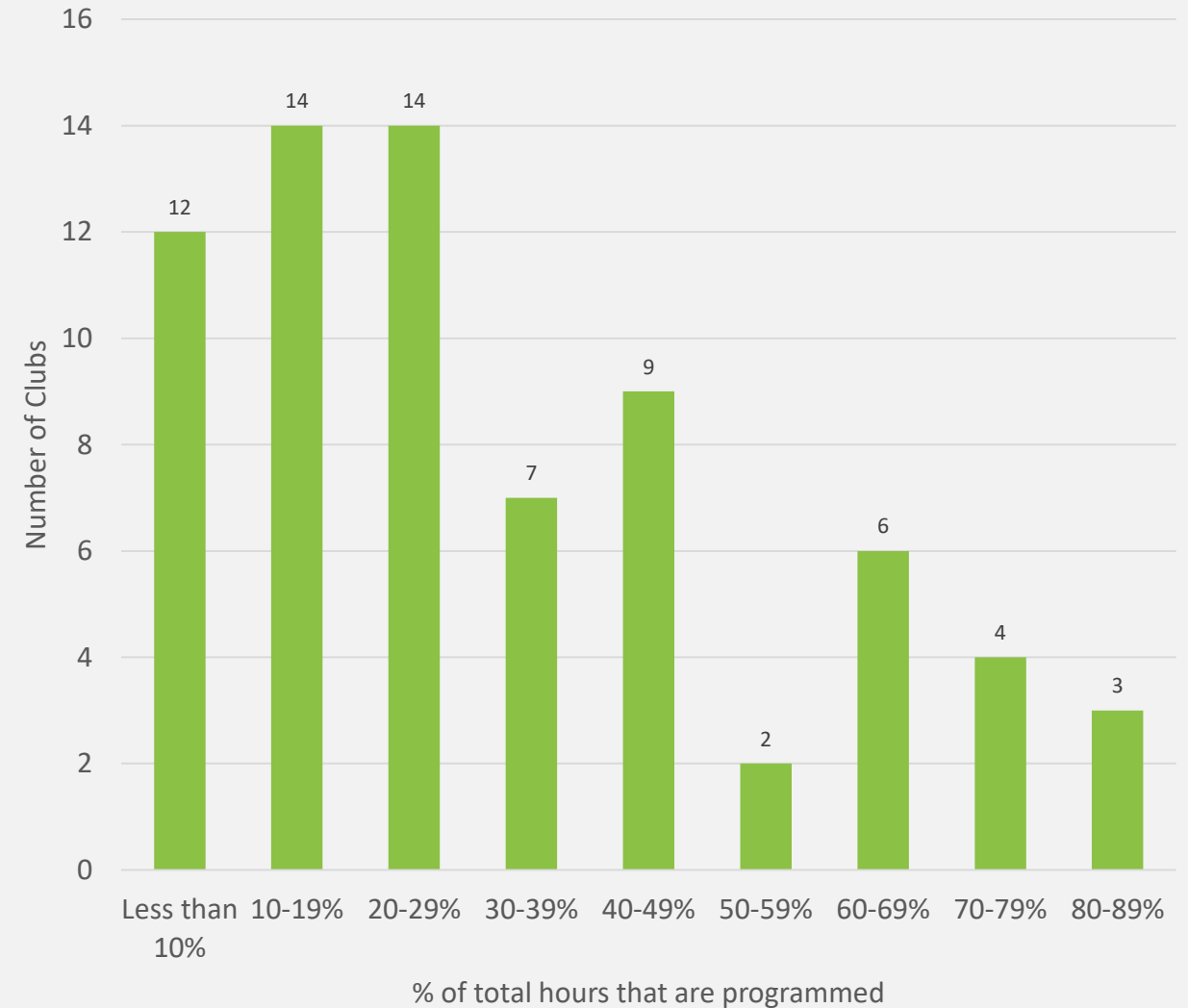


# DISTRIBUTIONS OF COURT HOURS

## PROGRAMMED COURT HOURS

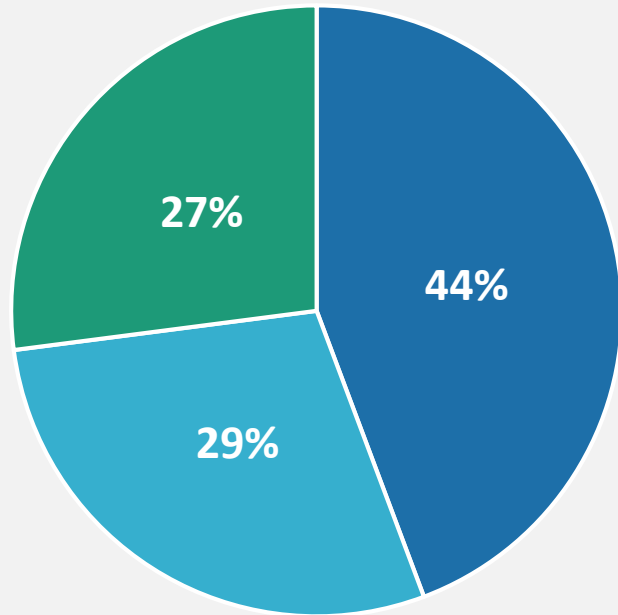
| % of total hours that are programmed | % of Clubs | Cumm. % |
|--------------------------------------|------------|---------|
| 80% or more of total hours           | 4%         | 4%      |
| 70-79% of total hours                | 6%         | 10%     |
| 60-69% of total hours                | 8%         | 18%     |
| 50-59% of total hours                | 3%         | 21%     |
| 40-49% of total hours                | 13%        | 34%     |
| 30-39% of total hours                | 10%        | 44%     |
| 20-29% of total hours                | 20%        | 63%     |
| 10-19% of total hours                | 20%        | 83%     |
| Less than 10% of total hours         | 17%        | 100%    |

Clubs **vary greatly** in the percentage of court hours allocated to programming.



# DISTRIBUTION OF COURT HOURS

**AVERAGE DISTRIBUTION OF PROGRAMMED HOURS**

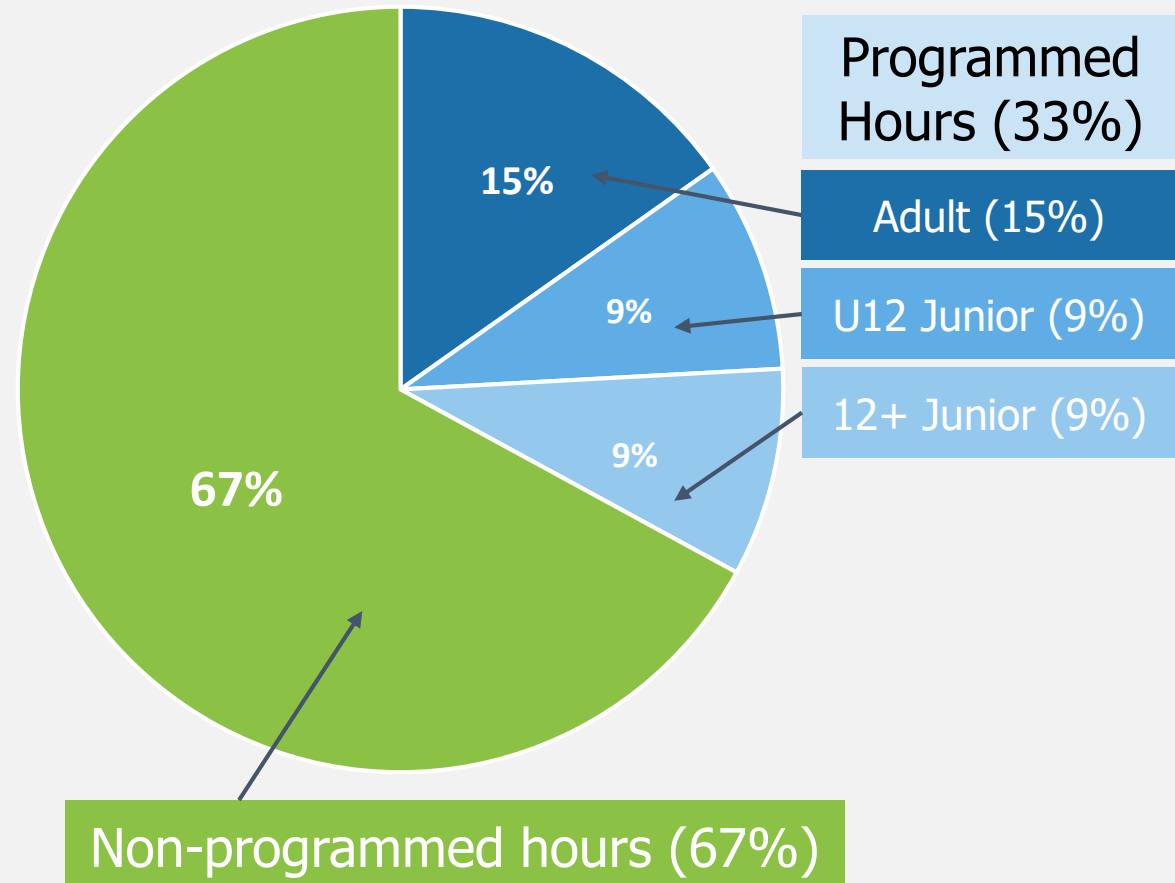


Adult Programming (44%)

U12 Junior Programming (29%)

12+ Junior Programming (27%)

**AVERAGE DISTRIBUTION OF TOTAL HOURS**



Non-programmed hours (67%)

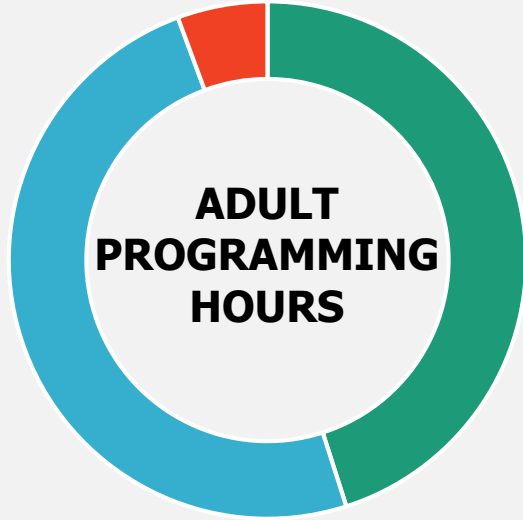
Programmed Hours (33%)

Adult (15%)

U12 Junior (9%)

12+ Junior (9%)

# DISTRIBUTION OF COURT HOURS

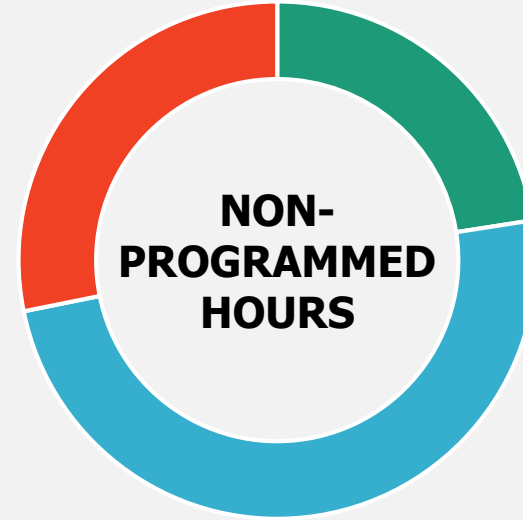


Court hours for **adult programming:**

**Increased** for 45% of clubs

**Stayed the same** for 49% of clubs

**Decreased** for 6% of clubs

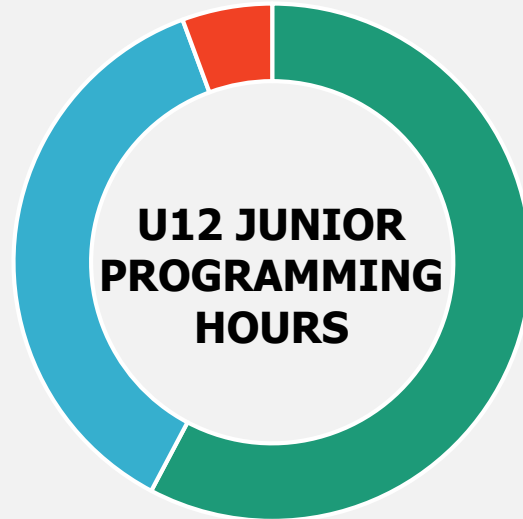


**Non-programmed hours:**

**Increased** for 23% of clubs

**Stayed the same** for 49% of clubs

**Decreased** for 28% of clubs

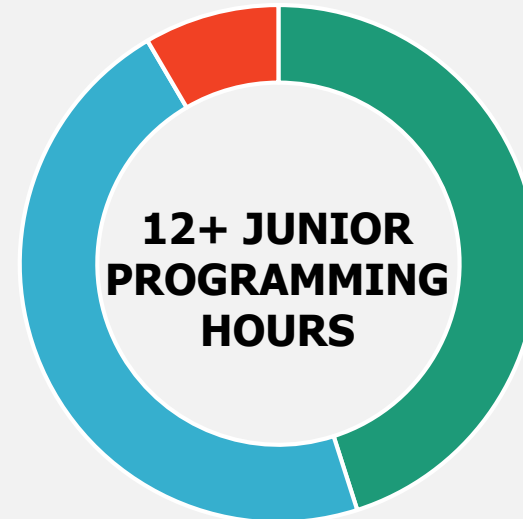


Court hours for **U12 junior programming:**

**Increased** for 58% of clubs

**Stayed the same** for 36% of clubs

**Decreased** for 6% of clubs



Court hours for **12+ junior programming:**

**Increased** for 45% of clubs

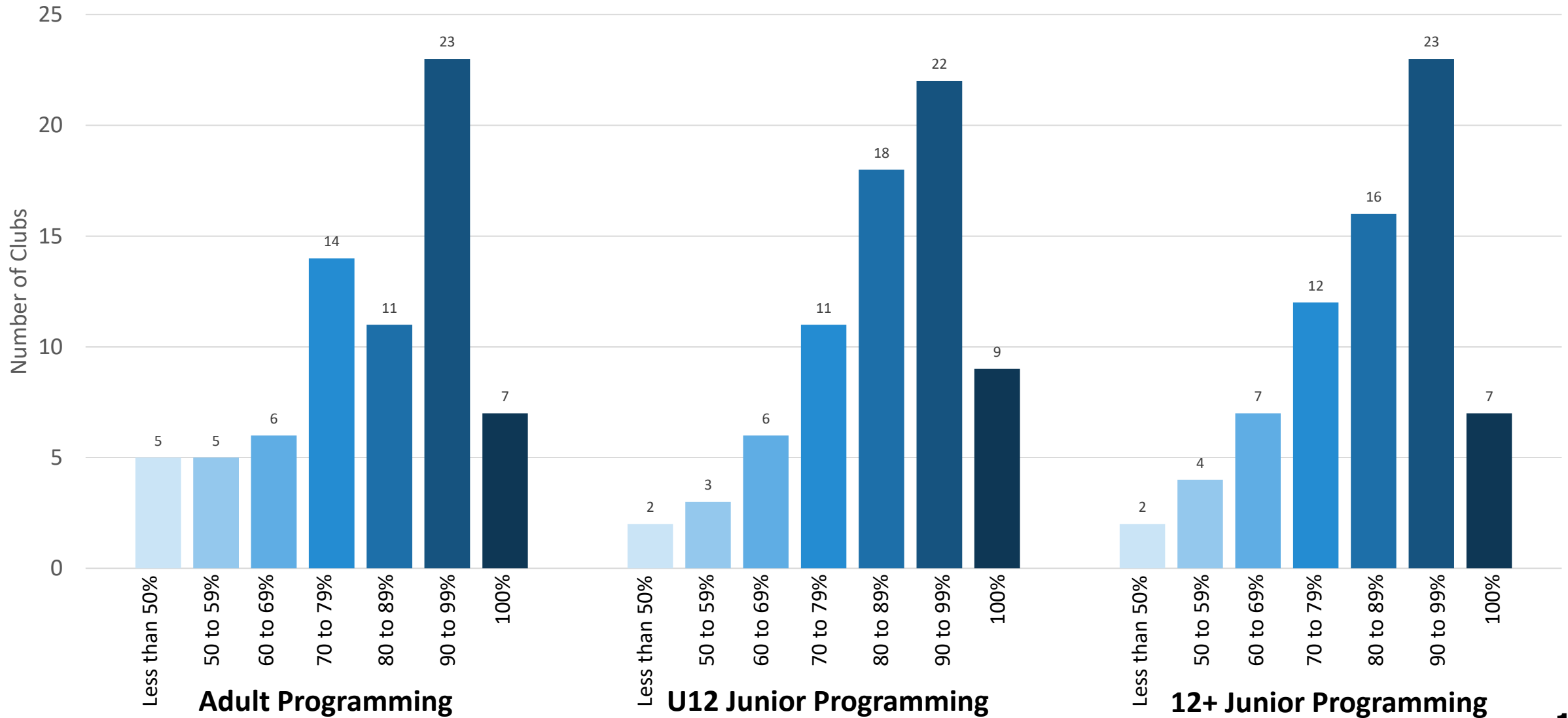
**Stayed the same** for 46% of clubs

**Decreased** for 8% of clubs



# PROGRAMMING ENROLLMENT RESULTS

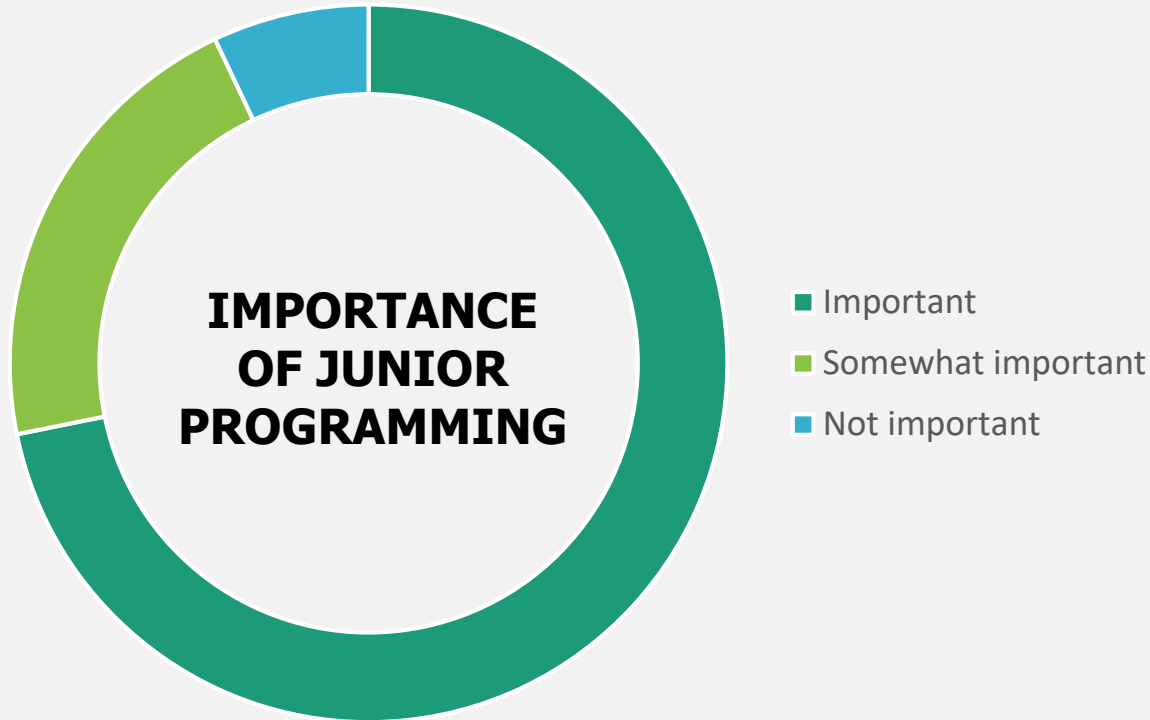
How full is your programming?



# PROGRAMMING ENROLLMENT RESULTS

| Program Enrollment:  | Adult Programming |             | U12 Junior Programming |             | 12+ Junior Programming |             |
|----------------------|-------------------|-------------|------------------------|-------------|------------------------|-------------|
|                      | % of Clubs        | Cumm. %     | % of Clubs             | Cumm. %     | % of Clubs             | Cumm. %     |
| <b>100%</b>          | <b>10%</b>        | <b>10%</b>  | <b>13%</b>             | <b>13%</b>  | <b>10%</b>             | <b>10%</b>  |
| <b>90-99%</b>        | <b>32%</b>        | <b>42%</b>  | <b>31%</b>             | <b>44%</b>  | <b>32%</b>             | <b>42%</b>  |
| <b>80-89%</b>        | <b>15%</b>        | <b>58%</b>  | <b>25%</b>             | <b>69%</b>  | <b>23%</b>             | <b>65%</b>  |
| <b>70-79%</b>        | <b>20%</b>        | <b>77%</b>  | <b>15%</b>             | <b>85%</b>  | <b>17%</b>             | <b>82%</b>  |
| <b>60-69%</b>        | <b>8%</b>         | <b>86%</b>  | <b>8%</b>              | <b>93%</b>  | <b>10%</b>             | <b>92%</b>  |
| <b>50-59%</b>        | <b>7%</b>         | <b>93%</b>  | <b>4%</b>              | <b>97%</b>  | <b>6%</b>              | <b>97%</b>  |
| <b>Less than 50%</b> | <b>7%</b>         | <b>100%</b> | <b>3%</b>              | <b>100%</b> | <b>3%</b>              | <b>100%</b> |

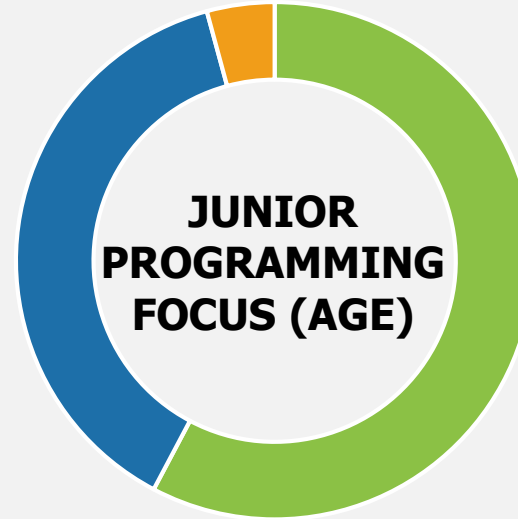
# JUNIOR PROGRAMMING RESULTS



**72%** “An **important focus** and we have dedicated substantial programming hours to it.”

**21%** “A **somewhat important focus** and we have dedicated some programming hours.”

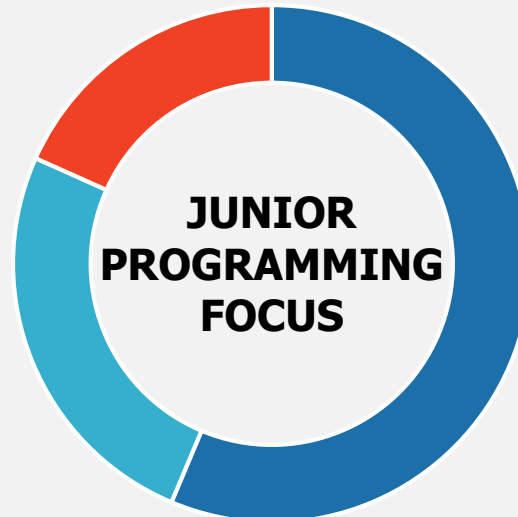
**7%** “**Not an important focus** and we have dedicated very few programming hours.”



**58%** of clubs **equally** focus on U12 & 13+ junior players

**38%** of clubs focus **more on U12 players.**

**4%** of clubs focus more on **13+ junior players.**



**56%** of clubs equally focus on **recreational & competitive** junior players.

**25%** of clubs focus more on **recreational** junior players.

**18%** of clubs focus more on **competitive** junior players.

# JUNIOR PROGRAMMING RESULTS

## JUNIOR PROGRAMMING PATHWAY

**94%** Of clubs' junior programming included **Red Ball** (1/2 court).

**94%** Of clubs' junior programming included **Orange Ball** (3/4 court).

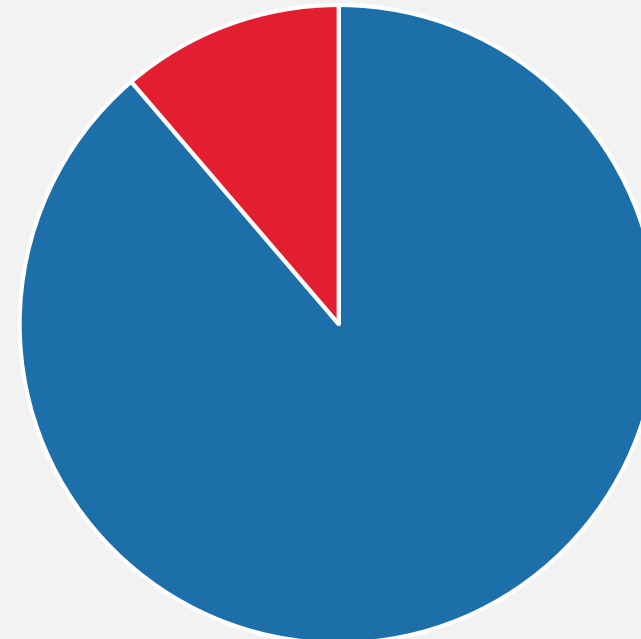
**92%** Of clubs' junior programming included **Green Ball** (full court).

**96%** Of clubs' junior programming included **Regular Ball** (full court).

**86%** Of clubs have a **full pathway** of red-orange-green-regular ball/court programs.

## POINT/MATCH PLAY

Does your Junior Programming include a dedicated regular program that is oriented towards point play and/or match play?



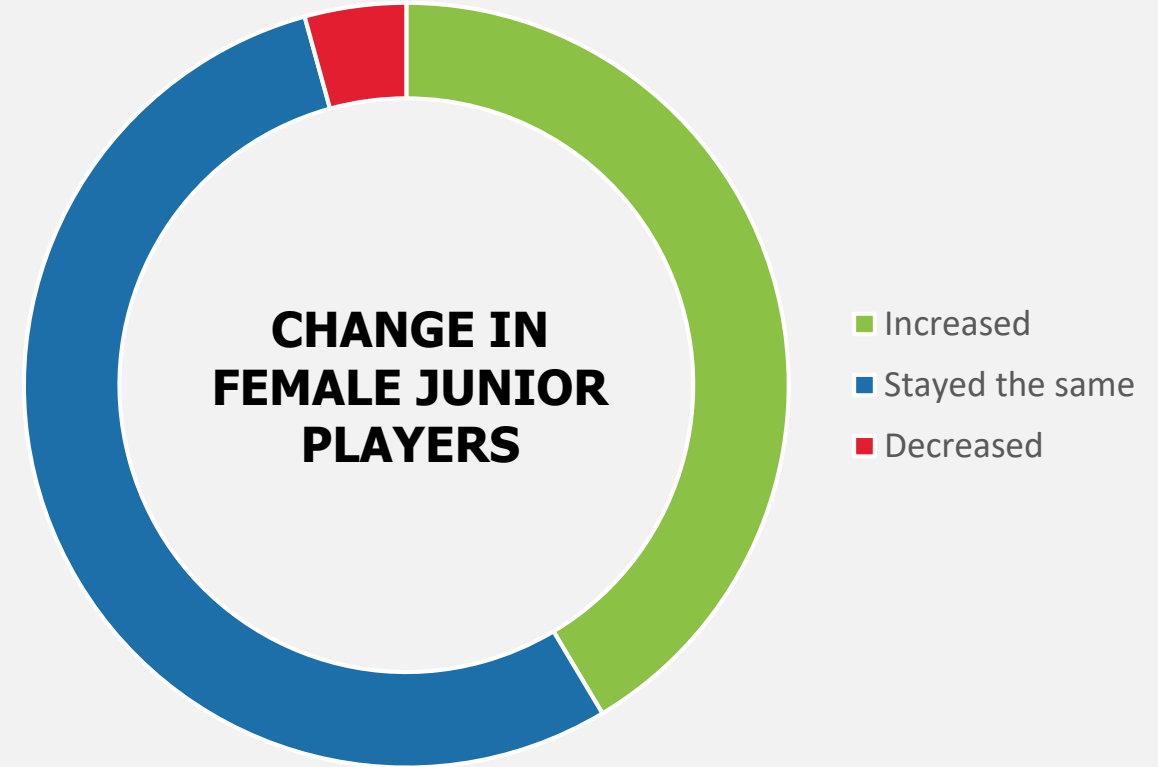
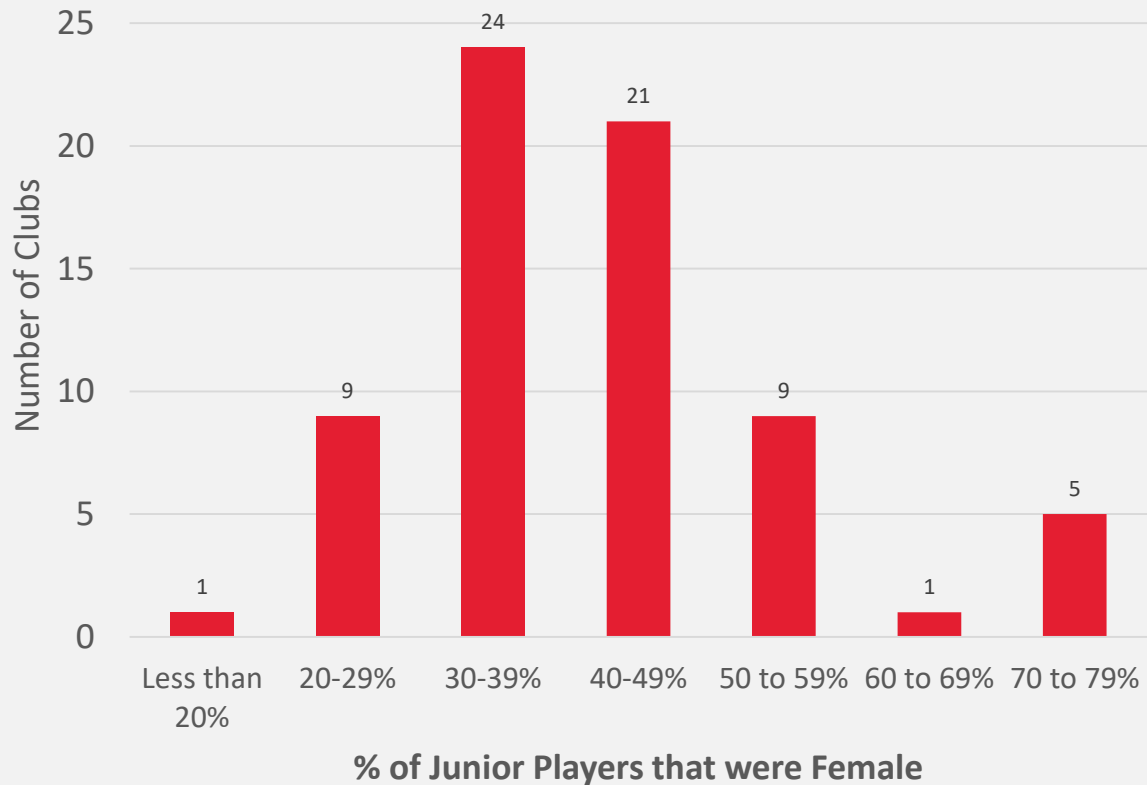
**89% YES**

**11% NO**

# JUNIOR PROGRAMMING RESULTS

## % OF JUNIOR FEMALE PLAYERS

At most clubs female junior players are under-represented versus male junior players.



**41%** Of clubs saw an **increase** in female jr. players

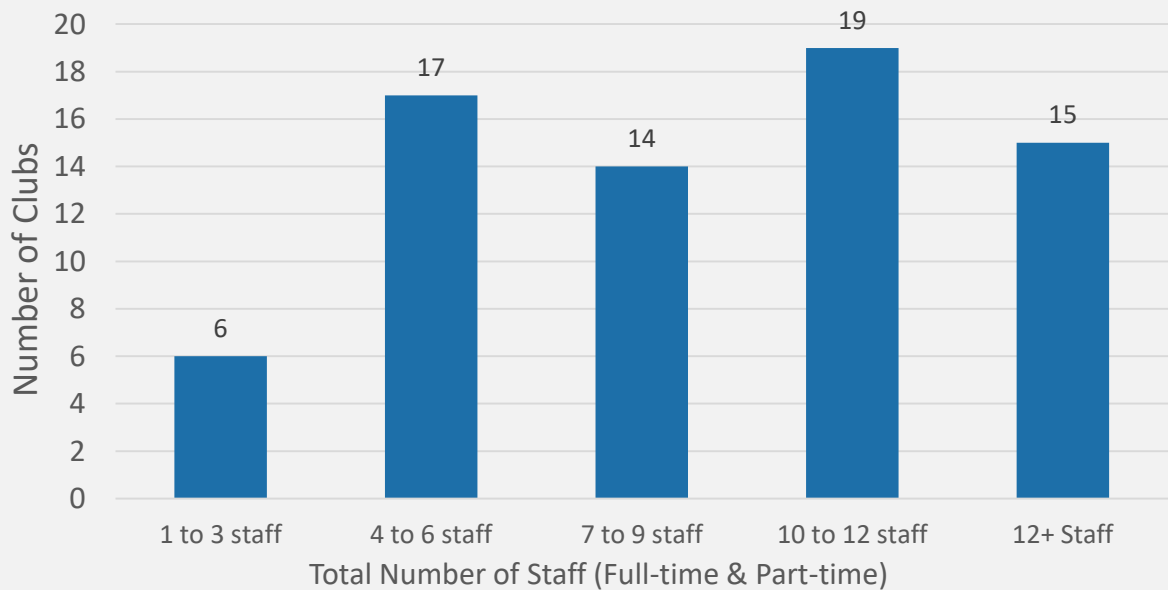
**54%** Of clubs' junior female players **stayed the same**

**4%** Of clubs saw an **decrease** in female jr. players

# STAFFING RESULTS

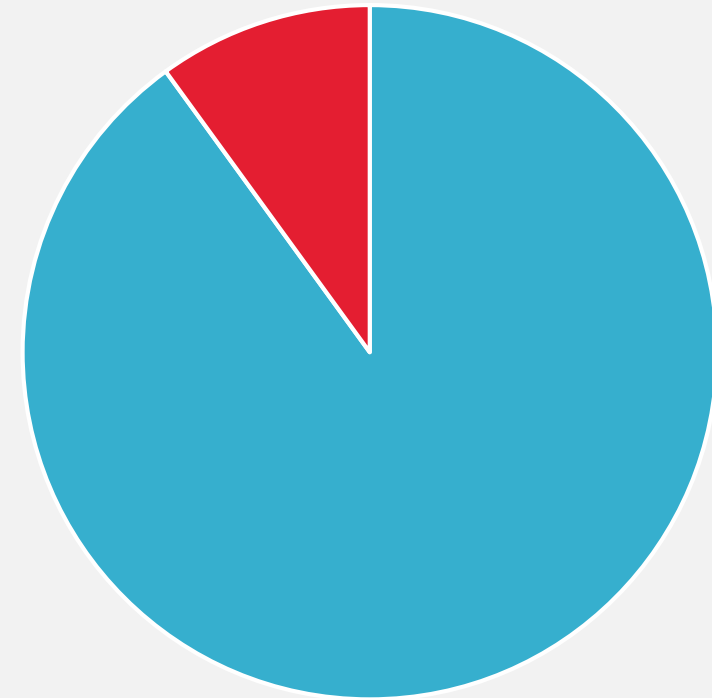
## TENNIS FOCUSED STAFF (Full-time & Part-time)

| Total Number of Staff  | % of Clubs | Cumm. % |
|------------------------|------------|---------|
| Over 12 staff members  | 21%        | 21%     |
| 10 to 12 staff members | 28%        | 49%     |
| 7 to 9 staff members   | 20%        | 69%     |
| 4 to 6 staff members   | 24%        | 93%     |
| 1 to 3 staff members   | 8%         | 100%    |



## SAFEGUARDING

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



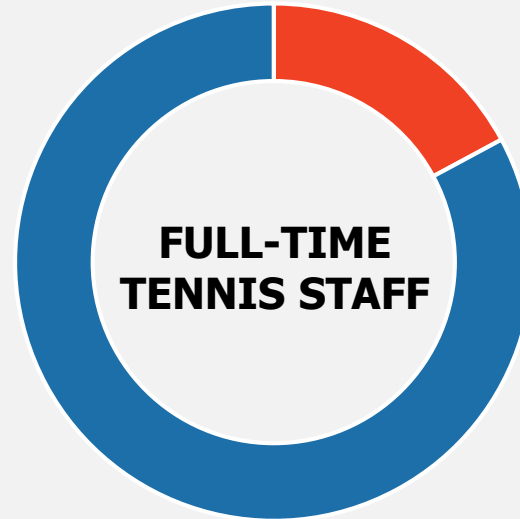
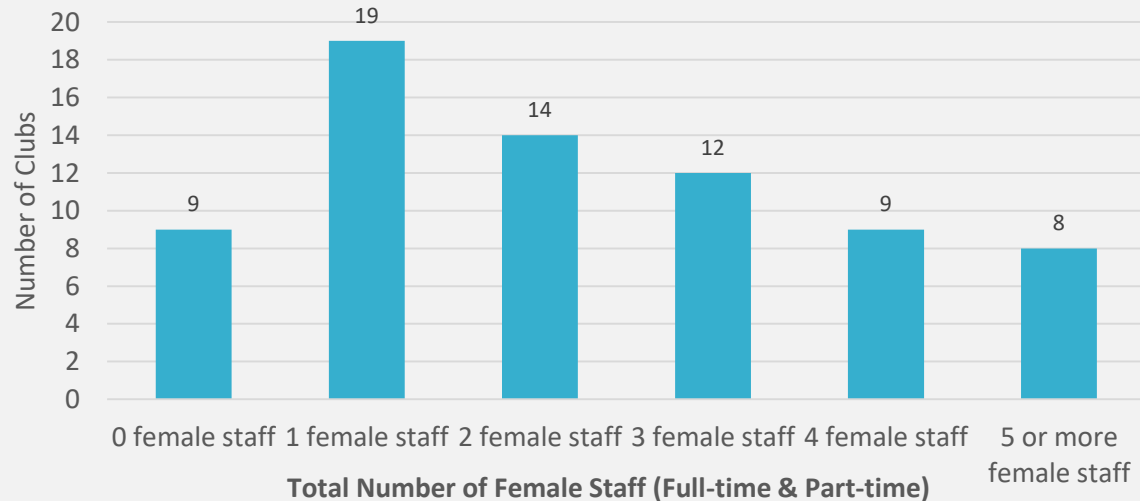
**90% YES**

**10% NO**

# STAFFING RESULTS

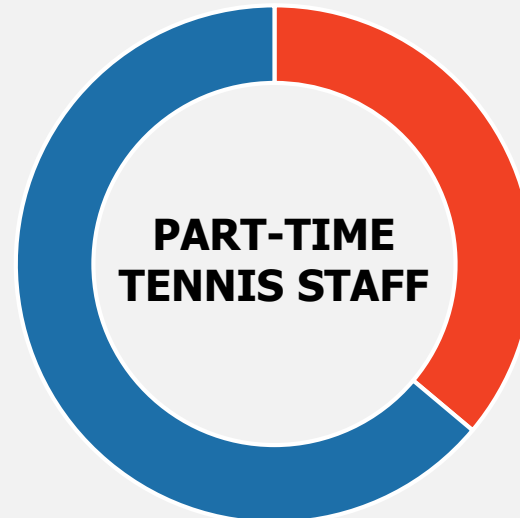
## TENNIS FOCUSED STAFF – FEMALE (Full-time & Part-Time)

| Total Number of Female Staff | % of Clubs | Cumm. % |
|------------------------------|------------|---------|
| Over 5 female staff members  | 11%        | 11%     |
| 4 female staff members       | 13%        | 24%     |
| 3 female staff members       | 17%        | 41%     |
| 2 female staff members       | 20%        | 61%     |
| 1 female staff members       | 27%        | 88%     |
| 0 female staff members       | 13%        | 100%    |



**17% FEMALE**

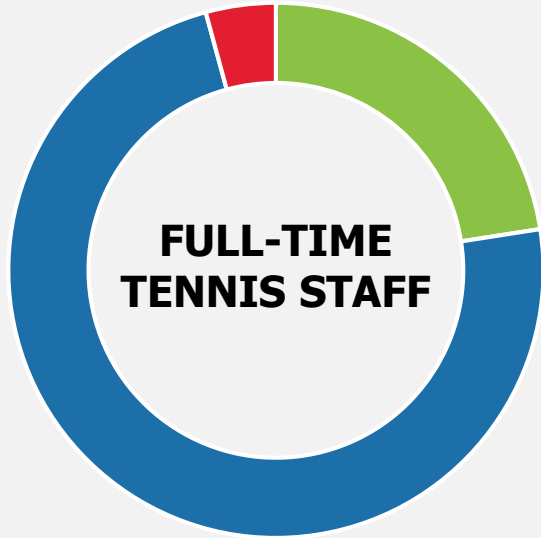
**83% MALE**



**36% FEMALE**

**64% MALE**

# STAFFING RESULTS

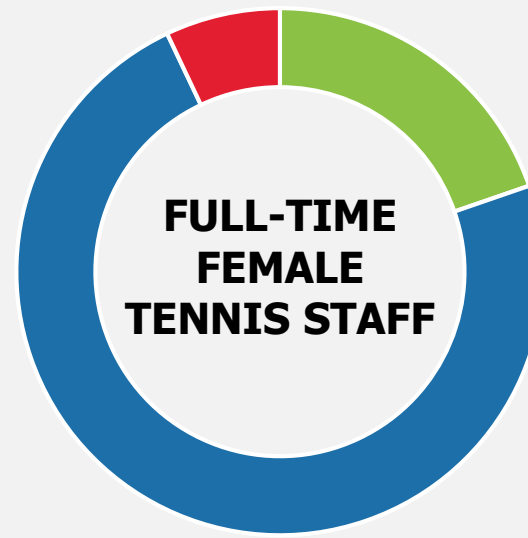


**Full-time staff** focused on tennis:

**Increased** for 23% of clubs

**Stayed the same** for 73% of clubs

**Decreased** for 4% of clubs

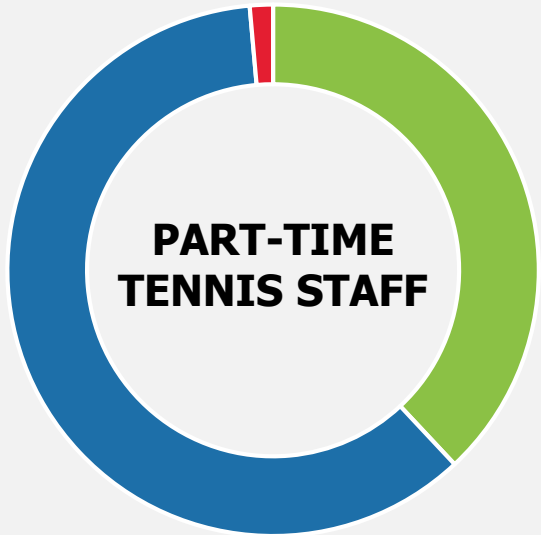


**Full-time female staff** focused on tennis:

**Increased** for 20% of clubs

**Stayed the same** for 73% of clubs

**Decreased** for 7% of clubs

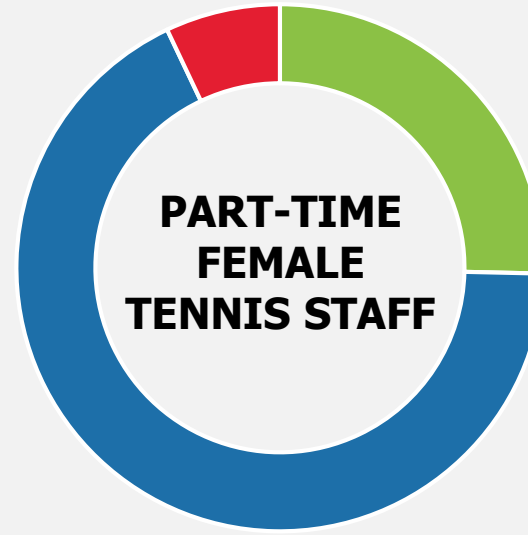


**Part-time staff** focused on tennis:

**Increased** for 38% of clubs

**Stayed the same** for 61% of clubs

**Decreased** for 1% of clubs



**Part-time female staff** focused on tennis:

**Increased** for 25% of clubs

**Stayed the same** for 68% of clubs

**Decreased** for 7% of clubs