2019 TIA Tennis Participation Report

Youth tennis and Cardio Tennis continue to grow, though the latest participation research highlights ongoing challenges such as declining play occasions and fewer frequent and avid players.

The most recent data by the Physical Activity Council (PAC) shows that total U.S. tennis participation increased a slim 0.9 percent from 2017 to 2018, to a total of 17.84 million players. Over the last five years, the average annual change rate is flat at 0.2 percent. The tennis participation rate for the U.S. population ages 6 and older remained at 5.9 percent, the second straight year with a participation rate under 6 percent.

Among the positive trends is a 12.6 percent increase in Cardio Tennis players and a nearly 2 percent increase in youth tennis players over the past year. In addition, “latent demand” for tennis remains strong. The PAC study shows that over 16 million non-players are interested in tennis, and another 14 million Americans “consider themselves players” (also known as “intermittent participants”), but may not have been on court in the last two years. These intermittent players make up 4.7 percent of the age 6-and-over U.S. population, the highest percentage of the population since latent demand was first measured in 2011.

That said, total “play occasions” decreased in the past year, down 3.3 percent to 384 million. This decrease is driven by declines in frequent and avid player play occasions, which make up more than 70 percent of all play occasions. And equipment sales, as indicated by the Tennis Equipment Index (shown at right), continue to slide.

The most recent industry research is available from the TIA at various membership levels. Visit TennisIndustry.org or call 866-686-3036.
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All-weather, durable, and elegant, Har-Tru Sports Coatings are made with the highest grade raw materials to achieve a long-lasting, consistent, and comfortable surface.

High Yield Efficiency
Har-Tru Sports Coatings deliver performance and value. Our formula maximizes yield and stability to spread consistently for the best possible surface coverage.

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At Har-Tru, you’ll find nearly everything you need to build an exceptional court — all under one roof. Contractors also get significant savings from combined shipping costs.
Participation

Tennis participation has remained fairly constant over the past eight years, with an average annual change of -0.4 percent from 2010 to 2018. In the last five years, overall participation has seen negligible increases, averaging an annual change of 0.2 percent; “core” tennis participants—those who play 10 or more times a year—increased 1.6 percent from 2017 to 2018, but have fallen 1.7 percent each year on average from 2010 to 2018 and 0.7 percent from 2013 to 2018. Participation continues to trend to more casual play, with a 13.6 percent increase in non-core participation since 2009 and a 14.9 percent decline in core participation in the same time period.

“Core players account for 86 percent of the money spent in the ‘tennis economy’ and 93 percent of all tennis play occasions,” says TIA Executive Director Jolyn de Boer. “This decrease in core players is in line with a trend toward more casual play for sports overall, rising inactivity levels, aging baby-boomers, and new generations of players who are ‘samplers’ of multiple sports and activities, and is a major concern for our industry. Fortunately, Cardio Tennis is following the positive trends in fitness and group exercise and Net Generation’s focus on bringing more youth into the sport is seeing growth.”

Youth participation increased 1.6 percent in 2018, driven by teenage players ages 13 to 17, which increased 2.8 percent while the youngest players ages 6 to 12 grew 0.5 percent.

Within the total number of young players, “core” youth players, those who play at least 10 times a year, grew by a significant 6.7 percent to 2.83 million.

Tennis Research

The Industry at a Glance (2018 data)

<table>
<thead>
<tr>
<th>Total Participation</th>
<th>17.84 Million</th>
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</thead>
<tbody>
<tr>
<td>Youth Tennis Participation</td>
<td>4.64 Million</td>
</tr>
<tr>
<td>Ages 6-12</td>
<td>2.40 Million</td>
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<tr>
<td>Ages 13-17</td>
<td>2.24 Million</td>
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<tr>
<td>Core Tennis Players (10+ times a year)</td>
<td>9.67 Million</td>
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<tr>
<td>Cardio Tennis Players</td>
<td>2.5 Million</td>
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<tr>
<td>Total Play Occasions</td>
<td>384 Million</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Manufacturer Year-End Wholesale Shipments (units)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tennis Racquets</td>
</tr>
<tr>
<td>Tennis Strings</td>
</tr>
<tr>
<td>Tennis Balls (including ROG)</td>
</tr>
<tr>
<td>Red, Orange, Green Balls</td>
</tr>
<tr>
<td>Tennis Equipment Index</td>
</tr>
</tbody>
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(index reference year: 2003)
Getting to know TENNIS PLAYERS in the U.S.

In 2018, total Tennis participation grew 0.9% from a total of 17.68 million players to 17.84 million players.

Gender:
- Male (55.0%)
- Female (45.0%)

Ethnicity:
- Caucasian/White, non-Hispanic (69.5%)
- Hispanic (9.4%)
- African American/Black (6.9%)
- Asian/Pacific Islander (4.1%)
- Other (10.8%)

Income:
- Under $25,000: 20.0%
- $25,000 to $49,999: 16.1%
- $50,000 to $74,999: 16.8%
- $75,000 to $99,999: 17.4%
- $100,000+: 41.7%

High Earners: 59% of tennis players have a household income greater than $75,000/year

New Players in 2018:
- 2.05 million NEW players in 2018, up 1.8% from 2016.

WHERE THEY LIVE:
- Pacific: 22.9%
- South Atlantic: 20.8%
- East North Central: 13.1%
- Middle Atlantic: 11.7%
- West South Central: 10.7%
- Mountain: 6.4%
- West North Central: 6.0%
- East South Central: 4.3%
- New England: 4.1%

40% of tennis players are ages 35+
26% of tennis players are under the age of 18

Education:
- Post-Grad Studies: 17.7%
- College Grad: 31.0%
- 1-3 years of College: 18.0%
- High School Grad: 7.6%
- 1-3 years of High School: 1.1%

Over 16 Million consumers are interested in playing tennis!