

The 2009 Tennis Marketplace Report

Highlights from the TIA 16 pg. Executive Summary

Stay abreast of all the latest industry trends and data by reviewing The 2009 Tennis Marketplace. Included in this year's report is an overview and outlook of the industry, participation data from the 2009 USTA/TIA tennis participation study and Court Activity Monitor. Also included is pro specialty retail market and dealer trends and data, a summary of the 2009 Cost of Doing Business for Facilities, consumer point of purchase trends, and more. Don't miss out on your opportunity to see all of the latest macro trends, participation trends, facility trends, wholesale market trends, retail market trends, and consumer trends in the tennis industry from 2009.

In This Report

In 2009, total tennis participation topped 30 million players for the first time in more than two decades (see page 4) as reported by the annual TIA/USTA Tennis Participation Survey. On the heels of that report, the "Sports, Fitness and Recreation Participation Overview Report", which annually tracks 117 different sports, showed tennis at #1 for the past decade among traditional sports, with participation up 43% since 2000.

Despite the great participation news, the tennis industry was not able to completely weather the storm caused by the sluggish U.S. economy, as the industry saw a drop in its core revenue generator, frequent players, which slipped 3.4 percent from the year before. However, nearly 60 percent of facilities felt that there was an increase in the number of new players at their facility during the late season of 2009 which helped fuel total tennis participation increase of 12%. We also saw a rebounding fourth quarter that helped mitigate the impact the struggling economy had on wholesale shipments and as consumer confidence started to recover, dealer trend studies are also expecting the racket market at pro/specialty to improve. (see pg. 11)

With the ever-changing technology landscape and greater demand for online services that combine accessibility and affordability, consumer point-of-purchase trends show an increase in rackets, shoes, and balls being purchased via the internet (see page 14). The industry as a whole is making strides to embrace new trends in technology that will allow tennis businesses alternate means of generating revenue while fulfilling the consumers' demand for products and services that are available through new and innovative technologies.

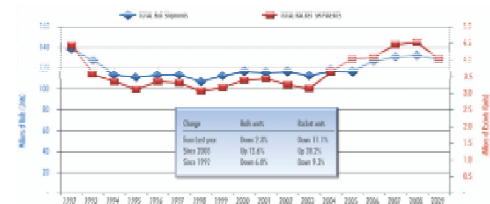
As the tennis marketplace continues to expand, the industry is developing new methods to measure the economic impact and health of the industry with the forthcoming Economic Benchmark Study and an increased focus on creating more frequent players and improving conditions at retail. The TIA continues to review the needs, issues, and challenges affecting our industry and together with our partners is working on improved communication and pathways that will help ensure the sustainability, growth, and economic vitality of our sport.

For more information – visit TennisIndustry.org or contact the TIA at info@tennisindustry.org or call toll-free 866-686-3036.

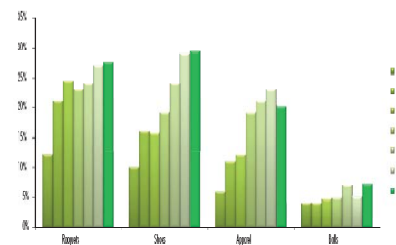
Report Name: Tennis Participation **Pg 5**
Key Findings: Tennis Participation Tops 30 Million in 2009 with 12% growth from 2008



Report Name: Ball and Racket Shipments **Pg 8**
Key Findings: Ball and Racket Shipments are up 13.6% and 28.2%, respectively, since 2003.



Report Name: Consumer POP Trends **Pg 15**
Key Findings: Tennis equipment purchases see increase in internet based purchases since 2003



Report Name: Cost of Doing Business **Pg 14**
Key Findings: Average revenue per tennis court is up 18% since 2005

	2005	2007	2009
18% increase in average tennis revenue / court	\$26,988/ Ct.	\$37,462/ Ct.	\$31,823/ Ct.
75% of facilities rate the outlook for the tennis industry as good or very good, representing a 7% increase from 2005	71%	77%	74%
75% of facilities operate on a year round basis	72%	74%	75%
The retention rate of introductory programs for new players / beginners remains high	65%	67%	65%
Average number of members per facility is down 18% since 2005	392	443	314
Average tennis only membership fees are down 15% since 2005	\$729	\$768	\$617