



Sports Marketing Surveys

quality research for management action



the
next generation
of tennis players

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The IMPORTANCE

- Development of Future Tennis stars – creation of role models
- Driving participation
- Identifying habits & lifestyles
- Communication with “The Next Generation” – in the way they want to....
- Attitudes to tennis coaching & the importance of National Federations in delivery...
- Unique research available for National Federations – analysed by
 - Tennis ranking & gender
 - Emerging & Established markets



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What have we done.....

- » Multi-language Online surveys amongst 15-18 year old elite junior tennis players across Europe
- » Tennis Europe website & emails sent by Federations themselves

Achieved

- » 790 interviews were obtained across a range of European countries - 47 in total
- » All were ranked in the top 300 in their countries, in age groups from 15 to 18



TennisEurope.org

Tennis Europe Professional Tennis Junior Tennis Seniors Tennis Media & Infocentre Development

Junior Tennis

Since its inception, Tennis Europe has always been keen to place as much emphasis as possible on the development and organisation of the junior game in Europe. The first goals of the Junior Committee were the consolidation of existing international team competitions, and the creation of European Junior Championships, events which thrive to this day. The European Junior Circuit followed in 1990, completing the structure as it currently stands, and has proven to be route to success for virtually every major European tennis player since - Grand Slam winners from Federer, Ferrero, Kafelnikov and Moya to Hingis, Graf, Henin-Hardenne and Sanchez Vicario all made their first impressions on the Tennis Europe Junior Tour.

Another aim of the Junior Committee has been to encourage all member nations to organise their own international tournaments, whilst limiting the total number of events in order to balance quality with quantity. The European Junior Ranking system was introduced over a decade ago, is recognized throughout Europe. Each year, the ITF/Tennis Europe Development programme ensures that considerable amounts of money are invested in order to assist the less developed member nations; the largest proportion of these funds being reserved for junior activities.

The Tennis Europe Junior Tour is divided into three age groups; 12, 14 and 16 & Under, and comprises regular tour events, plus the various European Championships, both individual and team events.

Virtually every top European player of the past twenty years spent some time playing Tennis Europe Junior Tour events before turning professional.

TOP JUNIOR TENNIS PLAYER IN YOUR COUNTRY?

Tennis Europe





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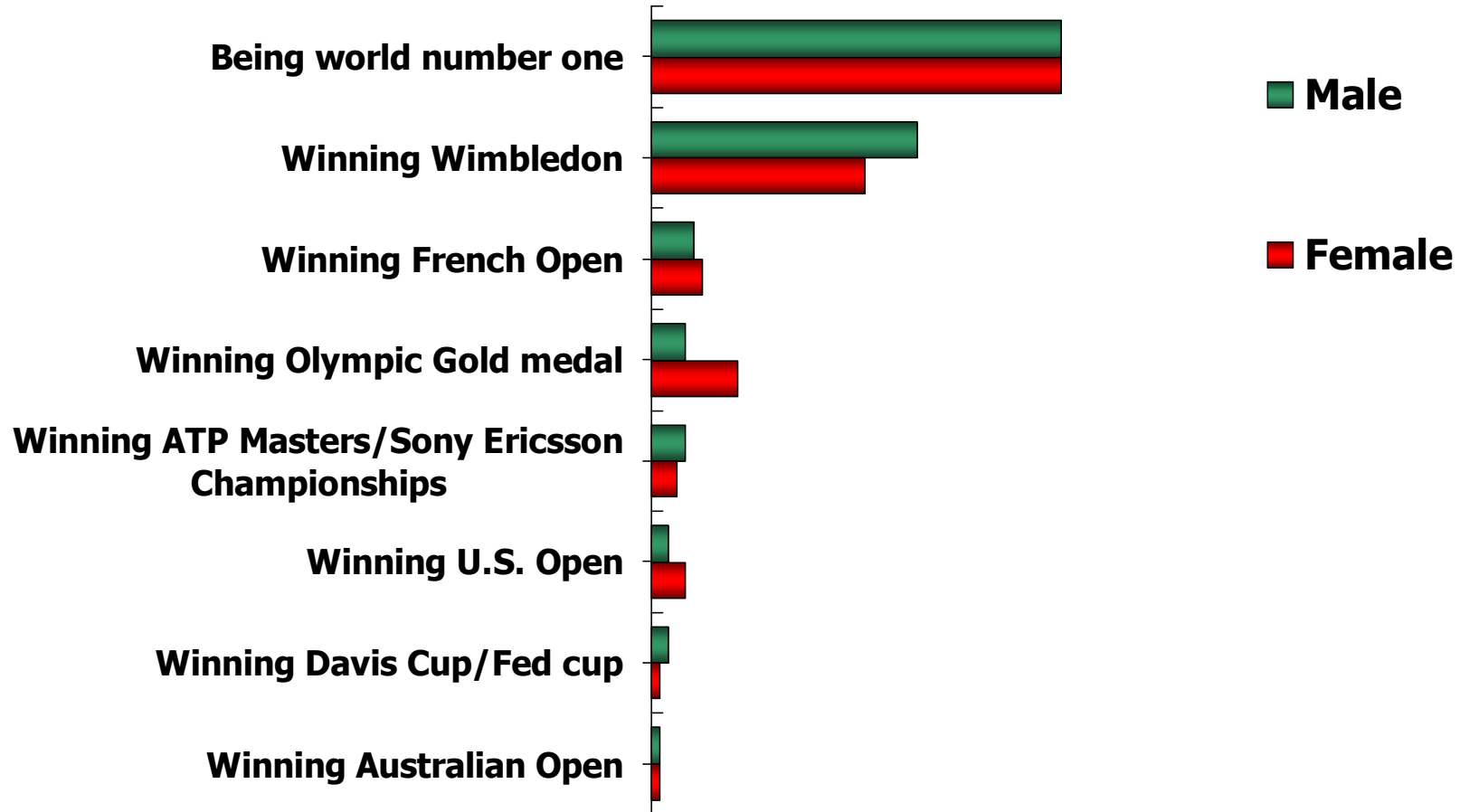


Attitudes to Tennis

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Most Prestigious Achievements in Tennis



Question 33: Which of the following achievements in Tennis do you think is the most prestigious? (% of respondents).

Base:
All respondents (790);
Male (467), Female (323)



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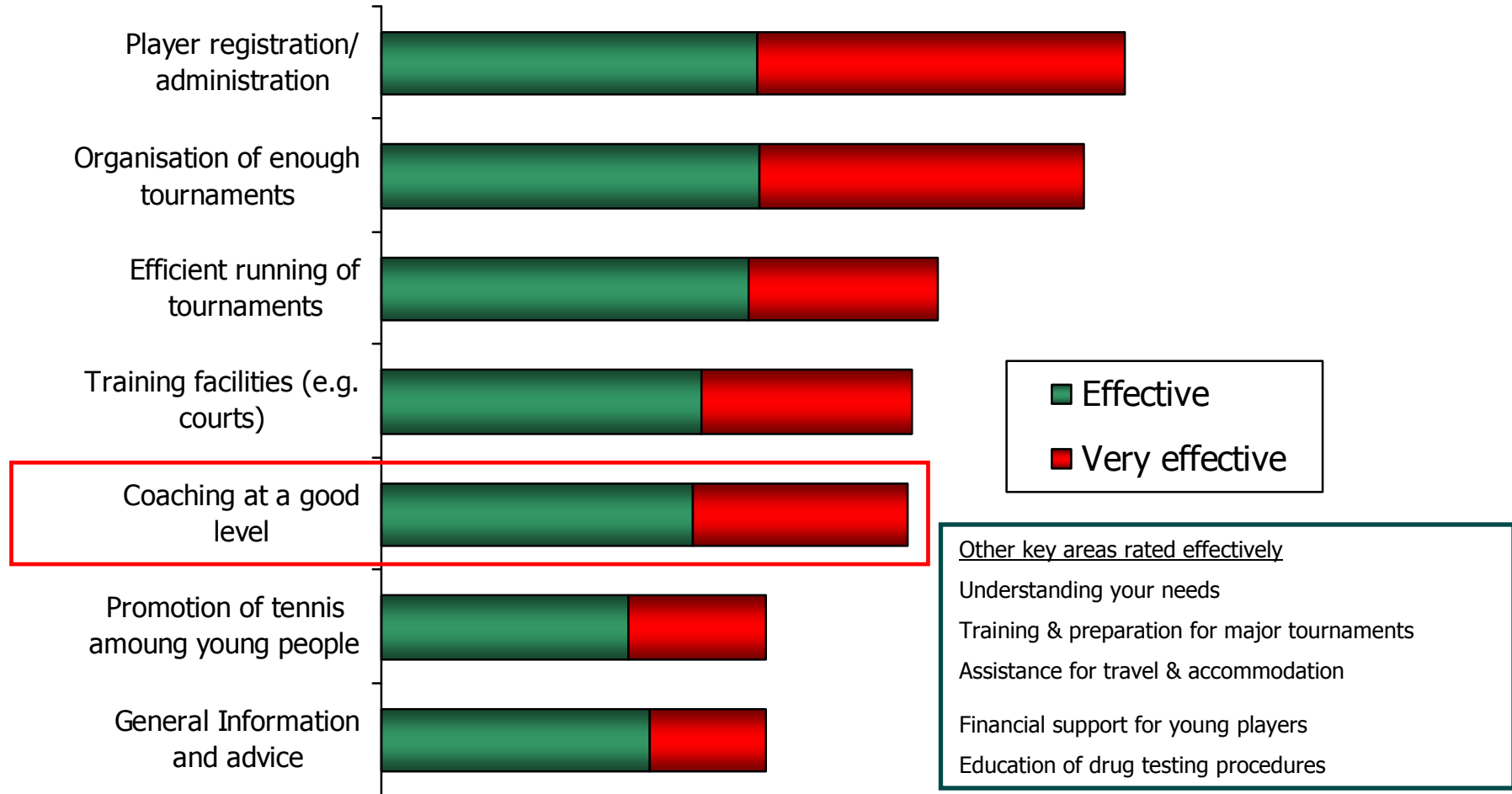


National Federations Performance

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National Federations Performance



Question 30a: How effectively do you think your National Tennis Federation provides the following services to young players?

Base:
All respondents (790).



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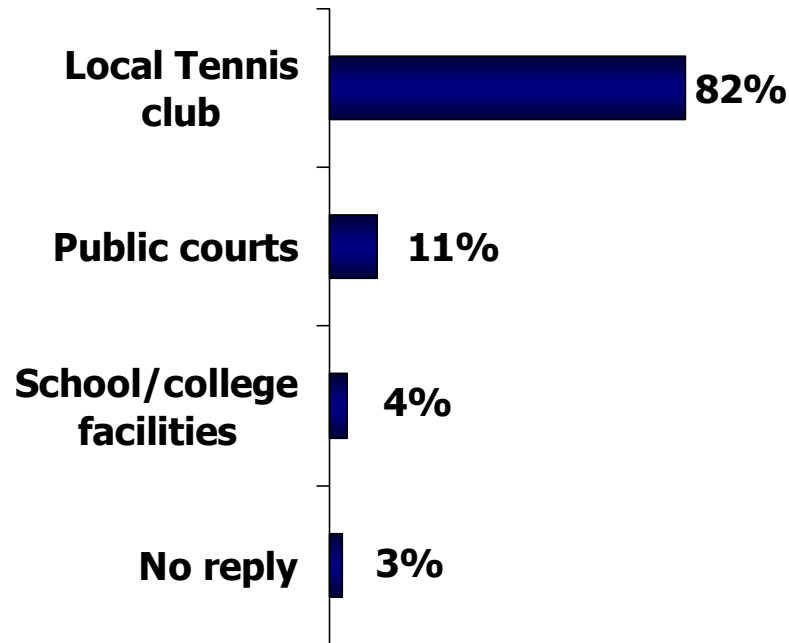
Involvement of Juniors in Tennis

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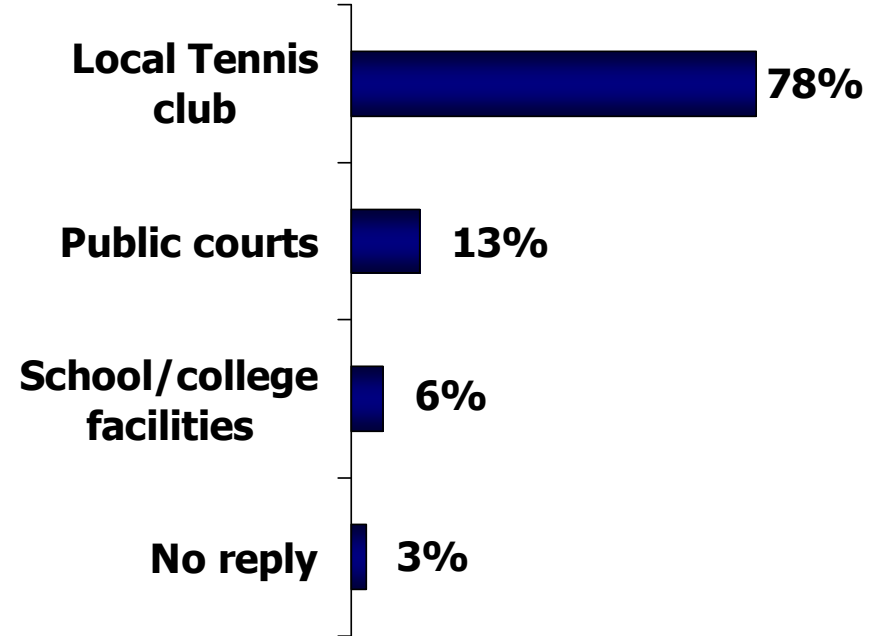


Where Began Playing Tennis

Top 50 ranked players



Players ranked 51-300

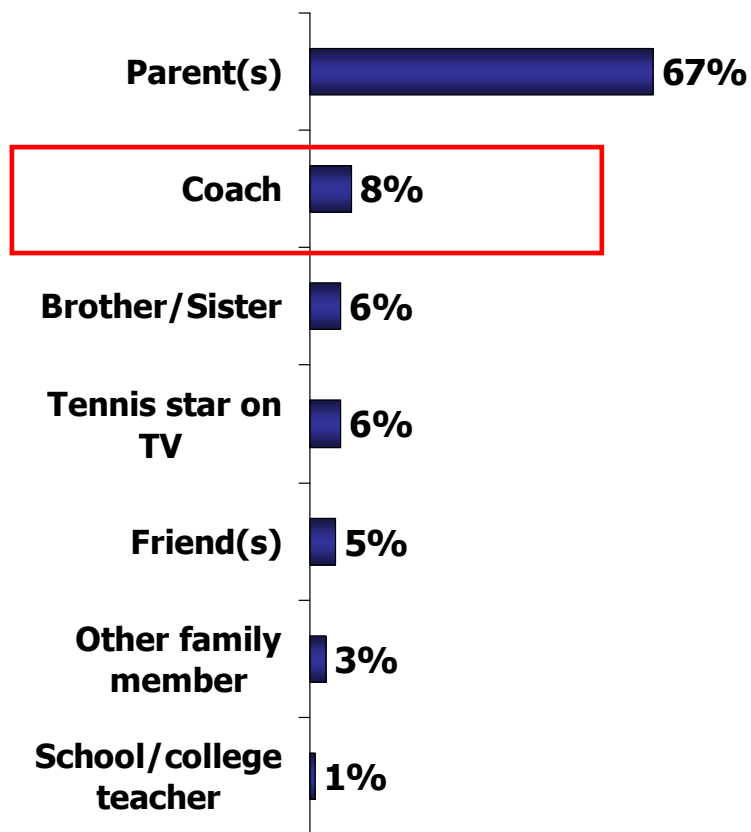


Club system acting as principal feeder for elite junior tennis players.

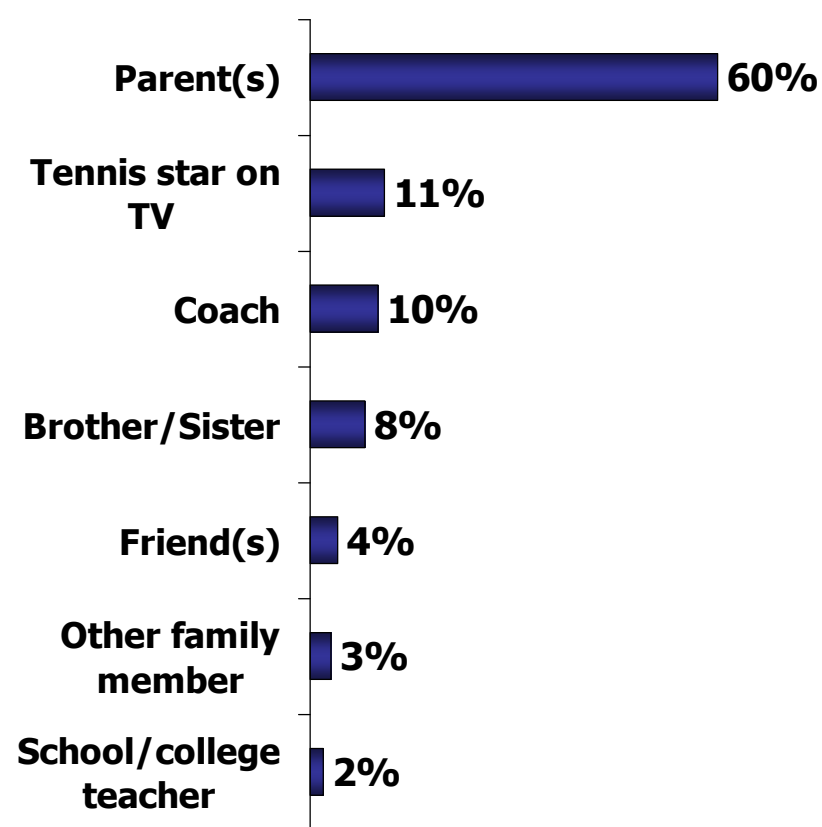


Greatest Influence in Starting Tennis

Top 50 ranked players



51-300 ranked players



Question 41: Who was the most influential person in you starting to play Tennis?

Base:

All respondents (790).



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Coaching & Roles of Coaches

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Racquet Purchasing considerations



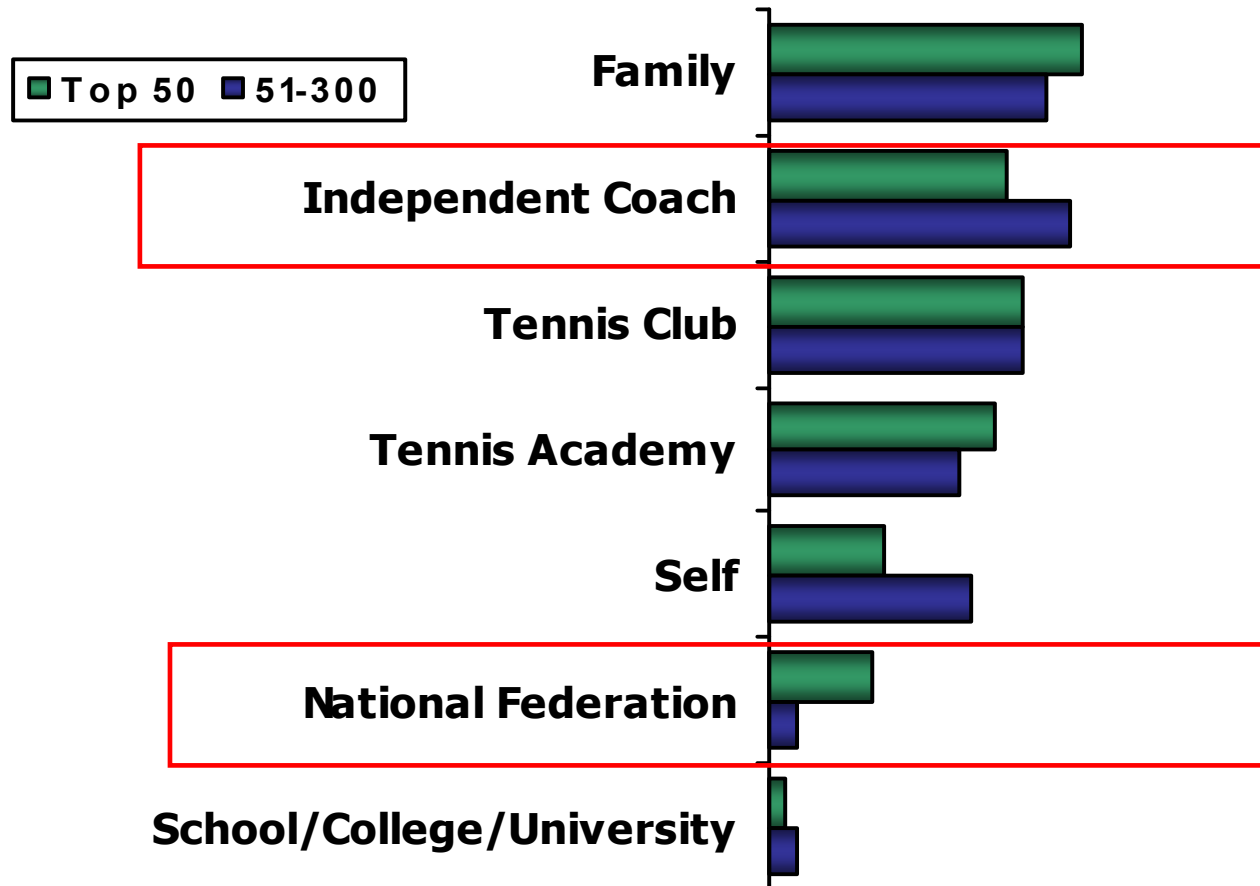
Question: Which of the Following are most Important to you when Choosing a brand of Racquet. Tick all that apply.

Base:

All respondents = 790



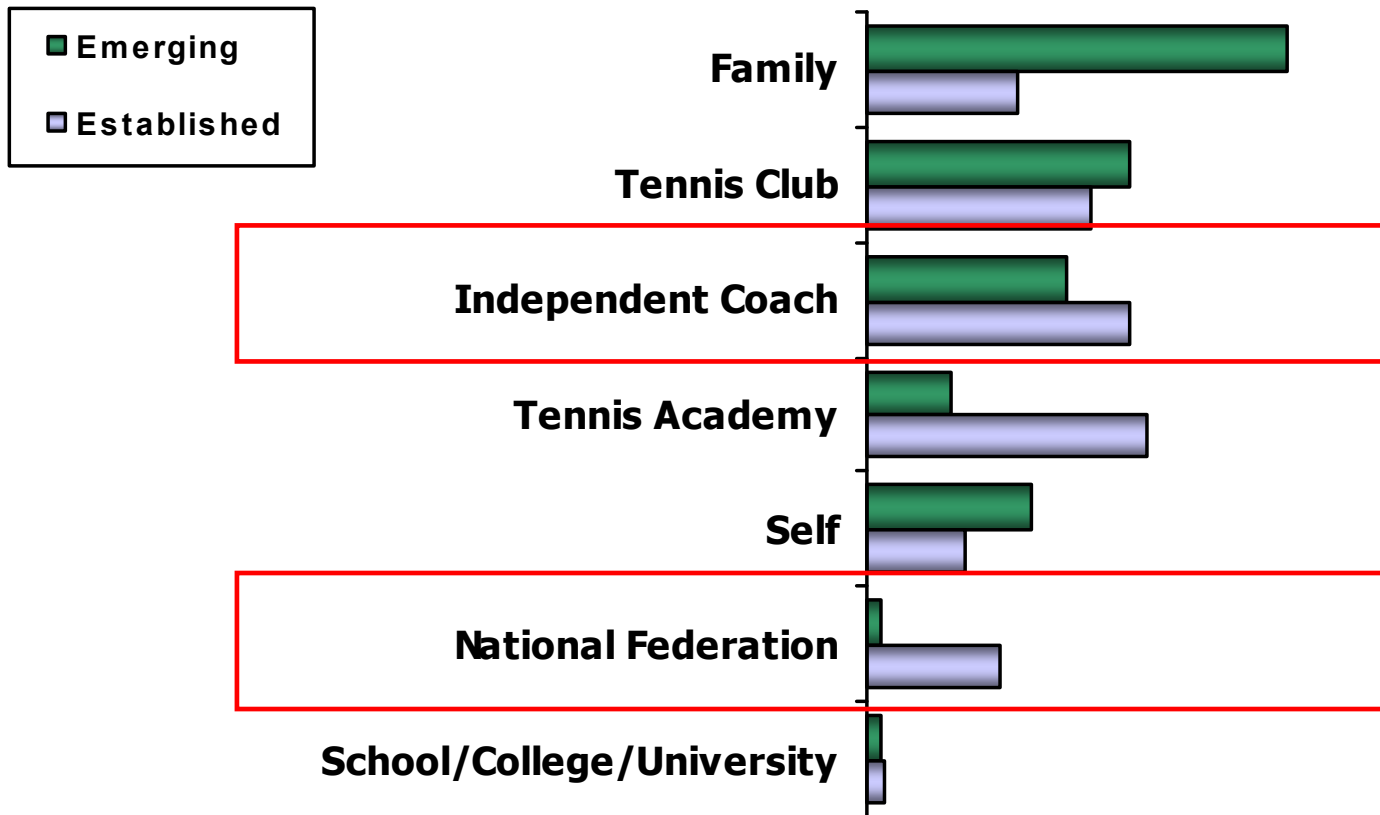
Responsibility for Junior Training & Coaching?



Question 43: Who is mainly responsible for your Tennis training and coaching?

Base:
All respondents (790).

Who is responsible for the training and coaching by Emerging and Established Countries?



Question 43: Who is mainly responsible for your Tennis training and coaching?

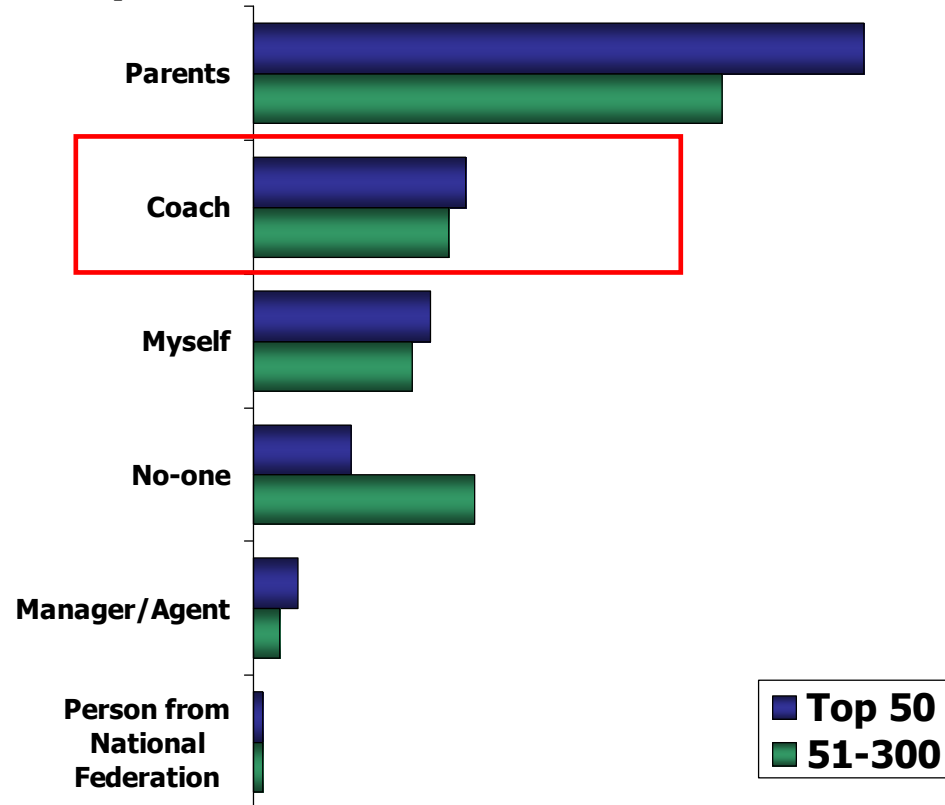
Base:
Emerging (353),
Developed (381)

Who Deals with Sponsorship / Management Issues?

Overall



By rank



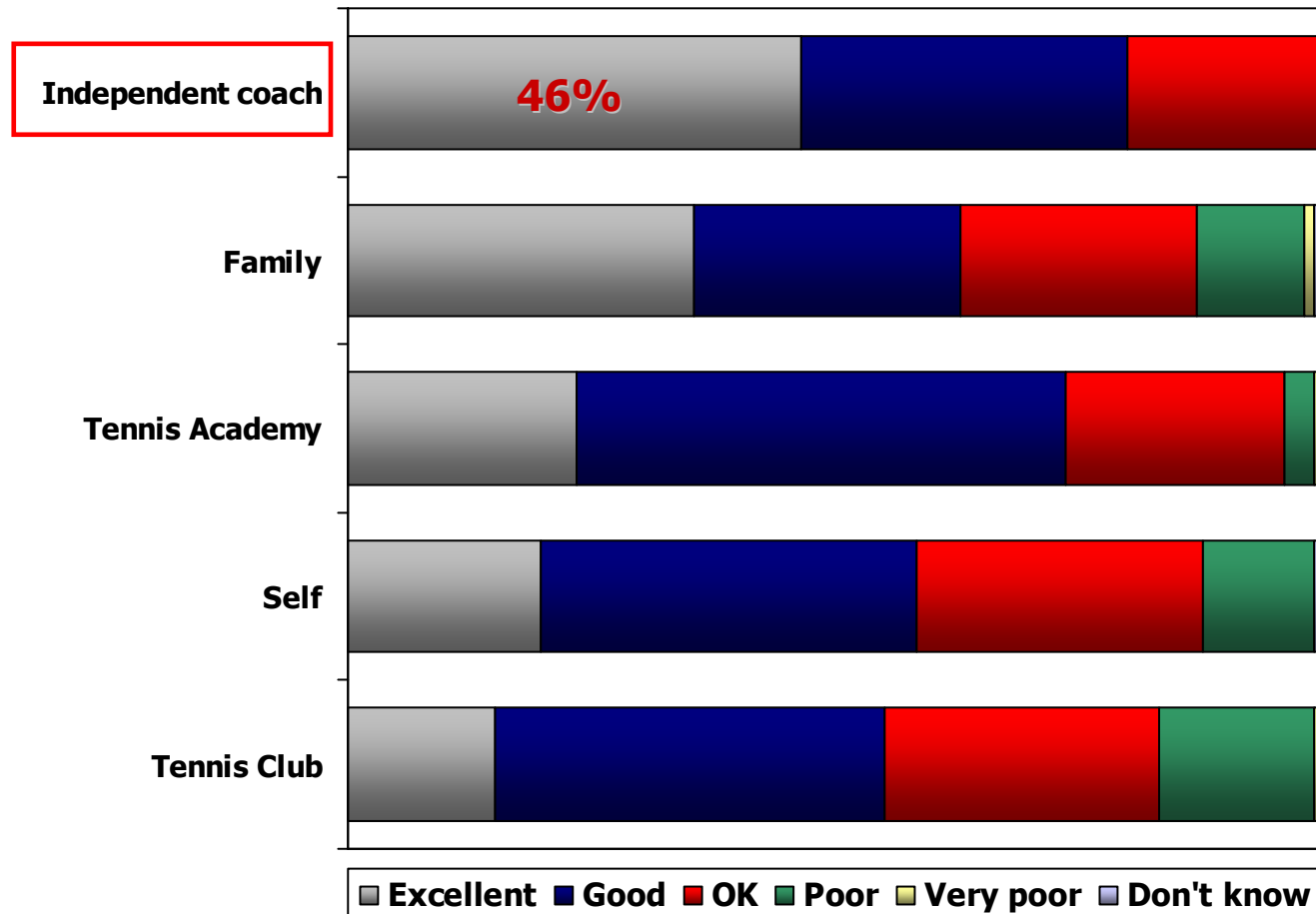
■ Top 50
■ 51-300

Question 46: Who is dealing with your sponsorship/management issues?

Base:
All respondents (790).



How do the Players Rate their Training and Coaching?



Question 44: Overall, how good is your training and coaching at providing everything you need to achieve your potential as a tennis player?

Base:
All respondents (790).



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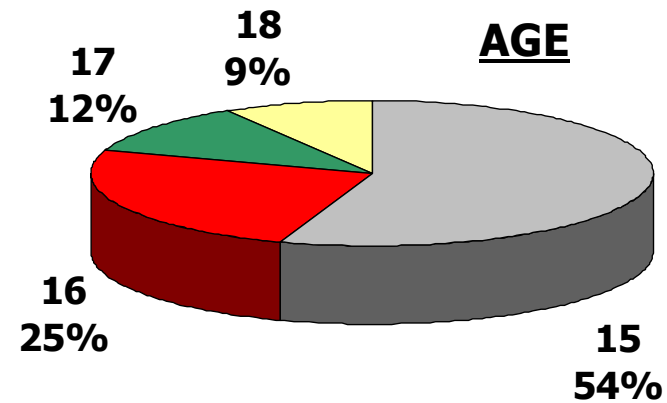
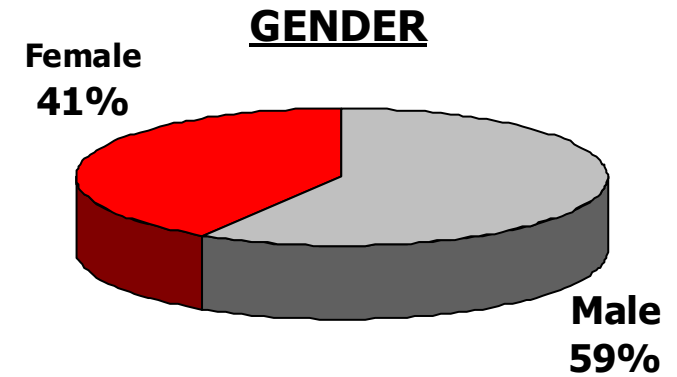
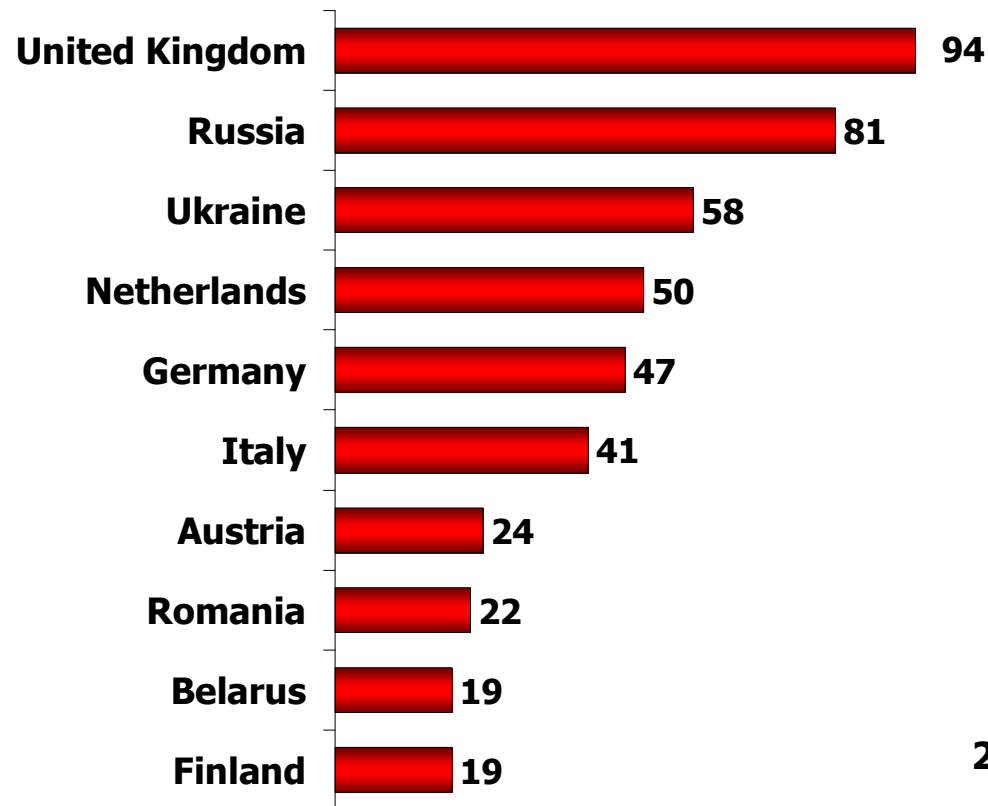
Respondents

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Respondent Demographics



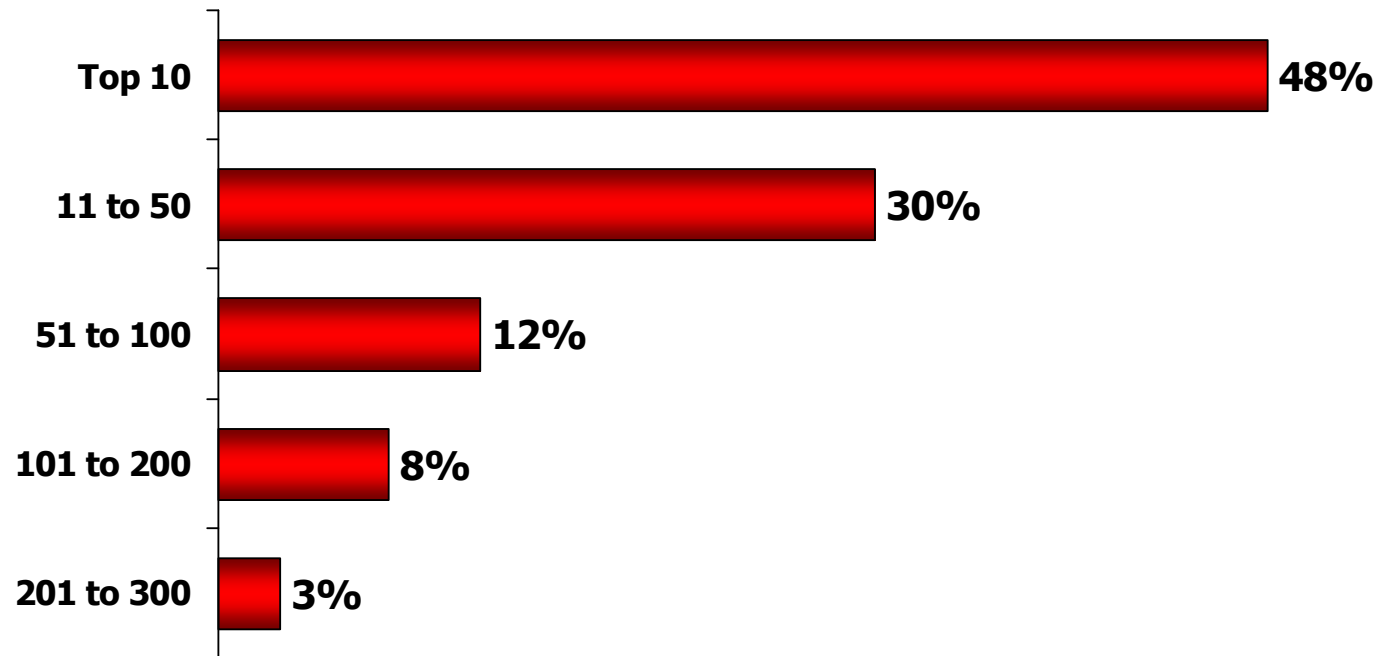
NUMBER OF RESPONDENTS - Top 10 Countries



Base: All respondents (790).



Respondent National Junior Ranking



Question 50: Please select your tennis ranking for your age group in your country.

Base: All respondents (790).



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Other Topics

- Favourite Tennis Players – both male & female professionals
- Future in tennis - plans post Aged 18.....how many want to be Coaches?
- Communication & Source of Tennis Information
 - Use of Tennis websites
 - Rating of websites for information
- Attitudes to National Federations
- Role of Tennis Europe & National Federations
- Performance of National Federations
- Attitudes to ATP and WTA Tours
- Equipment usage – additional survey





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The Opportunity

- Numbers, numbers, numbers – using the statistics
- Consumer insight is critical for Tennis
- This is about the “Future of Tennis”
- Can any National Federation afford NOT to have this information?
- Relevant for:
 - Coaching
 - Communications
 - Marketing
 - Your National development of Tennis



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NEXT STAGES

- Influence the “Next Generation” survey for 2009
 - Complete your evaluation form....
- Purchase the report on behalf of your National Federation
 - All National Federations should have this report
- Report price
 - Normal price of €2,500
 - Order at the Tennis Europe Coaches Symposium: €1,400
- Order today from Hrovje & Carola at Tennis Europe



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- » Leading **INDEPENDENT** specialist sports & sponsorship agency
- » **FULL SERVICE** provision – media, market research, consultancy
- » **HOLISTIC** approach – working with all partners
- » **LOCALLY GLOBAL**
- » **HISTORY** – databases, knowledge, experience
- » **UNDERSTANDING** all angles of the business
- » **LOYAL** client base and a long term attitude
- » **QUALITY** – service, executives, data, reporting

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