



TOP 10 INSIGHTS / SOLUTIONS FOR A BETTER TENNIS WORLD

Jolyn de Boer Founder, Racquet Sports Alliance





# TOP 10 INSIGHTS / SOLUTIONS

## FOR BETTER TENNIS WORLD



- 2. THE PERFECT BACKHAND
- 3. LIVE FOREVER
- 4. PLANET EARTH
- 5. TOUCHPOINTS TO CONSUMERS
- 6. STOP THE LEAK
- 7. ONE SIZE FITS ALL
- 8. ANALYTICS APPS EVERYWHERE
- 9. THE METAVERSE
- 10. NEW WORLD, SAME HUMANS









# The Silver Lining The Great Reset

The participation rate of 75.6 percent was the highest across the past six years.

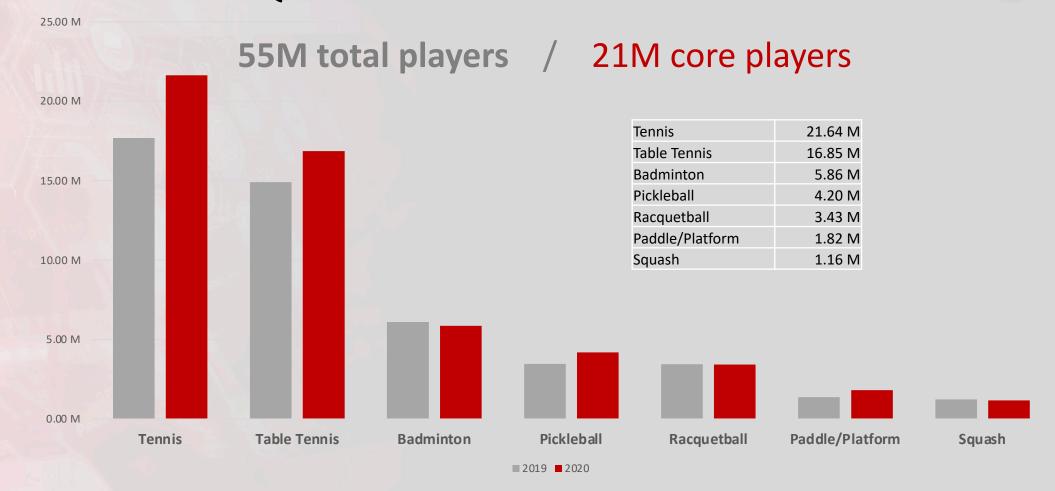
- The COVID-19 pandemic influenced Americans to look to alternative ways to spend their time. Over a third of active Americans participated in high calorie activities, such as bicycling, tennis, and trail running.
- Outdoor activities and racquet sports had the biggest pandemic increases

On the negative side, the pandemic affected fitness club activities and team sports the most, reflecting category-wide declines though some activities within those categories did excel.





## **RACQUET SPORTS TOTAL PARTICIPATION**

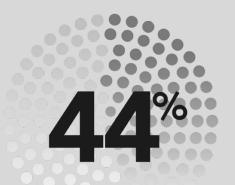




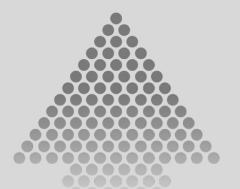
# **TENNIS PARTICIPATION GROWTH IN 2020**

**†22**%

TENNIS
PARTICIPATION
INCREASED 22% IN 2020



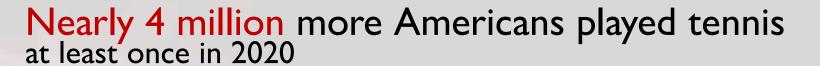
NEAR 3 MILLION
NEW PLAYERS PICKED UP
A RACQUET IN 2020
AN INCREASE OF 44%
OVER NEW PLAYERS IN 2019



4 MILLION MORE PEOPLE PLAYED TENNIS IN 2020 THAN IN 2019

Source: 2020 Physical Activity Council's Participation (PAC) Report.

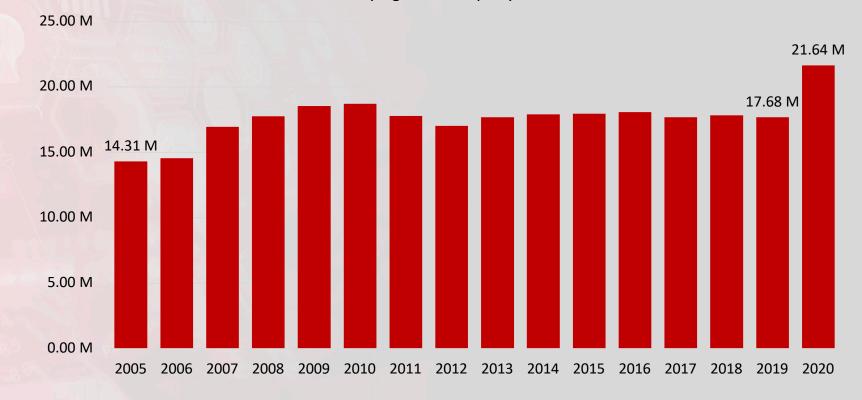






**Total U.S. Tennis Players - Age 6+** 

Playing 1+ times per year

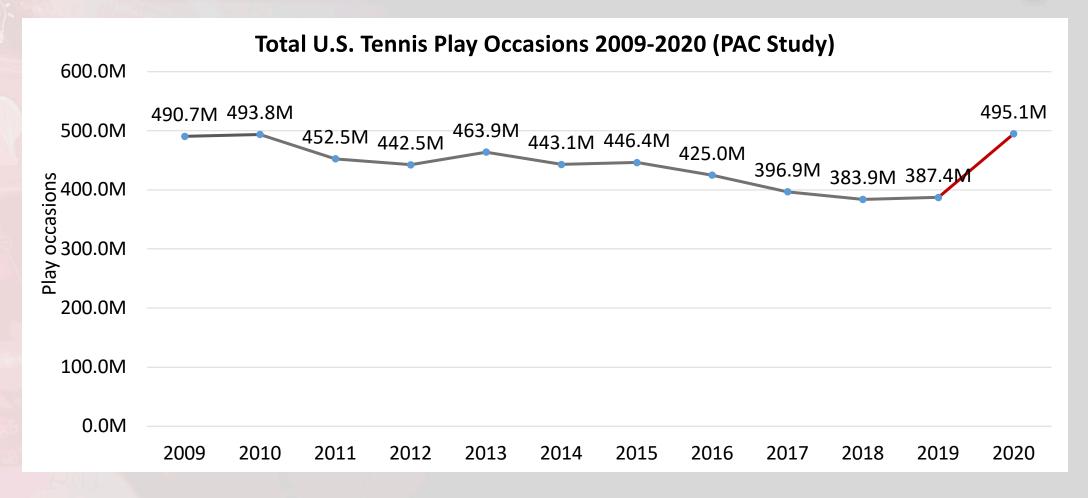


 After several years of flat participation, total tennis players increased 22% to 21.64 million players



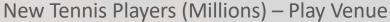
## Total Play Occasions Increased by 27.8% to 495.10 million

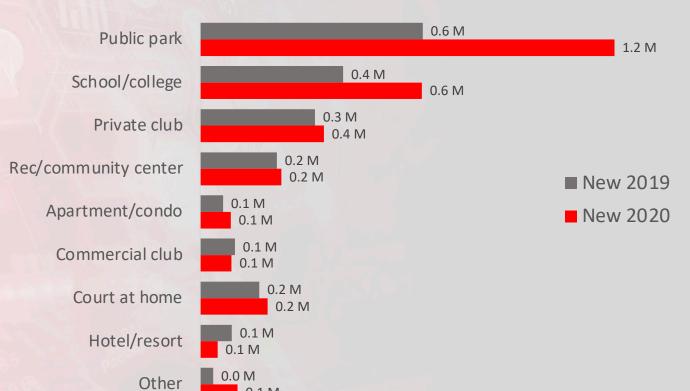




## Where are the <u>new</u> players playing?







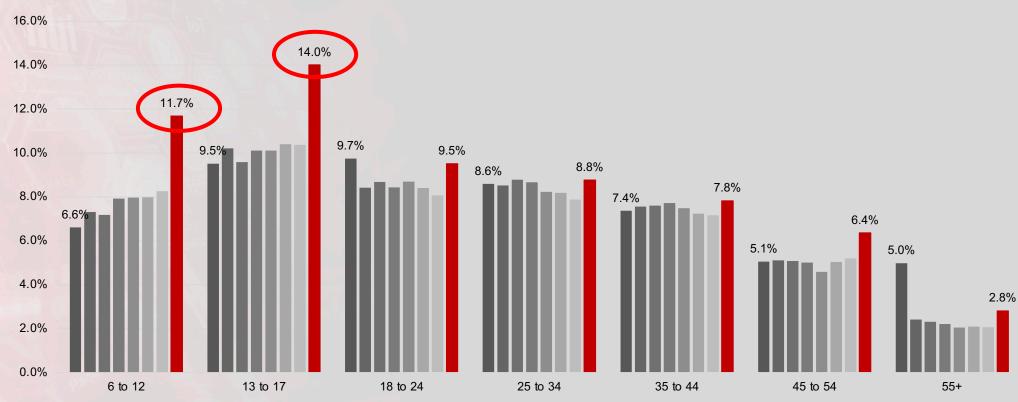
- 2020 saw a big increase in the number of new players at public parks and schools/colleges.
- Just over 2 million new players were at public parks, schools, and recreational facilities —where programming is likely to be limited or not available.





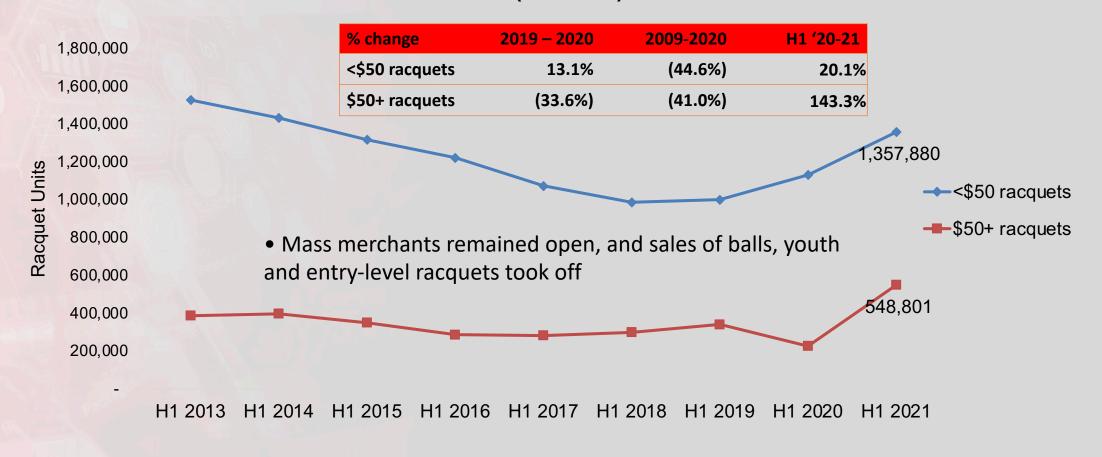
# U.S. Tennis Participation Rates by Age (% of U.S. population ages 6+)







# U.S. Racquet Unit Shipments: <\$50 Wholesale vs \$50+ Through Half Year (Q1 & Q2)

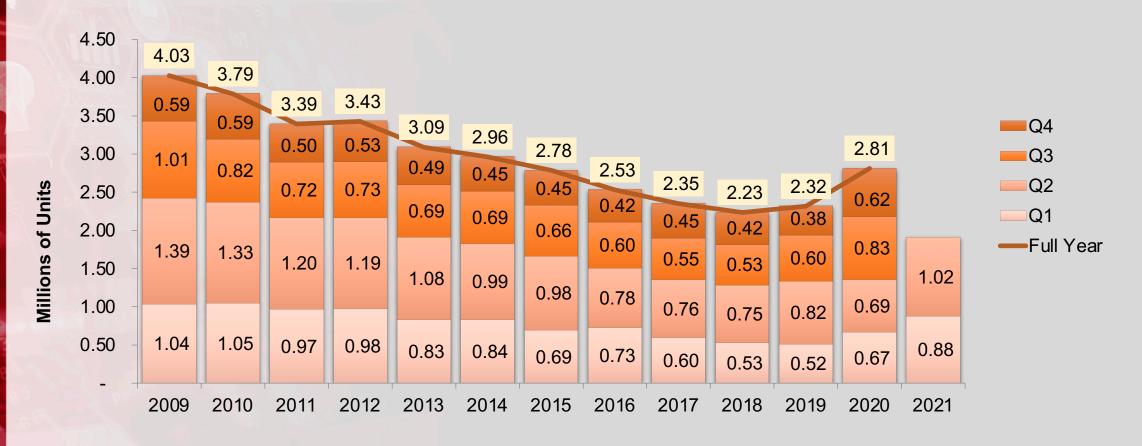


Source: TIA U.S Wholesale Equipment Census





## U.S. Wholesale Racquet Unit Shipments - Quarterly through Q2 2021



Source: TIA U.S Wholesale Equipment Census







# IT'S NOT ABOUT THE PERFECT BACKHAND ANYMORE



## **IMPORTANT GROWTH**

The following information shows current demographics for Millennials, including population trends, geographic locations, age, income and education.

While the Millennials have grown significantly, it's important to understand the different cultural influences in your community.

**US POPULATION** 



**MILLENNIALS** 

75,400,000

**CONNECT WITH** 

**COMPANIES ON** 

**SOCIAL MEDIA** 

NETWORKS.

**SOCIAL MEDIA** 









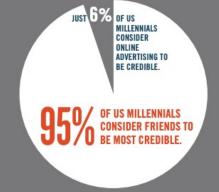


4 YEAR DEGREE, MAKING THEM THE BEST EDUCATED GR OF YOUNG ADULTS IN US HISTORY.









US Millennials are 7 TIMES MORE LIKELY to give their personal information to a trusted brand than to any other brand.

of US Millennials would share vith companies to receive

businesses.

of US Millennials

deals for nearby

## **MILLENNIALS**

largest generational cohort

Want FUN, SOCIAL, BEER

Connection to Friends

Convenience (seamless one transaction)

Online Bookings

Social Media

Technology

The Experience





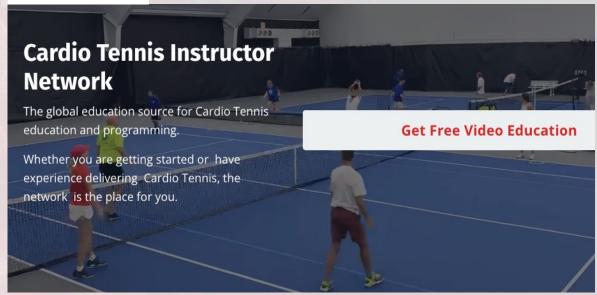


- Millennials range from the ages of 18-34 and make up for 80 million of the nation's population.
- Within the next 5 years their purchasing power is projected to increase 133% from \$600 billion to \$1.4 trillion.
- Generation Z (iGens) those that were born between the years of 1994-2010.
- The first generation to grow up and spend their entire adolescence in the age of the smartphone.





## Cardio Tennis continues to be one of the fastest growing activities



- Cardio Tennis was the industry's solution to the fitness business when this segment started to surpass traditional sports
- Fifteen years later it continues to make impact with its emphasis on fun, social, fitness and large group exercise using heart rate monitors, music and high 5s.
- Pandemic driven health focus provides an added opportunity to engage new and returning players







# TENNIS EXTENDS YOUR LIFE BY 10 YEARS

# Tennis significantly reduces the risk of all-cause mortality

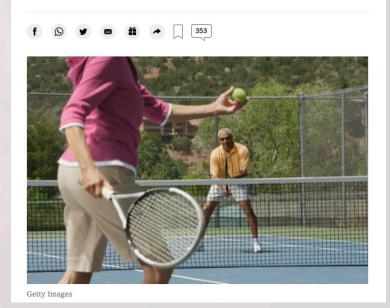


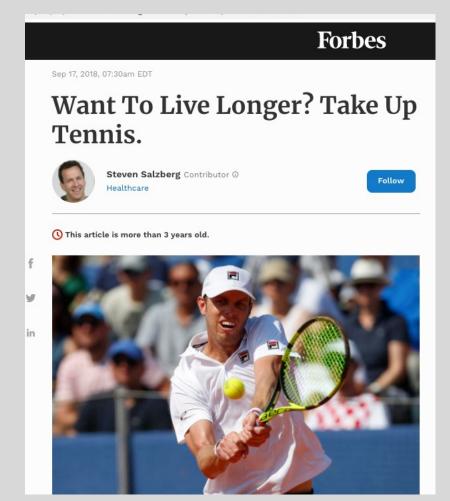


PHYS ED

# The Best Sport for a Longer Life? Try Tennis.

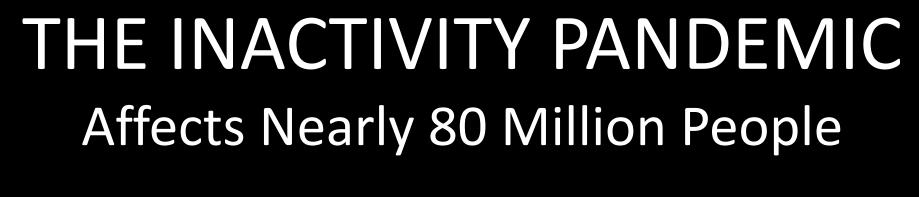
People who played tennis, badminton or soccer tended to live longer than those who cycled, swam or jogged.











- The Lancet, the leading medical journal in the world, estimates nearly 5 million people die from physical inactivity every year.
- The Inactivity Pandemic has been a pandemic for over 10 years and is getting worse. Leading to obesity, diabetes which are unfortunately contributing factors to adverse covid outcomes.
- Inactivity levels associated with \$117 Billion in Annual Healthcare costs



# Kids are increasingly inactive and at risk



Kids are ranked LAST in physical health

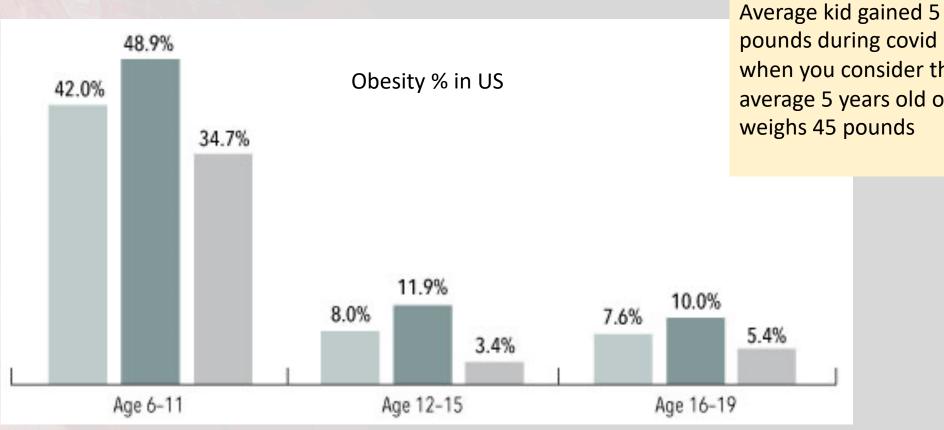
In a global study by UNICEF of 38 developed countries

- Kids are ranked 47<sup>th</sup> out of 50 countries in fitness
  - In a global study by the British Journal of Sports Medicine
- 50 million (or approximately 90%) are not active to CDC physical activity standards
- Almost 50% of all schools have eliminated or greatly reduced physical education in schools
- And, in the past year, kids' inactivity levels and body weight have increased. COVID-19 has made the 'Inactivity Pandemic' even worse.





# Kids obesity levels are rising



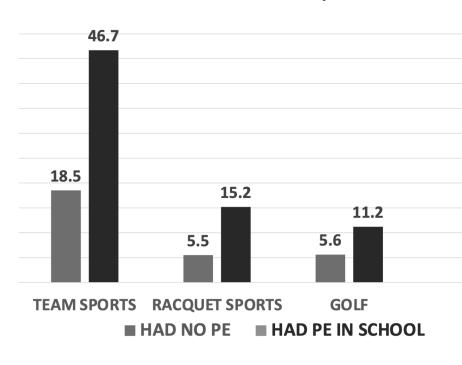
pounds during covid and when you consider the average 5 years old only weighs 45 pounds





# KIDS WHO LEARN BASIC SKILLS IN SCHOOL ARE 2-3 TIMES MORE LIKELY TO BE ACTIVE OUTSIDE OF SCHOOL

## % OF KIDS ACTIVE IN TENNIS, GOLF OR TENNIS



## IMPORTANT TO GET KIDS MOVING TO ENSURE THERE IS A FUTURE PIPELINE OF PLAYERS

If running, throwing, catching skills aren't developed at an early age – there is less likelihood of that kid becoming a future tennis player











# RECYCLE – REUSE – REPURPOSE RECOMMERCE

Be a Good Citizen of Planet Earth





## TO RECYCLE AND REUSE ALL TENNIS BALLS

We are saving the planet. One ball at a time.



## The Problem Tennis balls take 400 years to decompose.

Nationwide, approximately 125 million used tennis balls wind up in America's landfills every year. That is 20,000 metric tons of methane-producing, near non-decomposable rubber waste. U.S. tennis players recognize this as a significant environmental problem that no longer represents their sport in 2021.

U.S. tennis players want to be part of the solution and will recycle all of their balls if convenient courtside bins are available. Organizations also want to be part of a cost-effective green solution. In short, there needs to be an economical, universally adopted initiative to collect, recycle, reuse and publicize a national initiative – one that will inspire the US tennis community to change habits and stop trashing tennis balls.











HOME OUR

R WORK TAKE AC

ABOUT

TUS DO

CANADA

HELP US SAVE THE PLANET ONE BALL AT A TIME

152,631

Estimated individuals making a difference

Join our non-profit mission to he p save the planet by reusing and recycling ALL tennis balls. 6,751,967

Tennis balls saved from our landfills



**INDIVIDUALS** 

QuickLabe

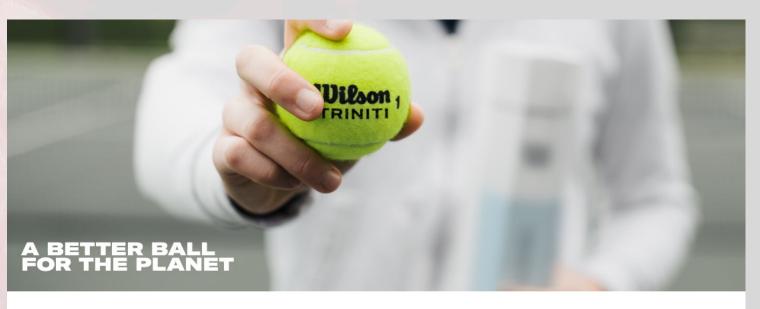
Get Labels



**TENNIS FACILITIES** 

QuickShip

Get Bins





Introducing Triniti, the world's first eco-conscious, high-performance tennis ball:

100% Sustainable Packaging

Maintains its fresh ball feel 4x longer to reduce consumption and waste\*

5% of Triniti profits support worldwide sustainability efforts

BUY TRINITI NOW



## **Wilson Triniti**

- plastic free packaging
- balls that last longer

Looking at ... how to improve efforts for Sneakers – 300 million thrown out annually

 Can take 30-40 years in landfill to decompose

Tennis Racquets
RecycleBalls working on solution

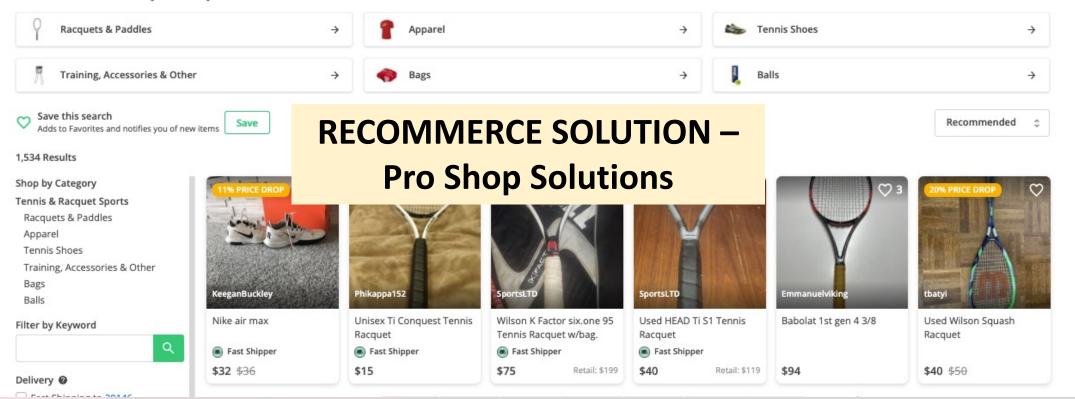




# SIDELINESWAP

Tennis & Racquet Sports

## Tennis & Racquet Sports



# Top 10 Insights/Solutions - #5





# Touchpoints to the Consumer



# Tennis Coaches are Vital to a Healthy Industry



- A new player's success is dependent on being introduced to the sport the right way with instruction from a tennis coach
- New player retention boosted to 70% when nurtured via program pathway
- New coaching apps flooding the marketplace and analytic tools to help with training only as good
  as the coach that embraces the technology provided
- Conference is full of great coaches and expert advice that will be sharing tech and innovation
- Challenges for future:

70% of coaches above age 50 while less than 4% under the age of 30

### Solution?

Tennis Coaches need to adopt new technology and pivot to keep new players engaged/retained

Tap into the approximately 340,000 certified personal trainers (fitness) to cross-train social and fitness

elements on your courts / Engage PE teachers to get more involved with the tennis community



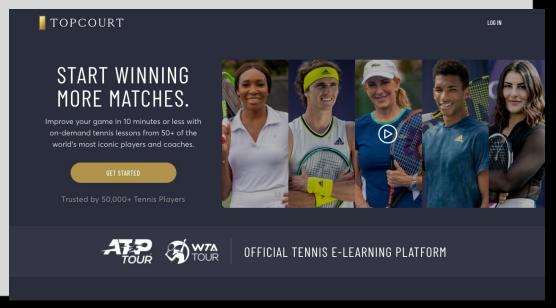
## **Proliferation of Coaching and Training Apps ...**



- Elite Sports Training
- Tennis Coaching
- TA Coach Premium
- Virtual Tennis Coach
- Tennis Training Infotech
- TennisCall
- TennisLocker for Coaches
- Cartmell Tennis Coaching
- JS Tennis Coaching
- Take Tennis Lessons
- JPL Tennis Coaching
- TennisPal
- HEAD Coach App

- Rafael Nadal Tennis
   Academy Teaching App
- TOPCOURT
- Tennis Trakker Pro
- Ultimate Tennis Coach
- miCoach Tennis
- The Seven Six Tennis App
- The Tennis Agility App
- Tennis Australia
   Technique
- AND MORE ...

**Exploding on Marketplace**More on Analytics #8









# THE BUCKET KEEPS LEAKING





Over the past decades, we've added millions of new or returning players each year, yet we continue to lose that same number or more annually—it is tennis' "leaky bucket."

## Pre-Covid:

A sport, an industry that had seen declining play, core players leaving, straight years of declining racquet sales, pro specialty challenges, coach shortages ... SWOT analyses showed challenges for an aging workforce, and a traditional sport not open to change

## **Covid Silver Lining:**

MORE PLAYERS ... 4 Million More

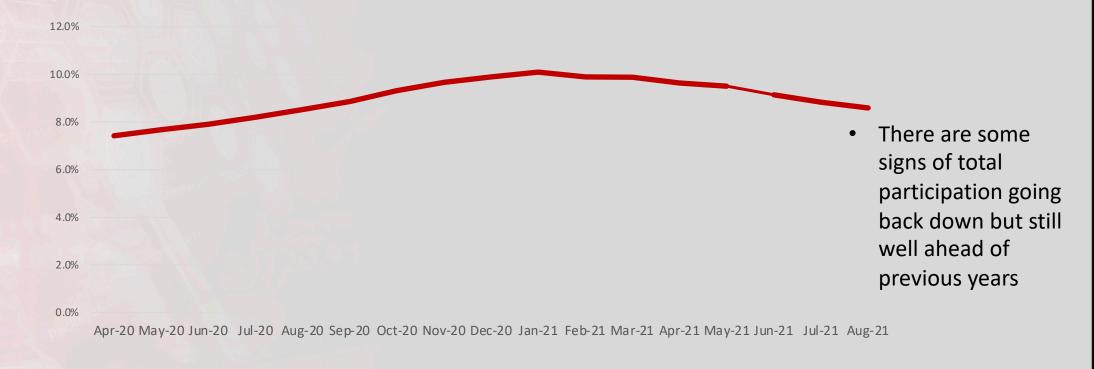
MORE CONSUMERS ... mass merchants had trouble keeping entry level racquets stocked

MORE FANS ... triumphant return to fans in the stands and great US Open matches!



# Some signs of total participation going back down







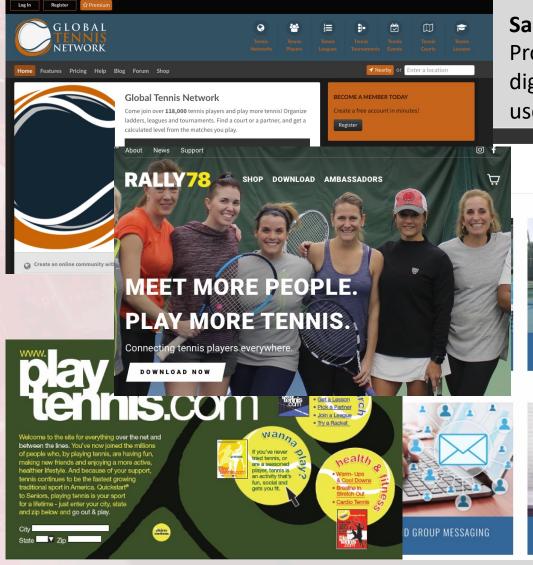


# **Engagement & Retention Are Key**



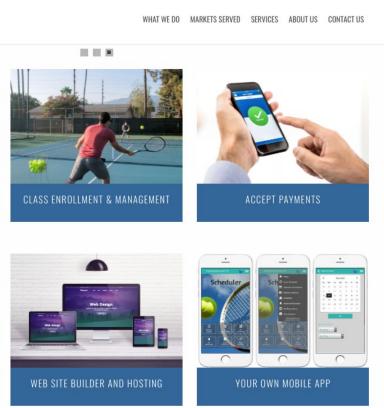
- Make it easier for players to connect
- Offer Online Court Bookings
- Adopt Saas & Technology Products
- Improve Communication Tools
- Social Media Engagement
- Player and Challenger Apps
- Entertainment & Media Enhancements





## SaaS technology platforms

Providing club operations and payment software, digital management – sites, hosting, apps) – 1M users/30M online bookings



# Player Connections

Seamless transactions

One location to find players, programs, courts, coaches, retailers, events and more

# Top 10 Insights/Solutions - #7





# NEXT COURT

#### INSIGHTS AND SOLUTIONS





NEXT COURT



# ONE COURT for Multiple Sports

#### on a regulation USTA/ITF 60' doubles court

- Pickleball
- •Youth Tennis U10 / Adult Masters Tennis
- Cardio Tennis Orange Ball
- POP Tennis / Paddle Tennis
- · Platform Tennis (with added fencing)
- Badminton

\*20' X 44' inside the service lines with orange kitchen line

SEND ME MORE INFO



# The Next-Court addresses the recreational demand for multiple racquet & paddle sports experiences and provides additional income opportunities for operators - One court for multiple sports.

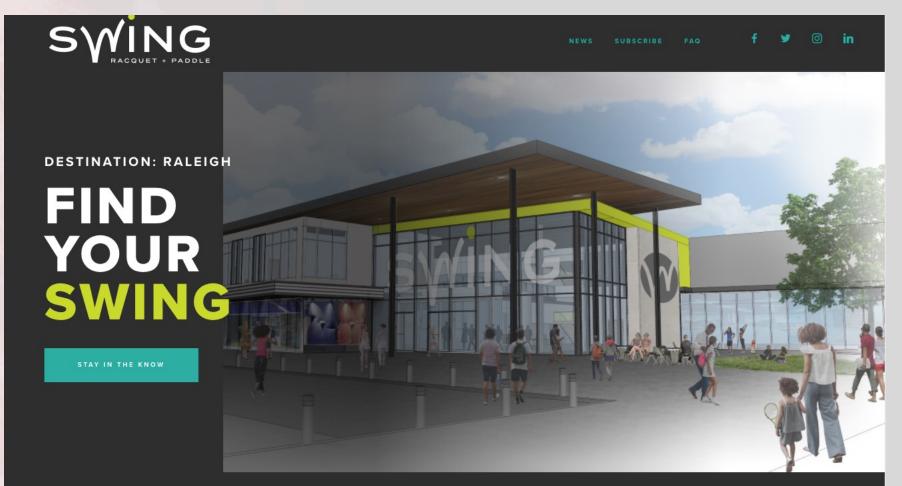
• The area dimensions of the court supports six different sports: tennis, pickleball, pop/paddle tennis, platform tennis with wire cage in addition to badminton and volleyball. (see graph below)

• Next-Court is a shortened tennis court with only one added line for the pickleball kitchen, acceptable net height is the same for all regulation sports at 34 inches with exception of badminton (60') and volleyball (88')

	Next-Court One Court Multiple Sports	ι	JSTA 60	Pop/Paddle	Pickle	Platform	Badminton
Court Dimensions	60 x 27		0 x 27	60 x 27	44 x 20	44 x 20	44 x 20
Doubles Play	60 x 27		0 x 27				
Singles Play	60 x 20	6	0 x 21	60 x 20	60 x 20	60 x 20	60 x 20
Service Box	22 ft. from net		1 ft from net	22 ft. from net	22 ft. from net	22 ft. from net	22 ft. from net
Overrun (10ft around	80 x 47		0 x 47	80 x 47	80 x 47	80 x 47	80 x 47
Net height	34 inches	3	86 inches	34 inches	34 inches	34 inches	60 inches
Orange Kitchen Lines	7 ft. from net						
Fence Height		1	.0 ft.			12 feet	







45 acre campus in Raleigh, NC featuring
Tennis
Pickleball
Padel
Beach Tennis
Table Tennis
Fitness







# ANALYTICS - APPS EVERYWHERE

## **Explosion of Analytics**

TENNIS
INNOVATION
WEEK
OCTOBER 27°-30°, 2021

- Smart Courts
- Player Apps
- Tennis Sensors
- Swing Apps
- Video Apps
- Match Analytics
- Stat Apps
- Machine Learning
- Artificial Intelligence



#### Your All-in-One Tennis System

Portable and fixed connected camera video platforms.

The latest innovations in sports AI and machine learning applied to tennis.

playsight pro+

playsight pro

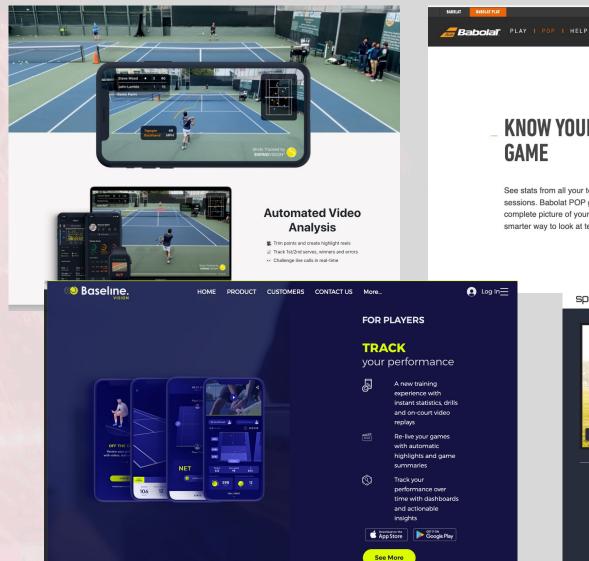
playsightgo



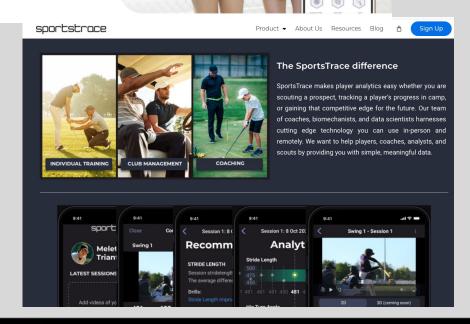
#### Player Analysis Technology (PAT)

- VR Motion Learning
- InfoSys Tennis Platform (ITP)
- BraingameTennis
- Rally Analysis
- Second Screen
- Tennis Tracker
- PlaySight
- HawkEye
- TOP COURT
- Versa Court
- Sports Trace
- Baseline Vision
- Swing Vision
- And more ....









#### **VR MOTION LEARNING**



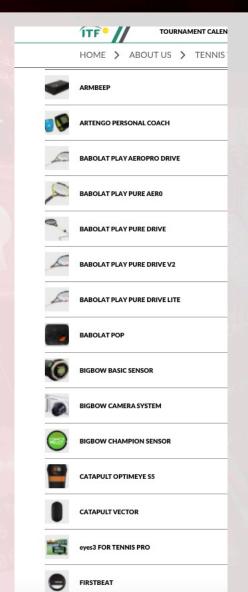


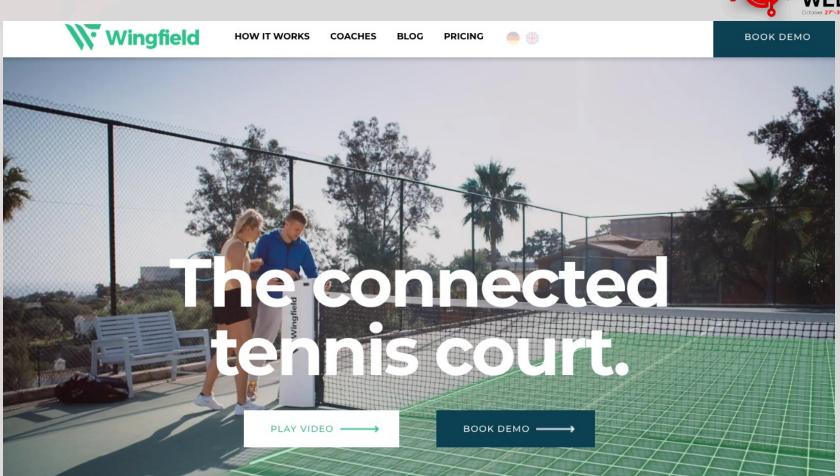


# COME FOR THE MATCH, STAY FOR THE EXPERIENCE

At the Western & Southern Open, a summer tournament in Ohio, technology is key to keeping core fans and attracting new ones. The event's home town of Cincinnati doesn't have a beautiful ocean or mountains or desert to attract fans like a lot of other venues do. So the tournament instead works to create a premium experience, supported by technology. Organizers have built an event that includes a tennis tournament and other experiences. Those additional experiences, including adaptive tennis and fitness programs, family-focused events, and culinary exhibits, aim to make their tournament engaging to both core and new fans. Those efforts appear to have had an impact Fans spend between six and seven hours per visit — the time equivalent of two football games.







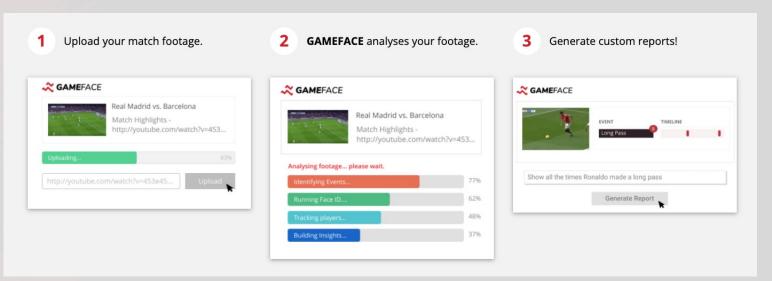


#### Slingerbag adds new APP and GameFace Al

The AI market in sports has a projected growth rate of 28.7% over the next five years, and the overall sports analytics market is expected to reach \$5.2 billion by 2025.



Smart courts -> video analysis  $\rightarrow$  AI apps to help players and coaches identifies patterns and areas to work on  $\rightarrow$  AI delivered through the Provider branded app (connecting the court, consumer, teaching pro, and provider through their branded app and web site user experience).







# The SportsEye Platform

Shaping a more informed and connected sector

A data intelligence service designed for sport and recreation



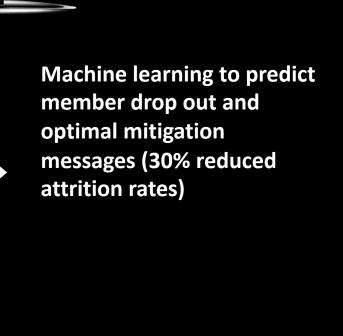


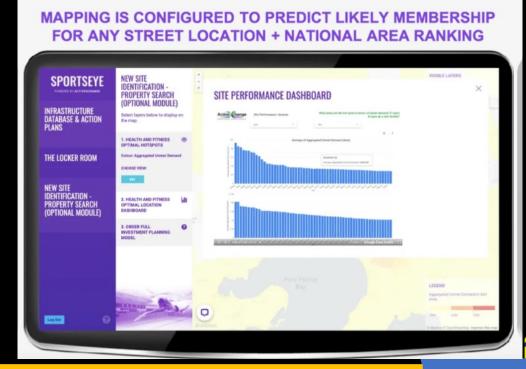


BRINGING INNOVATION TO TENNIS

#### SportsEye for Recreation and Fitness Operators

- Predictive modelling to identify growth areas and optimal member acquisition campaigns (25% additional ROI)
- **Optimal programming and pricing decisions**
- Evidence your local community social impact to connect with key stakeholders

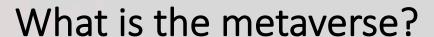








# THE METAVERSE IS COMING!





- a single, persistent virtual environment shared by everyone on the planet. The go-to pop culture references are The Matrix or Ready Player One's Oasis
- Zuckerberg recently announced Facebook would become 'a metaverse company'

(Every day 2.7 billion people access Facebook)

 Facebook launched a new virtual reality meeting space - Horizon Workrooms can be accessed via the Oculus 2 VR platform.











Facebook Oculus took out billboards across the country promoting Virtual Reality

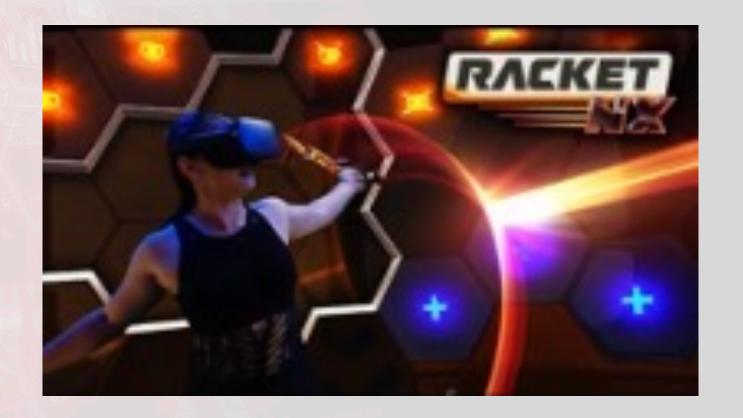








## Racket Next – is the 7th highest rated app



Globally 3.5 billion people actively use one of the family of Facebook apps every month



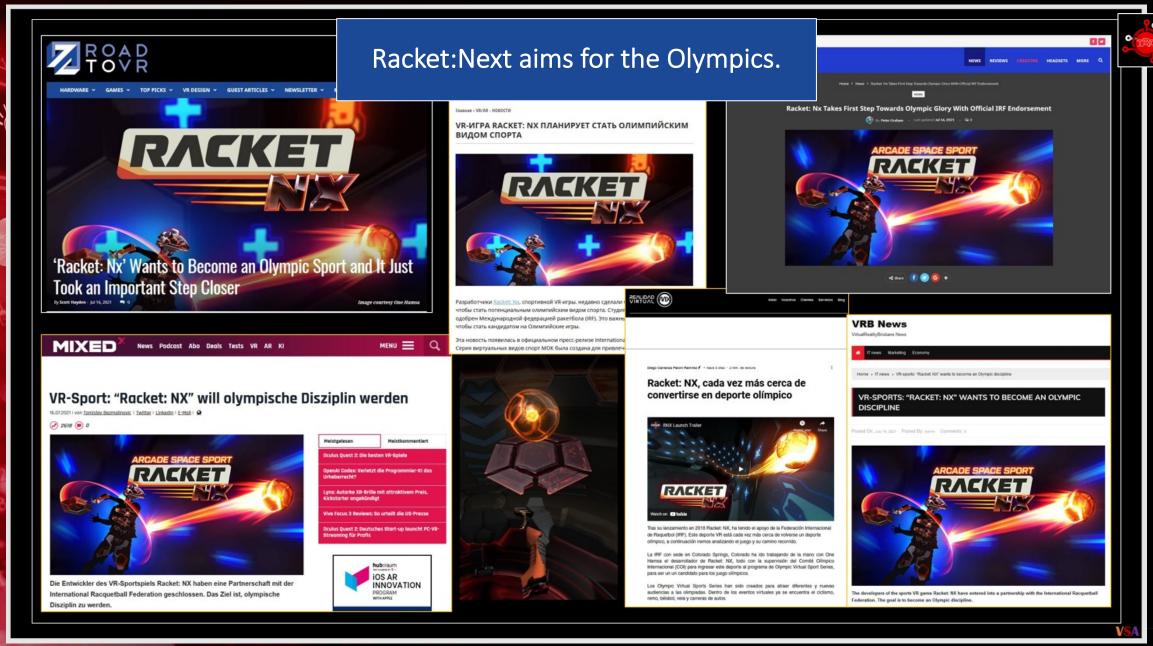


## **Exciting Development for Virtual Sports**



- On July 1, 2021, the International Racquetball Federation
   One Hamsa, a VR software developer, and the Virtual Sports
   Association made history.
- The IRF officially endorsed One Hamsa's VR game, Racket: Nx... the
  first time this has happened. Agreement to "develop... Racket: Nx as a
  potential full Olympic Virtual Sport and an eventual candidate for the
  Olympic Games."
- This is the beginning of a new era in the world of electronic games, in the world of virtual reality, and in the world of sport.





TENNIS INNOVATION WEEK





# New World Same Humans





New World Same Humans is a newsletter & podcast on trends, technology, and society. And a community for those on a mission to build a better shared future.





#### **Embracing the future!**

- Many wonder if newly hooked participants will be retained when other recreational options become more available again?
- For those that engage with players, consumers and fans important to understand and adopt technology to ensure engagement & retention
- Also recognize that these new and returning active people have been forever altered by the pandemic with the vast majority (77%) paying more attention to their physical health while many of them are dealing with mental health challenges brought on by the pandemic and our changing world
- Tennis has been given a new opportunity to build back the sport if only we don't fall back into the status quo





# Media Entertainment Is a main key to growth!

Good media drives people's willingness to engage with the sport along with a positive on-court experience to help create more players, more fans and more consumers!

Today's average fan age is 61

Tennis needs to address new ways to attract and grow the fans of the future.







#### Is this the future?







## Top 10 Insights/Solutions for a Better Tennis World





## Thank You!

#### Join the Network

Like Minded – Future Thinkers – Problem Solvers

Presentation & Resource Links will be posted at RacquetSportsAlliance.com & DiscoverySportsZone.com

**JOLYN DE BOER** 

jolyn@racquetsportsalliance.com



