



Two-season SPLIT

The NPD Group asks: is tennis losing its sporting appeal?

The start of the annual awakening of casual tennis players is upon us as the evenings get longer and hitting partners reappear for matches with friends and colleagues.

Tennis in Britain is thought to be on the crest of a wave as Andy Murray edges nearer the level of a successful grand slam player, while the LTA basks in the reflected glory. Peel away the veneer of recent successes, though, and cracks become visible.

Rise & fall

Back in 2004 the LTA released figures stating that 3.5million players

“50 per cent of tennis shoes in 2008 were actually used for their manufactured purpose”

Average Price of Tennis Footwear in Britain by Gender - 2008



Source: NPD Sports Footwear & Apparel Consumer Panel

took part in tennis at all levels, and this was increasing. At six per cent of the total population, this is an extremely high estimate, but it is true that there was a higher level of interest in the sport five years ago when Tim Henman was still active. Figures released in 2008, therefore, indicate a dramatic fall. There are now just 100,000 licensed adults and only a few thousand juniors in Britain. Compare this to France, which has over a million licensed adults and 500,000 juniors. France's club situation is also healthier with over 10,000 registered associations, compared with just over 2,000 in Britain.

However, there are signs of a recovery. The number of junior players in Britain is said to have increased to around 18,000 recently. Also, the LTA now has a proactive chief executive, who has brokered a new sponsorship deal to cover three build-up tournaments to Wimbledon. AEGON has agreed a £25million five-year deal that means the life and pensions company will sponsor the Queen's Club tournament as well as Eastbourne and Edgbaston.

On the downside, male competitors have requested to be based closer to London around the month of the grass-court season, so Eastbourne has been expanded to accommodate both male and female championships. Nottingham has therefore lost an established tournament, while the south gains another. With such a short grass-court season it is hard to see an advantage of locating the majority of tournaments in the south, the very region that attracts the major interest in the sport as it is.

So is tennis still a major sport in Britain? NPD's online consumer data states that in 2008 the tennis footwear and apparel sector was worth around £82million, representing about two per cent of total sportswear sold in Great Britain. Comparing the second half of 2008 with the second half of 2007 showed a decline of over 15 per cent. Apparel is declining faster than footwear, but this is linked in with average prices - the volume of apparel sales actually grew during this period as a result of heavy discounting. However, tennis footwear increased in price. The trend among other sports was similar, with many technical shoes holding their price.



Male/female markets

It is often thought that males will spend more on sports footwear than females, but looking at tennis shoes this doesn't stack up. NPD's consumer panel reveals that females are paying up to 15 per cent more on tennis footwear than men. Are these shoes being used for the purpose intended? If we split the analysis by usage, what is revealed is that there is a larger market for males who use tennis shoes simply for leisure. Males will pay more for this leisure usage than females, whereas women are prepared to spend greater amounts when they use footwear for its intended sporting purpose.

A further look at usage reveals that only 50 per cent of tennis shoes in 2008 were actually used for their manufactured purpose. The second highest usage was leisure with 30 per cent. Males again were the driving factor behind high off-court usage. So it appears at first glance that the women's game is healthy, whereas the men's is facing some tough times. The first half of 2008 revealed that females purchase a greater amount of tennis footwear for playing the game in. As we move into the winter months, male purchases are higher than females, but these shoes are purchased more for leisure purposes. This seems to show a two-season split by gender for tennis in Britain. Females are more inclined

to purchase in the summer months for sporting reasons, males in the 'off-season' generally for leisure.

A recent survey by Sport England, which asked participants if they took part in tennis once a week for more than 30 minutes at a time, recorded a level of 487,000 adults. Fifty-three per cent of the respondents were male, indicating that there are still plenty of men interested in playing the game. What this may indicate is that men are more inclined to play tennis in footwear not necessarily manufactured for the sport, but women prefer to use specific tennis equipment.

As the swing in popularity changes over the year, it is important to get the pricing structure right to make gains from the right market. What British tennis needs is a consistent winner who can inspire a generation to want to play the game all year round, inside and outside. An Andy Murray win at Wimbledon, or even in Paris beforehand, would go a long way to kick-starting this trend. So let's get behind Britain's best talent and hopefully raise the awareness of tennis as a key sport in Britain.

The NPD Group monitors the sales of sports footwear and sports apparel in many countries around the world. For more information contact The NPD Group sports team on 01932 355580.

