

# 2021



## TENNIS INDUSTRY ASSOCIATION PARTICIPATION REPORT



An overview of findings on tennis participation in the United States from the 2021 *Physical Activity Council Sports, Fitness, and Recreational Activity Study*

**Sports Marketing Surveys**



In partnership with the Physical Activity Council

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# 1 EXECUTIVE SUMMARY

Despite the disruption brought by the COVID-19 pandemic, the total number of tennis players ages 6 & older in the United States increased to 21.64 million in 2020, a significant 22.4% gain from 2019. Of the 123 sports tracked in the Physical Activity Council (PAC) Study, tennis is the sport with the fifth largest increase in total participation over the year. Prior to 2020, overall tennis play had remained relatively constant over the past 9 years, with the average annual change rate from 2010 through 2019 at -0.4%. The 2020 tennis participation rate of 7.1% is 1.3 percentage points higher than 2019 and the highest U.S. participation rate ever recorded in the PAC Study. Youth tennis participation surged by 36.6% in 2020 to 6.23 million players.

Frequency of tennis participation is separated into five categories: Casual (1 to 3 times), Occasional (4 to 9 times), Regular (10 to 20 times), Frequent (21 to 49 times) and Avid (50+ times). Overall, casual and occasional participants (non-core players) made up 46% of total participants.

Regular, frequent, and avid participants are considered “Core” tennis participants, accounting for 93% of all tennis play occasions. Core tennis participation increased 27% from 9.15 million players in 2019 to 11.63 million players in 2020. Since 2009, the total number of core tennis players has increased by 2.3%. On the other hand, non-core tennis participation increased 39% in the same period of time.

The number of times people took to the courts also increased significantly in 2020. The total 21.64 million participants played a total of 495.1 million times (an average of between 22.9 play occasions per tennis player), an increase of 27.8% from 2019. Between 2009 and 2020, total play occasions increased 0.9%. Though an increase in avid player play occasions was a primary factor in the 1-year increase, declines in avid player play occasions over the long term are a significant contributor to the overall multi-year trend of decreasing play occasions.

The 2020 study indicates there are 11.16 million non-players who intend to play tennis, and another 17 million who consider themselves tennis players but have not played in the last two years.

Tennis players enjoy a range of different sports and fitness activities. The most popular alternative activities enjoyed by tennis players are (participation rates of tennis players are in brackets):

- Walking for Fitness (48.8%)
- Treadmill (42.8%)
- Bowling (40.9%)
- Running/Jogging (37.5%)
- Hiking (day) (37.2%)
- Free Weights (Dumbbells/ Hand Weights) (34.5%)
- Basketball (32.9%)
- Yoga (31.1%)
- Swimming for Fitness (30.2%)
- Bicycling (road/paved surface) (30%)
- Table Tennis (28.7%)

## 2 METHODOLOGY

During 2020, a total of 18,000 online interviews were carried out with a nationwide sample of individuals from U.S. online proprietary online panels representative of the U.S. population for people ages six and older. Strict quotas associated with gender, age, income, region, and ethnicity were followed to ensure a representative sample.

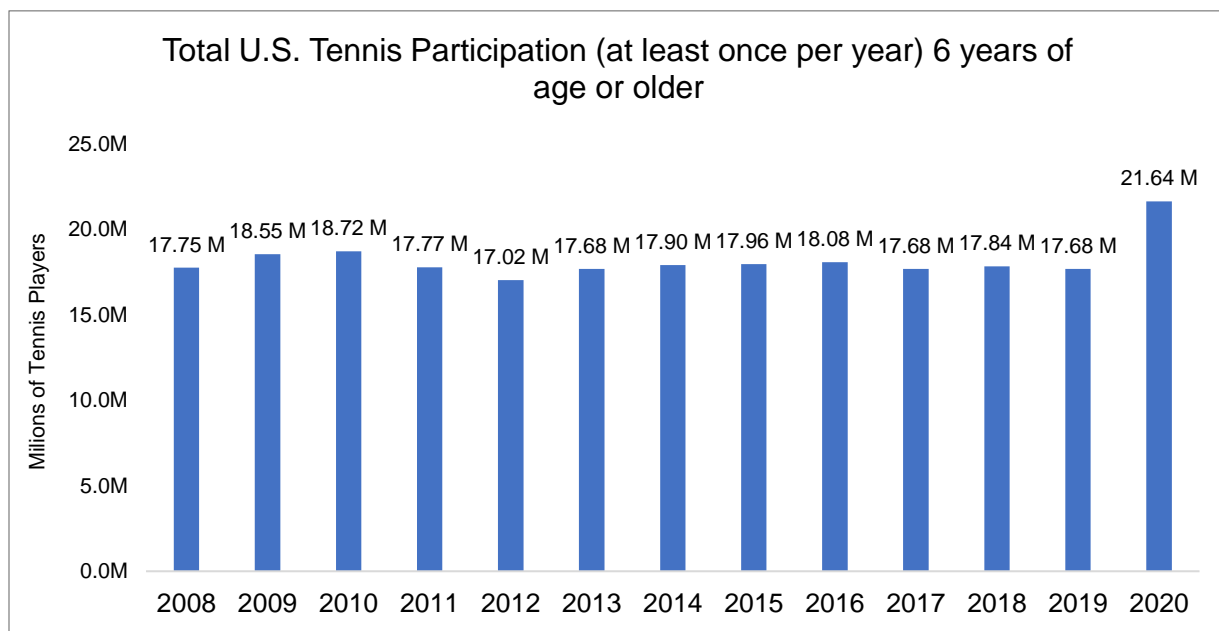
The 2020 participation survey sample size of 18,000 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error - that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.32 percentage points at the 95 percent confidence level.

A weighting technique was used to balance the data to reflect the total U.S. population ages six and above. The following variables were used: gender, age, income, ethnicity, household size, region, population density, and panel join date. The total population figure used was 303,971,652 people age six and older.

Each survey consisted of several questions regarding the participant's involvement in a variety of physical activities during 2020. These activities ranged from team sports to individual fitness with questions including frequency of activity, preferred venue of activity, and participation in organized events. Participants were only asked questions pertaining to their reported activity involvement, in addition to demographics and other sporting interests.

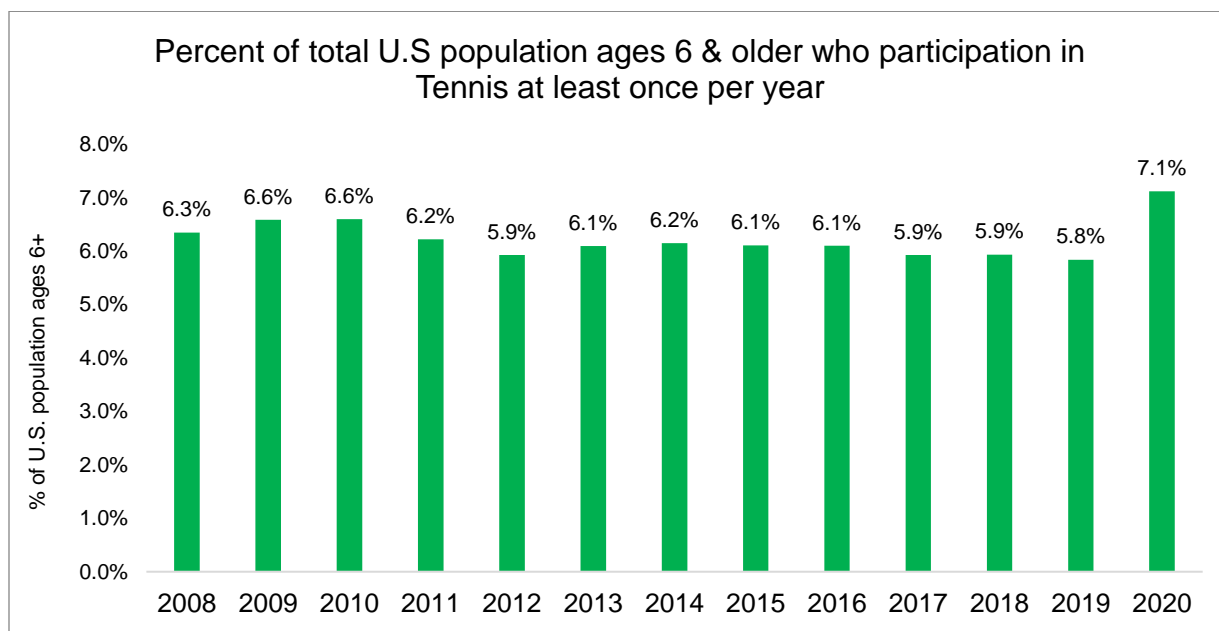
### 3 TENNIS PARTICIPATION TRENDS

#### 3.1 Total Tennis Participation Trends



- In 2020, total U.S. tennis participation increased by 22.4% from 2019. Prior to 2020, total tennis participation had been relatively stable since 2011.

#### 3.2 Total Participation Rate Trends



- The tennis participation rate climbed to 7.1% in 2020.

### 3.3 Tennis Participation vs Other Sports in 2020

Of the 123 sports tracked in the Physical Activity Council (PAC) Study, tennis is the sport with the fifth largest increase in total participation over the year.

To put into context with other sports, gym/health club-based activities and organized team sports suffered, but outdoor and individual activities showed big increases in 2020.

#### Largest Increases

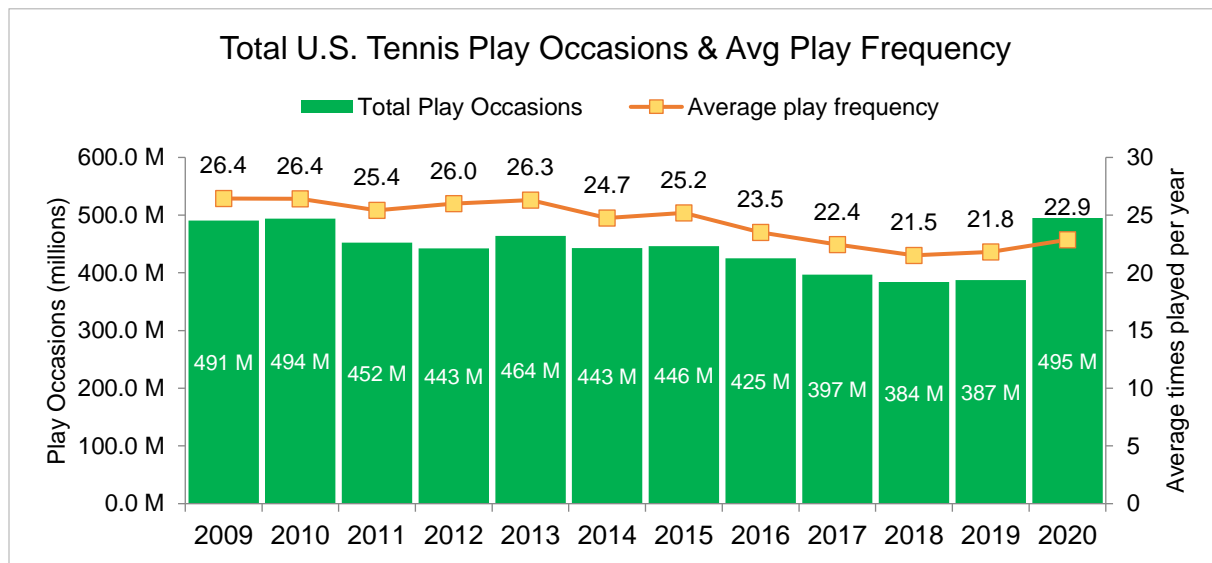
Sport	2017	2018	2019	2020	1 year change	Change in participants
Skateboarding	6.38M	6.50M	6.61M	8.87M	34.2%	2.26M
Pop Tennis/Paddle Tennis/Platform Tennis	1.07M	1.06M	1.38M	1.82M	31.2%	0.43M
Surfing	2.68M	2.87M	2.96M	3.80M	28.2%	0.84M
Camping	26.26M	27.42M	28.18M	36.08M	28.0%	7.90M
<b>Tennis</b>	<b>17.68M</b>	<b>17.84M</b>	<b>17.68M</b>	<b>21.64M</b>	<b>22.4%</b>	<b>3.96M</b>
Pickleball	3.13M	3.30M	3.46M	4.20M	21.3%	0.74M
Hiking (Day)	44.90M	47.86M	49.70M	57.81M	16.3%	8.11M
Camping (RV)	16.16M	15.98M	15.43M	17.82M	15.5%	2.40M
Kayaking (Recreational)	10.53M	11.02M	11.38M	13.00M	14.2%	1.62M
Table Tennis	16.04M	15.59M	14.91M	16.85M	13.1%	1.95M
Bicycling (Road/Paved Surface)	38.87M	39.04M	39.39M	44.47M	12.9%	5.08M

#### Largest Decreases

Sport	2017	2018	2019	2020	1 year change	Change in participants
Weight/Resistance Machines	36.29M	36.37M	36.18M	30.65M	-15.3%	-5.53M
Elliptical Motion/Cross-Trainer	32.28M	33.24M	33.06M	27.92M	-15.5%	-5.14M
Stationary Cycling (Recumbent/Upright)	36.04M	36.67M	37.08M	31.29M	-15.6%	-5.80M
Volleyball (Court)	6.32M	6.32M	6.49M	5.41M	-16.6%	-1.08M
Gymnastics	4.81M	4.77M	4.70M	3.85M	-18.1%	-0.85M
Softball (Fast-Pitch)	2.31M	2.30M	2.24M	1.81M	-19.2%	-0.43M
Cardio Kickboxing	6.69M	6.84M	7.03M	5.29M	-24.6%	-1.73M
Stair-Climbing Machine	14.95M	15.03M	15.36M	11.26M	-26.7%	-4.10M
Boot Camp Style Training	6.65M	6.69M	6.83M	4.97M	-27.3%	-1.86M
Cross-Training Style Workouts	13.62M	13.34M	13.54M	9.18M	-32.2%	-4.36M
Stationary Cycling (Group)	9.41M	9.43M	9.93M	6.05M	-39.0%	-3.88M



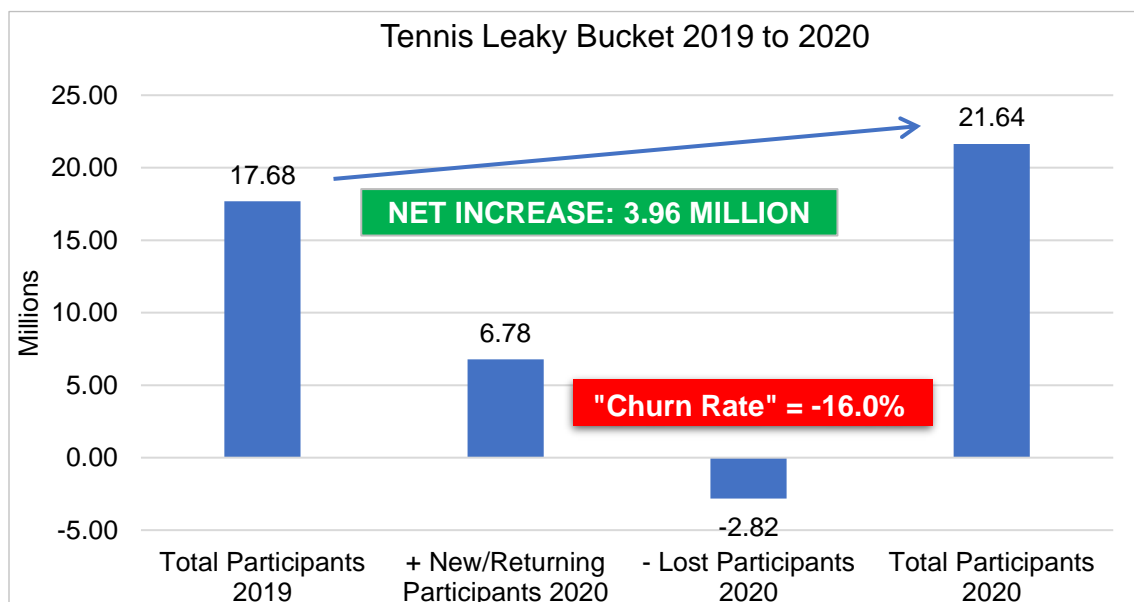
### 3.4 Total Play Occasions



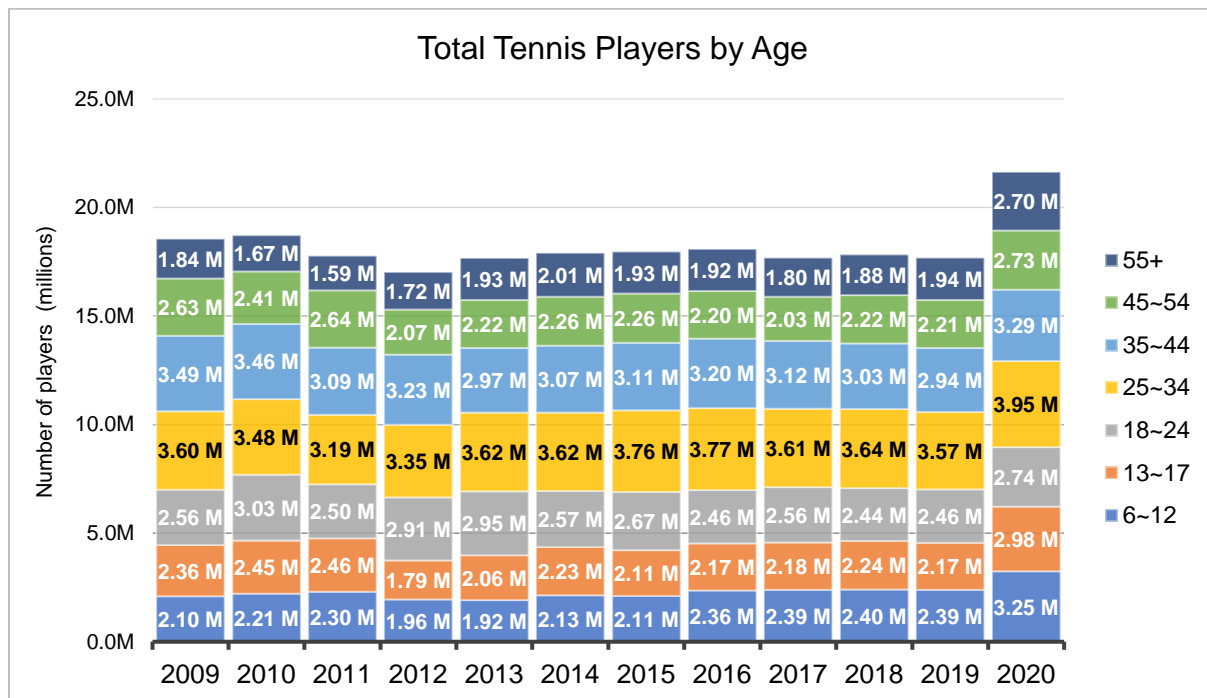
- Total play occasions increased 27.8% to 495 million from 2019 to 2020. Tennis players played an average of nearly 23 times in 2020, up about 5% from the previous year.

### 3.5 Tennis Participation Leaky Bucket

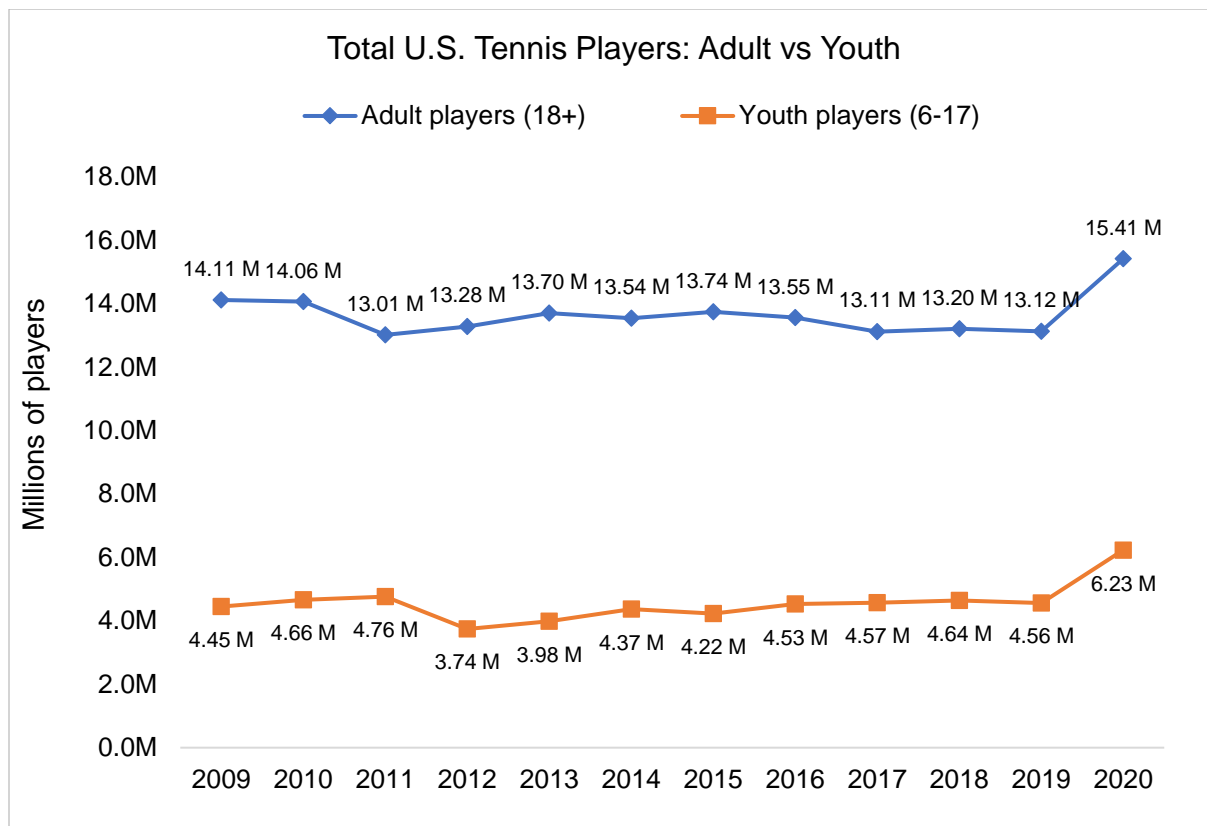
The Leaky Bucket shows participation retention/attrition over the past year by looking at the net increase in players over the past year and the *churn rate*. This is calculated by taking the lost participants of 2020 and dividing by the 2019 total participation. In 2020, 6.78 million players either tried tennis for the first time or came back to tennis. 2.82 million of the 2019 players did not play in 2020, resulting in a net increase of 3.96 million players.



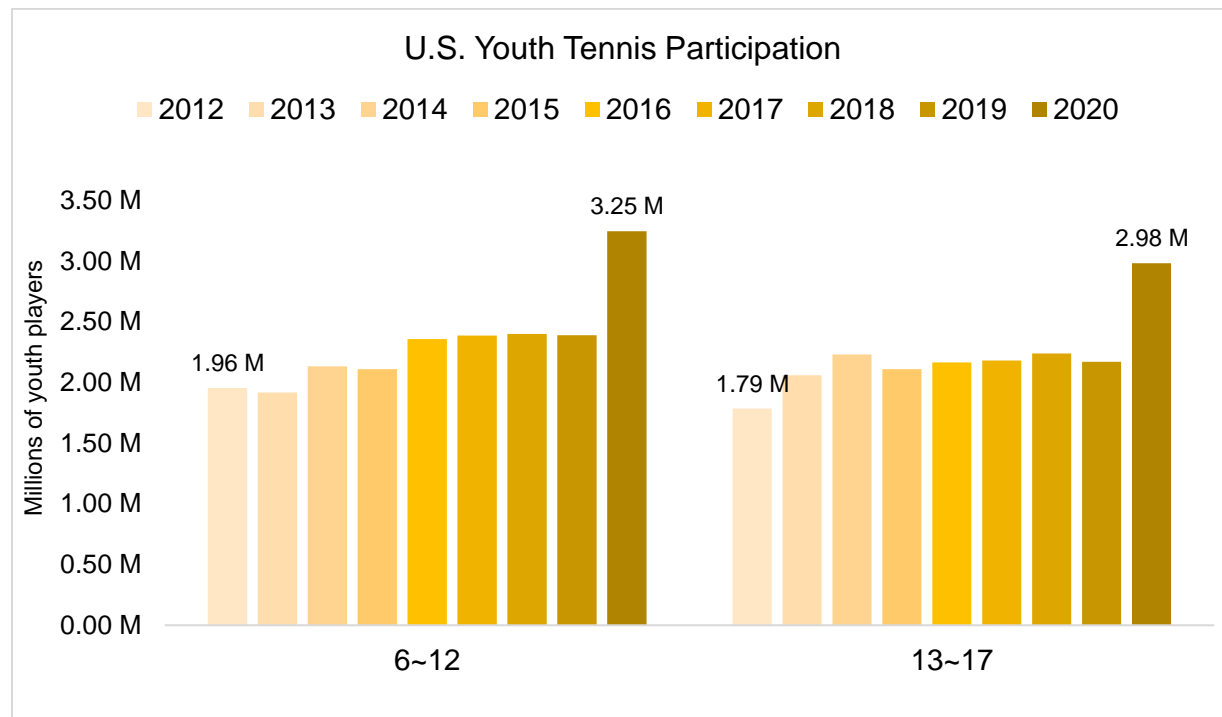
### 3.6 Trends by Age – Total Players & Youth Players



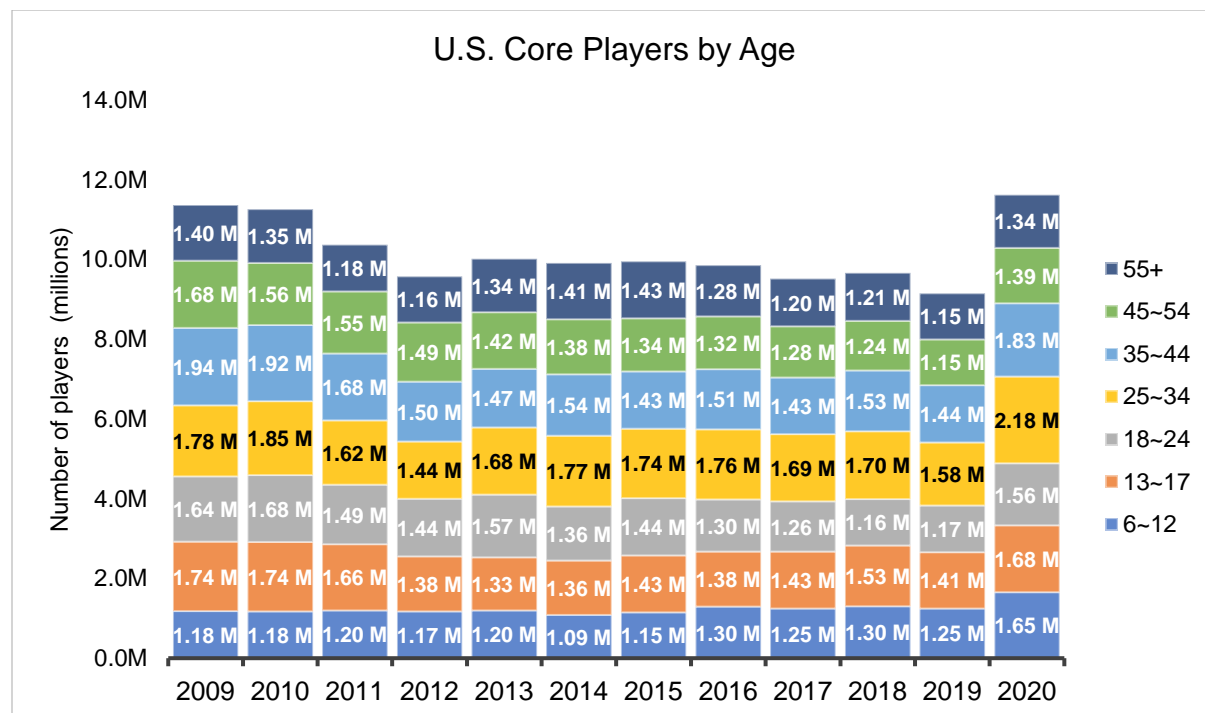
- Total youth participation increased 36.6% from 4.54 million in 2019 to 6.23 million in 2020. Adult participation increased by 17.5%



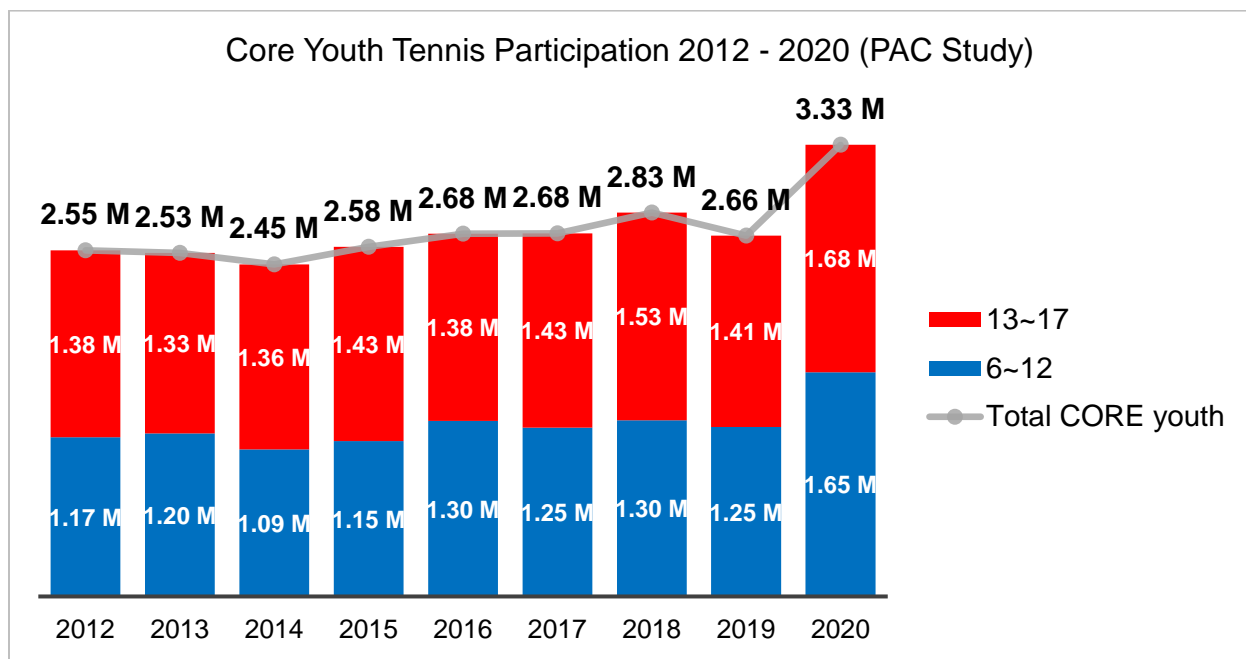
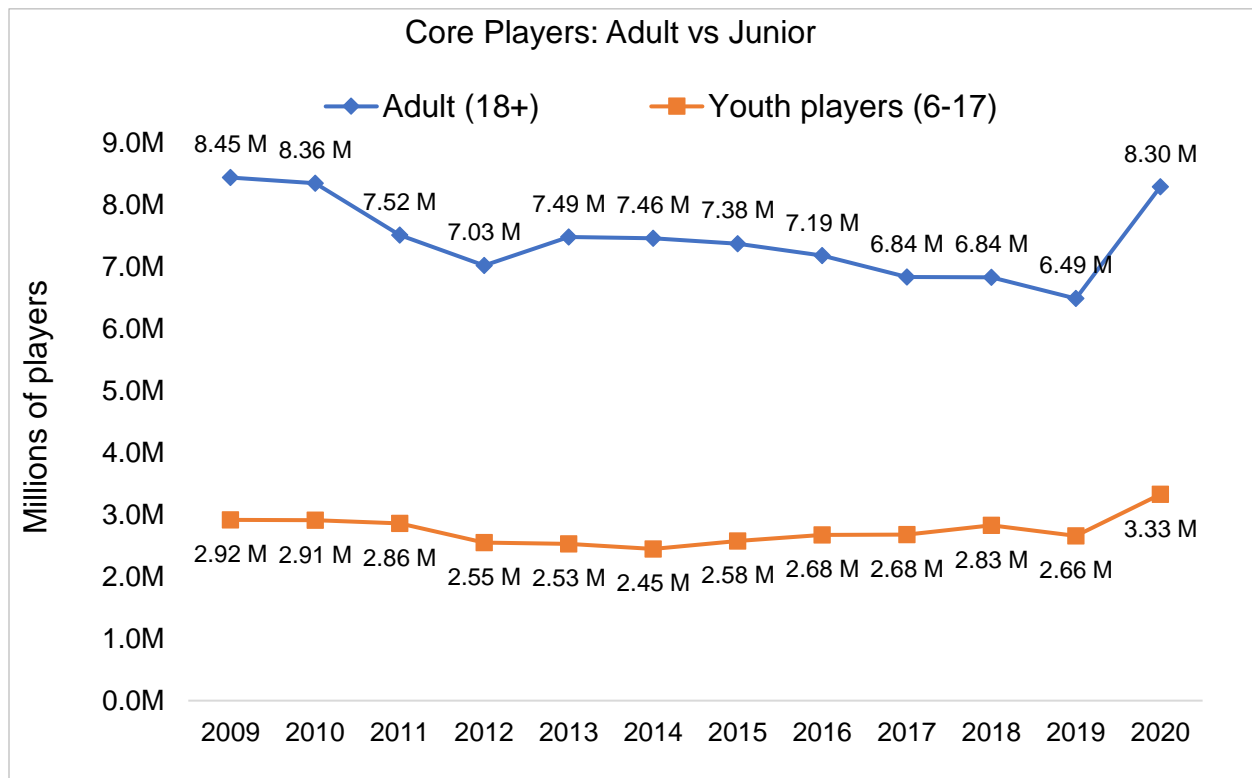




### 3.7 Trends by Age – Core Players & Youth Core Players

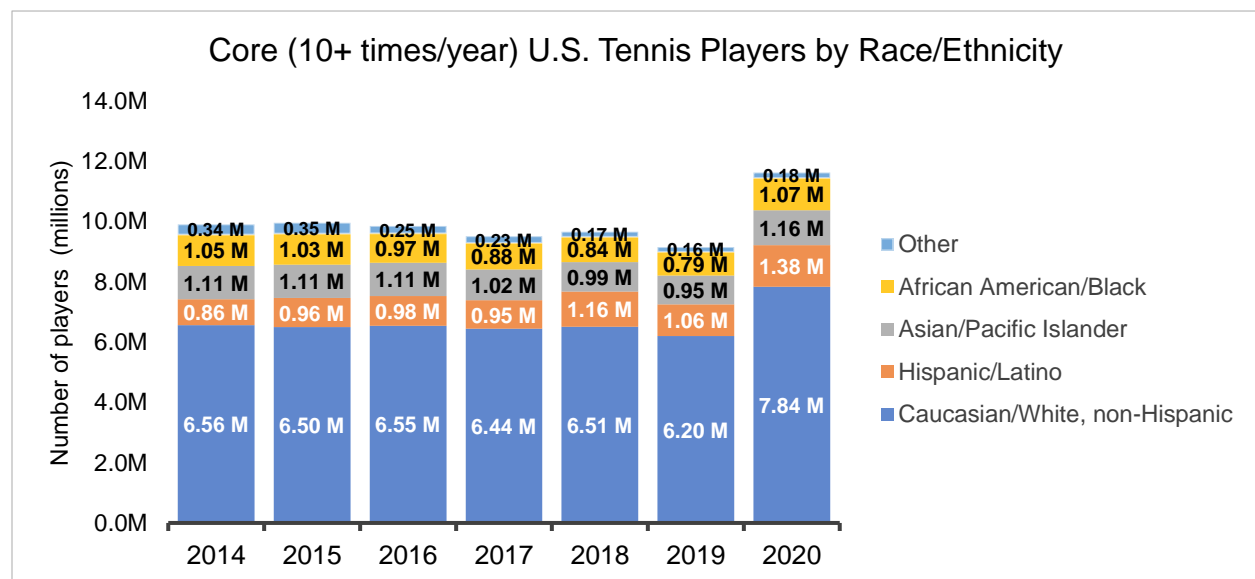
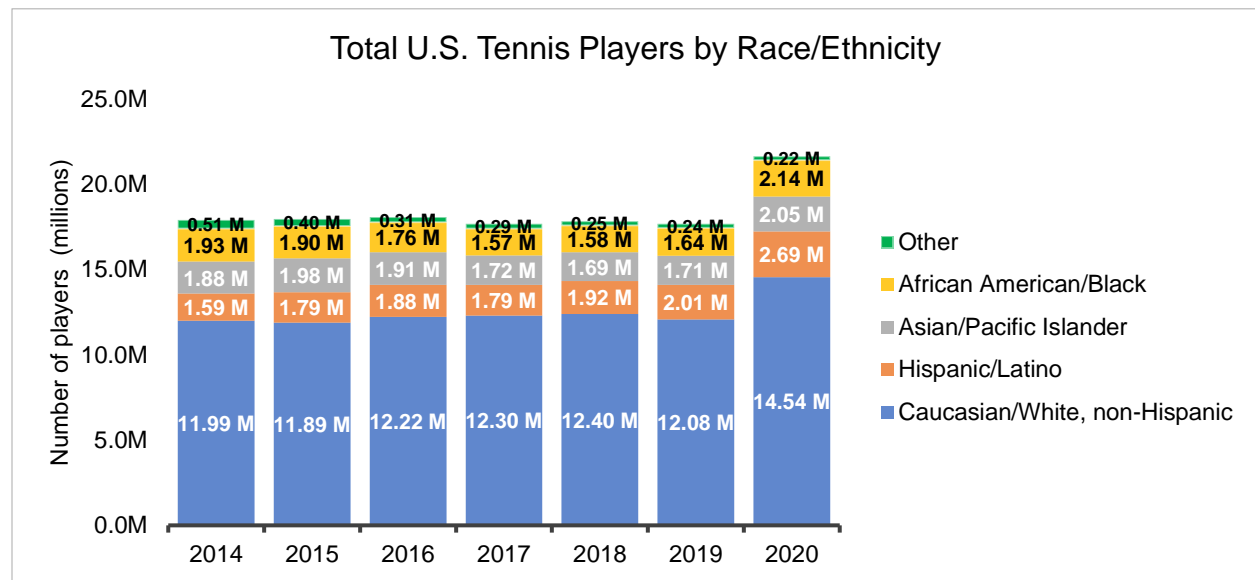


- The total number of core players under age 35 increased 30.7% from 2019 to 2020, while core players 35 and older increased 21.8%.



- Youth core participation increased 25% in 2020 from 2019 and 30% from 2012-2019.

### 3.8 Trends by Race/Ethnicity – Total Players & Core Players



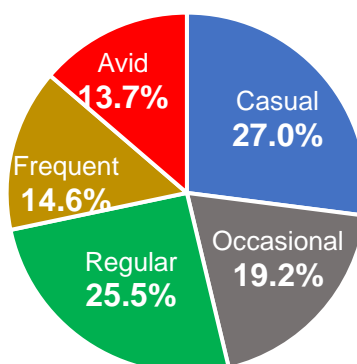
6-Year % Growth (2014-2020)	Total Tennis Players	Core Tennis Players
<b>Caucasian/White (Non-Hispanic)</b>	21.3%	19.5%
<b>Non-White Players</b>	20.0%	13.1%
<b>Hispanic/Latino</b>	68.4%	60.8%
<b>Asian/Pacific Islander</b>	9.4%	4.9%
<b>African American / Black</b>	10.7%	1.8%

## 4 PLAY FREQUENCY

### 4.1 Play Frequency Defined

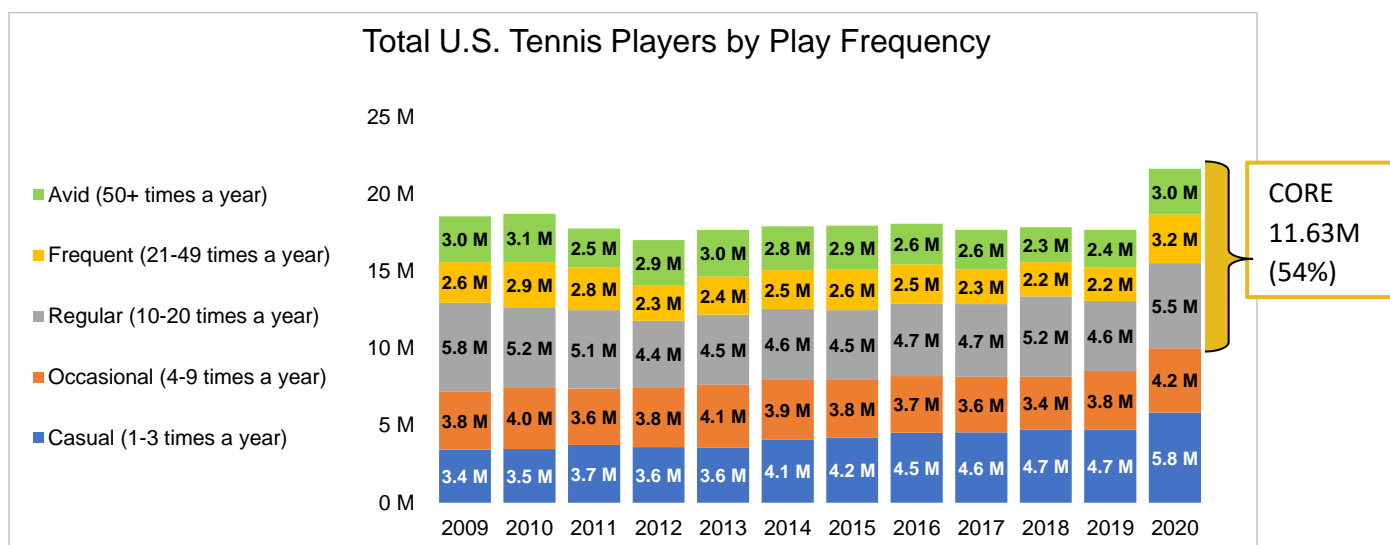
	Description	Frequency	Approximates to:
C	Casual	1-3 times a year	Less than once a quarter
O	Occasional	4-9 times a year	At least once a quarter
R	Regular	10-20 times a year	Approx. 1/month
F	Frequent	21-49 times	Approx. 2/month
A	Avid	50+ times a year	At least once a week
<b>C</b>	<b>CORE (Regular + Frequent + Avid)</b>	<b>10+ times a year</b>	<b>Once a month or more</b>

% of U.S. Players by Play Frequency

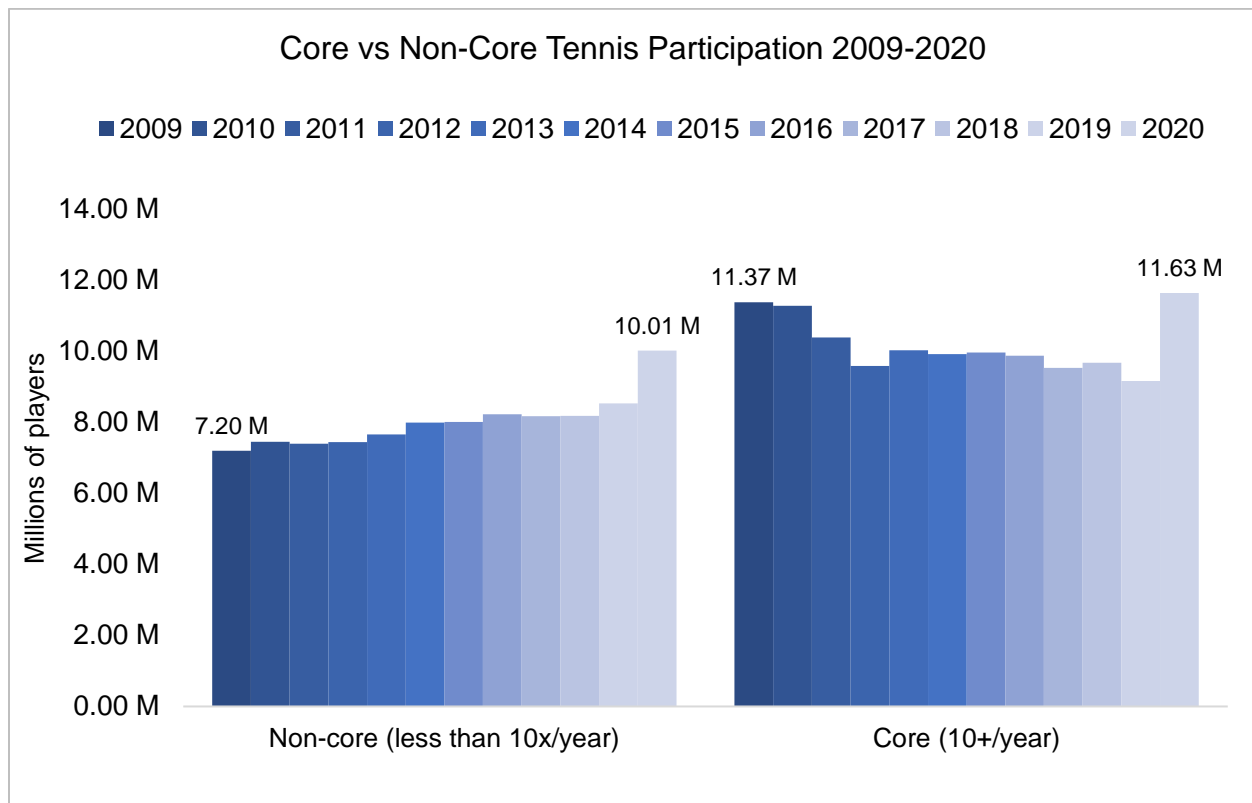


- 46% of all tennis players are either casual or occasional (non-core) players.
- Almost 14% of tennis participants play at least once a week.

### 4.2 Total Players by Frequency

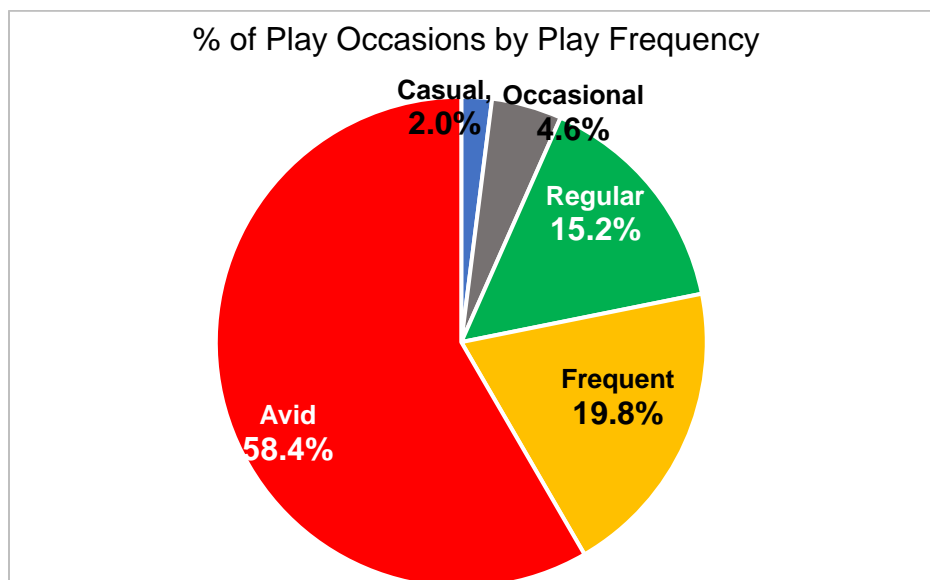


- Core participation (10+ times) increased in 2020 by 27%. Total non-core (less than 10 times) in 2020 increased by 17.4%

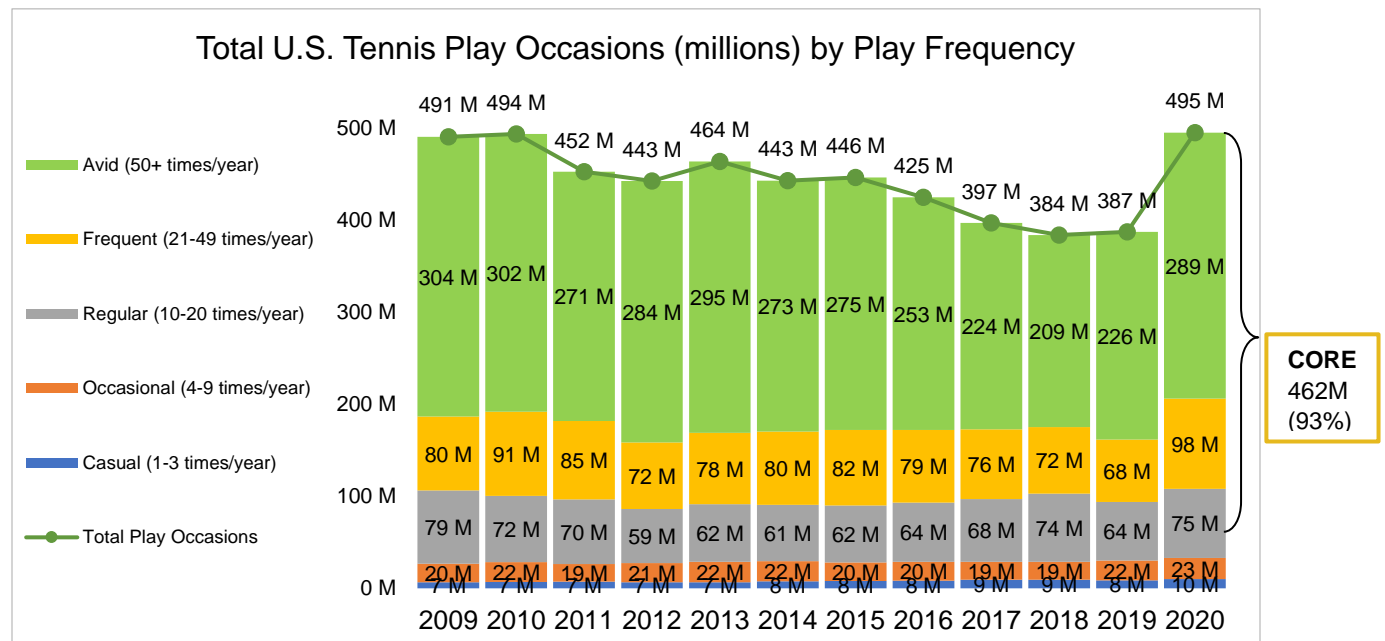


- The total number of non-core tennis players increased 39% from 2009 to 2020, while core participation increased 2.3%. Long-term trends show that non-core play has increased while core participation has decreased.

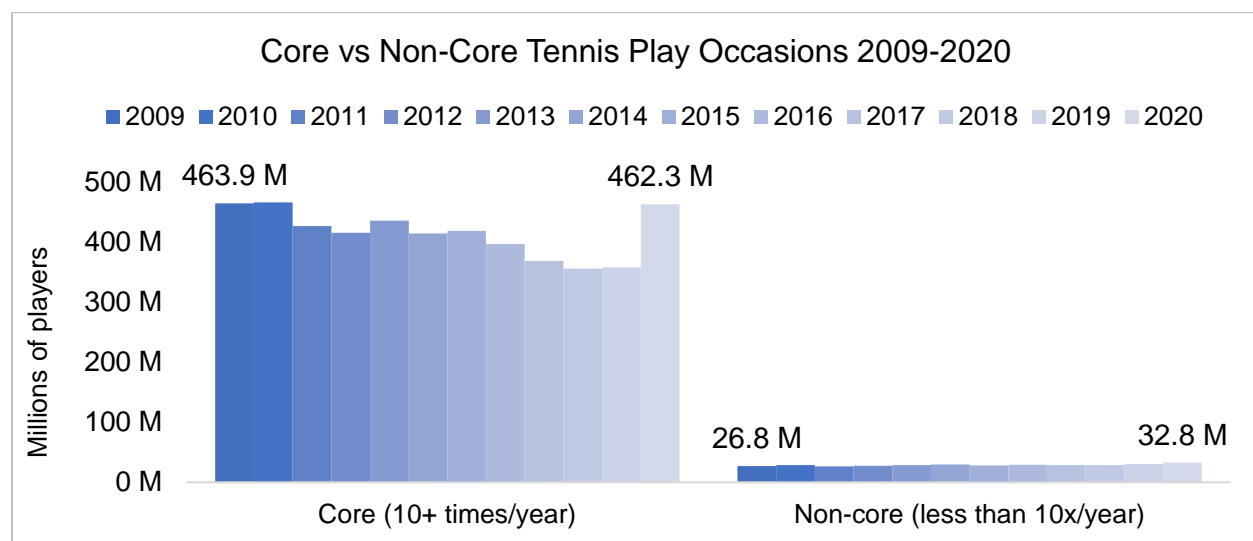
### 4.3 Play Occasions by Frequency



- Core players contribute over 93% of total play occasions.



- Avid players played a total of roughly 289 million times in 2020, 58% of all play occasions. The 28% increase in 2020 was a primary contributor in bringing the total number of play occasions above the 2019 total.



- Core player play occasions increased over 29% from 2019 to 2020 while non-core play occasions increased 8.7%. Long-term trends show total core play occasions decreasing, down 0.4% from 2009 to 2020; non-core play occasions, on the other hand, increased by 22.6%.
- The downward trend in both total & core play occasions is primarily driven by decreasing avid player play occasions, which decreased about 5% from 2009 to 2020.

## 5 TENNIS PARTICIPANT PROFILES

### 5.1 Total Tennis Participants

How to read this table:

- An index of 110 means players are 10% MORE likely to fall into that group
- An index of 90 means players are 10% LESS likely to fall into that group

		Total # of Part.	Segment %	Participation Rate by Group	Index vs. Total Population	
	<b>Total</b>	<b>21.64 M</b>		<b>7.1%</b>		
<b>Gender</b>	Male	12.27 M	56.7%	8.2%	115	➤ Nearly 19% of tennis participants are under 18 years old.
	Female	9.37 M	43.3%	6.1%	86	
<b>Age</b>	6~12	3.25 M	15.0%	11.7%	164	➤ 13- to 17-year-olds have the highest participation rate (14%) among all age groups.
	13~17	2.98 M	13.8%	14.0%	197	
	18~24	2.74 M	12.7%	9.5%	134	
	25~34	3.95 M	18.3%	8.8%	123	
	35~44	3.29 M	15.2%	7.8%	110	
	45~54	2.73 M	12.6%	6.4%	89	
	55+	2.70 M	12.5%	2.8%	40	
<b>Income</b>	Under \$25,000	1.97 M	9.1%	3.7%	52	➤ 58% of all tennis participants have a household income of \$75K+.
	\$25,000 to \$49,999	3.30 M	15.3%	5.0%	70	
	\$50,000 to \$74,999	3.73 M	17.2%	6.7%	95	
	\$75,000 to \$99,999	3.46 M	16.0%	8.5%	119	
	\$100,000+	9.19 M	42.5%	10.4%	146	
<b>Region</b>	New England	0.85 M	3.9%	7.2%	101	➤ The biggest regions for tennis participants are the South Atlantic and Pacific.
	Middle Atlantic	3.08 M	14.2%	7.5%	106	
	East North Central	2.83 M	13.1%	6.1%	86	
	West North Central	1.16 M	5.4%	6.4%	90	
	South Atlantic	4.86 M	22.4%	7.2%	101	
	East South Central	0.90 M	4.1%	5.1%	71	
	West South Central	2.33 M	10.8%	7.5%	105	
	Mountain	1.30 M	6.0%	5.6%	78	
<b>Education</b>	Pacific	4.33 M	20.0%	9.1%	128	➤ The Pacific has the highest participation rate of all the regions.
	Education Under 18's	6.06 M	28.0%	12.4%	174	
	1-3 years of High School	0.48 M	2.2%	3.6%	50	
	High School Grad	1.87 M	8.6%	3.3%	46	
	1-3 years of College	3.30 M	15.2%	5.0%	70	
	College Grad	6.08 M	28.1%	7.9%	111	
<b>Race/Ethnicity</b>	Post-Grad Studies	3.86 M	17.9%	9.3%	130	➤ Roughly 49% of tennis players 18+ have a college degree or higher.
	African American/Black	2.14 M	9.9%	5.7%	80	
	Asian/Pacific Islander	2.05 M	9.5%	12.8%	180	
	Caucasian/White (non-Hispanic)	14.54 M	67.2%	6.9%	97	
	Hispanic/Latino	2.69 M	12.4%	7.2%	101	
	Other	0.22 M	1.0%	7.0%	98	

\*Participation figures are in millions.

\*Education figures are ages 18 and over.



## 5.2 Core Tennis Participants (10+ times/year)

		Total # of Part.	Segment %	Participation Rate by Group	Index vs. Total Population	
	<b>Total</b>	<b>11.63 M</b>		<b>3.8%</b>		
<b>Gender</b>	Male	6.34 M	54.5%	4.2%	110	➤ 39% of core participants are 35 years or older.
	Female	5.29 M	45.5%	3.4%	90	
<b>Age</b>	6~12	1.65 M	14.2%	5.9%	155	➤ 13- to 17-year-olds have the highest participation rate (7.9) among all age groups.
	13~17	1.68 M	14.4%	7.9%	206	
	18~24	1.56 M	13.4%	5.4%	141	
	25~34	2.18 M	18.8%	4.8%	126	
	35~44	1.83 M	15.8%	4.4%	114	
	45~54	1.39 M	11.9%	3.2%	85	
	55+	1.34 M	11.5%	1.4%	36	
<b>Income</b>	Under \$25,000	0.88 M	7.5%	1.6%	43	➤ 61% of all tennis participants have a household income of \$75K+.
	\$25,000 to \$49,999	1.53 M	13.2%	2.3%	60	
	\$50,000 to \$74,999	2.11 M	18.2%	3.8%	100	
	\$75,000 to \$99,999	1.92 M	16.5%	4.7%	123	
	\$100,000+	5.19 M	44.7%	5.9%	154	
<b>Region</b>	New England	0.47 M	4.0%	4.0%	103	➤ The biggest regions for tennis participants are the South Atlantic and Pacific.  ➤ The regions with the highest Core player participation rate are the Middle Atlantic and Pacific.
	Middle Atlantic	1.79 M	15.4%	4.4%	114	
	East North Central	1.47 M	12.6%	3.2%	83	
	West North Central	0.59 M	5.1%	3.2%	85	
	South Atlantic	2.82 M	24.2%	4.2%	109	
	East South Central	0.48 M	4.2%	2.7%	72	
	West South Central	1.21 M	10.4%	3.9%	102	
	Mountain	0.75 M	6.5%	3.2%	84	
	Pacific	2.05 M	17.6%	4.3%	113	
<b>Education</b>	Education Under 18's	3.16 M	27.2%	6.4%	168	➤ 46% of tennis players 18+ have a college degree or higher.
	1-3 years of High School	0.51 M	4.4%	3.8%	100	
	High School Grad	0.81 M	7.0%	1.4%	37	
	1-3 years of College	1.79 M	15.4%	2.7%	71	
	College Grad	3.31 M	28.5%	4.3%	112	
	Post-Grad Studies	2.05 M	17.6%	4.9%	128	
<b>Race/ Ethnicity</b>	African American/Black	1.07 M	9.2%	2.9%	75	
	Asian/Pacific Islander	1.16 M	10.0%	7.3%	190	
	Caucasian/White (non-Hispanic)	7.84 M	67.4%	3.7%	98	
	Hispanic/Latino	1.38 M	11.8%	3.7%	96	
	Other	0.18 M	1.6%	5.6%	148	

How to read this table:

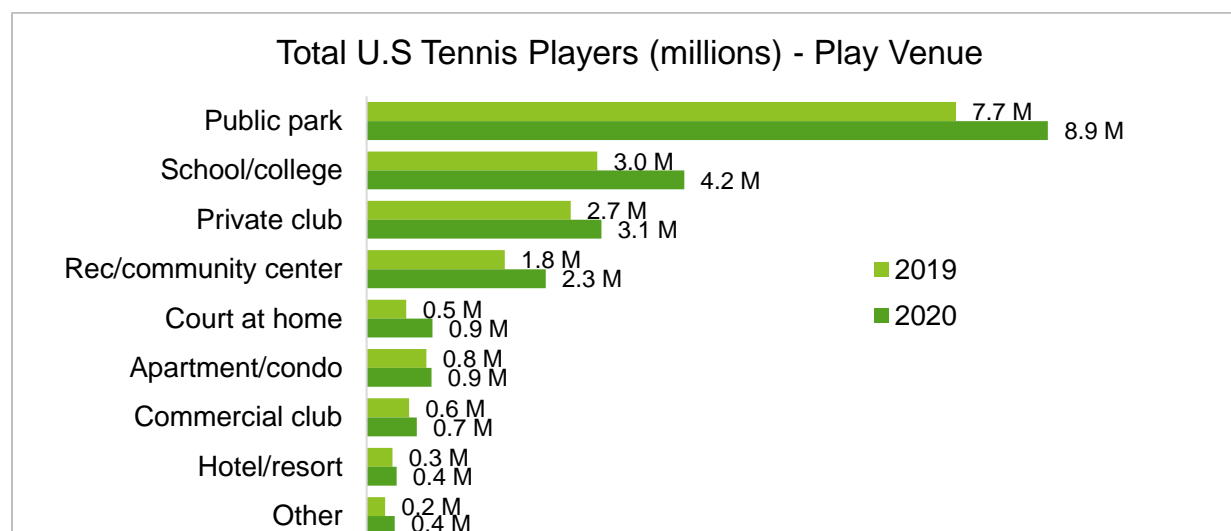
- An index of 110 means players are 10% MORE likely to fall into that group
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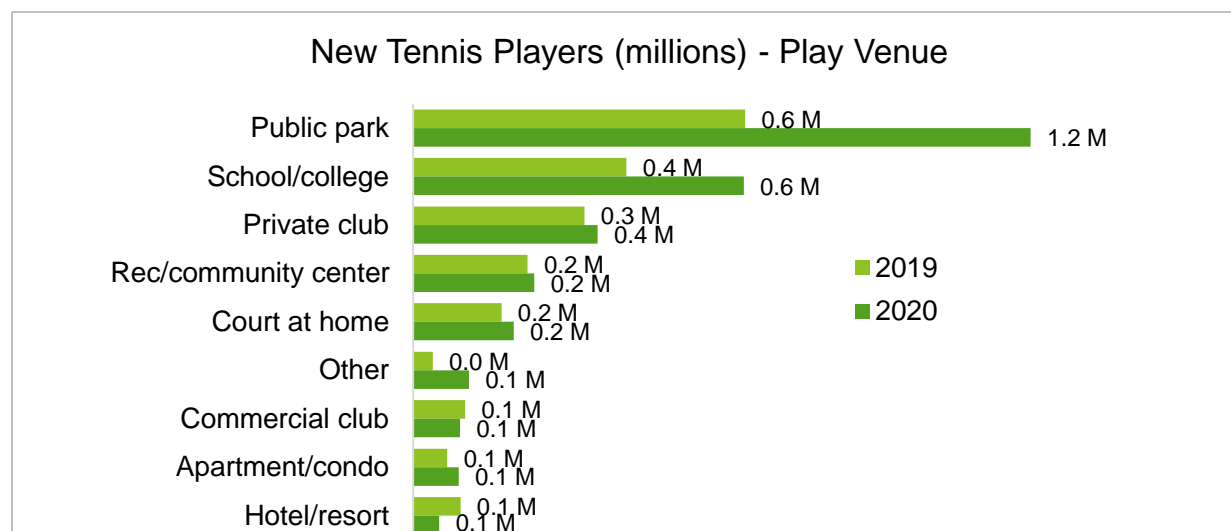
## 6 PLAYING VENUE

### 6.1 Total Tennis Participants by Most-Used Venue



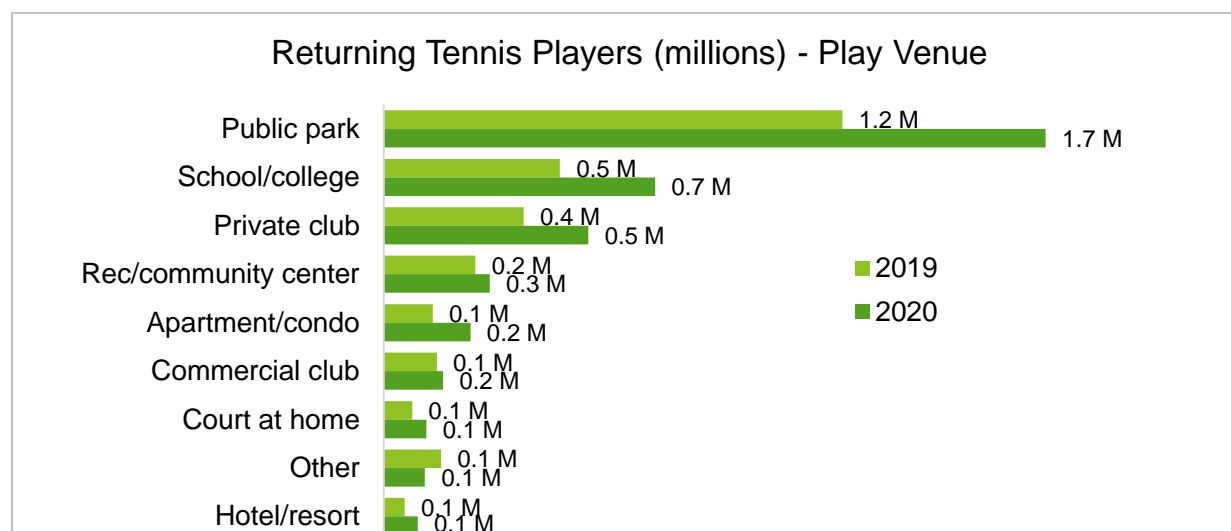
- The total number of players who say they most often play at public parks increased nearly 16% from 2019 to 2020. Those saying they play at schools/colleges increased about 38% over the year.
- The number of players saying the most often play at a private tennis facility increased 15% in 2020.

### 6.2 New Tennis Participants by Most-Used Venue



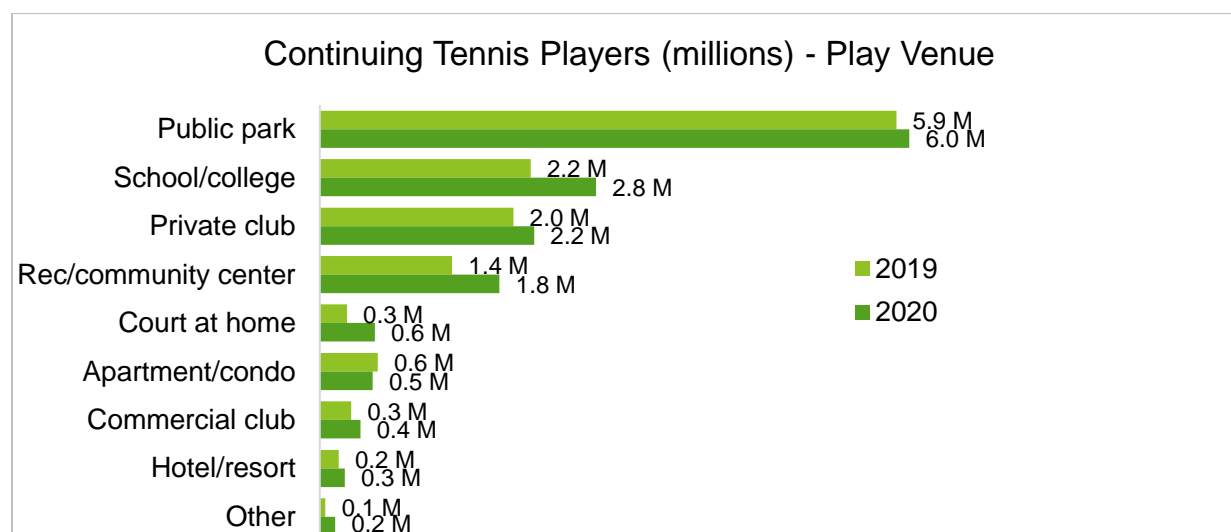
- 2020 saw a big increase in the number of new players at public parks and schools/colleges.
- Just over 2 million new players were at public parks, schools, and recreational facilities, where programming is likely to be limited or not available.

### 6.3 Returning Tennis Participants by Most-Used Venue



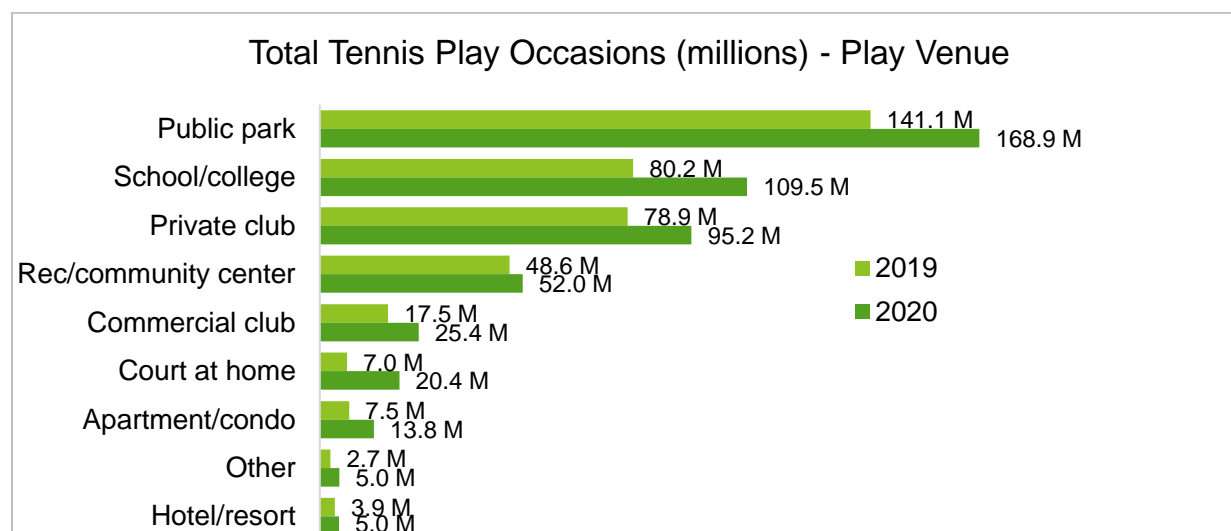
- The number of returning players playing most often at public parks and schools/college increased significantly in 2020 (44% and 54%, respectively). A substantial number also went back to private clubs.
- 69% of returning players played most at public parks, schools/colleges, and recreational facilities, where programming is likely to be limited or unavailable.

### 6.4 Continuing Tennis Participants by Most-Used Venue



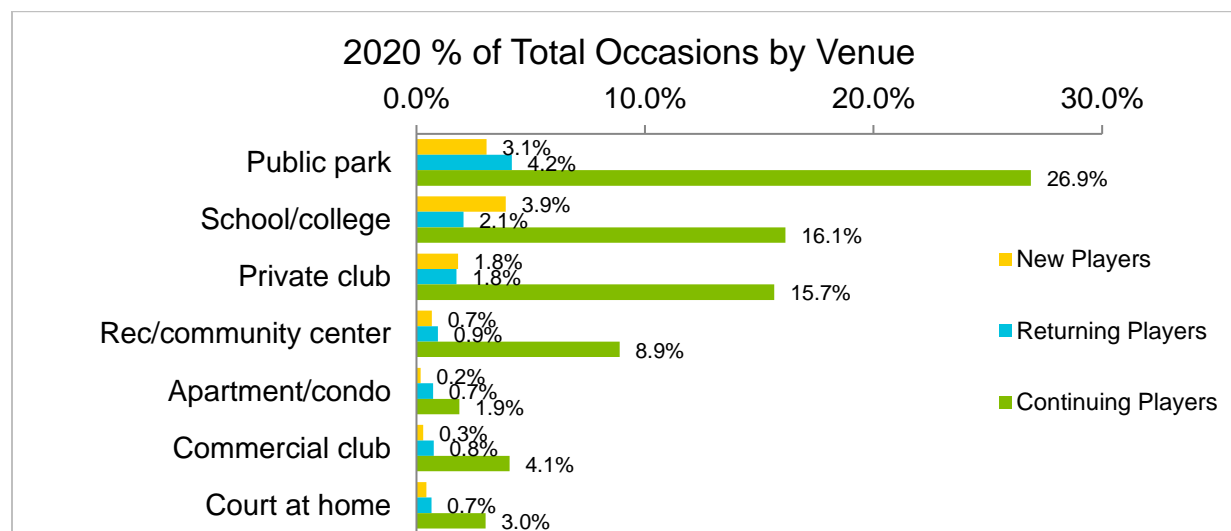
- The number of continuing players at public parks remained at around 6 million.
- The biggest increases were seen at schools/colleges (31%), private clubs (11%), and recreational facilities/community centers (36%).

## 6.5 Total Tennis Play Occasions by Most-Used Venue



- All venue types saw increases in play occasions from 2019 to 2020. The biggest growth was at home courts & apartment condos, though they represent a small percentage of total play occasions.
- Play occasions at public parks, schools/colleges, and recreational facilities/community centers, which make up almost 70% of total play occasions, increased over 22% in 2020.
- Total play occasions at private & commercial facilities, which account for roughly a quarter of all play occasions, grew by 25% from 2019 to 2020.

## 6.6 New/Returning/Continuing Play Occasions by Most-Used Venue

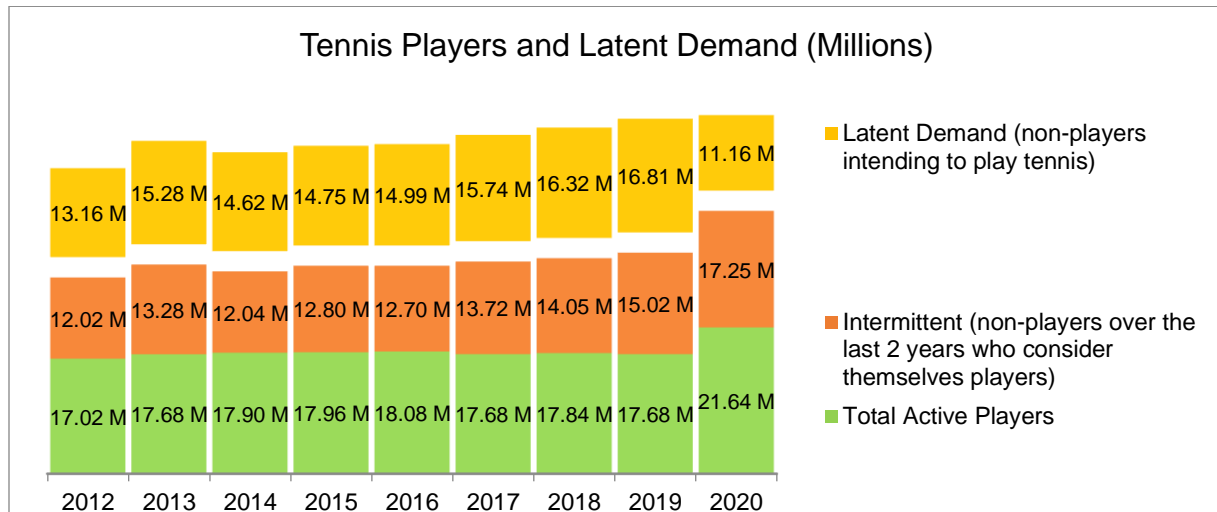


- % of all play occasions: Continuing players 78%, New 11%, Returning 11%
- Almost 15% of all play occasions were new/returning players at public parks, schools, and recreational facilities, where programming is likely to be limited or unavailable.

## 7 TENNIS PLAYERS AND LATENT DEMAND

Non-tennis players were asked if they intend to play tennis in the next year. This gives an added 11.16 million people ages 6 and older who are potential players.

*\*Note: Starting in 2020, respondents were asked about their intent to play tennis. Prior to 2020, respondents were asked their interest in playing tennis.*



## 8 ABOUT THE PHYSICAL ACTIVITY COUNCIL (PAC)

Each year, the Physical Activity Council (PAC) conducts the largest single-source research study of sports, recreation, and leisure activity participation in the nation. The PAC is made up of eight of the leading sports and manufacturer associations that are dedicated to growing participation in their respective sports and activities.



These leading trade and industry organizations are dedicated to providing the most comprehensive, accurate, and actionable database of sports participation data. The PAC Study is managed by Sports Marketing Surveys USA. The study looks at 123 different sports and activities in a variety of sub-categories including, but not limited to: team and individual sports, outdoor sports and activities like camping, hunting, and fishing; fitness and exercise, action sports, golf, tennis, and much more.

The data, dating back as far as 2007, is representative of the U.S. population ages 6 and older. Universally accepted research practices are used to ensure data is obtained from traditionally under-responding segments of the population. Please contact any of the individual members of the PAC or Sports Marketing Surveys to learn more about the study and other available data.

If you have specific questions regarding the methodology, please contact Sports Marketing Surveys USA at [info@sportsmarketingsurveysusa.com](mailto:info@sportsmarketingsurveysusa.com) or (561) 427-0647.

The Physical Activity Council is made up of the following industry-leading organizations:

- CLUB/INSTITUTIONAL FITNESS: International Health, Racquet, and Sportsclub Association (IHRSA) [www.ihrsa.org](http://www.ihrsa.org) P: (617) 951-0055
- GOLF: National Golf Foundation (NGF) [www.ngf.org](http://www.ngf.org) P: (561) 744-6006
- OUTDOOR ACTIVITIES/SPORTS: Outdoor Foundation (OF) [www.outdoorfoundation.org](http://www.outdoorfoundation.org) P: (202) 271-3252
- SNOW SPORTS: Snowsports Industries of America (SIA) [www.snowsports.org](http://www.snowsports.org) P: (435) 657-5140
- TEAM SPORTS/INDIVIDUAL SPORTS/GENERAL FITNESS/WATER SPORTS: Sports & Fitness Industry Association (SFIA) [www.sfia.org](http://www.sfia.org) P: (301) 495-6321
- FOOTBALL: USA Football [www.usafootball.com](http://www.usafootball.com) P: (317) 489-4417
- TENNIS: Tennis Industry Association (TIA) and United States Tennis Association (USTA) [www.tennisindustry.org](http://www.tennisindustry.org) and [www.usta.com](http://www.usta.com) P: (708) 601-9877

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Any publication of confidential information outside your organization without the prior consent of Tennis Industry Association is expressly prohibited. You should send us a copy of any literature that references our data before it is published.

If you have any questions regarding these guidelines or the appropriate uses of TIA research, please feel free to contact us.

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