

TIA STATE OF THE INDUSTRY | 2010

Key Tennis Industry Indicators

A synthesis of
TIA Research Reports
across different sectors
of the Tennis Industry



State of the Tennis Industry 2010

About the Report

The State of the Tennis Industry Report has been developed to provide a synthesis of the various studies & surveys conducted by the Tennis Industry Association. This report is divided into 4 “top-level” segments:

The Economy and Tennis – Tennis has not been completely impervious to the overall economic impact the recession has had on the country, as reflected in decreased participation and consumer spending. Fears the economy in the US will experience a “double dip” recession leaves consumers wary, but tennis consumers expect their current financial situations to remain the same or become slightly better.

Demand – The demand for tennis goods and services has remained relatively stable over the long term, however, instability in consumer confidence and the economy was reflected by slight decreases in short-term participation and the industry’s key revenue generator, frequent players.

Supply and Service – Manufacturers, Retailers, Facilities, Court Contractors, Teaching Pros, and Organizations comprise the supply/service side of the industry. The majority of businesses in the fragile economy saw slight reductions in sales and business. However, the future outlook for the industry remains positive as tennis facilities continue to see increases in play and opportunities exist with exciting new initiatives under way such as 10 and Under Tennis.

Media / Pro Events – Tennis exposure to consumers is an important factor in showcasing the sport to the mainstream. TV coverage, both live and tape delayed, saw a substantial growth increase in 2010 and the US Open continues to be one for the most widely attended sporting events in the world.

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References:

- Dow Jones Index
- Consumer Confidence Index
- Tennis Consumer Report Racquets 2010 (TIA/SMS)
- TIA Economic Index Report – TIA/SMS
- 2010 Tennis Participation – Taylor Research & Consulting for TIA/USTA
- Tennis Participation 2010 – Physical Activity Council (PAC data study) (SGMA/PAC)
- Physical Activity Council 2010 Traditional Sports (SGMA/PAC)
- 2010 United States Tennis Participation Study: In-depth interviews (USTA/SMS)
- 2010 Racquet/Ball/String Census Reports (TIA/June & Associates)
- Tennis Retailer Satisfaction & Brand Perception Report: Rackets 2010 Season (TIA/SMS)
- Cost Of Doing Business: Tennis Facilities (TIA/SMS)
- Court Activity Monitor: Late Season 2010 (USTA/SMS)
- State of the Industry: Late Season 2010 (TIA/SMS)
- United States Tennis Association
- US Open Attendance – USTA/USOpen.org
- World TeamTennis
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Sluggish Stuttering Economy Leads to Caution Among Tennis Consumers and a Relatively 'Flat' Economy for Tennis

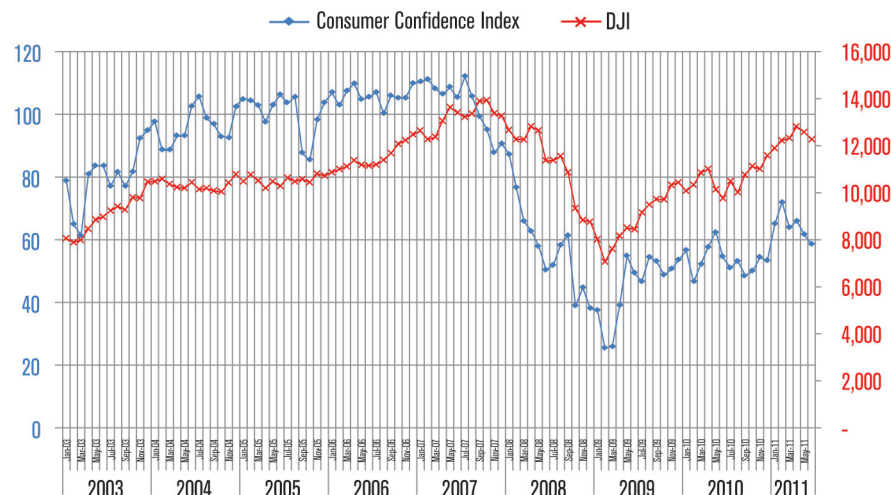
- Opportunity: Consumers still looking to make tennis related purchases but looking for more value
- Challenge: Consumers remain cautious with current economic outlook

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Experts predicted an economic recovery throughout 2010, building an expectation that the economy would be growing and back up to pre-recession conditions during the first quarter of 2011, but this did not happen.

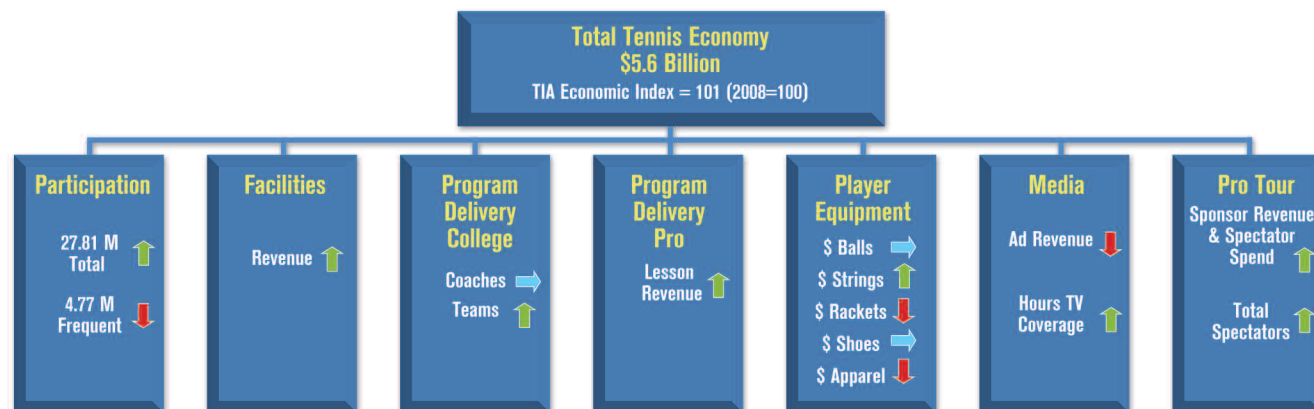
Looking at today's business news and using the Dow Jones Industrial Index as a barometer and one may be mistaken that the recovery is in full swing. As the chart below indicates, the Dow Jones index shows two linear growth periods from a low in February 2009 rising to 11,009 in April 2010. There is a slight dip in the middle of 2010 but almost linear growth from June 2010 to current levels.

Consumer Confidence Index



From 2007 to 2010, the average Consumer Confidence Index (CCI) is down over 50 points, but was up over 8 points in 2010 vs. 2009, highlighting the cautious nature of consumers. According to TIA-conducted surveys of frequent tennis players, household spending has been reduced or is expected to remain about the same and personal financial situations are also expected to remain the same or become slightly better. Tennis consumers represent the overall cautious sentiment reflected in the CCI with frequent players holding onto their current rackets longer and delaying new equipment purchases, reflective by the overall increase manufacturers saw in string shipments and decrease in racket shipments during 2010.

The TIA's Economic Index, developed in 2009, measures the overall "worth" of the tennis industry. The updated model based on 2010 data shows an index of 101 and an estimated worth of \$5.6 Billion. Index components that increased (from the base of 2008) are: overall participation, facility revenue, active college teams, lesson revenue, wholesale strings, and TV coverage.



Note: Arrows show the trends for the Sector since 2008

Tennis-Playing Habits of Players Strongly Dictated by Partner Availability, Court Access and Time Commitments

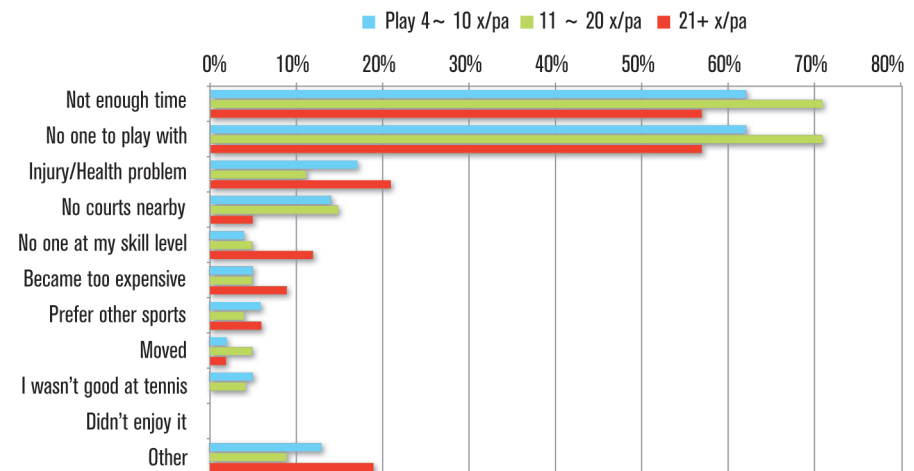
- **Opportunity:** New technology developments for player matching, services and finding courts
- **Challenge:** Non-sports related common issues for increased work/school/family/time commitments

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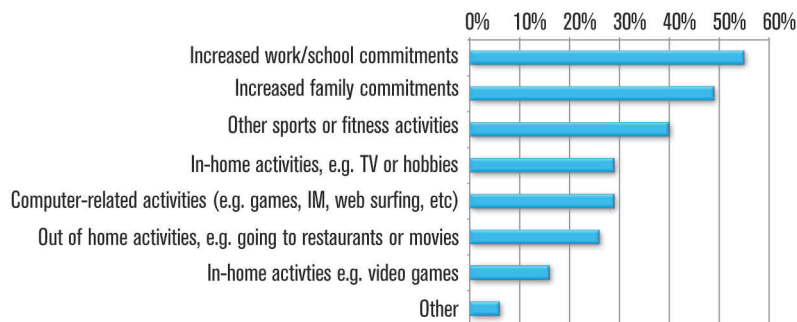
Understanding why participation numbers are down (especially among frequent players) is imperative for the entire industry. Insight from last year's Physical Activity Council (PAC) participation study with tennis players sheds some light onto the reasons why players are changing the amount of tennis they play.

For players who weren't playing as much tennis as they would like, the primary reasons are: not enough time, no one to play with, injury or health problems and lack of nearby courts.

Why aren't you playing as much tennis as you would like to?



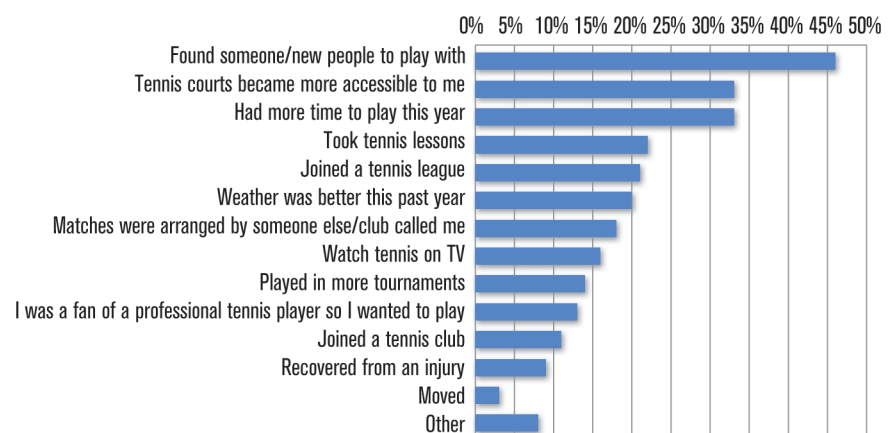
What other activities do you find yourself doing instead of tennis?



Frequent players, which declined by 11% in 2010, are either reducing the amount of tennis they play, or stopping altogether. The reduction in play among frequent tennis players can be attributed to increased work/school commitments as well as increased family commitments. The tennis industry has to be cognizant of the reasons for reduction in play and address these issues to not only increase participation, but to ensure tennis players are still tennis consumers, to ensure sustainability for the sport.

Coincidentally, for players who increased the amount of tennis they played last year, the primary reasons were: having someone to play with, increased access to courts, and having more time. By addressing matchmaking programs, injury awareness and court access, the industry has potential opportunities to grow its frequent player base. Programs such as the USTA's 10 and Under Tennis and the TIA's Cardio Tennis are helping to bring more families into the game and greater attention to the health and fitness benefits that tennis affords.

What influenced you to play more tennis this past year than you did the previous year?



Tennis Players Exercised Caution with Their 2010 Equipment Expenditures – Delayed Purchases

- **Opportunity:** Understanding how the notion of 'value' is changing for players
- **Challenge:** Creating profitability in a value-oriented market

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With the direction of the U.S. economy still unclear in 2010, tennis players were "making do" with their current tennis equipment by delaying purchases. Overall, the tennis industry experienced a shift from the "traditional materialists" who tend to be "early-adopters" and avid buyers of new products to selling in a market with more value oriented consumers.

What did you spend less on in 2010?

(% of those spending less)

	Tennis Players Only	USA Overall	Index vs. Actives
Equipment Purchase	63.1%	48.4%	130
Pay To Play Fees	42.6%	28.6%	149
Travel To Take Part in Sports/Recreation	36.1%	41.7%	87
Dues For A Health Club	28.0%	25.2%	111
Lessons/Instruction	26.4%	21.0%	126
Dues For A Country Club	12.9%	10.9%	118

What do you plan to increase spending on in 2011?

(% of those planning to increase spending)

	Tennis Players Only	USA Overall	Index vs. Actives
Equipment Purchase	39.1%	35.5%	110
Travel To Take Part in Sports/Recreation	34.9%	31.5%	111
Join/Re-join Health Club	25.9%	25.8%	100
Lessons/Instruction	25.0%	21.4%	117
'Pay To Play' Fees	21.1%	18.5%	114
Join/Re-join Country Club	4.6%	4.2%	110

Responses to the Tennis Consumer Survey regarding tennis rackets show patterns of two distinct groups among tennis players – grounded consumers who make do with current equipment – and traditional materialists, those who prefer to have the "latest and greatest." According to the survey, grounded consumers account for roughly 50-55% of players surveyed while traditional consumers represent about 30-40%.

What did you put off purchasing in 2010? (% of those putting off)

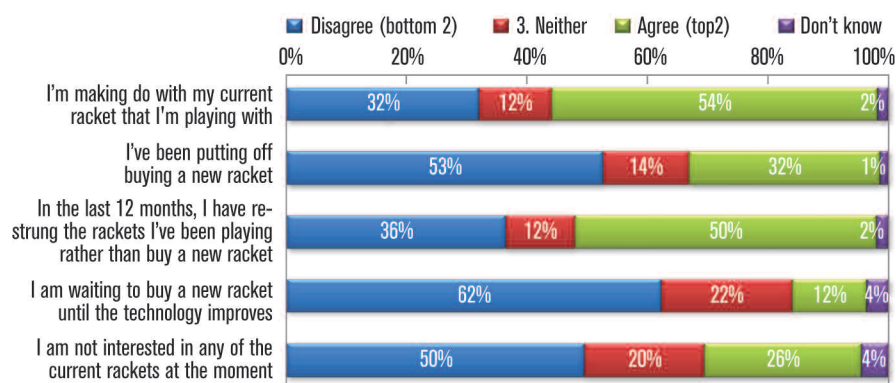
	Tennis Players Only	USA Overall	Index vs. Actives
Equipment Purchase	54.5%	50.2%	109
Travel To Take Part in Sports/Recreation	48.5%	38.7%	125
Pay to Play Fees	33.9%	29.8%	114
Dues For A Health Club	26.1%	26.9%	97
Lessons/Instruction	21.4%	20.8%	103
Dues For A Country Club	13.6%	13.1%	104

In addition to delaying spending in a variety of categories, tennis players also spent considerably less on equipment compared to the overall US population in 2010. Nearly 2/3 of tennis players spent less on equipment in 2010 and over 40% reduced their pay to play fees, which could be correlated to the reduced participation numbers represented in the USTA/TIA Tennis Participation Study.

Ultimately, the tennis industry appears to have a consumer market that is more cautious than the overall US market and as an industry, proper adjustments have to be made to account for the wary tennis consumer.

Opportunities do exist for 2011, however, as tennis consumers intend to increase equipment spending in 2011, 25% plan to increase spending on lessons/instruction, and 21.1% plan to increase spending on 'pay to play' fees.

Level of agreement with the following statements



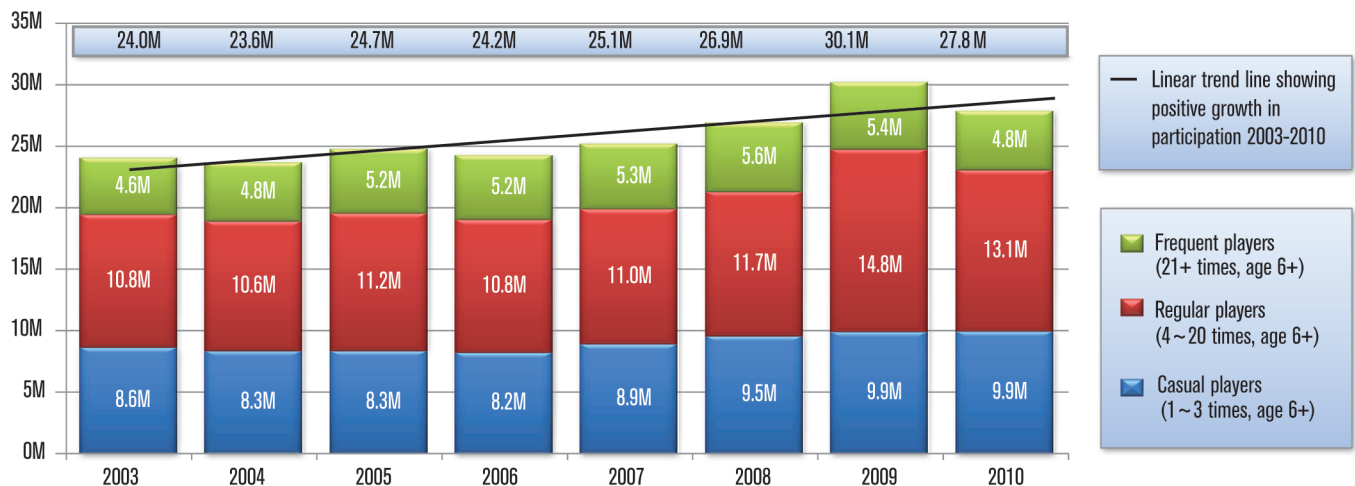
Participation Shows Positive Linear Growth Over Long Term – Short-Term Challenges Remain

- **Opportunity:** Tennis is growing at a higher rate compared to other traditional sports
- **Challenge:** To expand the frequent player base beyond 5 million and attract greater diversity

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From 2000-2010 tennis has been the fastest growing traditional sport in America, up 46%. In 2009 tennis reached an all-time participation high of 30 million players. However, in 2010 the industry saw for the second consecutive year a reduction in its key revenue generator, the frequent tennis player, down 11% year over year, along with a decrease in total participation of 7%.

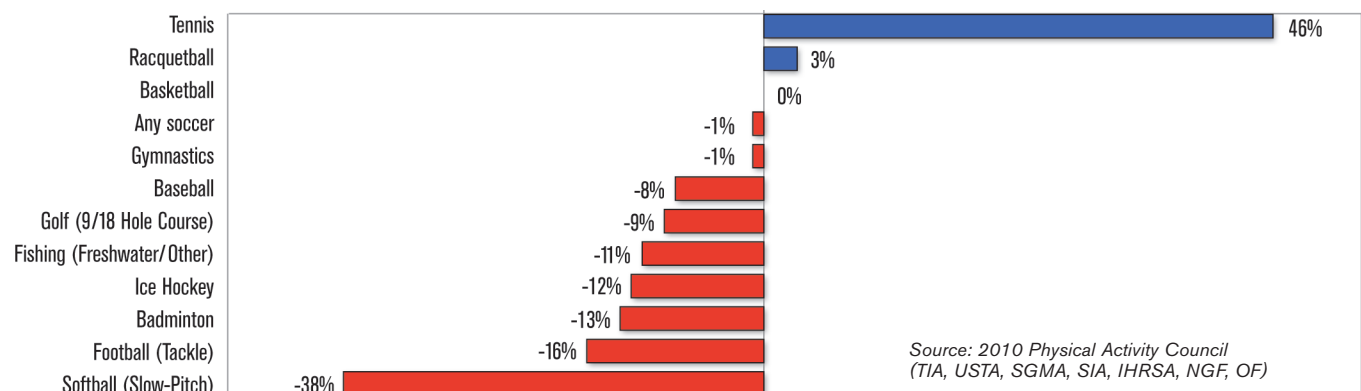
Tennis Participation (Millions) by Play Frequency



Key demographics of tennis players have remained relatively stable compared to previous years with males comprising approximately 55% of tennis players and females roughly 45%. In 2010 the age distribution of tennis players was fairly evenly distributed, with the 35-49 age bracket edging out the 12-17 age bracket by approximately 2.7 million players as the core age participants. Cities and suburbs account for over 60% of where tennis players live.

If an overall profile were given of the average tennis player, he or she would be white between the ages 35-49, live in the city or suburbs, and have a household income of \$75,000 a year or more. The TIA, together with USTA and industry partners, continues to expand the diversity of tennis players, sponsoring promotions to make the game more accessible for all ages and ethnicities, and increasing and retaining the frequent player base, which is the key economic driver of our sport.

Tennis is the Fastest Growing Traditional Sport 2000-2010

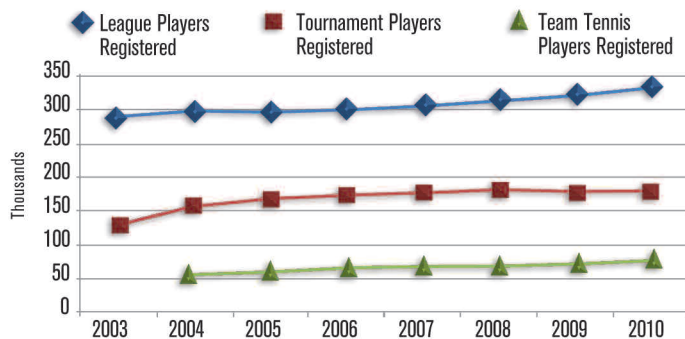


Organized Competition Continues to Grow – It Remains a Catalyst for Frequent Player Growth

- **Opportunity:** Increased tournaments with mandated 2012 rule change and potential future league growth
- **Challenge:** Costs associated with tournament and league play, aging profile of competitive players

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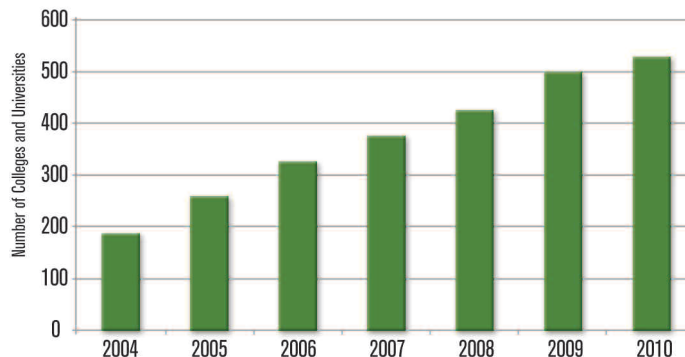
Numbers of Players playing in USTA League Programs, Tournaments and Team Tennis Programs



In 2010, participation in USTA Leagues, Tournaments, and Jr. Team Tennis remained strong despite the slight decline in overall participation numbers. Similarly to the long-term growth trend of participation, however, league program participation, tournament participation, and Jr. Team Tennis participation show positive linear growth from 2003-2010. Illustrating the importance organized tennis brings to the industry is the growth in the total number of league programs (up 14.7% since '03), tournaments (up 38.1% since '03), and team tennis programs (up 31.5% since '04).

From 2009 to 2010 the number of registered USTA League players increased 3.4% and the number of registered Jr. Team Tennis players increased 4.8%. Reflective of the grounded tennis consumer and the dips in discretionary spending per household for Americas was the minimal 1.4% decline in the number of registered tournament players in 2010.

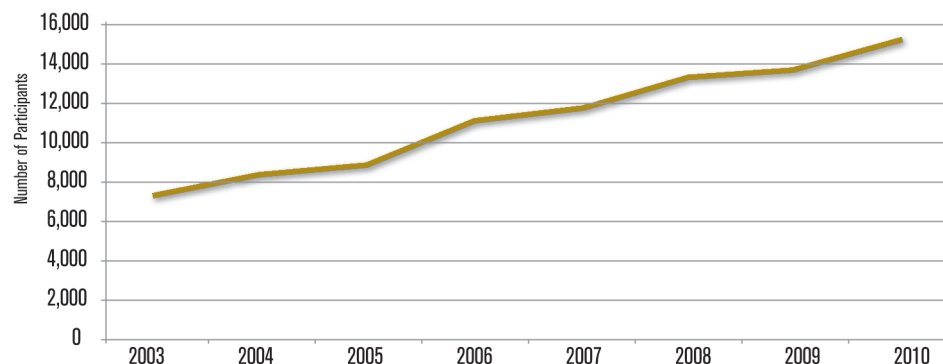
Tennis On Campus Program Sites



From 2004 to 2010, USTA's Tennis on Campus program, which was designed to promote and develop the growth of tennis on college campuses throughout the U.S., has grown 182% to 527 colleges and over 31,600 players.

As a part of the USTA Tennis On Campus program each USTA section hosts USTA Campus Championships. In 2008-2009 those events hosted a total of 2,481 players and 315 teams from 205 different colleges.

WTT League Participation Rates: 2003-2010



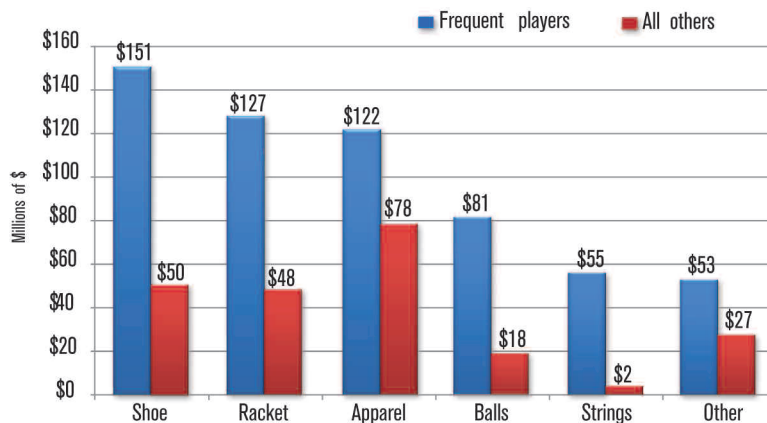
At the recreational level, World TeamTennis has experienced sustained positive competitive tennis participation growth since 2003 with a 106% increase in league participation and a 118% increase in national qualifier participants from 2003-2010. Additionally, the number of WTT league directors continues to grow, up 11% from 2009-2010 and 41% from 2003-2010.

Frequent Tennis Players Are Key Revenue Drivers for the Industry – Creating More Frequent Players Is Crucial for Long-Term Success

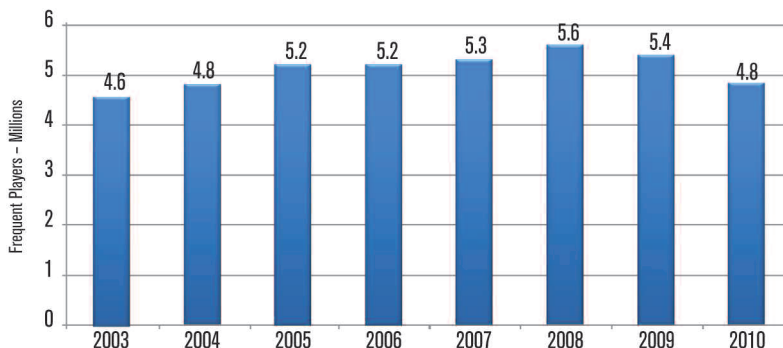
- **Opportunity:** Embrace frequent players – look for ways to recognize their importance, such as stringing loyalty programs, shoe warranties, racket exchange programs
- **Challenge:** Keeping the current frequent players engaged and expanding the base

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Frequent Player Spending 2010 (At Retail)



Frequent Players (21+ Times/Year) : 2003-2010



Frequent Tennis Player Profile

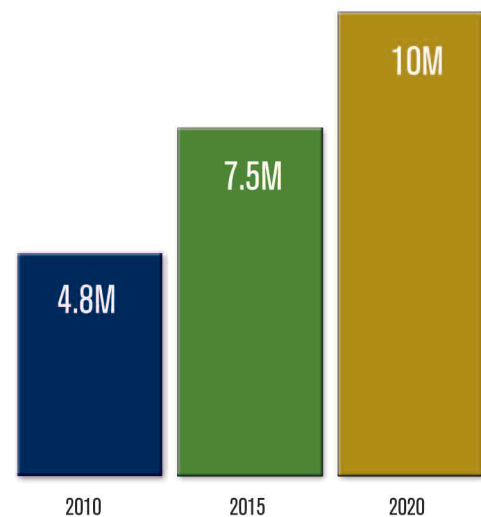
Total No. of Frequent Players	4.8 Million
Male	52%
Female	48%
Average Age	33
Where Do Frequent Players Live	43% Cities - 29% Suburbs
Ethnicity	79% White
Median Household Income	\$98,000
Frequent Player Total Play Occasions	361,000
Frequent Player Share of Total Play Occasions	72%
Average Times Frequent Player Played Tennis	75
Est. Total Annual Tennis Spending Per Player	\$758

Every 1 million new frequent players would have an approximate impact on the tennis industry of \$758 million. Based on similar spending trends among frequent players in the upcoming years, the industry's goal of having 10 million frequent players would equate to an estimated economic impact of roughly \$3.9 billion.

In 2010, frequent tennis players (defined as players that play 21+ times/ year) accounted for 72% of total tennis spending and spent (dollars per player) 12 times more than all other tennis players annually on tennis equipment, according to TIA projections.

Frequent players accounted for more than 70% of dollars spent in all equipment categories: apparel, balls, strings, and rackets, for total spending of approximately \$590M across all distribution channels. Nearly all tennis string and stringing consumer expenditures can be attributed to frequent tennis players with the frequent player category accounting for 97% of string dollar sales in 2010.

Frequent Player Growth Goals



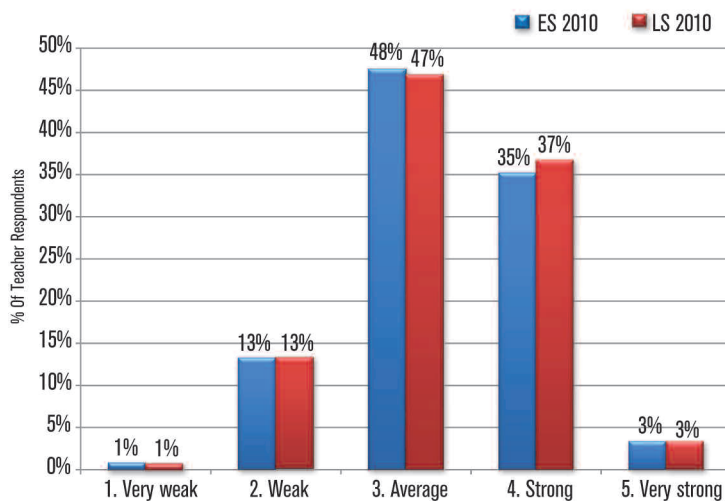
The tennis industry has set long-term goals for frequent player growth to help achieve sustainable economic growth for the industry. By 2015 the industry hopes to attain a frequent player base of 7.5 million and by 2020 a frequent player base of 10 million. The industry is spear-heading frequent player growth efforts through a variety of initiatives and programs such as 10 and Under Tennis, Cardio Tennis, the PlayTennis.com website to be launched in 2012, as well as other measures.

Teaching Pros Indicate Steady Business and Positive Outlook for Tennis Teaching – Most Expecting 2011 to be the Same or Better

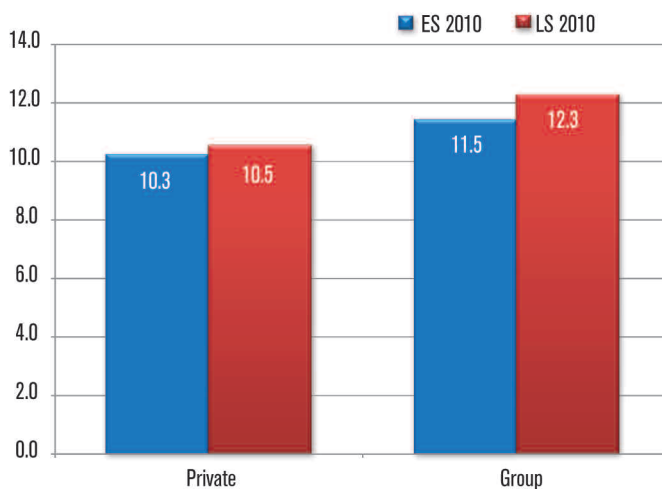
- **Opportunity:** Significant USTA investment in 10 and Under Tennis provides expanded instructional and structured programming income
- **Challenge:** Reduced frequent player participation numbers and lowered discretionary spending

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Rate the Current State of the Tennis Teaching Business



Average Number of Lessons/Clinics Taught per Week



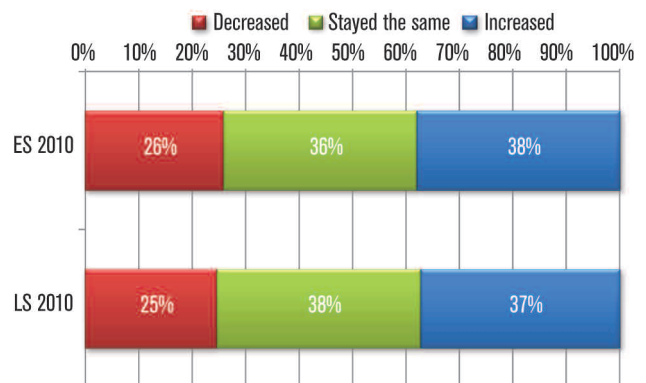
Similarly to the early season of 2010, nearly half of tennis teaching pros predicted their business would increase in 2011 and the percentage expecting a decrease in business was significantly down.

Despite a 7.8% decrease in tennis participation for 2010, only a quarter of teaching pros indicated decreased business for the early and late season. Over the course of both early and late season surveys of teaching pros the percentage of those indicating increased business was around 38%.

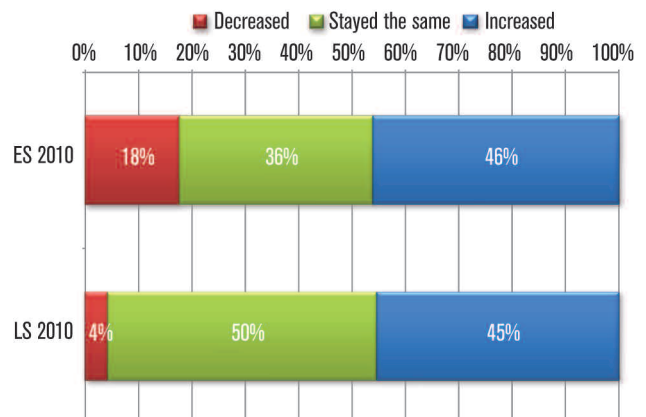
Compared to the early season of 2010, teaching pros indicated a slight increase in the number of private and group lessons taught per week during the late season. This stability in the number of lessons taught, as well as business compared to the previous 12 months, positively correlates to the overall “average” to “strong” rating that tennis teaching pros give to the current state of the tennis teaching business.

Change in On-Court Teaching Business-

Last 12 months compared to previous 12 months



How is your projected 2011 business vs. 2010?



Activity At Tennis Facilities Remained Stable, Despite The Sluggish Economy and Dips in Frequent Players

- **Opportunity:** Industry initiatives and focus on pathways to increase play; USTA facility line grants
- **Challenge:** Membership decline and court fee revenues resulting from frequent player drop

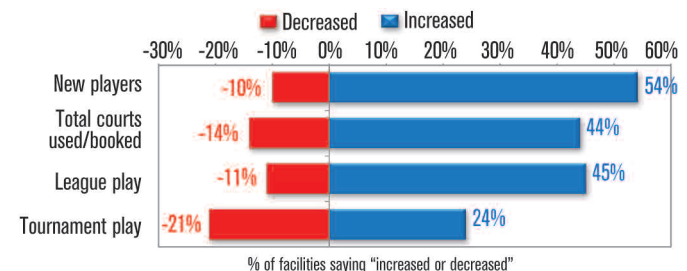
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Tennis facilities, the key providers of tennis and the core of tennis program delivery, have maintained stability in the turbulent economy. According to the Late Season Court Activity Monitor Study, a national facility audit that supplements participation and census reports and measures tennis activity across the country, 54% of facilities indicated they saw an increase in new players, 44% indicated an increase in total courts used/booked, 45% indicated an increase in league play, and 24% indicated an increase in tournament play. However, in accordance with the decreases in tennis participation numbers from 2009 to 2010, there is a discernible trend that the increase in new players is plateauing.

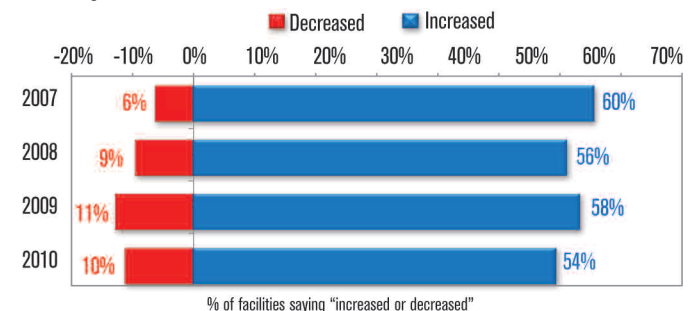
Research indicates that league play shows positive increase/decrease net over the past three survey periods. This correlates well with players identifying finding someone or having a new partner to play with as the #1 reason for playing more tennis.

Court Activity Monitor:

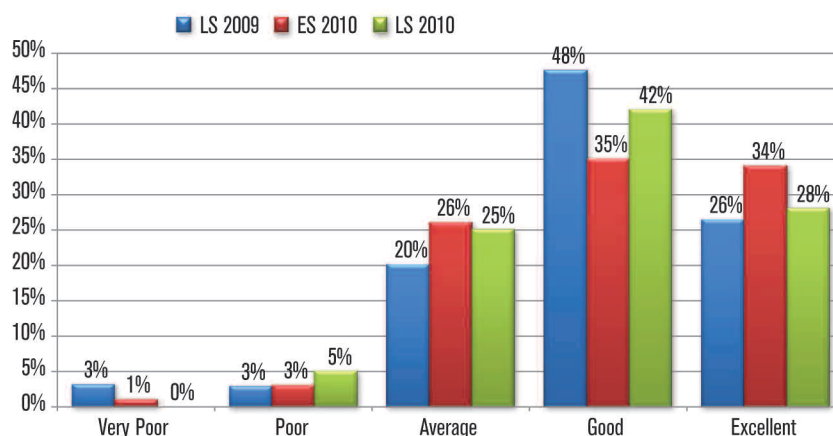
Category Increase / Decrease: Comparing Late Season 2010 to Late Season 2009



New Players: Increase / Decrease Trends



Overall how would you rate 10 and Under Tennis in terms of the benefit to your facility?



Tennis facilities recognize the opportunity that exists with 10 and Under Tennis using the QuickStart Tennis format with 70% of tennis facilities rating the program and play format as "good" or "excellent" (scale of 1-5 where 1 was 'very poor' and 5 was 'excellent').

According to the 2009 Cost of Doing Business for Tennis Facilities Report, tennis facilities saw net increases in numbers of members, numbers of regular players and tennis court usage. However, compared to previous survey periods, the rate of increase was lower in all categories, again, reflecting decreased participation, especially among the frequent player base.

Other positive news for tennis facilities from the 2009 CODB report was an 18% increase in average revenue per court, to \$31,823, since 2005.

		2005	2007	2009
Changes in Number of Members	% saying increase	59%	52%	44%
	% saying decrease	9%	11%	24%
Changes in Number of Regular Players	% saying increase	64%	57%	55%
	% saying decrease	6%	7%	30%
Tennis Court Usage	% saying increase	68%	62%	60%
	% saying decrease	5%	7%	13%

Court Constructors Struggled Through Recession – Signs of Turn-Around at Start of 2011 – Early Indicator of Increased Player Demand

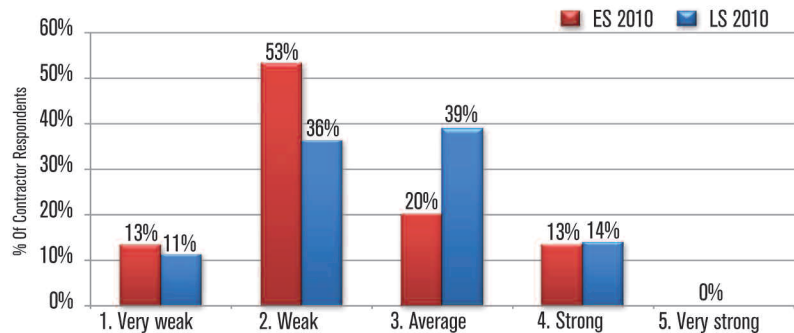
- **Opportunity:** Mandated rule change for 10 and Under Tennis puts focus on court building and lining
- **Challenge:** Economy and limited budgets find many electing to “make-do” with current infrastructure

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There are nearly 300,000 estimated tennis courts at various facility types in the U.S. Building new courts and upgrading or resurfacing existing courts falls into the hands of another important supplier in the industry – court contractors. Court contractors were perhaps among the hardest hit in the supply side of the tennis market with the instability in the U.S. economy. Facilities were spending less on capital improvements and there were fewer new projects started in 2010, resulting in decreased business for court contractors.

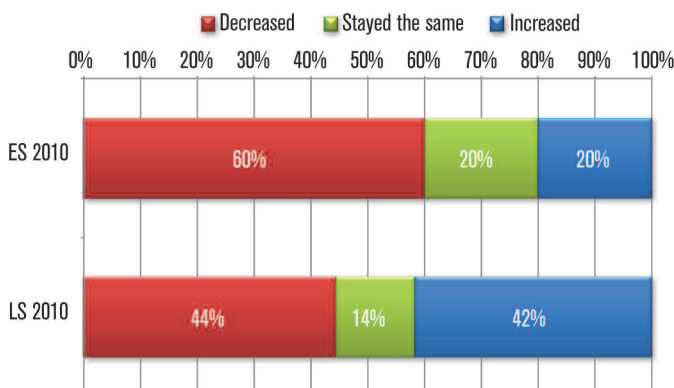
Court contractors rated the current state of the tennis court construction business in the weak to average range (on a scale 1-5, 2=weak, 3=average) with a higher percentage of court contractors leaning towards “weak,” 53% in the early season versus “average” (39%) in the late season. Remaining consistent through both reporting periods was the percentage of court contractors who rated the business as “strong,” 13% in the early season and 14% in the late season. No court contractors surveyed in 2010 in either the early season or late season rated the state of the business as “very strong.”

Rate the Current State of the Tennis Court Construction Business

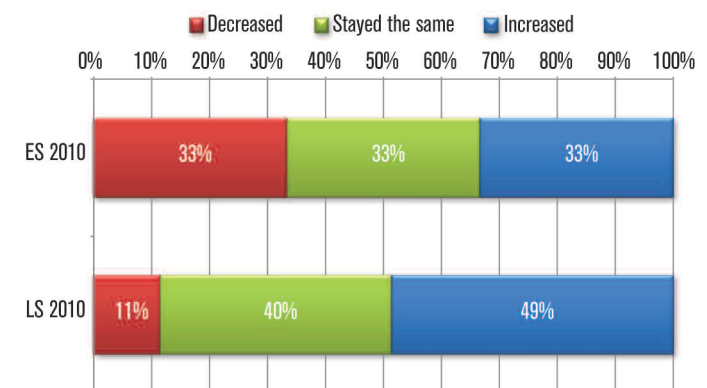


Court Contractors were experiencing substantial decreases in business in the 12 months prior to the early season survey as 60% of respondents indicated decreased business over the preceding 12-month period. The late season, however, did show signs of improvement as the percentage of those who indicated decreased business declined from 60% in the early season to 44% in the late season and the percentage of respondents indicating increased business improved from 20% in the early season to 42% in the late season.

Change in Court Contractor Business -
Last 12 months compared to previous 12 months



How is your projected 2011 Business vs. 2010?



Similarly to manufacturers, court contractors have a new opportunity with the 10 and Under Tennis initiative and the mandated rule change by the USTA of all 10 and under tournaments being played on scaled courts by 2012. A financial commitment from the USTA to provide “line grants” to tennis facilities for the 10 and Under Tennis initiative presents potential business for re-lining existing courts with the specified dimensions, as well as the construction of the scaled 36’ and 60’ courts. To date, the USTA has provided assistance to line and build over 3,000 36’ and 60’ tennis courts. Court contractors were more optimistic regarding future business in 2011 during the late season of 2010 compared to the early season, with nearly 90% of respondents projecting increased or stable business for 2011.

Tennis Retailers, a Crucial Distribution Channel for the Industry, Face a Variety of Challenges – Shift in buying habits

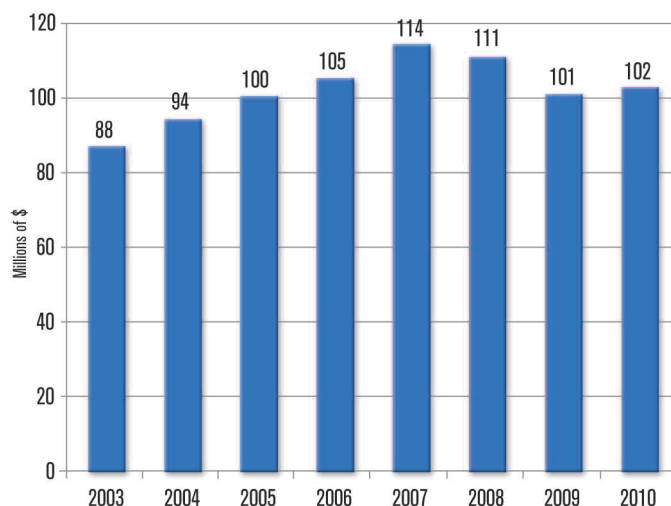
- **Opportunity:** Potential for new customer generation in youth market and future consumers of tennis
- **Challenge:** Unsteady economic factors affecting all sectors of spending; reduced margins; internet growth

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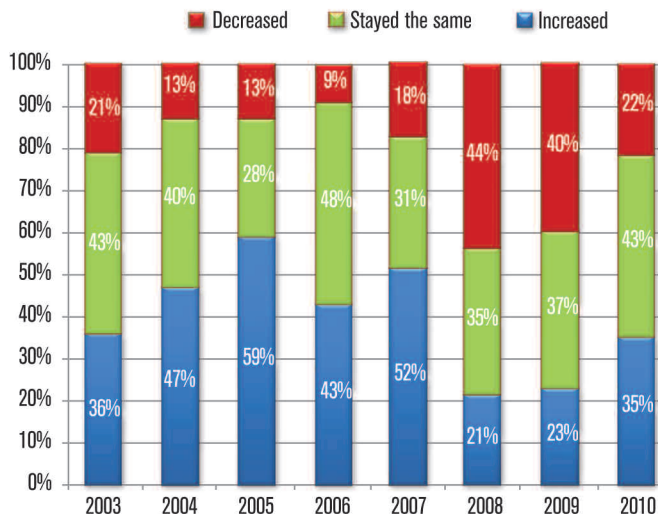
Tennis consumer point-of-purchase trends continue to shift from the traditional “over-the-counter” (OTC) market to the internet. Similarly to racket manufacturers, in 2010 specialty tennis retailers experienced a 1% decline in racket unit sales and a 2% increase in dollar sales. Reduced margins across a variety of product segments and the changing marketplace is a challenge the tennis industry is attempting to address.

The outlook remains cautiously optimistic for tennis retailers, as 35% expected to see an increase in racket sales for 2011 versus only 23% who expected an increase in 2010. Additionally, the percent of those expecting a decline in 2011 sales decreased from 40% who said rackets sales would decrease in 2010, compared to 22% who believe racket sales will decrease in 2011.

Pro/Specialty Dollar Sales [Tennis Racquets] Quarterly 2003 to 2010



Pro/Specialty Dealer Forecasts: Trended Racket Sales 2003 to 2010



In 2010, net profit (before taxes) remained in line with the previous reporting periods from the Cost of Doing Business Tennis Retailers report at 23%. Wages, rent, and advertising/marketing maintained the top 3 expense categories for retailers, 36%, 14%, and 10%, respectively. Gross margins were down in almost all major categories for tennis retailers in 2010 versus 2008, highlighting instability in the market during the reporting period. Moving forward, retailers are rating the future outlook of the tennis industry and tennis retailing at an “average to good” rating of 3.59 (out of 5). This is down slightly from the previous reporting period, reflecting the drop in pro/specialty retail business since 2008.

Retailers will play an important role in the future of the sport of tennis, especially with 10 and Under Tennis. The TIA is spearheading a retail effort that includes marketing and promotional materials to help retailers position 10 and Under Tennis equipment to consumers.

New Initiatives Present Opportunities for Manufacturers to Convert Short-Term Declines Into Long-Term Growth

- **Opportunity:** Industry initiatives to increase product demand and consumer awareness
- **Challenge:** Grounded consumer market, increased manufacturing costs, retailers reducing inventory levels

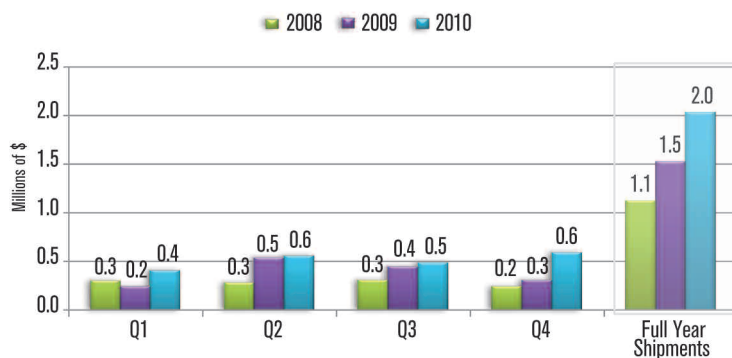
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As with manufacturing in most segments of the U.S. economy, tennis manufacturers face challenges of businesses and retailers who are now operating on a "leaner" basis, meaning reduced inventories and reduced new line purchases, as a result of the more "grounded" consumer market. In 2010, tennis manufacturers saw a 6% decline in tennis racket shipment units.

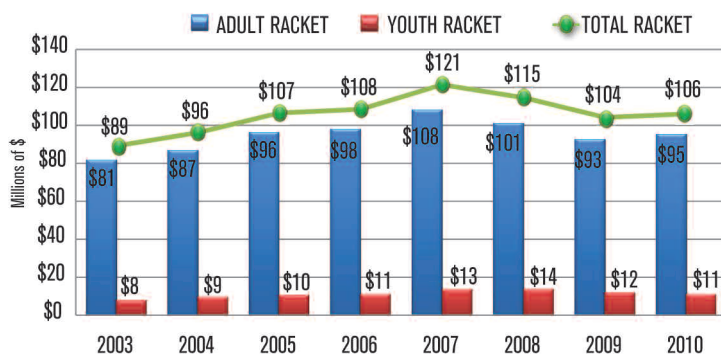
Ball shipments, one of the key indicators of U.S. Tennis Participation, were down slightly, 1%, as expected with the decline of the overall participation rate.

String wholesale dollars and shipments showed positive growth in 2010, contrastingly to ball and racket shipments. Wholesale string shipments were up 5% in 2010 versus 2009 and string wholesale dollars were up 4.5%. The emerging trend of the "grounded" tennis consumer opted for the money saving option of restringing their racket(s) rather than purchasing a new model(s).

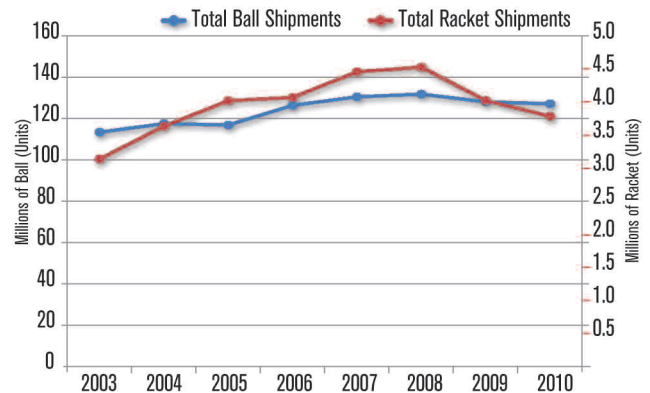
Transition Ball Shipment Units 2010



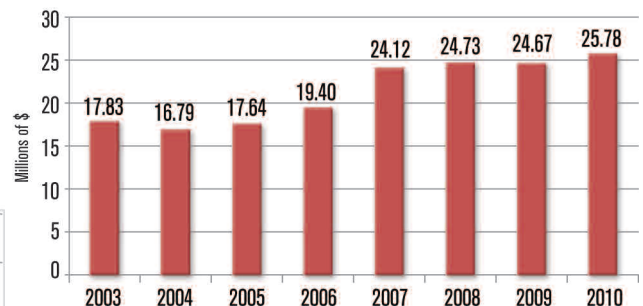
Adult & Youth Racket Shipments - Wholesale Dollars 2003-2010



Rackets and Balls - Wholesale \$ from 2003-2010



String Census - Wholesale \$



With the implementation of 10 and Under Tennis by the USTA, opportunities exist to expand youth markets with transition balls and rackets. These balls saw a 33% increase in 2010 vs. 2009. Manufacturers are now capitalizing on this opportunity with expanded product lines developed and marketed specifically for the 10 and under age group. It is estimated this demographic has more than 20 million Americans who could possibly become tennis participants.

Despite short-term declines and flat shipments and sales for manufacturers in 2010, long-term percentage increases are evident in all census categories: balls, rackets, and strings. From 2003 to 2010, ball wholesale dollars were up 12.1%, racket wholesale dollars were up 19% and string wholesale dollars were up 45%. Soft good data not available for 2010.

Fans Show an Overwhelming Interest in Attending the US Open. 81.5 Million Unique Viewers Watched Tennis on NBC, CBS and ESPN2

- **Opportunity:** Tennis has mainstream appeal with positive pro player role models; health and fitness benefits.
- **Challenge:** Competing sports activities – both traditional and non-traditional, changing consumer viewing habits

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Total Hours OF TV COVERAGE AND VIEWERSHIP: 2010

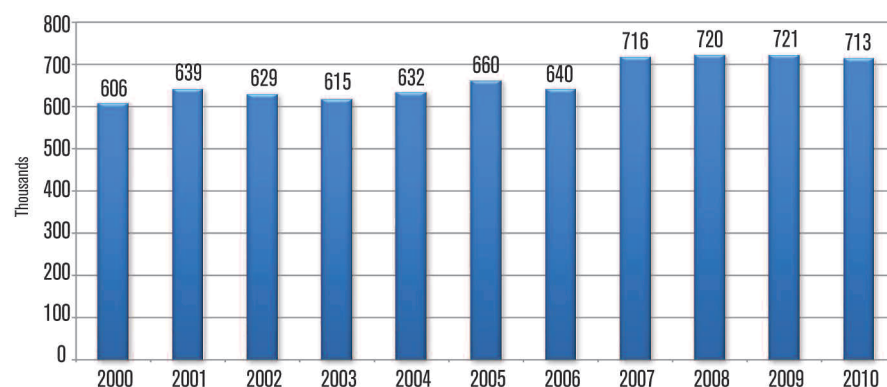
Year	2009	2010
Total Hours	1875	2736
Total Viewers	91.59 MILLION*	81.52 MILLION*

* Ties to Tennis Channel audience viewership was up

** Tennis Channel is not yet measured on a national basis.

More than 26% of the US population watched TV coverage of tennis in 2010. TV coverage, both live and tape delayed, saw a substantial 46% growth in total hours vs. 2009 thanks to the addition of 822 hours of programming on Tennis Channel. The number of unique viewers to tennis on CBS, NBC, and ESPN2 was down 11%. However, the growth of Tennis Channel audience may offset all or part of the 11% decline.**

US Open: Spectator Attendance



The US Open continues to be one of the most widely attended sporting events in the world and the lack of Americans inside the top 100 rankings seem to have little effect on its international appeal. For the past four years attendance has broken the 700,000 mark with 2009 setting the all time attendance record with 721,059 attendees. Despite the troubled economy and a decrease in discretionary spending by Americans, tennis fans have maintained a healthy interest in attending the US Open.

In 2011, record purses will be offered at each of the Grand Slams, with total prize money available for the four tournaments alone approaching \$100 million. Despite a turbulent global economy, tennis' place amongst highly branded sports and professional athletes resulted in an approximate increase of 5.8% in total prize money available at the Grand Slam events.

Year	2010	2011
Australian Open	\$ 24,005,000	\$ 25,000,000
Roland Garros	\$ 24,095,088	\$ 25,116,672
Wimbledon	\$ 21,493,560	\$ 23,798,000
US Open	\$ 22,668,000	\$ 23,700,000
Total	\$ 92,261,648	\$ 97,614,672

* Note: Currency exchange rates may affect total valuation of prize money

About the TIA

The Tennis Industry Association is the not-for-profit trade association for tennis formerly known as the American Tennis Industry Federation. The TIA traces its history to 1974 as an affiliated organization within the Sporting Goods Manufacturers Association. In 1993, the ATIF was renamed the Tennis Industry Association. Today, the TIA works closely with the USTA, industry partners and various sectors of our sport, focusing on common goals to help unify the industry and promote the growth of tennis and the tennis economy. As the No. 1 source for tennis research, the TIA is dedicated to educating the marketplace and providing market intelligence to the industry. The TIA invests 100% of its resources back into supporting tennis growth, providing research, technology and tools for the industry and supporting grow-the-game activities with the USTA and industry partners. The TIA also focuses on positive communications and positioning of the sport, promoting the benefits of tennis and the economic vitality of the industry.

>> Working towards common goals to help unify the tennis industry involved in the manufacturing, marketing, promotion and sales of tennis products and services.

>> Promoting frequent player growth and the economic growth of tennis by developing and providing technology and tools for the industry and supporting grow-the-game activities with the USTA and industry partners.



>> The TIA is the not-for-profit trade association focused on keeping a pulse on the industry and its needs.

The TIA is dedicated to facilitating advocacy and awareness in pursuit of growth and economic vitality.

>> The TIA is dedicated to educating the marketplace, funding research and providing market intelligence.

The TIA is THE information source and clearinghouse for positive tennis news.



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The Tennis Industry Association is the not-for-profit trade association promoting the growth and economic vitality of tennis

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