The Importance of Market Research in Tennis.

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ABSTRACT
This article summarizes the main findings of Tennis Europe's Next Generation survey with an emphasis on the commercial aspects of the player-coach relationship.

INTRODUCTION
For a few years now, Tennis Europe has been working with one of the world’s leading sports research agencies, IFM Sports Marketing Surveys, in order to increase the available knowledge and information on the European tennis market. The work that has been done so far has taken several guises, but one particular survey – a study of the ‘Next Generation’ of European players - has provided a unique look into the world of sponsorship and commercial matters from the junior player’s perspective.

As the largest regional association of the International Tennis Federation, managing and administering a roster of over 300 junior tournaments each year, the intention of Tennis Europe was to offer national federations, the equipment and clothing manufacturers, and the wider tennis industry, and specifically coaches a valuable insight into the world of sponsorship and commercial matters from the junior player’s perspective.

The Big Question is “how can market research in tennis help you in your role, and how does your role affect the results of the research?”

The answer is manifold. Studies have shown that brand loyalty is formed at an early age. As a coach, you have a significant impact on the decisions that junior players make. This can include influencing their first decisions as a consumer of tennis equipment brands. If they are happy, or have a good experience with those products, in all probability, the brands they choose will be brands to which they remain loyal for many years. With particular regard to junior players, the coaches’ role is often a formative one with advice on the most suitable racquets, strings, shoes and clothing as well as in technical matters on the court.

For you to be able to recognize, and act upon, this knowledge gives you greater power when working with manufacturers and players alike. The results of the survey can help coaches and players to find out more about the perceived roles of the varied entities involved in their development, as well as informing coaches, who are often the link between their players and the tennis brands in terms of sponsorship. Furthermore the roles of different stakeholders in the commercial, technical and overall development of junior elite tennis players are examined and analysed.

From the survey, it was possible to gather a thorough impression of the importance of sponsorship for junior players. The survey understands the lifestyles and pressures on these players and how they live their lives in general.

Some 790 interviews were obtained from a broad range of European countries. All respondents were players ranked within the top 300 of their respective countries (78% of them within their national top 50), and were aged between 15 and 18.

Throughout the report, findings are analysed by ‘emerging nations’ versus ‘established nations’, by national ranking position (top 50 vs. top 51 – 300) and also by gender.
The complete report comprises more than 200 pages, however the following extracts focus on topics that are of special interest to coaches, and provide food for thought when dealing with players in general and specifically with the commercial aspects of the player-coach relationship.

Aims in tennis

Before looking at commercial matters, a fundamental question when engaging with talented junior players is that of their long term intentions: how long, and to what level, do they expect to play the game?

By far the most popular goal of elite European juniors is to become full-time tennis professionals. 60% intend to do so, whilst a further 16% plan to pursue a tennis scholarship. The greater ability and potential of junior tennis players currently ranked in their nations top 50, is leading them more to plan a fulltime tennis playing career after the age of 18 than those with national rankings below 50. Most others plan to maintain a vocational involvement in tennis in the capacity of coach, part-time or amateur player.

This finding clearly validates the aim of discovering more about the habits of these players. For equipment manufacturers at least, these will be the heavy consumers of their products for many years to come.

The study moves on to analyse the vital area of training. The findings help to understand the varied relationships that players have with their coaches, an arrangement that may be family, professional or commercial.

Elite juniors look to a range of sources for coaching and training help and advice. The family, so important in encouraging the initial participation in tennis continues to play an important role in their development within the sport. Family members are far more likely to have a coaching role in emerging countries, with over a third of coaches being a relative. This figure drops to just 13% in established countries.

Tennis clubs and independent coaches are also significant, with some elite players receiving coaching from tennis academies (This is more likely for higher ranked players and those from established countries). Those ranked 51-300 in their country are most likely to be without any formal coaching and training help. There is little difference in help and support for training and coaching between male and female junior elite players.

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Sponsorship in general

The next part of the survey looks at the perception of sponsorship in tennis.

Just over half of elite juniors have a racquet sponsor, whilst only a quarter have clothing or shoe sponsors. Such racquet sponsorships for junior players typically take the form of heavy discounts on racquets purchased, meaning that the next generation of top tennis players – and their coaches – is a huge target group for tennis manufacturers. Elite juniors claim to be very aware of sports brands used by top professional players (Nadal, Federer, Sharapova, etc.), especially their favourite players.

Encouragingly, nine-in-ten take notice of these sponsorships and there is a high level of recognition for sponsors of clothing and rackets used by current top players. Over a quarter of players claim to be influenced to ‘a high degree’ by the sponsorship of their favourite player, whilst an additional 44% agree that this is an influential factor.

Overall, three quarters of elite juniors rely on their parents and coaches for help in dealing with sponsorship and management issues. This is especially the case for those ranked in the top 50. Once again, this underlines the important role played by parents and coaches in the early stages of a player’s career.

Racquets

The importance of the coach is once again illustrated when we look at the vital area of racquet purchasing. Almost half of all players, male and female, make their decision based on a recommendation from their coach.

The primary answer, that they use the racquet ‘most suited to’ their game, is also evidence, as it is invariably the coach who gives feedback on such matters.

A combination of these two factors, plus the fact that 75% of players like to try the racquet before purchasing, means that it is not surprising that racquet manufacturers are increasingly targeting coaches, as key influencers to promote, sell and influence their players’ choices.

Interestingly, an additional third of elite juniors also claim to choose rackets based on available sponsorships, especially male juniors.

Summary

From the brief examples given above, it is clear that the role of a coach is not confined to merely the teaching of tennis; rather that coaches are increasingly expected to take on the role of consultant and advisor with regards to equipment and
sponsorship matters. At a time when much attention is focused on attracting and retaining players to the sport, the findings of the Next Generation survey have been a tool for all entities involved with the junior player – parents, national federations, manufacturers and, as we have seen, coaches – to better understand and cater for the needs and aspirations of their players, increasing the likelihood of an enjoyable time in the sport and facilitating a future career in tennis.

If you would like to find out more about this survey, please contact Carola Löffler, carolal@tenniseurope.org, the reports are available for purchase.

REFERENCES

Sports Marketing Surveys & Tennis Europe (2008), Next Generation Survey - Industry Edition
Sports Marketing Surveys & Tennis Europe (2008), Next Generation Survey - Federation Edition

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