

**Survey of Indoor Tennis Facilities in Areas of Best
Supply - 2001**

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1. SURVEY OF INDOOR TENNIS FACILITIES IN AREAS OF BEST SUPPLY 2001

The aim of the survey of indoor tennis facilities was to provide Sport England with data for its Facilities Planning Model. As such the survey was carried out in three areas of 'best supply':

- Hertfordshire
- Dorset
- Warwickshire.

Therefore the results presented in this report reflect the position of indoor tennis across these three areas only and are not nationally representative. Nevertheless, the results do provide an indication of patterns of usage and management practices at indoor tennis facilities generally.

2. EXECUTIVE SUMMARY

2.1. CHARACTERISTICS OF THE FACILITIES

- Of the 19 centres taking part 7 were pay and play facilities, 7 voluntary members clubs and 5 were private clubs.
- Thirteen centres had other sports facilities on site whilst the remainder were dedicated to tennis. All except 2 centres had both indoor and outdoor courts.
- All centres had at least one catering facility on site two thirds had either/both a vending machines or a café which provided both food and drink.

2.2. MANAGEMENT OF THE FACILITIES

- Only 8 of the facilities were open to members of the public, 7 of these were open on a pay as you play basis.
- Of the centres which provided information, just under half charged an annual fee for adult membership which ranged from £50 to in excess of £1000 per annum. Hourly rates were also levied which depended on whether an annual fee was charged and the type of centre, pay and play centres being the cheapest and the private clubs the most expensive.
- All centres were open all year round for indoor tennis excepting those with air halls (3 centres) which were usually taken down in the summer.

2.3. USAGE

- Centres were normally open for long hours. Typical hours were from 8 or 9 in the morning until 10 at night in the weekdays, and until 9pm at the weekends. This represents an average of 13 hours in the week and 11 hours at weekends.
- Of the time centres were open just under two thirds was accounted for by indoor tennis usage.
- On average pay and play centres had a greater number of available court hours than voluntary members clubs.
- For both types of centre the best use of available time occurred on Saturdays
- The main types of usage identified by centre managers were; coaching, social tennis clubs/groups, casual/informal tennis, competition/matches, competitive training and other (special events)
- The overall usage pattern was predominantly casual/informal tennis (groups/clubs or ad hoc) followed by coaching. The usage time dedicated to general coaching was double that for competitive (squad) coaching.
- The use of courts for Ladies tennis appears to be greater than that for mens or mixed tennis. However although we have limited data in this area our findings on gender usage back this up.
- Doubles are twice as likely to be played than singles and special formats 3 or 5 players e.g coaching and rotations also comprise a significant minority.

2.4. PARTICIPATION

- There were an estimated total of 12,253 visits made to the 19 indoor tennis facilities over the 7 day period of the survey, March 12th – March 18th 2001.

- Around 36% of visits were made to pay and play facilities, 25% to voluntary members clubs and 39% to private facilities
- A total of 2,631 questionnaires were completed over the 7 day period and an estimated response rate from those eligible of 48%.

2.5. SOCIAL CHARACTERISTICS

- There was an even split of gender between the users of indoor facilities as per our survey of users. However when usage figures are analysed there appears to be greater overall participation by females.
- The percentage of males who played at pay and play centres was significantly higher than in the other types of centre.
- The overall player profile is focussed on the middle – older age categories (50% aged 41 years and above). There are also a significant minority of players of school age (23%).
- The socio-economic profile of indoor tennis players is non manual ABC1 – 92% of players come from ‘mainly non manual’ households.

2.6. CATCHMENT INFORMATION

- Players normally live within 5 miles of their tennis centre (69%) and most journeys take less than 15 minutes (64%).
- The majority of players had at least one car available to use themselves or for other members of the household.
- Even though players live within close proximity to the indoor tennis centre, transport to centres is by car (95%). Only 3% walk and 2% cycle or go by bus.

- Eighty percent of journeys originate from home whilst for 78% their destination is also home, after they complete their tennis session.

2.7. TYPES OF PARTICIPATION

- Three quarters of all visits by indoor tennis players were made by club members (74%), and 26% were made by members of the public.
- The majority of visits are for casual or informal tennis whilst one third are for coaching. Competitions and matches comprise a relatively small proportion of visits.
- A typical indoor tennis session is 2 hours. The length of session is similar in each of the 3 types of tennis club/centre.
- Players of indoor tennis typically play 3 times per week in the winter period October – March based on the survey period.
- Those playing in competitions tend to play more frequently than those who play mainly informal/casual tennis.
- Most players also play indoors quite frequently during the summer months, 92% claim to play at least some indoor tennis during the months of April – September. Again the most frequent users are the match/competition players.
- Most players who play indoor tennis also participate in outdoor tennis during the summer months but also to a lesser extent in the winter. Most use hard courts (65%), only 20% play on grass. One of the main reasons for this difference is that grass court facilities are concentrated in the voluntary members clubs - most of the pay and play and some of the private facilities do not have grass courts available.

- Most players use the indoor tennis facility nearest home (75%) however 25% do not. The most likely reason (22%) for this is better quality of facilities elsewhere. Convenience, cheapness and different base for their tennis club are noted as other reasons.

3. INTRODUCTION

This report presents the findings of a survey carried out by Sport England in mid-March 2001 to examine the use of indoor tennis facilities.

This survey is one of a series of sport facility studies being undertaken by Sport England. Others in the series completed to date have been:

- *Survey of Sports Halls and Swimming Pools in England, 1997*
- *Survey of Synthetic Grass Pitches, 1998*
- *Survey of Outdoor Grass Playing Pitches, 1999*
- *Survey of Indoor Bowls Facilities, 1999.*

The primary aim of these surveys has been to establish statistically reliable, authoritative data on the levels and patterns of use of sports facilities, their relationship to management practice and how these change over time. The data obtained from the survey of indoor tennis centres will be used to recalibrate Sport England's Facilities Planning Model (FPM). The FPM is a means of assessing facility requirements.

4. METHODOLOGY

The survey of indoor tennis centres was undertaken on behalf of Sport England by NFO BJM. It involved two elements:

- A survey of users
- A survey of programming and management practice.

The survey was carried out between Monday 12th March and Sunday 18th March 2001. The timing was chosen to reflect participation by regular users of indoor tennis facilities and not to include infrequent use that may, for example, occur during public holidays.

The study was carried out at 19 indoor tennis centres in three areas of England:

- Hertfordshire
- Dorset
- West Midlands

The areas were identified from provisional analysis of data from Sport England's Facilities Database as being the three areas of 'best supply' i.e. the areas where the supply of indoor tennis centres is highest relative to the local population. The primary output for the study, The Facilities Planning Model (FPM) dictates that areas of 'best supply' be selected.

The FPM is a mathematical model that compares supply (facility capacity) and demand (participation in sporting activity) for different types of sports facilities within a particular catchment area in order to identify any deficiency in supply. It is used to identify the priorities for development. The FPM was developed by the Scottish Sports Council using the results from surveys carried out in Scotland. It was then adopted by Sport England as a means of assessing facility requirements in England although still using Scottish data as the basis for its calculations.

The data underpinning the FPM comes from surveys carried out in 'areas of best supply' (i.e. areas considered to have as good a supply of facilities as possible). It assumes that in these areas supply meets demand and that there is no latent demand (i.e. all demand is met). The data from these surveys has created a number of assumptions about peak operating times, capacity, duration of visit, number and frequency of visits and catchment areas that are used in the model. When the model is applied to any geographical location it therefore compares existing supply with a scenario of 'best supply' and identifies the scale of any deficiency.

The aim of the survey of indoor tennis centres was to provide English-based data for the model. Therefore, the survey was carried out in the three identified areas of best supply.

Results from the survey therefore reflect the usage of indoor tennis centres across these three areas only (not national figures) and represent a single snapshot in time of only one week in time in March 2001. Nevertheless, the results provide an indication of patterns of usage and management practices at indoor tennis centres generally.

For further detailed of the methodology adopted for the research and the individual facilities included, please see the Technical Appendix to this report.

4.1. SURVEY OF USERS

Between 12th and 18th March 2001 an NFO-BJM research interviewer was present for a period of seven consecutive days at most of the centres. Due to anticipated lower usage a research interviewer was not present on Saturday 17th March at two small public voluntary members centres. At eleven of the nineteen centres an interviewer was present for twelve hours each day. In the remaining centre this varied from four to eleven hours a day. For more details regarding the presence of interviewers please see the Technical Appendix.

Each interviewer had the following two tasks:

- Distribute self-completion questionnaires (and collect after completion) to all indoor tennis players aged 11 or over. Each participant was only eligible to receive one questionnaire during the seven days.
- Count the actual number of participants taking part in indoor tennis during each day.

The count data was used not only to establish visit numbers but also to 'weight' the completed questionnaires, that is to make the survey outcomes reflect visits across all facilities selected for the study. For further information on 'weighting', please refer to the Technical Appendix at the end of this report. The count data was supplemented by non-response data which recorded the number of 'refused' ineligible players and the number of questionnaires distributed. A copy of the non-response form can be seen in the Technical Appendix.

The user survey questionnaire looked at:

- purpose of visit
- frequency of visits
- use of other tennis facilities (both indoor and outdoor)
- session length
- journey length
- demographic characteristics of the user such as sex, age, social class, ethnicity, disability.

In total, 2,631 users were surveyed across the 19 sites. Over the seven days of the study, an average of 645 visits were made to each facility (a total of 12,253 visits across the 19 sites).

4.2. PROGRAMMING AND MANAGEMENT SURVEY

Alongside the survey of users, facility managers were asked to complete a booklet containing a set of diary sheets for each day of the survey. They were asked to provide details of how each court at the tennis centres was utilised throughout each day, on a session-by-session basis. The sheets were completed at the end of each day so that they not only recorded sessions that were pre-booked but also those that took place on a casual basis. Information on each of the following was recorded:

- overall usage of the tennis centres (used, available but not used, closed)
- type of use (such as club, casual use)
- type of user (such as gender, adults/juniors)

Managers were also asked to complete a questionnaire that looked at aspects of the facility itself and management practices such as location, ownership, membership levels/fees, months when used and presence of other facilities.

Copies of both the diary sheet and the managers questionnaire can be found in the Technical Appendix.

5. CHARACTERISTICS OF THE FACILITIES

Sport England's database of sports facilities along with additional desk research conducted by NFO BJM identified a total of 21 indoor tennis facilities used by local people across the three geographical areas. Nineteen of these facilities agreed to take part in the survey – a response rate of 90%:

- Five out of six agreed to take part in Dorset/Wiltshire.
- Seven out of six agreed to take part in Hertfordshire.
- All seven agreed to take part in the West Midlands.

The only indoor facility that was not eligible was a private school in Hertfordshire which had two courts. These indoor courts were not available to the public even on a private membership basis.

Seven pay and play, 7 voluntary members' clubs and 5 privately owned facilities were covered by the research. Whilst previous studies in the series of facility surveys by Sport England included only publicly owned facilities – the FPM being primarily concerned with the provision of facilities for the public – findings from this study indicate that indoor tennis is an activity which revolves around all three types of clubs. Excluding any of these from the research would therefore have serious implications for the study's ability to reflect the actual position of indoor tennis in terms of patterns of usage and management practice.

Two facilities (both privately owned) refused to take part in the survey. The reasons for refusal reflected the private nature of the facilities – a desire for confidentiality and a disinterest in the survey outcomes.

Of the 19 facilities agreeing to take part, all completed the Management Survey and also the Usage Diary. However, there were some diaries which were not fully completed and four centres failed to complete the site questionnaire. In most cases information gained from the site visit was available.

5.1. LOCATION OF FACILITIES

Of the 19 facilities taking part in the survey, almost three-quarters were located in urban and suburban areas.

Table 1 – Location of Facility

LOCATION	Facilities in User Survey	
	%	Base
Built-up urban area	42	8
Suburban	32	6
Market town	10	2
Village	16	3
Base (number of facilities)	100	19

5.2. OWNERSHIP

As is evident from Table 2, there is a significant private sector involvement in the provision of facilities for indoor tennis. Over a quarter of the facilities (27%) included in this study were operated by a private/management company with a further 5% being joint ventures between a commercial operator and the local authority.

The largest category of facility was that operated as private members' club, accounting for almost half the facilities included in the study.

Facilities operated by a local authority represented 16% of the sample.

Table 2 – Ownership of Facility

OWNERSHIP	Facilities in User Survey	
	%	Base
Private company	11	2
Management company	16	3
Private members club/LTA	47	9
Local council	16	3
Joint venture – local council/private company	5	1
Other	5	1
Base (number of facilities)	100	19

5.3. OTHER SPORTS FACILITIES ON SITE

The range of other sports available on the site of the indoor tennis facility varied between the different centres, often being dependent on the type of ownership. As is evident from the following table (Table 3), two thirds had outdoor tennis courts on the site. Space for fitness training, a dance studio and a gym were also featured in a significant number of facilities. A third of facilities included squash courts, sauna, solarium on the site.

Table 3 – Other Facilities on Site

OTHER FACILITIES	Facilities in User Survey	
	%	Base
Outdoor tennis courts	65	11
Sports hall	18	3
Swimming pool	24	4
Outdoor grass pitches	24	4
Weightlifting room	24	4
Fitness room	53	9
Dance studio	41	7
Gym	24	4
Squash courts	35	6
Sauna	35	6
Solarium	35	6
Shooting gallery	6	1
Athletics track	12	2
Multi-use games area	12	2
Other	12	2
Base (number of facilities)	100	17

Note: Insufficient information was obtained from two of the facilities to include in this analysis

5.4. CATERING FACILITIES AVAILABLE

All of the indoor tennis centres which provided information on the catering facilities available (18), had at least one of the five listed facilities. One half had a café with slightly fewer (44%) providing a drinks vending machine and around 4 in 10 had a bar (39%).

Table 4 – Catering Facilities on Site

CATERING FACILITIES	Facilities in User Survey	
	%	Base
Bar	39	7
Café	50	9
Restaurant	22	4
Drinks vending machine	44	8
Snack vending machine	28	5
Base (number of facilities)	100	18

6. MANAGEMENT

6.1. ELIGIBILITY TO USE FACILITY

Managers of the facilities were asked for the categories of tennis player eligible to use the facility. As discussed in Section 5, 12 of the 19 facilities were either private or voluntary members clubs.

Table 5 – Eligibility to Use Facility

ELIGIBILITY	Facilities in User Survey	
	%	Base
Club members	78	14
Guests of club members	28	5
Members of the public – who pre-book	44	8
Members of the public – who do not pre-book	39	7
Base (number of facilities)	100	18

Half of the 18 facilities which provided this information claimed that the indoor tennis courts were open to the public, either by pre-booking or just turning up to gain access to a court. In contrast, four facilities were for the exclusive use of club members and their guests and a further three did permit organised groups of non-members and/or school groups to have some limited access to the facility, on a pre-booked basis.

6.2. FEES

Of the 15 facilities which provided information on fees and pricing, nine claimed that they charged an annual fee which ranged from less than £50 to in excess of £1000 for an adult membership. Most of these facilities offered a range of memberships covering families, juniors and seniors.

The hourly rate levied by the facilities exhibited some degree of variation, depending on the ownership of the facility and whether an annual fee was charged. Where an annual fee was levied, the hourly rate was around £4-£5 but where there was no annual fee, the hourly rate increased to around £12-£15. Once again, there were some variations in the hourly rate between off-peak and peak periods but also, in some instances, between adults and children.

6.3. MONTHS USED FOR INDOOR TENNIS

Out of the 19 facilities taking part in the research all were open for indoor tennis for the full 12 months of the year, and 16 open for indoor tennis all year. The 3 centres that were not were solely because their indoor tennis facility consists of 'air halls' which are normally dismantled during the summer months.

7. USAGE

Centre managers were asked to record details of how their courts were being used in a “usage diary” for seven consecutive days in March 2001.

Eleven out of the nineteen centre managers returned their diary sheets. Of these, nine were complete enough to allow analysis of the data recorded and had been completed by managers of pay and play centres and voluntary members clubs. Of the two diary sheets which were discounted, one had been returned by a private tennis centre and by a pay and play centre.

In order to analyse the way the centres were used, information collected on both the respondent and manager questionnaires was used as well as the data recorded on the usage diaries.

Types of usage were categorised into general groups and where possible, these groups contained the sub-category adult/junior (where “junior” was used to indicate players who were under 18).

In analysing the time spent on each type of usage, the unit of time used was a court hour.

7.1. FACILITY OPENING TIMES

The information received from managers was first divided into court hours that were *available for use* (for tennis or any other activity) and court hours that were *not available for use* (due to the hours the facility was closed or maintenance work).

There was some variation in the amount of time that centres were available for use.

Opening hours varied from as early as 7am to as late as 9:30am on weekdays and from 8am to 10am on weekends. Closing hours varied from as early as 8pm to as late as 11pm during the week and from 6pm to 10pm at the weekend.

- On average the centres were open for 13 hours every weekday and for 11 hours on a weekend day.
- As a result, more space was available for use during the week than at the weekend.
- At one centre, a court was closed for maintenance for part of the week. This represented a 1% drop in total availability of usable space.

Table 6 – Availability for Use

AVAILABILITY	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Space available for use:	54	57	47	47	302
Space not available for use:	46	43	53	53	258
Maintenance	1	1	0	0	3
Closed	45	42	53	53	254

7.2. USAGE OF AVAILABLE TIME

Of the time that centres were available for use, just under two-thirds was accounted for by indoor tennis usage. For the remaining one third of the time, courts were available but not used (i.e. no demand for them).

- The available space was more likely to be used at the weekend than during the week.
- Greater use of the available space was made on the Saturday (78%) than on the Sunday (69%). In contrast the weekday available space was only 62%.

Table 7 – Use of Indoor Courts

USE	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Space available for use:	100	100	100	100	302
Used for tennis	65	62	78	69	195
Space available but not used	35	38	22	31	107

Of the nine centre managers who returned their usage diaries, five were responsible for pay and play centres and four were responsible for voluntary centres. In order to compare usage of available time between the two types of centre, the data has been separated out according to centre type and is shown in Tables 8 and 9.

- On average, pay and play centres had a greater number of available court hours than voluntary centres.
- In addition, greater use of the available space was made at pay and play centres (66%) than at voluntary centres (60%).
- For both types of centre, the best use of available space occurred on Saturday.

Table 8 – Use of Courts at Pay and Play Centres

USE (Pay and Play Centres)	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Space available for use:	100	100	100	100	341
Used for tennis	66	63	79	74	227
Space available but not used	34	37	21	26	115

Table 9 – Use of Courts at Voluntary Members clubs

USE (Voluntary Members Clubs)	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Space available for use:	100	100	100	100	253
Used for tennis	60	59	76	62	156
Space available but not used	40	41	24	38	97

7.3. TYPE OF USE

Managers were asked to describe, where possible, the way in which the courts were being used for tennis. Six main usage types were identified:-

- Coaching – one-on-one/groups/schools
- Social/group tennis clubs – pre-allocated to regular groups eg, over 50s
- Casual – unstructured turn up and play
- Match/competition – both internal and external
- Competitive training – squads/county
- Other – special “one-off” events

Within these usage types it was possible to gain a general idea of the ages of the participants involved in terms of Adults (18+) and Juniors.

- In general adult usage was greater than junior usage.
- Casual usage was consistently the most common usage type. Of the total usage time, 40% was accounted for by this type of usage, rising to 45% on Sundays.
- Coaching was the next most popular type of usage accounting for just under a quarter of total playing time.
- Adult coaching was more likely to be one-on-one whilst junior coaching was more likely to be conducted in groups.
- Group coaching was the only category where juniors outnumbered adults.
- Social/group tennis clubs were more likely to occur during the week than at the weekend.
- Conversely, matches/competitions were twice as likely to occur at the weekend than during the week.
- Over 50s sessions accounted for 20% of the social club usage and always occurred on before 4pm during the week.
- Only one centre recorded sessions specifically for disabled players. This accounted for 3% of social usage time.

- Competitive training was marginally more likely to occur on Sunday than on Saturday or a weekday.

Table 10 – Use of Courts for Indoor Tennis

TYPE OF USE	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday*	Sunday	
Coaching	24	26	26	17	46
One-on-one – Adult	9	10	7	8	18
One-on-one – Junior	2	2	1	2	3
Groups – Adult	5	6	4	1	10
Groups - Junior	7	6	14	7	13
School lessons	1	1	0	0	1
Sports School	0	1	0	0	1
Social Clubs	18	21	8	9	33
Adult	16	18	8	9	30
Junior	2	2	0	0	3
Casual (turn up and play)	40	39	39	45	75
Adult	39	38	36	43	73
Junior	1	0	3	2	2
Match/competition	5	4	11	8	10
Competitive training (Squads/County etc)	11	11	11	13	21
Adult	10	10	10	13	19
Junior	1	1	1	0	2
Other	2	1	4	8	4

*Three centres had not fully completed their usage diaries for Saturday. As a result when calculating types of usage for Saturday, data from these three centres was excluded and is based on data from six centres rather than all nine.

7.4. TYPE OF USER

The centre managers were asked to record whether the tennis courts were occupied by men-only, women-only, or by both men and women.

Very few managers actually stated this and for 92% of the time that tennis was being played in the nine centres, the gender of the players is not known.

Table 11 – Use of Courts for Indoor Tennis – By Gender (Across 9 centres)

GENDER OF USER	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Men	2	2	1	*	5
Women/ladies	4	6	*	2	13
Mixed	2	1	3	5	5
Used but not stated	92	92	95	93	279

*Negligible percentage.

However, one centre manager, of a voluntary members club in the West Midlands, completed the usage diary in great detail with respect to the gender of the participants. Given that this club is one of the larger clubs, it can be assumed that its data is more representative of the general situation than the collective data of the nine centres as outlined in Table 11.

Consequently, information collected for this one centre has been included in order to give a better idea of the breakdown of usage in terms of gender and is displayed in Table 12.

- Women-only were occupying the courts for 44% of all the time used for tennis at the centre, almost twice the amount of time accounted for by men-only.
- Just over a quarter of the time used for tennis was specifically designated as mixed gender.
- Mixed gender tennis was four times more likely to occur at the weekend than during the week and accounted for 70% of the time on Sunday.
- No women-only sessions took place on Saturday. From this it would appear that women are significantly more likely to play tennis with other women on Sunday than on Saturday.
- Men were more likely to play tennis with members of their own sex on Saturday than on Sunday.

Table 12– Use of Courts for Indoor Tennis – By Gender (Large voluntary members club in the West Midlands)

GENDER OF USER	Time %			
	Total	Weekdays	Saturday	Sunday
Men	23	27	18	6
Women/ladies	44	59	0	23
Mixed	27	14	46	70
Used but not stated	6	5	36	0

7.5. FORMAT OF USE

Centre managers were asked to state the time dedicated to each game format. Most centre managers recorded the number of people on a court at any one time although one did specify the game format in great detail. All the information was combined to work out the numbers of singles/doubles/larger groups.

Three centre managers had not fully completed their usage diaries for Saturday. For the hours that their courts were being used the format of use was therefore not known and was recorded as “used but not stated”. This accounts for 83% of the total “used but not stated” format hours on Saturday.

- Overall, doubles games were the most likely format for tennis accounting for 40% of the total available court time used.
- Doubles games were almost twice as likely to be played than singles games on weekdays and on Sunday.
- Large groups of 5 or more players were least likely to be playing on Sunday than any other day.

Table 13 – Use of Courts for Indoor Tennis – By Format (Large Voluntary Members Centre, West Midlands)

FORMAT OF USE	Time %				Average number of court hours per facility
	Total	Weekdays	Saturday	Sunday	
Singles	22	22	19	27	44
Doubles	40	43	28	40	79
3 players	2	1	4	8	4
5+players	17	18	20	10	34
Used but not stated	18	16	29	15	34

8. PARTICIPATION IN INDOOR TENNIS FACILITIES

This section provides information on:

- overall participation in indoor tennis
- the social profile of users
- types of participation
- frequency of participation
- catchment information
- use of other indoor facilities
- session length.

Information in this section was derived from the User Survey conducted at each of the 19 facilities. Data was collected for those participants aged 11 years and over only. Participation is presented in two ways:

- visits (that is, each occasion that an individual visited a tennis facility);
- visitors (information about each individual).

Information presented about visitors is derived from the survey information on visits and frequency of visit. The data is representative only of the 19 facilities included in the study for one week in the spring of 2001 (Monday March 12th to Sunday March 18th 2001). The information had been analysed by type of club as the usage character varied. Details of the weighting process used for the to calculate the number of visits can be found in the Appendix.

8.1. OVERALL LEVELS OF PARTICIPATION

Using frequency of visit information, during an average seven day period in March 2001, it is estimated that a total of 12,253 visits were made to the 19 facilities included in the study. This represents an average of 645 visits per facility.

- The number of visits per facility during the week ranged from 49 to 1534.
- Around 36% (4,364) of visits were made to pay and play centres, 25% to voluntary members clubs and 39% (4,755) to private facilities.
- The total number of interviews achieved during the survey period across the 19 facilities was 2,631 i.e. an estimated 48% of all eligible people (ie those over 11years) using the 19 indoor tennis centres were interviewed.

8.2. SOCIAL CHARACTERISTICS

Within this section, information is shown in terms of visitors (players) from information from the user survey.

8.2.1. Gender

Overall the gender of users was evenly split between men and women with men slightly higher than women by 2%.

- The percentage of male players at pay and play centres was significantly higher (57%) than those in voluntary members (48%) and private clubs (45%). Correspondingly the proportion of women playing at pay and play centres was significantly lower than men at the other types of club/centre.

Table 14 – Gender of Players

%	All players (2549)	Pay & Play (1108)	Voluntary Members (837)	Private (604)
Male	51	57	48	45
Female	49	43	52	55

Excludes 'not stated'

8.2.2. Age

In terms of the overall age profile, 50% of tennis players were aged 41 years or above whilst one quarter (25%) were 11-25 years.

- The age profile of players varied between type of indoor tennis club/centre. Pay and play facilities appear to be attracting younger players; in these 30% were 11-25 years compared to 25% in voluntary members clubs and only 16% in private clubs.
- Older players are most likely to be found in the voluntary members clubs, 23% of voluntary club members were over 55 years compared to only 19% in pay and play and 15% in private clubs.
- There are some gender differences within the age groups. More male users are found in the 11-18 year age group than women. In contrast women are more likely to play than men in the 41-54 year age group.

Table 15 – Age of Players

AGE IN YEARS	All Players (2488)	Pay & Play (1079)	Voluntary Members (811)	Private (598)
11 – 18	21	25	21	12
19 – 25	5	5	4	4
26 – 40	24	26	17	31
41 – 54	31	25	35	38
Over 55	19	19	23	15

Excludes 'not stated'.

8.2.3. Full Time Education

There were just below one quarter of players who were in full time education either at school or university. The majority, 83% were at school compared to just 17% at college or university. There were significantly more players at school rather than college or university, at pay and play centres.

Table 16 – Age When Finished Full Time Education

%	TOTAL PLAYERS
Base: All in Full time Education	(580)
In Full time education (school)	83
In Full time education (college/university)	17

Excludes 'not stated'

8.2.4. Employment

Those at school or in full time work dominate the use of indoor tennis centres (23% and 37% respectively). There are differences in employment status between the type of club /centre;

- Pay and play centres have significantly more school children/students playing indoor tennis than the other types of centre; 28% compared to 23% in voluntary members and 13% in private clubs.
- In contrast, private clubs have significantly more working people compared to other types of centre – 58% working compared to 51% in voluntary members clubs and 50% in pay and play centres. The same trend is shown for those full time at home where the proportion of players is much higher in private clubs than at the other two types of centre (17% in private clubs, compared to 13% in voluntary members clubs, and 7% in Pay and Play centres).

Table 17 – Employment Status of Players

%	All Players (2531)	Pay & Play (1104)	Voluntary Members (833)	Private (602)
Still at school/Full time student	23	28	23	13
Working full time (30+ hours/week)	37	37	35	40
Working part time (< 30 hours/week)	15	13	16	18
Retired	12	13	13	10
Unemployed	1	-	-	1
Looking after home/family	11	7	13	17
Other	1	2	-	1

Excludes 'not stated'.

8.2.5. Socio-Economic Grouping

Those with an income earner in their household were asked about the occupation of the chief income earner. Retired respondents were asked to record the occupation of the chief income earner before retirement.

The use of tennis facilities was dominated by the non-manual socio-economic groups (ABC1). Ninety-two percent of tennis players came from a household where the chief income earner was classified as mainly non-manual. The proportion of non manual workers was highest in the voluntary members clubs where 95% classified themselves as mainly non manual. In contrast, in pay and play centres the figure was significantly lower, (88%) however, still very high overall.

Table 18 - Socio-Economic Group of players - summary

%	All Players	Pay & Play	Voluntary Members	Private
	(2488)	(1018)	(767)	(572)
Mainly Non Manual	92	88	95	93
Mainly Manual	8	12	5	7

Table 19 – Socio-Economic Group of Users - detailed breakdown

%	All Players (2488)	Pay & Play (1018)	Voluntary Members (767)	Private (572)
Any non-manual:				
Higher professional/senior management	56	47	66	64
Manager/technical & intermediate Professional	26	30	23	24
Other non-manual	6	8	5	3
Don't know but non-manual	1	2	2	2
Any manual:				
Skilled manual	7	9	4	6
Semi-skilled manual	1	2	1	1
Unskilled manual	-	1	-	-
Don't know but manual	1	1	-	-

Excludes 'not stated'.

8.2.6. Disability

Only 3% of tennis players considered themselves as having a long-term illness or disability which limits their daily activities or work. Differences between types of centre were minimal with a range of only 2%. These figures were significantly higher than in the Sport England Bowls survey (June 2000) where 82% considered themselves as having a disability.

Table 20 – Use of Tennis Facilities by People With Disabilities

	All Players	Pay & Play	Voluntary Members	Private
%	(2523)	(1097)	(827)	(599)
With disability	3	4	2	4
No disability	97	96	98	96

Excludes 'not stated'.

8.2.7. Ethnicity

Indoor tennis players in the three geographical areas included within the study (Herts. Dorset and the West Midlands) were almost exclusively 'white'. Only 5% of players were from ethnic minority communities. The pay and play centres had the highest proportion of ethnic minorities (8%) split between Afro Caribbean's and Indians.

Table 21 – Ethnic Origin of Users

	All Users	Pay & Play	Voluntary Members	Private
%	(2536)	(1103)	(832)	(601)
White	95	92	98	97
Other	5	8	2	3

Excludes 'not stated'.

8.3. TYPES OF PARTICIPATION

Information in Sections 8.3.1 and 8.3.2 is discussed in terms of visits, whilst information in Section 8.3.3 is more appropriate to discuss in terms of visitors (players).

8.3.1. Club Member vs Public Use

Participation in indoor tennis is usually as a member of a club - 74% of all visits made to indoor tennis facilities were made as a club member.

- 67 % of all visits were made by members of clubs based at the facility where the questionnaire was distributed, whilst a further 7% were made by members of other clubs – players taking part in ‘away’ league matches/competitions against the facility in question.
- Only 26% of all visits were made by members of the public.
- The only truly open public play on indoor courts is found in the pay and play centres - 58% of players on these courts were members of the public/non members. The opposite is true of voluntary members clubs and private clubs where only 11% and 6% of visits were by the public.
- Visits by members of the public were most likely to be pre-booked. This was typical in pay-and-play indoor tennis centres, where 36% of people had pre-booked. The contrasting figures of 11% and 6% in voluntary members and private clubs respectively are not surprising given they are members clubs rather than open for public use.
- Guest visits are only a very small proportion of the whole (3%) and are similar across the three club types

Table 22 – Type of Use on this Visit

%	Visits			
	All	Pay & Play	Voluntary Members	Private
Any Club:	(12,206)	(4338)	(3126)	(4744)
Member of a club based at this facility	67	28	85	90
Member of a club based at another facility	7	14	4	4
Any Other:				
Guest of club member	3	4	2	3
Member of the public – pre-booked	15	36	6	1
Member of the public – not pre-booked	4	9	1	-
Other	4	9	2	2

8.3.2. Competitive v. Informal Use

Participation in indoor tennis was largely based around casual/informal tennis and coaching sessions rather than league competitions and matches. Half of all visits were made by tennis players who were taking part in casual/informal tennis, and just under a third of visits for coaching/lessons. Only 17% of visits comprised league matches and by far the majority of these (13%) were matches with members of the same club.

- The proportion of casual/competition visits varied with age. For children under 19 years the balance was only slightly in favour of casual tennis (casual tennis being 16% of visits compared to 13% of visits for competitions). In contrast in the 55 years+ age group only 9% were playing in competitions whilst 71% of visits were for casual/informal play.
- The types of centre/club showed differences in the proportion of competitive and informal use; the number of visits for competitions was highest in private

and voluntary members clubs (21% and 20% respectively) compared to only 12% in pay and play tennis centres. The differences in the number of visits for casual/informal use was less marked although the trend was the same, the highest number visits for informal tennis in private clubs (56%) and the lowest in pay and play centres (46%).

- There are more visits for tennis coaching in pay and play centres (40% of visits) compared to private centres where only 21% of visits were for coaching sessions. In voluntary clubs 30% of all visits were for coaching sessions.

Table 23 – Competitive or Informal use on day of Visit

%	Visits			
	All	Pay & Play	Voluntary Members	Private
	(12097)	(4280)	(3107)	(4711)
Any League/Competition:				
League match	17	12	20	21
Any Other:				
Casual tennis	51	46	50	57
Training /coaching run by coach	25	34	26	19
Other Coaching sessions	5	6	4	2
Over 50s/community sessions	2	2	-	1

8.3.3. Membership of the Centre/Club

As mentioned earlier, the private and voluntary members clubs are members clubs, whereas the pay and play centres are open to the public during opening times. Not surprisingly then 41% of Pay and Play players were non members compared to only 8% and 12% of players from private and voluntary members clubs respectively.

- Adult membership is the most typical type, followed by family and junior membership.
- In private clubs family membership is much more popular than in the voluntary members clubs (24% compared to 14%)
- Junior membership is highest in voluntary clubs (16%) closely followed by pay and play centres (14%)

Table 24 – Membership of Centre/Club

%	Players			
	All (2586)	Pay & Play (1120)	Voluntary Members (852)	Private (614)
Adult	44	36	49	52
Senior Citizen	8	9	8	6
Family Member	12	3	14	24
Junior	13	14	16	6
Student	3	4	3	2
Other	2	2	1	2
Not a member of facility	24	41	12	8

Excludes 'not stated'. Multicodes possible.

8.4. TENNIS SESSION LENGTH

The information in this section 8.4 and in 8.5 is discussed in terms of visits.

The average length of a tennis session was 2 hours, accounting for nearly two thirds of all visits to indoor tennis facilities. An additional 24% of sessions lasted between 2 and 3 hours. A minority (7%) of sessions lasted over 3 hours.

- There were more shorter sessions at voluntary members clubs than at the other club/centre types. In voluntary clubs sessions were significantly more likely to be up to 2 hours (76% of visits), compared to 65% for pay and play and 68% for private clubs.
- For really long sessions 4 hours and above there were no significant differences between clubs/centre types; voluntary members clubs 5%, pay and play 3% and private clubs 3%.

Table 25 – Session Length

Hours	Visits			
	All	Pay & Play	Voluntary	Private
Average Session Length	2hrs	1hr 57min	2hrs	2hr 03min
Up to 1 hour	16	19	14	14
1-1.5 hours	26	26	31	23
1.5-2 hours	27	20	31	31
2-3 hours	24	28	15	27
3-4 hours	3	4	5	1
4-6 hours	2	2	2	2
Over 6 hours	2	1	3	1

8.5. FREQUENCY OF PARTICIPATION AT FACILITY

8.5.1. Previous Seven Days

Participants in indoor tennis tend to play frequently. During the previous seven days, 12,253 visits had been made to indoor tennis facilities made by an estimated 4,084 players, an average of 3 visits per player (based on weighted data of all players). When only eligible payers are analysed (all over 11years) the figure is 2 visits per person

- Just under half of all tennis players had played indoor tennis two or three times at the facility in the past seven days, whilst a further 31% had taken part four or more times. Just under one quarter of players made just one visit to the facility in the previous seven days
- Competition players tended to play more often. Of those taking part in leagues/competitions 70% played 3 or more times compared to only 51% of casual/informal tennis players.
- Frequency across centre type varied significantly, with members from private clubs playing the most frequently – 66% played 3 or more times in the previous 7 days compared to 44% of voluntary club visits and 35% of pay and play centre visits.

Table 26 – Frequency of Visits in Last Seven Days

%	Player Visits in last 7 days			
	All (10739)	Pay & Play (3656)	Voluntary (2755)	Private (4327)
Once*	23	37	22	12
Twice	27	28	34	22
Three times	19	12	19	26
Four times	12	7	11	18
Five times or more	19	16	14	22

Excludes players visiting for the first time and 'not stated'.

8.5.2. Previous Four Weeks

Thirty-three of all indoor tennis player visits were from those who had played 8 or more times over the previous 4 weeks. A further 48% had taken part between four and seven times i.e. between once and twice a week. Just 19% had taken part less than four times over the previous 4 weeks. The overall average number of visits over the previous 4 weeks was 6. The average number of visits was highest in private clubs (7) and lowest in pay and play centres (5).

Table 27 – Number of Times Visited the centre/club in Past Four Weeks

%	Player Visits in last 4 weeks			
	All (7223)	Pay & Play (2987)	Voluntary Members (1930)	Private (2306)
Once*	5	6	5	3
Twice	8	7	6	9
Three times	6	9	5	4
Four times	26	38	22	16
Five times	7	6	10	6
Six times	10	7	12	12
Seven times	5	5	5	5
Eight or more times	33	22	35	45

Excludes players visiting centre/club for the first time and 'not stated'.

8.5.3. During Summer (April – September)

The majority of indoor facilities were permanent structures and therefore indoor courts were available during the summer – only in 4% of cases was this not the case. Air halls were found in three of the voluntary members clubs and these were dismantled in the summer to allow outdoor play. It is important to note that many of

the pay and play facilities did not have outdoor facilities and therefore indoor play is the only option.

- 92% of players claimed to use the indoor tennis facility to take part in indoor tennis during the months of April to September. Of these, 47% said they played indoor tennis more than twice a week during these months.
- The frequent users during the summer are mainly the competition players - they are most likely to play 3 or more times - 24% played 3 or more times compared to only 14% of casual/informal tennis players

Table 28 – Frequency of Using Facility for Indoor Tennis from April to September

%	Frequency of Player Visits			
	All (11682)	Pay & Play (4158)	Voluntary Members (2955)	Private (4646)
More than 3 times a week	17	11	9	28
2 or 3 times a week	30	22	22	42
Once a week	27	40	21	20
Once or twice a month	10	12	15	5
Once every 2 or 3 months	4	5	6	1
Once every 6 months	1	1	2	-
Less often	2	3	3	1
Never	4	6	4	1
Courts Not available	4	-	16	-

Excludes 'not stated'.

8.6. CATCHMENT INFORMATION

Information in Sections 8.62 to 8.65 is discussed in terms of visits, whilst information in Section 8.61 is more appropriate to discuss in terms of visitors (players).

8.6.1. Car Ownership Levels

The majority, (83%) of players had a least one car available to use for themselves or other members of their household.

- Players from pay and play facilities were most likely not to have use of a car. Just over one fifth (22%) did not have access to a car compared to only 15% in voluntary clubs and 10% in private clubs.
- Similarly those who had access to 2 or more cars were most likely to be from private clubs or voluntary members clubs. Two fifths, ie 42% from private and 40% from voluntary members clubs had access to 2 or more cars, whilst only 31% did from pay and play facilities.

Table 29 – Number of Cars Normally Available for Use by Family

%	Players	Players		
	All (2568)	Pay & Play (1110)	Voluntary Members (846)	Private (612)
None	17	22	15	10
One	47	47	45	48
Two	30	26	32	34
Three or more	6	5	8	8

Excludes 'not stated'.

8.6.2. Method of Transport

The vast majority (95%) of all player visits to indoor tennis facilities were made by car, 3% by foot and 2% came by public bus or bicycle.

- Players from private clubs were the most likely to arrive by car.
- There were differences between centre types for non car users. Players from voluntary members clubs were more likely to walk (7%) than either the private (1%) or pay and play indoor player (2%).
- Similarly those arriving by car were more likely to be driven if playing at a pay and play centre (27%) than either of the other two club/centres types (19% voluntary and 11% private club).

Table 30 – Main Method of Transport Used to Get to Facility for this Visit

%	Players	Player Visits			
	All (2603)	All (12116)	Pay & Play (4291)	Voluntary Members (3109)	Private (4717)
Car/van (driver)	72	76	67	70	86
Car/van (passenger)	22	19	27	19	11
Walked	3	3	2	7	1
Public bus	1	1	2	1	-
Motor cycle	-	-	1	1	-
Bicycle	1	1	1	2	1
Other(incl train)	1	-	-	-	1

Excludes 'not stated'.

8.6.3. Origin of Journey

Almost all, (80%) of visits made to indoor tennis facilities originated from home. Just 6% of tennis participants made their journey to the centre from work, reflecting the relatively high proportions of over 55s, those working in the home and college/school children who play.

- The highest proportion of players other than those coming from home was found in those coming from school or college to pay and play facilities. Ten percent of visits originated from school or college to go to pay and play centres compared to only 4% for private and 7% for voluntary members clubs.

Table 31 – Origin of Journey to Centre on Day of Visit

%	Player Visits			
	All (12126)	Pay & Play (4306)	Voluntary Members (3106)	Private (4715)
Straight from:				
Home	80	76	84	81
Work	6	7	4	8
Relative/friend's house	2	4	1	2
Shopping	2	1	1	2
School/college	7	10	7	4
Other	3	2	3	3

Excludes 'not stated'.

8.6.4. Destination After Visit

The majority, (78%) of all journeys away from indoor tennis facilities were journeys directly to the player's home. A minority (9%) went shopping, the second largest destination.

- Members from private clubs were least likely to be going home (71%) compared to 79% pay and play and 82% voluntary members clubs
- They were also more likely to be going shopping than members from the other 2 clubs

Table 32 – Destination of Journey From Centre on Day of Visit

%	Player Visits			
	All	Pay & Play	Voluntary Members	Private
	(12018)	(4285)	(3093)	(4641)
Straight to:				
Home	78	79	82	71
Shopping	9	6	7	12
Relative/friend's house	4	4	2	4
Work	3	2	4	4
School/college	2	1	1	3
Drink/lunch in pub	1	2	1	-
Do another Sport	1	1	1	1
Other	2	5	2	5

8.6.5. Catchment Distances and Times

A half of all visits made to indoor tennis facilities were journeys of under 3 miles, and just under two thirds (69%) were under 5 miles.

- Journeys to voluntary members clubs tended to be shorter than for the other centre types (67% were under 3 miles). For pay and play 43% of journeys were under 3 miles and for private clubs 45% under 3 miles.
- Players are willing to travel further to pay and play centres. Thirty-nine percent of visits to pay and play centres were over 5 miles compared to only 19% of voluntary clubs and 28% to private clubs.

Table 33 – Distance Travelled to Centre for Visit

%	Player Visits			
	All (12090)	Pay & Play (4298)	Voluntary Members (3103)	Private (4690)
Under ½mile	9	8	18	5
½miles but under 1 mile	10	8	17	6
1 mile but under 2 miles	15	12	18	15
2 miles but under 3 miles	16	15	14	19
3 miles but under 4 miles	10	8	8	13
4 miles but under 5 miles	9	8	6	13
5 miles but under 10 miles	17	21	11	16
10 miles or over	13	18	8	12
No Idea	1	2	-	1

Excludes 'not stated'.

In terms of the journey time, 64% of journeys to indoor tennis facilities took up to 15 minutes or less. Only 9% of journeys took over 30 minutes. In keeping with the findings above on distance travelled, the longest average journey time of 21 minutes was to pay and play centres and the shortest to voluntary members clubs, 14 minutes.

Table 34 – Journey Time to Centre for Visit

%	Player Visits			
	All	Pay & Play	Voluntary Members	Private
	(11865)	(4182)	(3024)	(4661)
Up to 15 minutes	64	52	76	68
15 – 30 minutes	27	35	20	25
30 – 45 minutes	5	8	2	5
45 – 1 hr minutes	2	3	1	1
1 –1hr 30 minutes	1	1	1	-
Over 1hr 30 minutes	1	1	-	1
Mean Journey Time (mins)	17	21	14	16

8.7. USE OF OTHER LOCAL TENNIS FACILITIES

Information in Section 8.73 is discussed in terms of visits, whilst information in Sections 8.71 and 8.72 is more appropriate to discuss in terms of visitors (players).

8.7.1. Indoor Tennis Facilities

Around one third of indoor tennis participants claimed to use other indoor tennis centres in the local area.

- Players playing in leagues/competitions were significantly more likely than those playing informally to have used other facilities (45% compared to 29%) This is unsurprising since many matches/competitions will involve travelling to other clubs for an event.
- Players from private clubs are least likely to use other local indoor tennis centres.

Table 35 – Whether Use Other Local Indoor Tennis Facilities

%	Players			
	All	Pay & Play	Voluntary Members	Private
	(2579)	(1123)	(846)	(610)
Yes	32	32	37	25
No	68	68	63	75

Excludes 'not stated'.

Play in Winter and Summer Seasons

- In keeping with the difference in seasonality, a significantly higher proportion of players claimed to never to use indoor tennis facilities in summer than winter (11% in summer compared to only 2% in winter).
- There was little variation between club types regarding the frequency of play in summer and winter.
- The most use of other local indoor tennis facilities was by players at pay and play centres. Approximately two fifths of players played at other clubs/centres at least once a week in both summer and winter. This contrasted with one quarter of voluntary club members and around one third of those who play indoor tennis at private clubs.

Table 36 – Frequency of Using Other Local Indoor Tennis Facilities

%	April-September Players				Oct-March Players			
	All	P&P	VM	Priv	All	P&P	VM	Priv
Base: All players who use other local indoor tennis facilities	(622)	(291)	(245)	(126)	(804)	(349)	(308)	(147)
More than 3 times a wk	7	8	7	6	7	8	7	6
2 or 3 times a week	11	12	10	11	12	14	9	12
Once a week	17	23	9	20	21	26	17	17
Once or twice a mth	13	13	13	10	16	19	15	13
Once every 2 or 3 mths	17	15	17	17	19	14	21	22
Once every 6 months	10	8	12	10	10	7	12	10
Less often	14	11	16	20	14	9	17	19
Never	11	10	16	6	2	3	2	1

Excludes 'not stated'.

8.7.2. Outdoor Tennis Facilities

The majority of indoor tennis players also claimed to take part in outdoor tennis (71%). There are differences between club types mainly because some centres only have indoor facilities throughout the year (and no outdoor) and some remove their air halls to increase outdoor provision during the summer months.

- Of those who do use outdoor facilities hard tennis courts are most often used. Only 20% use grass whilst 65% use hard courts.
- Differences between club/centre types are marked- in voluntary members clubs 81% use hard courts compared to only 51% in pay and play, (again the fact that some pay and play facilities do not have outdoor courts does affect these figures)
- The likelihood that players play tennis outdoors does not generally differ with age except in 2 age categories; - playing tennis outdoors is significantly more likely for 41– 55yrs age group (81%) than for the 19-25s (66%).
- League/competitive indoor tennis players (81%) are also more likely to take part in outdoor tennis than those playing informally (74%).

Table 37 – Whether Use Local Outdoor Tennis Facilities

%	Players			
	All (2560)	Pay & Play (1104)	Voluntary Members (845)	Private (611)
Yes	71	54	91	76
Yes				
Grass courts	20	5	47	9
Hard courts	65	51	81	69
No				
Not Avail	7	15	-	1

Avail-Don't Use	22	31	9	23

Excludes 'not stated'.

- As expected frequency of participation in outdoor tennis was much greater in the summer than winter months. In summer 46% play at least twice a week whereas in winter the percentage is around half this (21%).
- In contrast at indoor facilities in the winter months, 77% play at least twice a week (based on the number of times played in the last 7 days). Even allowing for the fact that the question format was slightly different between the summer and winter (less specific for summer play on outdoor courts) the claimed frequency of play on Indoor courts in season is much greater than that for outdoor courts in season (77% compared to 46%).
- The frequency of use is significantly different between club types; In voluntary members clubs, 62% of players say they play at least twice a week whilst only 39% of pay and play and 27% of private members say they play this often.
- Winter use of outdoor courts is generally low – most usually play once or twice a month or less often. Nearly two thirds (58%) play once a month or less often.
- Private clubs are least likely to play outdoors in winter (42% never play) whilst voluntary clubs are the most likely (only 14% never play outdoors in winter).

Table 38 – Frequency of Using Local Outdoor Tennis Facilities

%	Summer Players (April-September)				Winter Players (Oct-March)			
	All	P&P	Vol M	Priv	All	P&P	Vol M	Priv
	(1992)	(756)	(748)	(488)	(1871)	(709)	(732)	(430)
More than 3 times a wk	14	13	18	8	6	6	7	6
2 or 3 times a wk	32	26	44	19	15	16	19	5
Once a week	19	21	18	18	21	21	25	13
Once or twice a mth	14	15	8	23	13	13	16	10
Once every 2 or 3 mths	8	10	4	14	10	11	11	9
Once every 6 months	2	3	1	3	5	5	4	7
Less often	3	4	1	5	6	7	4	8
Never	8	8	6	10	24	21	14	42

Excludes 'not stated'.

8.7.3. Whether Using Nearest Facility to Home

Users of indoor tennis centres tended to use the facility that was closest to their home. Only one quarter of visits to indoor tennis facilities did not involve the nearest facility. This tends to be the case regardless of the type of centre involved.

Table 39 – Whether Using Facility Nearest Home for This Visit

%	Players			
	All	Pay & Play	Voluntary Members	Private
	(2603)	(1126)	(858)	(619)
Yes	75	72	78	75
No	25	28	22	25

Excludes 'not stated'.

The main reason for one quarter of visits not being to the nearest centre was because there were better quality of facilities elsewhere (22%). Approximately one fifth (18%) of visits not to a centre nearest home were due to greater convenience and a further 11% because of the base of the club they were playing with.

- Those from private tennis clubs were significantly more likely to be playing there because of better quality of facilities than for other types of centre. (28% compared to 17% pay and play and 16% at voluntary members clubs)
- Cheapness was more likely to be a reason for playing at a play and play centre than at the other two types of centre.

Table 40 – Reasons Why Not Using Facility Nearest Home for This Visit

%	Player Visits			
	All (2582)	P&P (262)	Vol M (169)	Private (137)
Base:All not using nearest Indoor Tennis Facility				
Better quality of facilities	22	17	16	28
More convenient for people playing with Base/club team playing with	18	11	18	19
Timing of training session more suitable	11	10	18	8
Cheaper	8	10	3	6
Other Sports available	8	12	3	6
Easier to book courts	6	1	4	12
Better quality tennis coaching	6	9	3	3
Tournament/competition arranged here	5	6	6	2
	3	3	10	2

Excludes 'not stated'.

8.8. NON TENNIS FACILITIES USED WHEN AT THE CENTRE

8.8.1. Other Sports Played whilst at Centre/Club

Just over one-fifth of centres were sole tennis clubs/centres with no other facilities other than tennis. These were most likely to be voluntary members clubs, 39% of which said there were no other sports available

Table 41 – Proportion of Centres Where No Other Sports Available

%	Player visits			
	All	Pay & Play	Voluntary Members	Private
	(8949)	(2824)	(2459)	(3666)
No other sports available	22	25	39	7

Table 42 - The Main Sporting Activities That Players Took Part In on the Day of Visit

%	Player Visits			
	All	P&P	Vol M	Private
Base: All who were at locations with other sports facilities	(7018)	(2105)	(1511)	(3402)
Gym	29	15	28	39
Swimming	24	5	25	35
Badminton	7	8	-	9
Aerobics	6	5	-	1
Squash	6	4	10	5
Table tennis	4	3	6	3
None	42	62	37	32

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Excludes not stated'. Multicodes possible.

8.8.2. Whether Food or drink was purchased

On just over half of all visits food and drink are purchased after playing indoor tennis. Significantly more players purchase food or drink at private clubs compared to pay and play and voluntary members clubs.

Table 43 - How many purchased Food or Drink whilst at the centre?

	Player visits			
%	All (12095)	Pay & Play (4286)	Voluntary Members (3104)	Private (4706)
Purchased food or drink	53	44	49	62

The most likely type of beverage to be purchased is drinks from the bar. Of all who did buy something, 62% bought from the bar whilst 24% bought drinks or food from the café. Only 18% specifically bought food from the bar whilst only 12% used the vending machines.

Although not all these facilities are available at every centre it is possible to note some differences between centres regarding purchase of drinks from the bar.

- Having a drink at the bar is much more likely in private and voluntary members clubs than in pay and play facilities. In pay and play facilities there were only 37% of player visits where drinks were bought from the bar compared to 74% at private and 69% at voluntary members clubs.

Table 44 - What type of Food and Drink was purchased?

%	Player visits			
	All (6298)	Pay & Play (1889)	Voluntary Members (1519)	Private (2889)
Base: All who purchased food or drink				
Drinks from Bar	62	37	69	74
Food from Bar	18	12	21	21
Drinks/food from café	24	32	18	21
Food/drink from vending machines	12	31	9	2
Other	2	1	5	2

Excludes 'not stated'. Multicodes possible.

8.9. INDOOR COURT ADDITIONAL FEES

Two fifths (41%) of all players have to pay an additional fee to play on indoor courts at their centre/club.

- Additional fees are much more likely at voluntary members clubs where two thirds of all players had to pay extra (67%).
- Additional fees were most unlikely to be required at private clubs, where it can be assumed the annual membership fees normally include additional charges.

Table 45 - Additional Fees Payable for Use of Indoor Courts

%	Players			
	All (2554)	Pay & Play (1100)	Voluntary Members (846)	Private (608)
Yes	41	37	67	13
No	49	45	29	83
DK	10	18	4	4

9. IN SUMMARY

Indoor tennis tends to be played by white, professional men and women who are most likely to be aged between 26 and 54 years or still at school (11-18 years).

They are generally club members and regular users of indoor facilities. Most play indoor tennis at least twice a week during the winter season. Use by the general public is in the minority, just over one quarter of all use.

The majority of indoor tennis sessions are non competitive – normally casual or informal tennis with friends or other club members. Tennis coaching sessions are the second most likely type of use, comprising around one quarter of all sessions.

The average length of an indoor tennis session is 2 hours which accounts for two thirds of all visits.

Most indoor tennis players live locally to the tennis centres, usually within 5 miles. Even so practically all travel by car to get there.

The majority just play indoor tennis at the centre nearest to their home. Those who do use other centres are most often those playing competitively in league matches or competitions.

Indoor courts are used for two thirds of the centres' opening times and usage tends to be greater during the weekends than during the week.

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10. TECHNICAL APPENDIX

10.1. INTRODUCTION

This survey report outlines the methodology adopted for a survey carried out by Sport England in March 2001 that examined the use made of both publicly and privately owned indoor tennis facilities in areas of best supply in England. It also examined the different management approaches adopted by the facilities.

The survey provides indicative data on the socio-demographic characteristics of users of such facilities, the levels and patterns of use and the impact of management policies on these levels and patterns of use.

This appendix provides details of the rationale for undertaking the survey, a summary of the methodology, how facilities were selected for participation and how data was 'weighted' to ensure that a representative sample of visitors achieved. The main findings from the survey can be found in the main body of the report – Survey of Indoor Tennis Facilities. Also included are details of tennis centres which participated in the study, the questionnaires and the fieldwork documents used for the usage diary, count and non-response data.

10.2. RATIONALE FOR THE SURVEY

Over the last 20 – 25 years, Sport England and its predecessor (GB Sports Council), have commissioned a number of studies which have examined factors relating to the use and management of sports facilities. Until recently, these studies tended to be on a case study basis providing information on catchment areas, customer profiles and attitudes at a local level. Consequently, the identification of aggregate trends in facility use and management required at a national strategic level was not possible.

To combat this, Sport England have, in the past few years, commissioned a series of sport facility surveys to assist with its national strategy. The Survey of Indoor Tennis Facilities is the most recent in this series. The others to date have been:

- Survey of Sports Halls and Swimming Pools in England, 1997
- Survey of Synthetic Grass Pitches in Areas of Best Supply, 1998
- Survey of Outdoor Grass Playing Pitches in Areas of Best Supply, 1999
- Survey of Indoor Bowls Facilities in Areas of Best Supply, June 2000

Such surveys have been crucial to Sport England in a number of key strategic areas:

- Strategic Guidance
Data has acted as performance indicators against which local authorities and both bodies can measure their own performance and practices.
- Facilities Planning Model
Data on participation in sport are crucial to Sport England's strategic planning requirements. As part of this, Sport England adopted the Facilities Planning Model (FPM) as a means of assessing facility requirements. The series of sport facility surveys allows the Model to be recalibrated using relevant English survey data, with its application extended to cover all regions in England.
- Impact of the National Lottery
The survey outcomes provide benchmark indicators against which the performance of Lottery-funded sports facilities can be measured and evaluated. The revised FPM can also be used in the decision-making process for lottery sports fundings by enabling an assessment to be made of the demand for built facilities.

The objectives of the Survey of Indoor Tennis Facilities focus primarily upon the Facilities Planning Mode. The FPM requires the relevant survey to be conducted in the three geographical areas of England considered to have the 'best supply' of relevant facilities i.e. the areas where supply of indoor tennis facilities is highest relative to the local population.

10.3. METHODOLOGY

The survey of indoor tennis centres was undertaken on behalf of Sport England by NFO BJM. It involved two elements:

- A survey of users.
- A survey of programming and management practice.

The survey was carried out over a one week period between 12th and 18th March 2001. The timing was chosen to reflect participation by regular users of indoor tennis facilities and not to include infrequent use that may, for example, occur during public holidays. It was also chosen to coincide with the period selected for previous surveys in the series.

The study was carried out at 19 indoor tennis facilities in three areas of England:

- Hertfordshire
- Dorset
- West Midlands.

The areas were identified from provisional analysis of data from Sport England's Facilities Database as being the three areas of 'best supply' i.e. the areas where the supply of indoor tennis facilities is highest relative to the local population. The primary output for the study, the FPM dictated the areas of 'best supply' be selected.

The FPM is a mathematical model that compares supply (facility capacity) and demand (participation in sporting activity) for different types of sports facilities within a particular catchment area in order to identify any deficiency in supply. It is used to identify the priorities for development.

The FPM was developed by the Scottish Sports Council using the results from surveys carried out in Scotland. It was then adopted by Sport England as a means of assessing

facility requirements in England although still using Scottish data as the basis for its calculations.

The data underpinning the FPM comes from surveys carried out in 'areas of best supply' (i.e. areas considered to have as good a supply of facilities as possible). It assumes that in these areas supply meets demand and that there is no latent demand (i.e. all demand is expressed). The data from these surveys has created a number of assumptions about peak operating times, capacity, duration of visit, number and frequency of visits and catchment areas that are used in the model. When the model is applied to any geographical location it therefore compares existing supply with a scenario of 'best supply' and identifies the scale of any deficiency.

10.3.1. Survey of Indoor Tennis Players

At each of the 19 facilities, an NFO BJM research interviewer was present for the majority of the opening hours on seven consecutive days when the facility was open. Each interviewer had the following two tasks:

- Distribute self-completion questionnaires (and collect after completion) to a random selection of tennis participants aged 11 or over during each tennis session (session times were identified prior to the study). Each participant was only eligible to receive one questionnaire during the seven days.
- Count the actual number of participants taking part in tennis during each session (excluding school parties).

At the minority of centres where throughput of players was low, interviewers were only present for some of the week. However, usage data was supplied by managers for the whole of the survey week.

The count data was used not only to establish visit numbers but also to 'weight' the completed questionnaires, that is to make the survey outcomes reflect visits across all facilities selected for the study. For further information on 'weighting', please refer to the 'Weighting' section.

The user survey questionnaire looked at:

- purpose of visit
- frequency of visits
- use of other tennis facilities (both indoor and outdoor)
- use of other non-tennis facilities
- session length
- journey details
- demographic characteristics of the user such as sex, age, social class, ethnicity, disability.

The survey took place during the hours that the facilities were open for use. Only people taking part in indoor tennis were included and the minimum age for eligible respondents was 11 years.

In total, 2631 questionnaires were completed with players who had taken part in indoor tennis during the fieldwork period. Through the application of weights and grossing-up, it was estimated that 5481 actual participants used the 19 facilities at least once during an average seven days across the fieldwork period. Therefore, 48% of all participants were interviewed.

The count information indicated that a total of 12,253 visits were made to the 19 facilities in an average seven day period – an average of 645 visits per facility.

10.3.2. Programming and Management Survey

Alongside the survey of users, facility managers were asked to complete a booklet containing a set of diary sheets for each day of the survey. They were asked to provide details of how each court at the tennis facility was utilised throughout each day (between 9 am and 11 pm), on a session-by-session basis. The sheets were completed at the end of each day so that they not only recorded sessions that were pre-booked but also those that took place on a casual basis. Information was recorded on each of the following:

- overall usage of the courts (used, available but not used, closed)
- type of use (such as club, casual use)
- type of user (such as gender, adults/juniors)
- format of use (singles, pairs, triples, fours, five or more players).

Managers were also asked to complete a questionnaire that looked at aspects of the facility itself and management practices such as location, ownership, membership levels/fees, months when used and presence of peripheral facilities.

10.4. SELECTION OF CENTRES

Before the Survey of Indoor Tennis Facilities could take place, Sport England provided a list of indoor tennis facilities in each of the three selected areas. Co-operation was subsequently sought from each relevant facility to take part in the study by visiting each site prior to the survey.

Nineteen facilities finally agreed to take part in the research from the .. identified in the universe. Sport England supplied each facility with a set of posters that advertised the purpose of the survey to customers.

- All 19 sites took part in the Customer Survey, with all facility managers completing a Management Questionnaire. Out of the 19 facilities, 11 completed the Programme Survey diary sheets.

10.5. WEIGHTING THE SURVEY DATA

Data for the study was required to be readable at the facility level and was to be based on both:

- Indoor tennis visitors;
- Indoor tennis visits.

The study was designed to achieve a random sample of indoor tennis visitors (no visitor could be interviewed more than once). Therefore, the purpose of the weighting was to gross up the achieved sample of visitors at each facility to the actual number of visits to that facility made by all visitors during the seven day fieldwork period (as recorded by the count data). The following procedure was adopted at each facility:

- For each visitor, a weight equivalent to the number of times they had used the facility in the past seven days was allocated (from Q8a on the questionnaire).

- For visitors not completing this question, a weight equivalent to the average for that facility was allocated.
- The number of visits made by the sample of visitors to the facility was totalled.
- This was compared with the actual number of visitors to the facility in the seven day fieldwork period (from the count information) and the number as calculated on the non-response sheets. An average of the two figures was taken as the total throughput for each centre.
- A constant factor (derived by dividing the total actual visits by the total sample visits) was then applied to each visitor so that the sample of visits equals the actual visits at each facility.

For previous sport facility surveys in the series, customer interviews were weighted to take account of differing levels of throughput at different times of the day throughout the seven day period. Reweighting on this basis was not considered necessary in the case of indoor tennis facilities for the following reasons:

- Capacities were usually low meaning that the majority, if not all participants in any one session could be approached by an interviewer.
- Repeat visiting during the seven day period was very high (average 3 visits across the sample). Therefore, if visitors were missed on their first visit, they remained likely to be given the opportunity to take part on a subsequent visit.

The above situation led to an estimated 48% of all eligible indoor tennis participants completing a questionnaire. There was no evidence to suggest that visitors in 'busy' sessions were less likely to have completed a questionnaire than visitors in 'quiet' sessions.

10.6. SAMPLING ERRORS

Because only a representative sample of participants were interviewed, it is not possible to be certain that the figures obtained were precisely those that would have been found had all indoor tennis participants been interviewed. However, it can be said that the figures are correct to within certain tolerances. These tolerances depend on the sample size and also on the order of magnitude of the research findings being considered. The following table shows certain sample sizes and gives the margin within which it is possible to be 95% certain that the figures will be accurate.

Sample Size	Research Findings				
	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
2,600*	± 1%	± 2%	± 2%	± 2%	± 2%
600	± 2%	± 3%	± 4%	± 4%	± 4%
400	± 3%	± 4%	± 4%	± 5%	± 5%
200	± 4%	± 6%	± 6%	± 7%	± 7%
100	± 6%	± 8%	± 9%	± 10%	± 10%
50	± 8%	± 11%	± 13%	± 14%	± 14%

* Total Sample only

So, for example, if 10% of respondents were first time visitors to the indoor tennis centres, the actual figure may vary from 9% to 11% as a result of sampling error.

For similar reasons, when comparing findings between sub-groups (e.g. by geographic area), it is not possible to be certain that differences found between these areas are genuine unless the sample interviewed in each area are of a certain minimum size. It is therefore possible to be 95% confident that any percentage differences found that are larger than those in the following table are genuine for given sample sizes. Conversely, if the differences are less than those given, the differentials may be due to biases in the sample rather than genuine differences between areas.

	Magnitude of Figures Being Compared				
Sample Size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
600 – 600	3%	5%	5%	6%	6%
400 – 400	4%	6%	6%	7%	7%
400 – 200	5%	7%	8%	8%	9%
200 – 200	6%	8%	9%	10%	10%
200 – 100	7%	10%	11%	12%	12%
100 – 100	8%	11%	13%	14%	14%
50 – 50	12%	16%	18%	19%	20%

The figures shown throughout assume a single-stage random sample. In practice that is a statistical ideal, almost never achieved in commercial research. Statistical theory indicates that an additional design factor should be applied to all of the confidence figures stated. This value is always a matter of judgement.

10.7. COPIES OF QUESTIONNAIRE AND FIELDWORK DOCUMENTS

(See overleaf)