



# SURVEY RESULTS

VENUE HEALTH SURVEY

OCTOBER 2024



# BACKGROUND AND SURVEY CONTENT

- After running a quarterly volunteer engagement & venue health survey in 2023, the survey has been adapted in 2024 to focus only on venue health and will be issued twice yearly.
- The September 2024 survey covered
  - Club health metrics (among committee members who say they have sufficient knowledge to answer these)
  - A “deep dive” on the financial situation of the club
  - Attitudes and knowledge around safeguarding
- The survey was issued to c.17,000 volunteers, with c.2,500 completing the questionnaire in part or in full, a response rate of 15%, in line with last wave.



# PROFILE OF PEOPLE SURVEYED VS PROFILE OF PEOPLE RESPONDING

	March 2024		September 2024	
	Invitations (17087)	Responses (Full & Partial) (c.2600)	Invitations (17189)	Responses (Full & Partial) (c.2500)
Female	47%	50%	47%	50%
Male	53%	50%	53%	49%
Under 45	17%	<b>10%</b>	17%	<b>9%</b>
45-54	20%	<b>15%</b>	19%	<b>15%</b>
55-64	32%	34%	32%	33%
65+	32%	<b>41%</b>	32%	<b>40%</b>
Central & East	19%	20%	19%	19%
North	18%	15%	18%	18%
South West	15%	16%	15%	15%
Midlands	17%	15%	17%	16%
London	10%	10%	10%	11%
Other South East	10%	10%	10%	11%
Scotland	8%	7%	8%	7%
Wales	3%	3%	3%	3%

# ROLE OF PEOPLE SURVEYED VS ROLE OF PEOPLE RESPONDING

	March 2024		March 2024	
	Invitations (17087)	Responses (c.2600)	Invitations (17087)	Responses (c.2600)
<b>Committee Member</b>	38%	30%	40%	35%
<b>Club Main Contact</b>	21%	31%	22%	31%
<b>Welfare Officer</b>	11%	11%	7%	6%
<b>Volunteer</b>	9%	8%	13%	10%
<b>Chairman</b>	5%	6%	5%	6%
<b>Administrator</b>	5%	5%	5%	5%
<b>Treasurer</b>	4%	3%	4%	3%
<b>Other</b>	8%	8%	4%	4%
<b>(Self-defined) contact with LTA for club</b>				
Do this most often for club	n/a	18%	n/a	18%
One of a number who generally do this	n/a	23%	n/a	21%
Do this occasionally, others do it more	n/a	21%	n/a	22%
Little or no contact with LTA for club	n/a	36%	n/a	37%

# HEADLINE MEASURES

## CLUBS & VOLUNTEERS

As clubs make up a such huge part of the tennis landscape, it's important for us to understand what's happening in them, both in terms of their current health, as well as how they feel about their future.

We have been surveying clubs and volunteers over the last 4 years, which has helped us develop the [venue support toolkit](#), housing practical tools and resources linked to all aspects of running a successful club.

The following slides provide an overview of what volunteers said about their club health.

# WE ASK CLUBS TO SCORE THEMSELVES FROM 1 – 5 ACROSS FIVE CORE AREAS THAT MAKE UP A SUCCESSFUL CLUB

## Core aspects of a healthy club

▼  Display this question

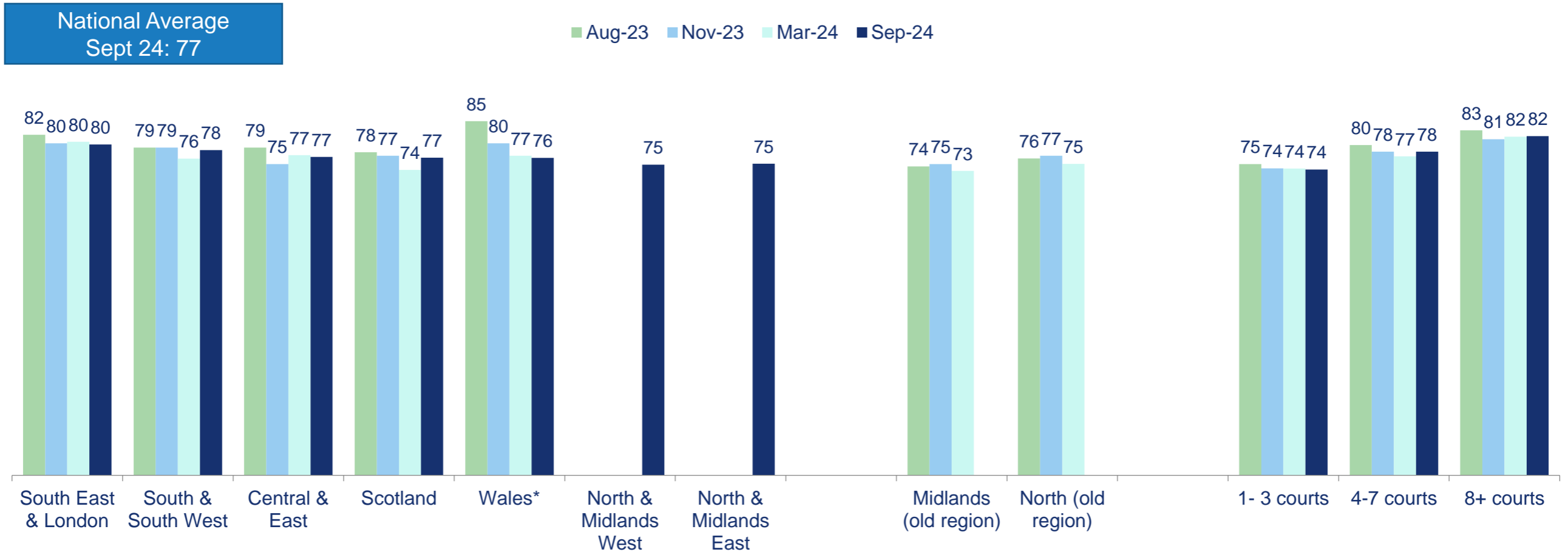
If The next few questions are about the general health of your tennis club. By that we mean aspects... Yes Is Selected

How would you rate the **current** health/state of your tennis club in regards to the following measures? 1= not healthy at all and 5 = very healthy

	1 = not healthy at all	2	3	4	5 = very healthy
Financial Stability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Governance and Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Membership Growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Membership Retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Court Programming and Utilisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# HEALTH SCORES REMAIN BELOW THE NATIONAL AVERAGE IN THE NORTH AND MIDLANDS, AND AMONG THE SMALLEST CLUBS

**Club Health by Region and Number of Courts**

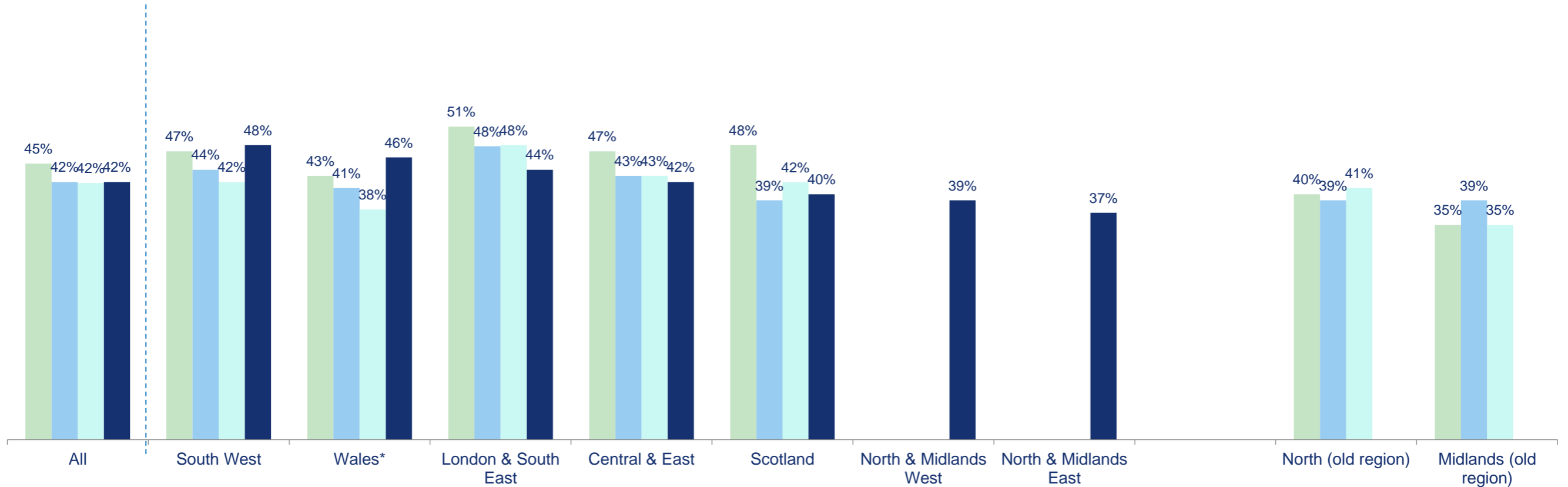


How would you rate the current health/state of your tennis club in regards to the following measures?  
 Sep 24: SE&London 363, Central & E 337, N&ME – 315, N&MW – 365, S&SW – 357, Scotland – 140, Wales 57\* - caution low base, 1-3 courts (729), 4-7 courts (961), 8+ courts (289)

# COMPARED TO MARCH, VENUES IN WALES AND THE SW HAVE BECOME MORE POSITIVE, BUT SENTIMENT HAS DIPPED ELSEWHERE

Positivity about future of Club: % Very Positive

■ Aug-23 ■ Nov-23 ■ Mar-24 ■ Sep-24

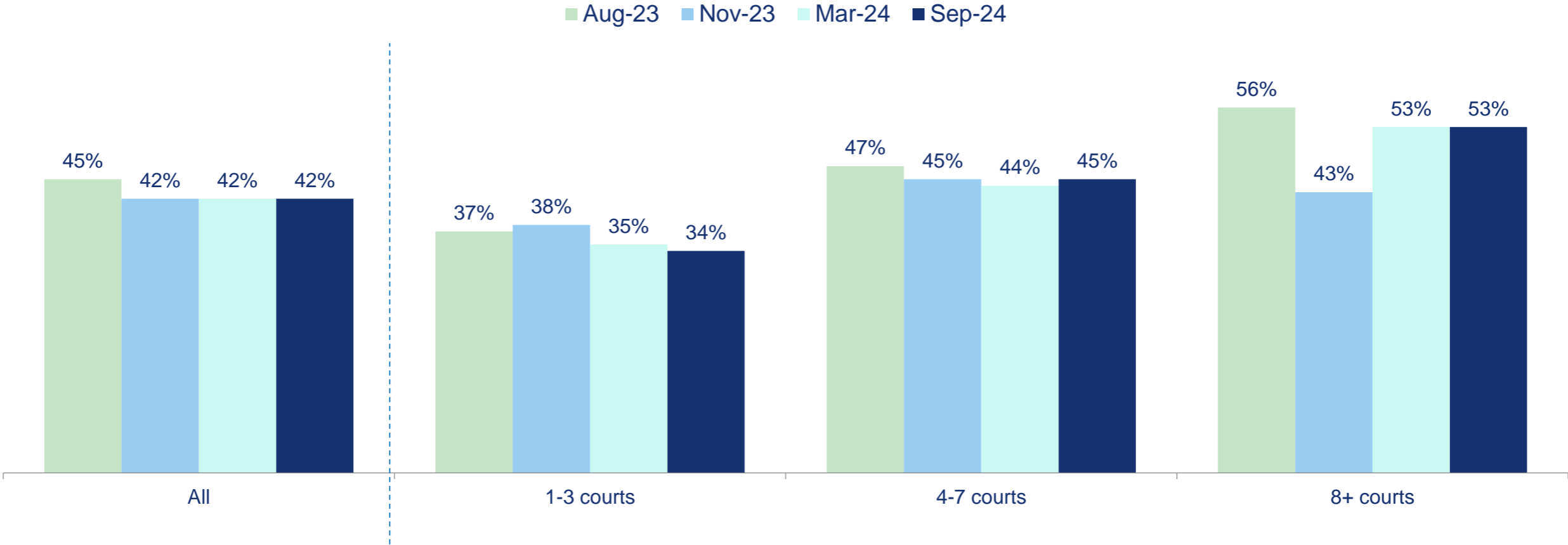


And how positive or negative do you feel about the future for your tennis club?  
 Sep 24: SE&London 363, Central & E 337, N&ME – 315, N&MW – 365, S&SW – 357, Scotland – 140, Wales 57\* - caution low base, 1-3 courts (729), 4-7 courts (961), 8+ courts (289)



# SMALLER CLUBS CONTINUE TO BE LEAST POSITIVE ABOUT THE FUTURE – THOUGH THERE HAVE BEEN DECLINES SINCE SUMMER 2023 ACROSS ALL SIZE BANDS.

Positivity about future of Club: % Very Positive



And how positive or negative do you feel about the future for your tennis club?  
Total (1975) 1-3 courts (729), 4-7 courts (961), 8+ courts (289)

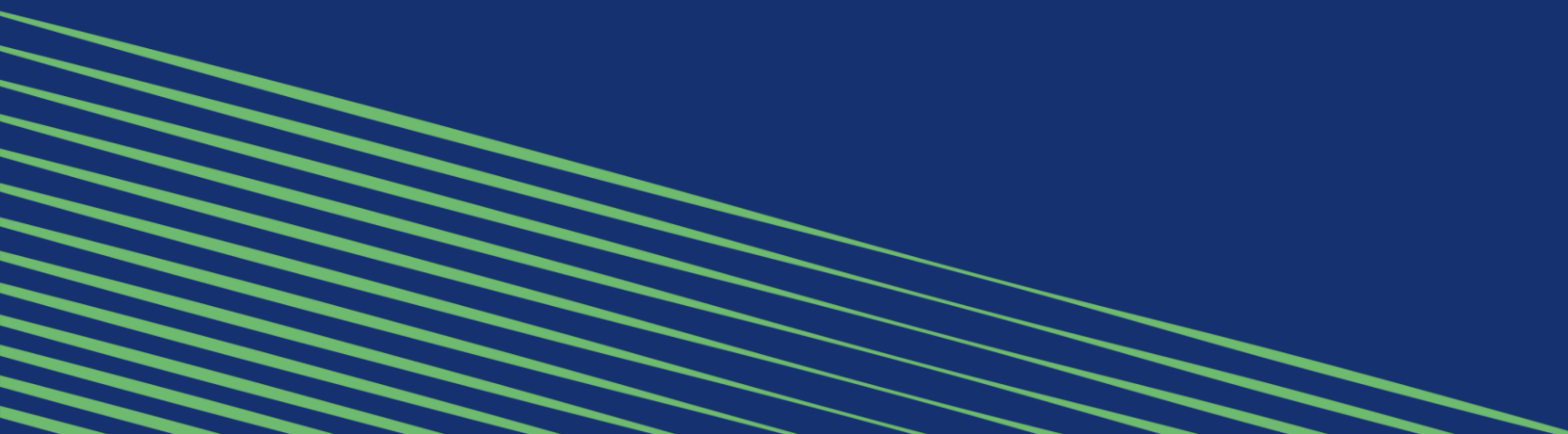
# REASONS FOR SENTIMENT ABOUT THE FUTURE OF THE VENUE

## TEXT ANALYSIS OF OPEN QUESTION (KEYWORD FREQUENCY)

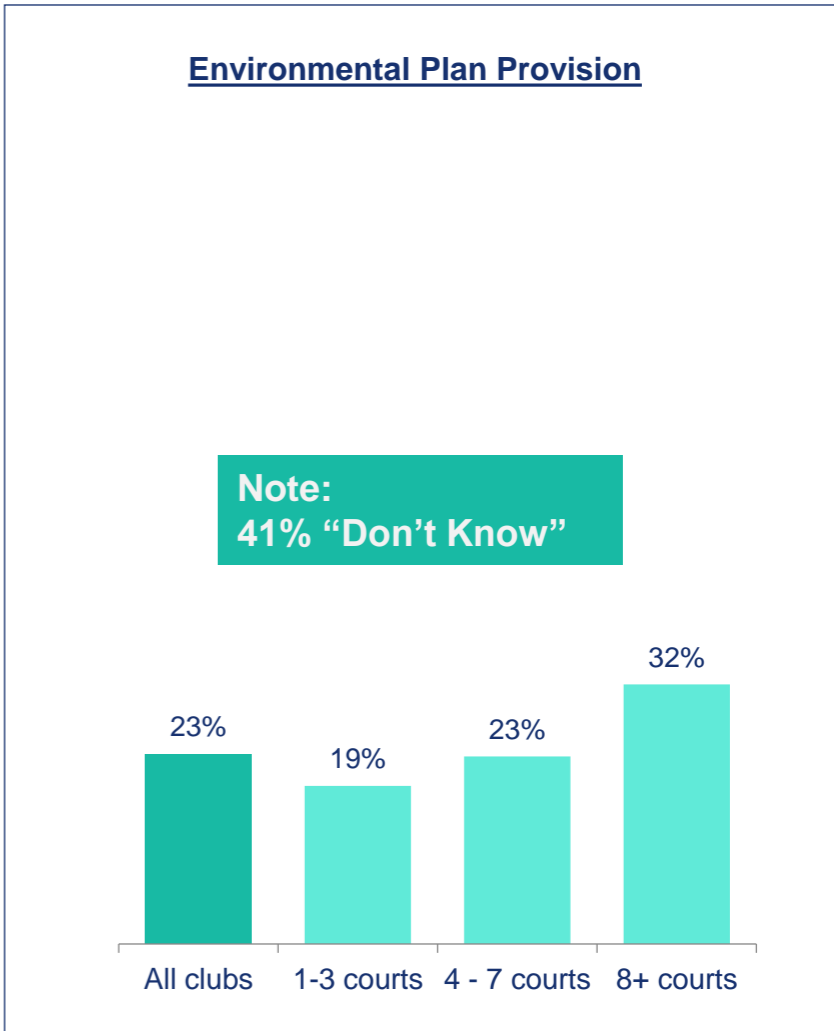
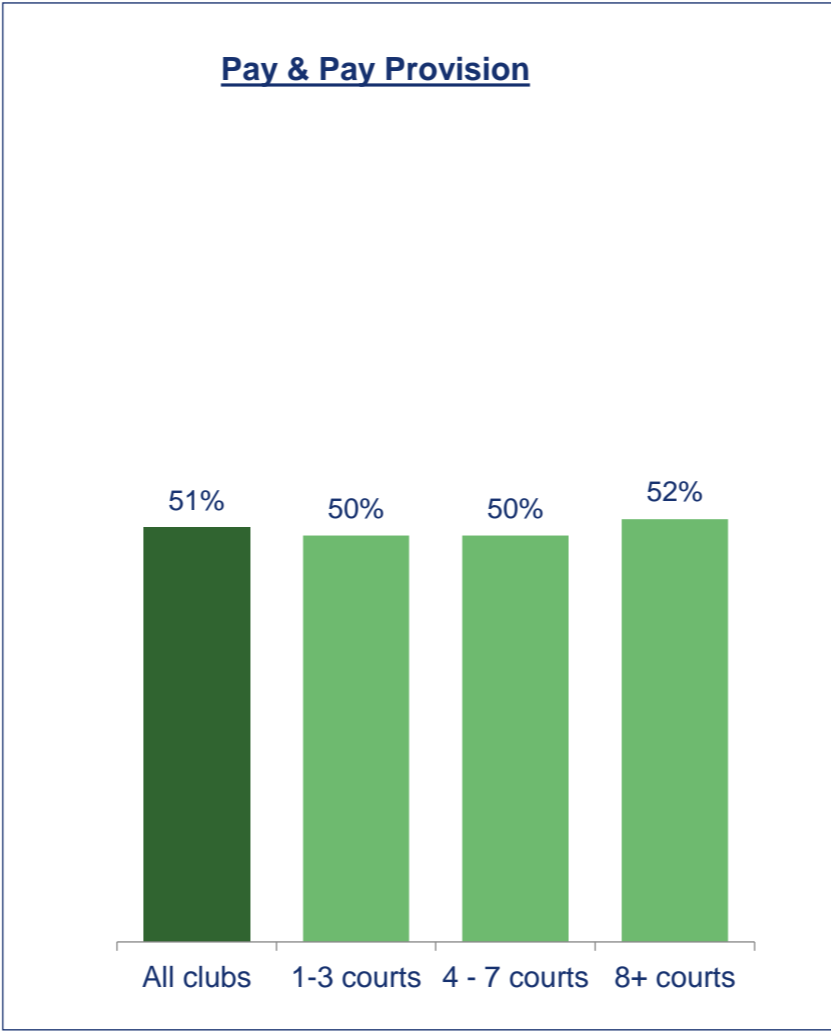
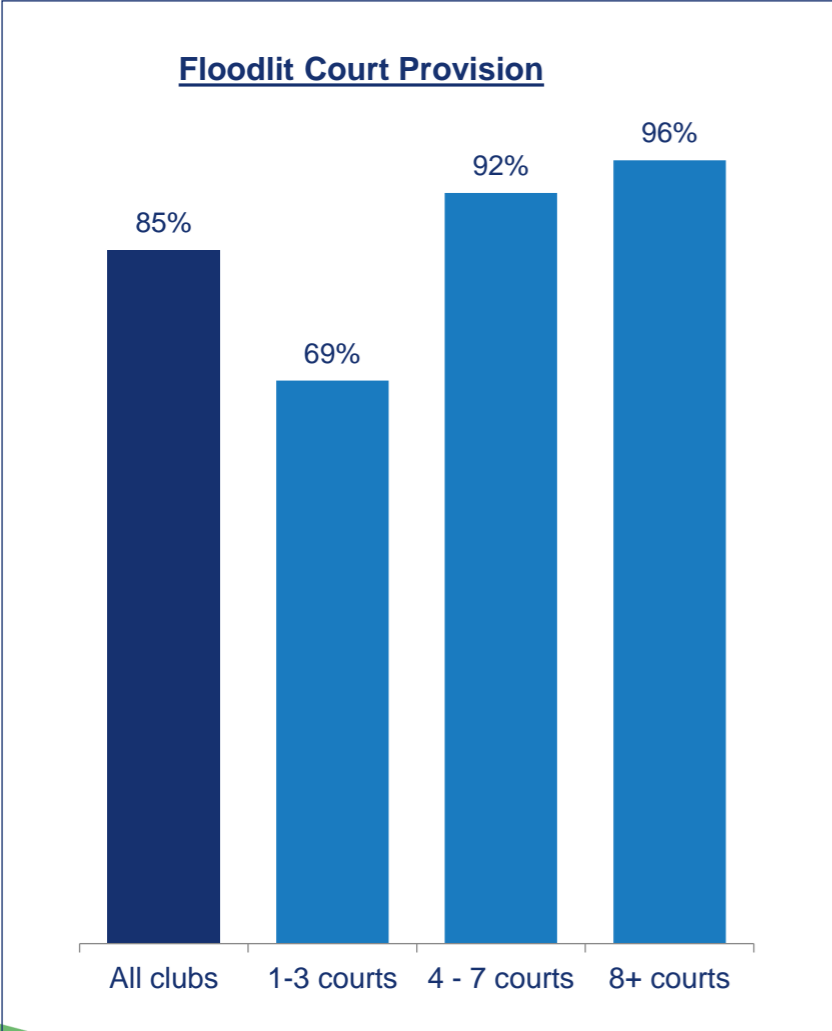
	Sentiment about Club's Future			
	Very positive	Quite positive	Neither positive nor negative	Quite OR Very negative
Members / membership	61%	59%	61%	67%
Courts	26%	25%	23%	34%
Coaching / programme	30%	20%	14%	24%
Chairman / committee	24%	17%	13%	20%
Juniors / youth / kids	16%	15%	10%	20%
Finance / funding / cost / revenue / expenditure	10%	12%	16%	27%
Young	5%	11%	14%	16%
Volunteers	4%	7%	13%	14%
Padel / pickleball	7%	6%	4%	5%
Small	4%	6%	10%	12%
Friendly / inclusive / welcoming	9%	4%	1%	0%
Community	5%	3%	3%	3%
Competition / tournaments	4%	4%	3%	5%

Why do you feel this way about the future of your tennis venue?

# CLUB INFRASTRUCTURE



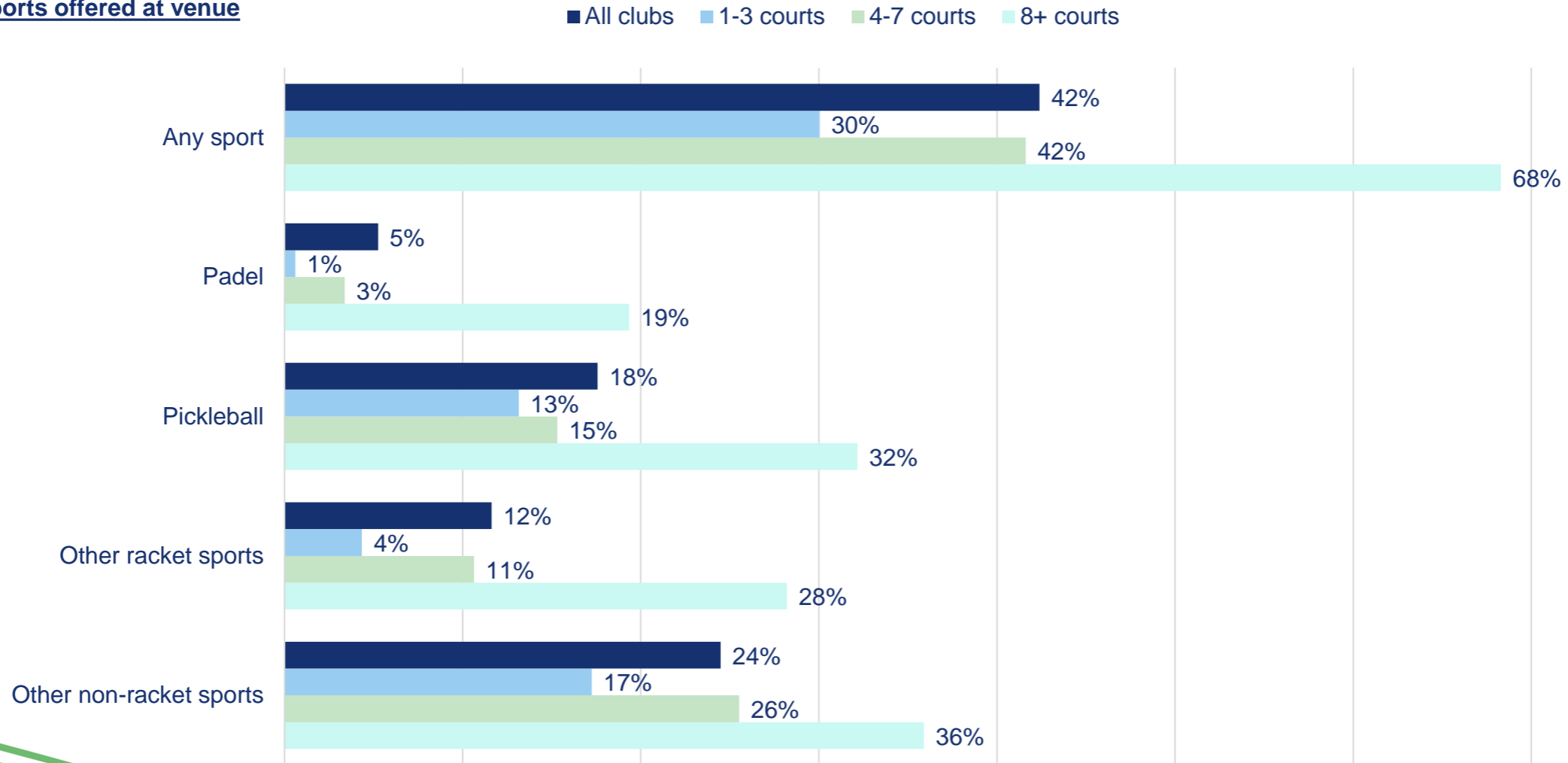
# MOST CLUBS HAVE FLOODLIT COURTS, WITH GREATER PROVISION AT LARGER CLUBS. AROUND HALF ARE OFFERING PAY & PLAY, AND JUST UNDER A QUARTER OF VOLUNTEERS WERE AWARE OF THEIR CLUB HAVING AN ENVIRONMENTAL PLAN



Does your club have one or more floodlit courts? All 2475,  
 Does your club offer pay & play access for non-members to play tennis? All 2421  
 Does your venue currently have an environmental sustainability policy? (2400)  
 1-3 courts (c.800), 4-7 courts (c.1100), 8+ courts (c.400)

# 4 IN 10 CLUBS OFFER OTHER SPORTS, RISING TO OVER 2/3 OF LARGER CLUBS. 18% WERE AWARE OF PICKLEBALL PROVISION AT THEIR VENUE, COMPARED TO 5% WHO SAID THAT THEIR VENUE OFFERED PADEL.

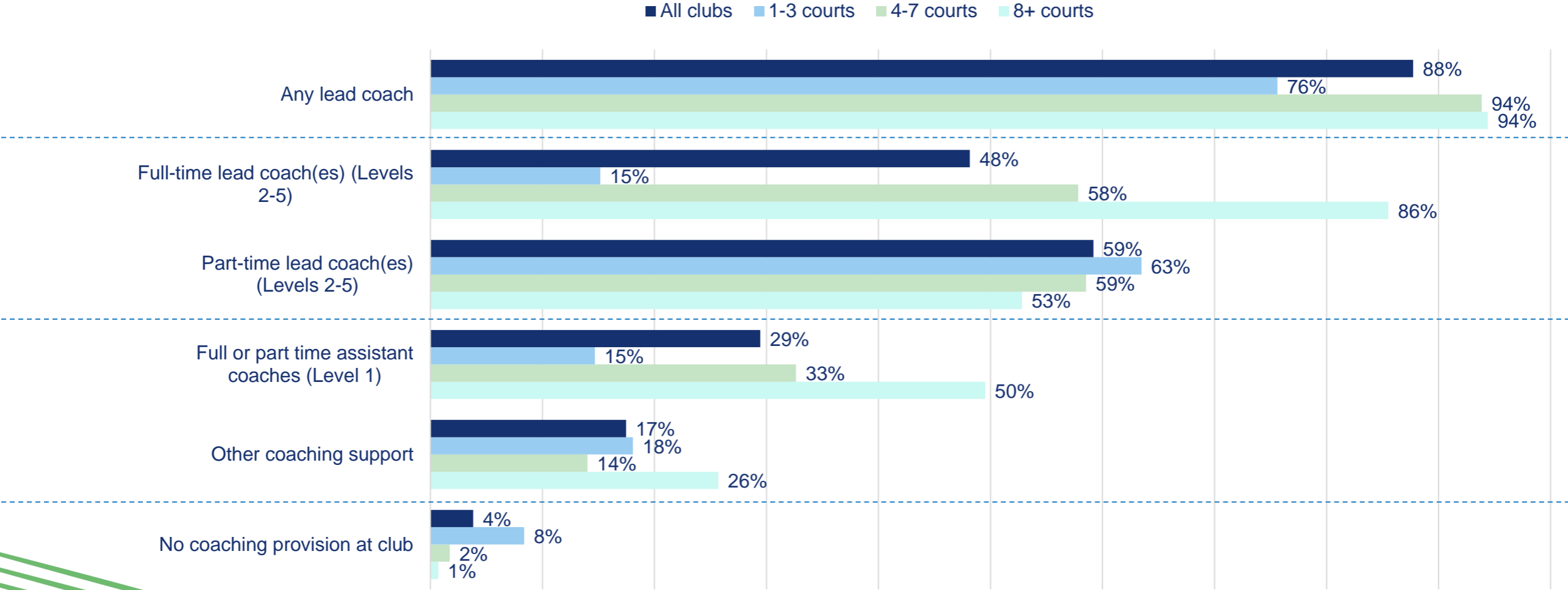
## Other sports offered at venue



'Does your club offer any sports other than tennis, whether for members or on a pay & play basis? Please select all that apply  
Total (2418) 1-3 courts (829), 4-7 courts (1156), 8+ courts (429))

# ALMOST ALL CLUBS OFFER SOME COACHING PROVISION, THOUGH 1 IN 4 SMALLER CLUBS DON'T HAVE ACCESS TO A LEAD (L2 AND ABOVE) COACH

## Coaching provision at Venue

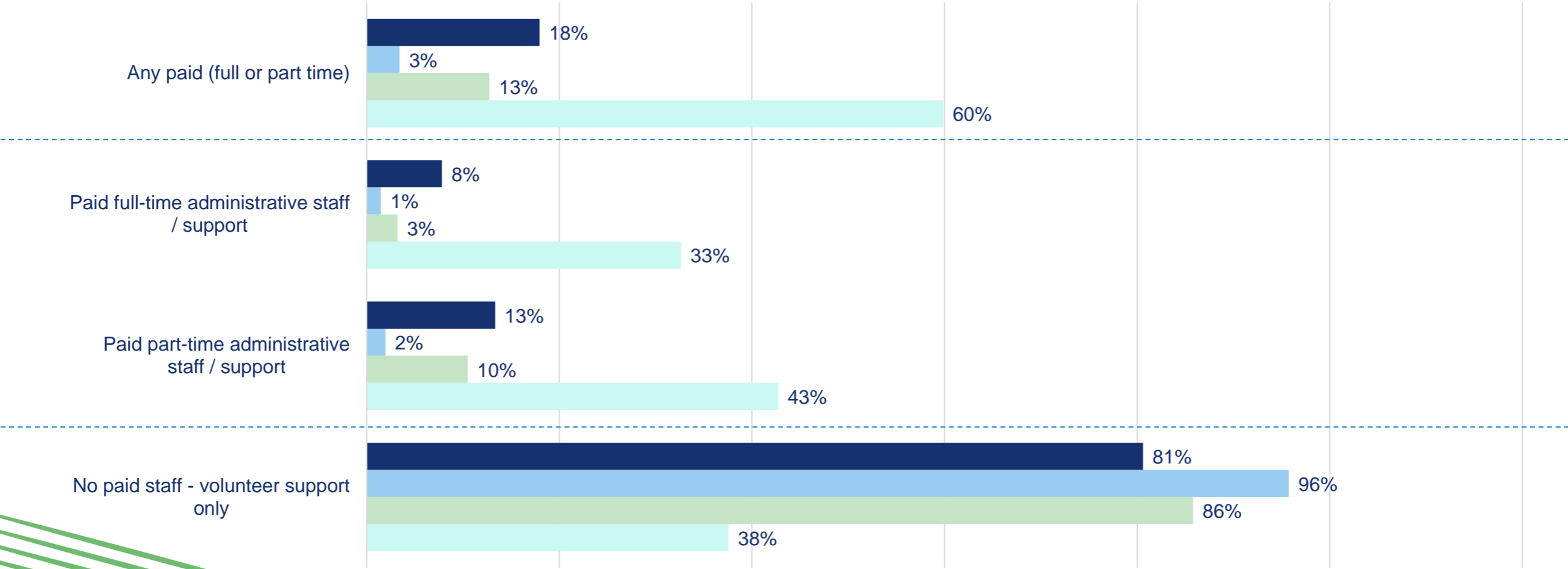


Which of the following types of coach does your venue have, if any? Please select all that apply  
 Total (2411) 1-3 courts (824), 4-7 courts (1155), 8+ courts (428))

# WHILE ONLY 3% OF SMALLER CLUBS EMPLOY ANY PAID ADMIN STAFF, THE FIGURE RISES TO 60% AMONG CLUBS WITH 8+ COURTS

## Administrative staff at venue

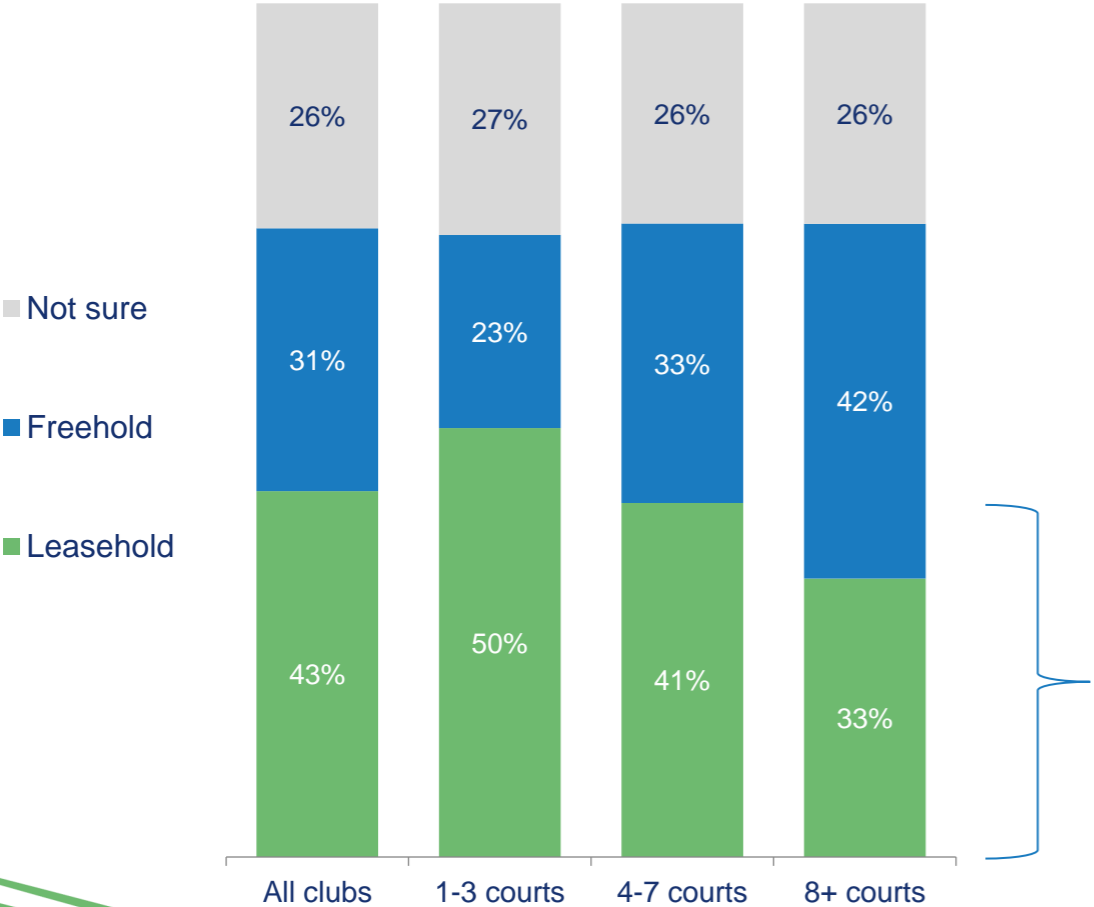
■ All clubs ■ 1-3 courts ■ 4-7 courts ■ 8+ courts



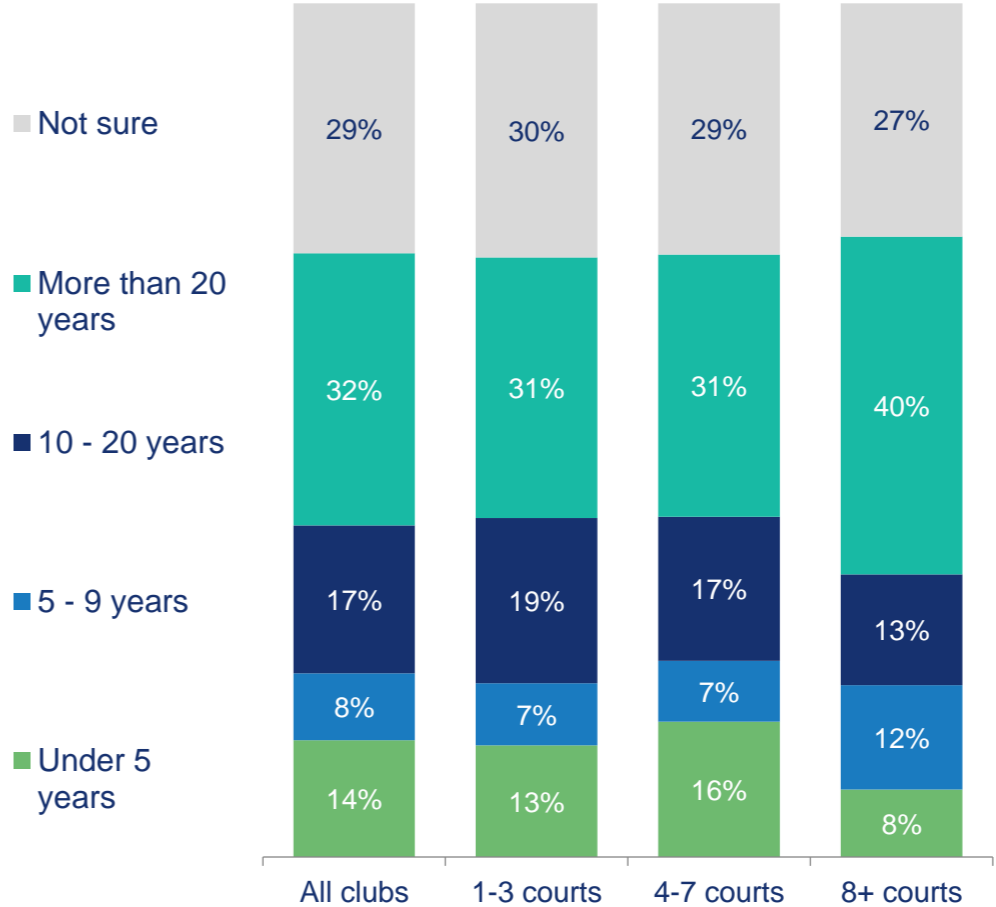
Which of the following types of paid administrative staff / support does your venue have, if any? Total (2408) 1-3 courts (823), 4-7 courts (1155), 8+ courts (426)

# 43% WERE AWARE OF THEIR COURTS BEING HELD ON A LEASEHOLD BASIS. MOST HAVE 10+ YEARS TO RUN ON THEIR CURRENT LEASE, THOUGH FOR 14%, THE CURRENT AGREEMENT WILL EXPIRE IN THE NEXT 5 YEARS

Usage Basis of Current Site



Years Remaining on Leasehold



Does your club use its current site on a leasehold or freehold basis?  
 Total (2407) 1-3 courts (822), 4-7 courts (1155), 8+ courts (426)  
 How many years are remaining on the current lease?  
 All on a leasehold basis (1032) 1-3 courts (413), 4-7 courts (479), 8+ courts (139)



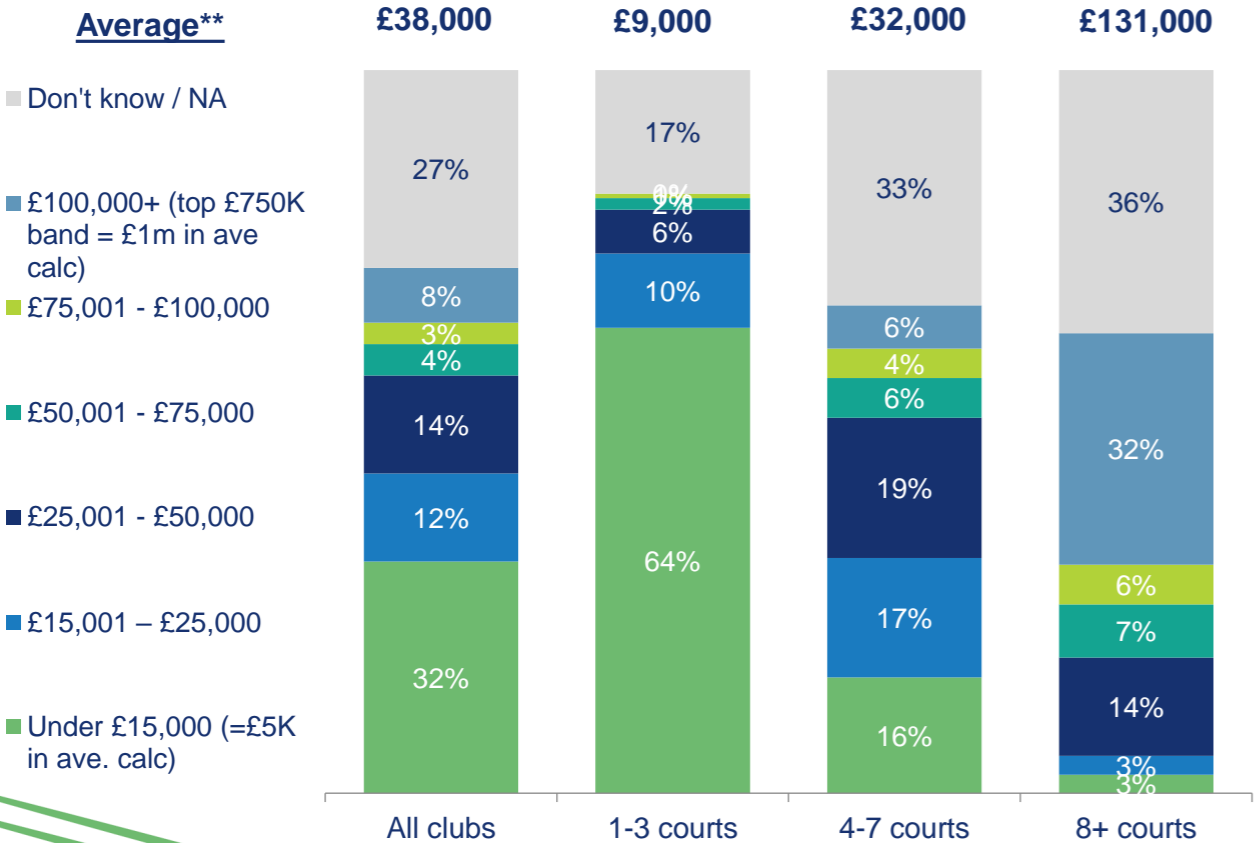
# HOT TOPIC FINDINGS

## FINANCIAL POSITION

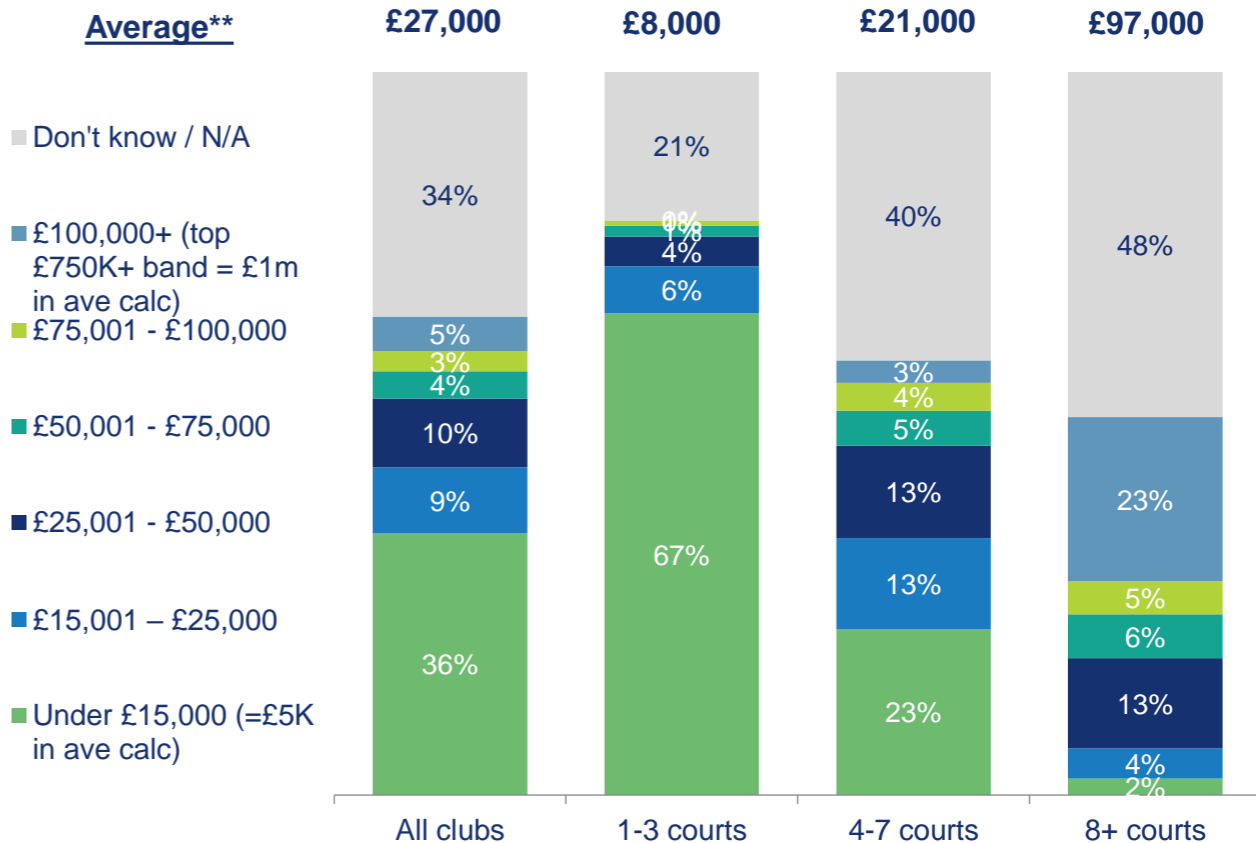
For this surveys deep-dive we focussed on your views of your financial position; your revenues, income, expenditure and measures your taking to support your financial position.

# REVENUE AND EXPENDITURE ARE HEAVILY DEPENDENT ON SIZE. MOST SMALLER CLUBS HAVE INCOME AND EXPENDITURE BELOW £15K P.A, WHILE AMONG LARGER CLUBS, 1 IN 3 ARE EARNING IN EXCESS OF £100K

## Revenue in 23/24 Financial Year



## Expenditure in 23/24 Financial Year



The next few questions are about the financial position of your tennis club. What was the total annual revenue (income) for your tennis club in the financial year 2023/24?  
 In the following questions, we'd like to ask about your club's expenditure. What was the total annual expenditure for your tennis club in the financial year 2023/24?  
 All replying: 1850, 1-3 courts 690, 4-7 courts 888, 8+ courts 272  
 \*\*Average calculated using mid points of scale bands. Under £15K counted as £5000, £750K+ counted as £1m

**MOST CLUBS ARE IN A STABLE OR HEALTHY POSITION (REVENUE AND EXPENDITURE IS MATCHED, OR THE REVENUE TREND IS MORE POSITIVE THAN THE EXPENDITURE TREND).  
HOWEVER 27% ARE IN A POSITION WHERE THE RELATIONSHIP BETWEEN THE EXPENDITURE AND REVENUE TRENDS IS A NEGATIVE ONE**

Club Financial Landscape – Expenditure vs Revenue Trends – Share of All Clubs

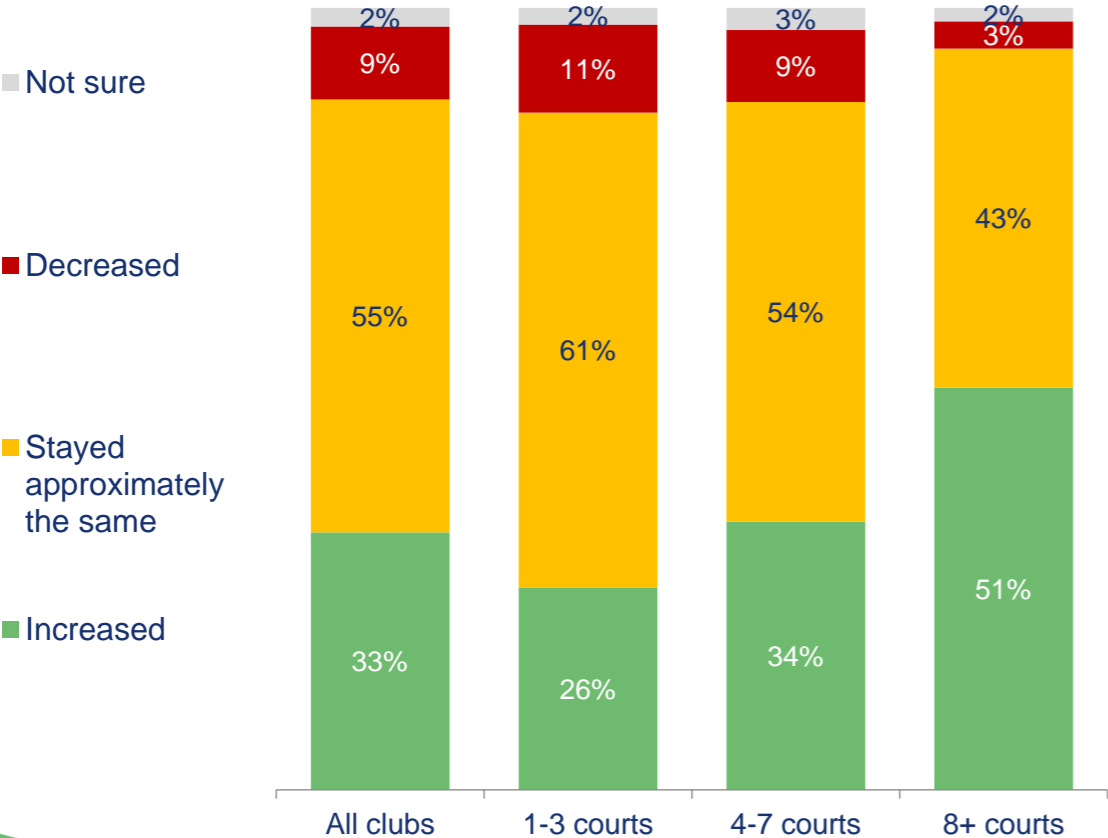
Note: Table sum is below 100% due to a small number of “don’t know” responses which are excluded

	Expenditure Increase	Expenditure Stable	Expenditure Decline
Revenue Growth	19%	11%	2%
Revenue Stable	19%	32%	4%
Revenue Decline	4%	4%	2%

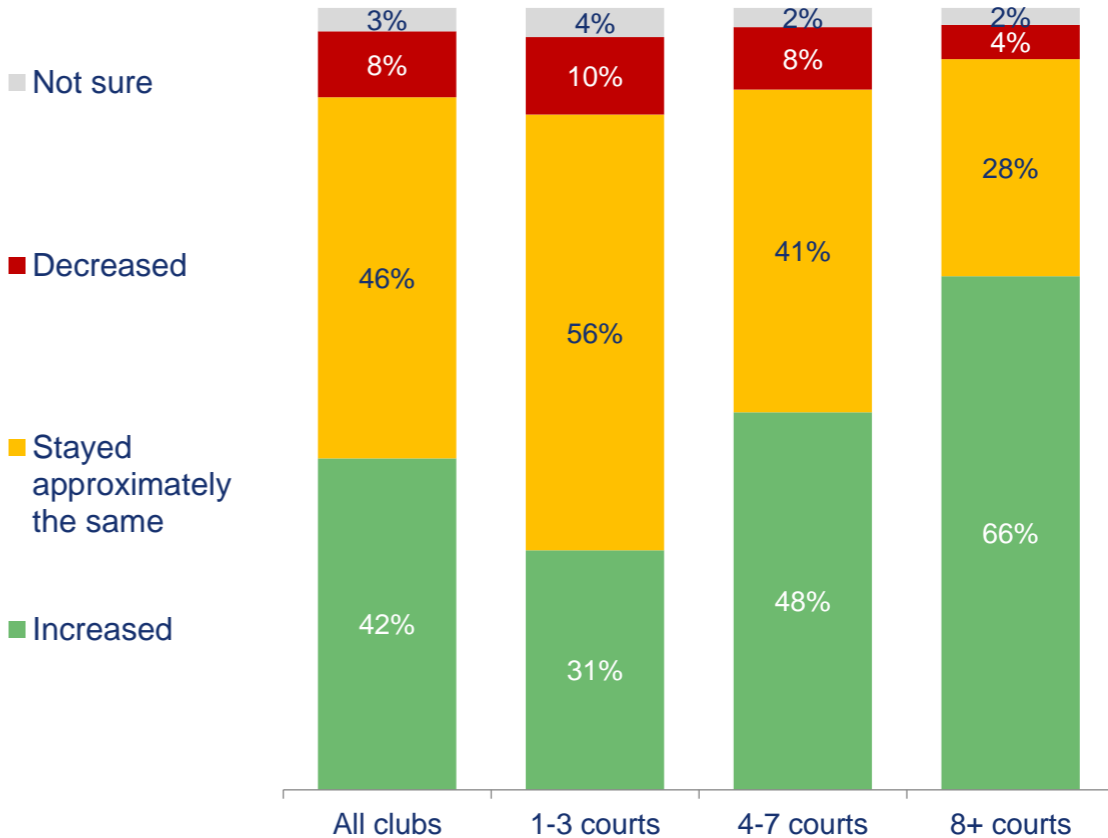
'In the 2023/24 financial year, how did your club's revenue change year on year, that is, compared to 2022/23?  
In the 2023/24 financial year, how did your club's expenditure change year on year, that is, compared to 2022/23?

# LARGER CLUBS ARE MORE LIKELY TO BE EXPERIENCING INCREASES IN BOTH REVENUE AND EXPENDITURE

Year on Year Revenue Trend – by Size



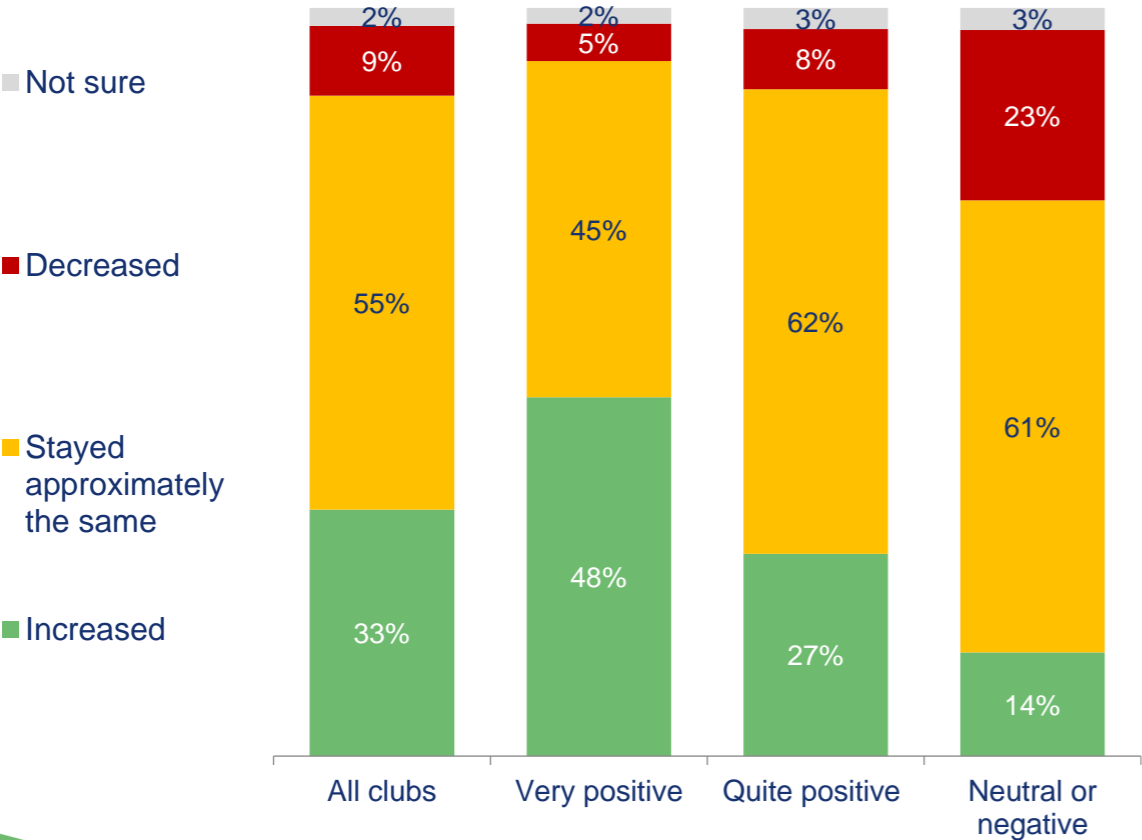
Year on Year Expenditure Trend – by Size



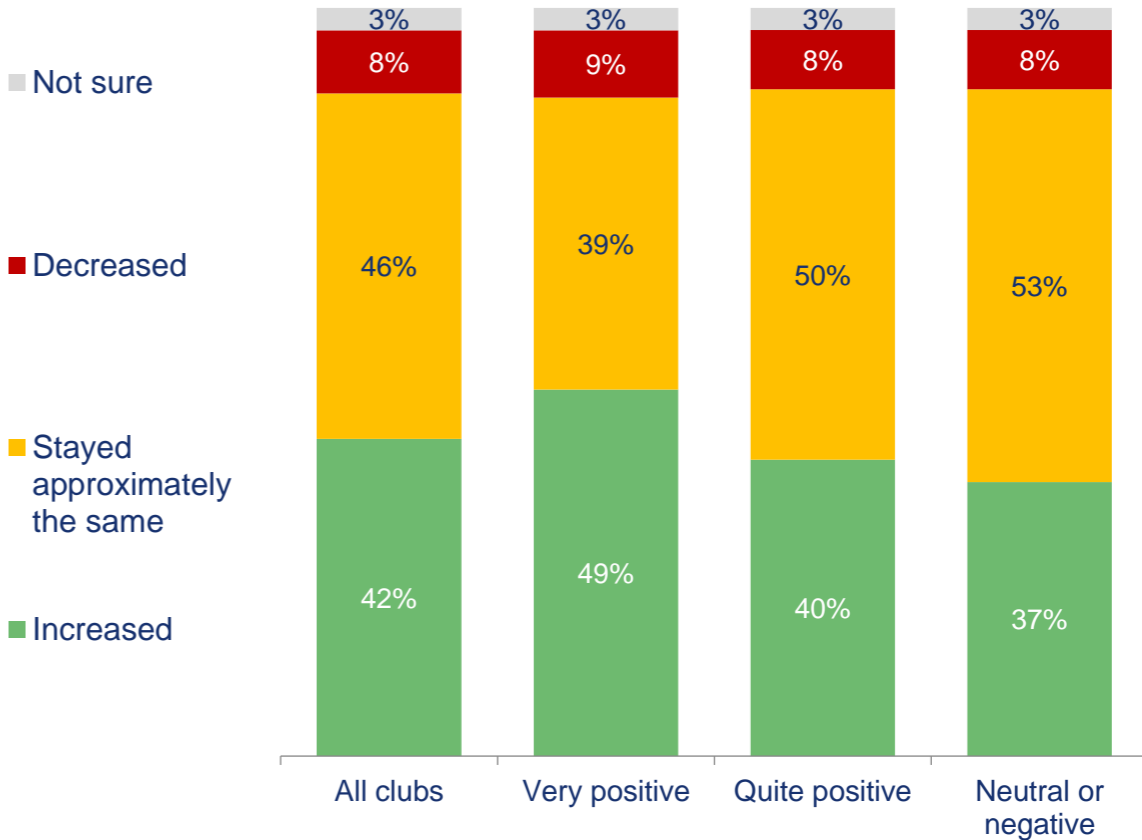
'In the 2023/24 financial year, how did your club's revenue change year on year, that is, compared to 2022/23?  
 In the 2023/24 financial year, how did your club's expenditure change year on year, that is, compared to 2022/23?  
 All replying: 1339/1198 , 1-3 courts 568/535, 4-7 courts 598/526, 8+ courts 173/137

# CLUBS WITH A POSITIVE OUTLOOK ARE MORE LIKELY TO HAVE INCREASED BOTH REVENUE AND EXPENDITURE. ALMOST 1 IN 4 CLUBS WITH A NEUTRAL OR NEGATIVE OUTLOOK SAY THAT THEY HAVE SEEN REVENUE FALL

Year on Year Revenue Trend – by Positivity About the Future

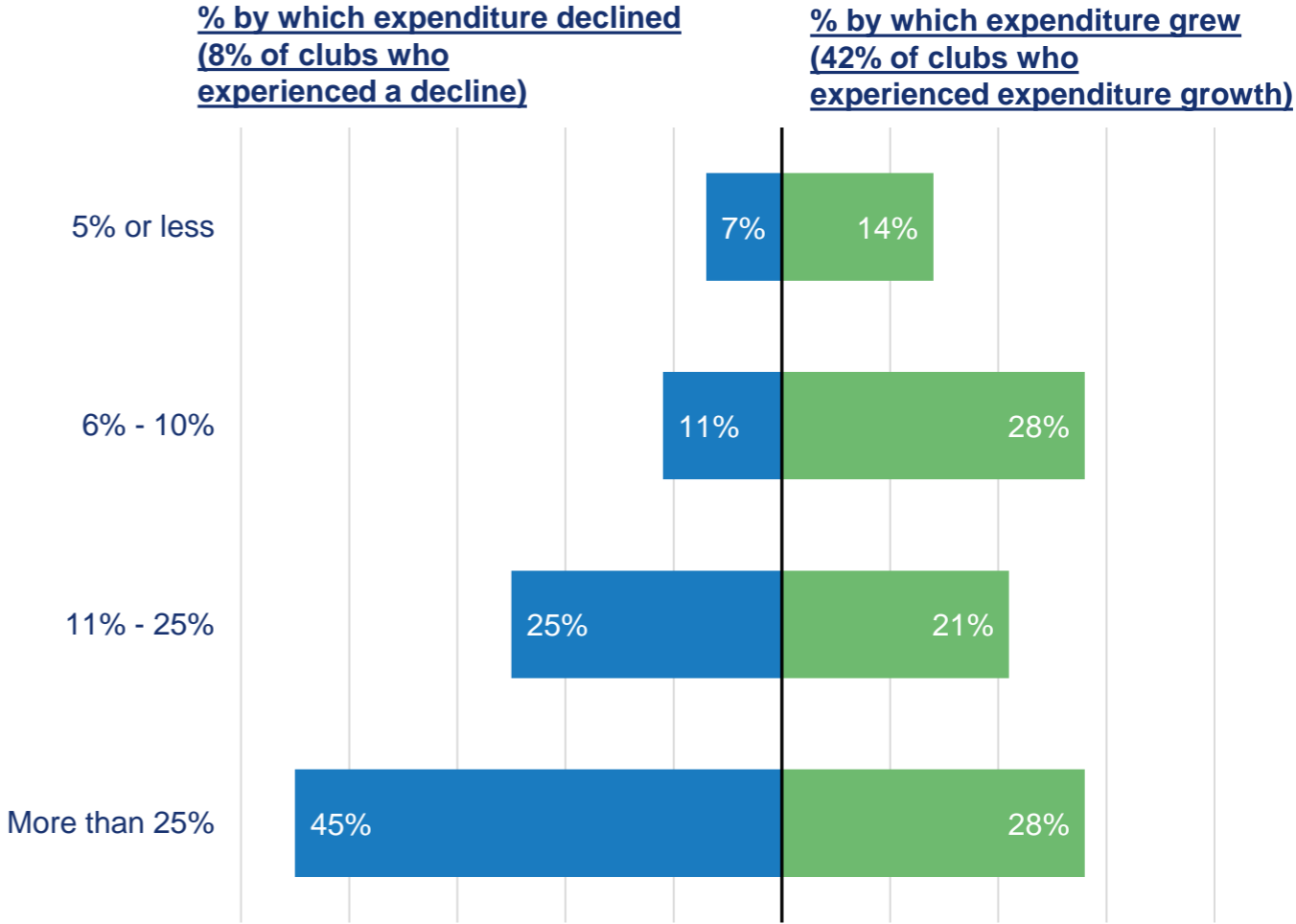
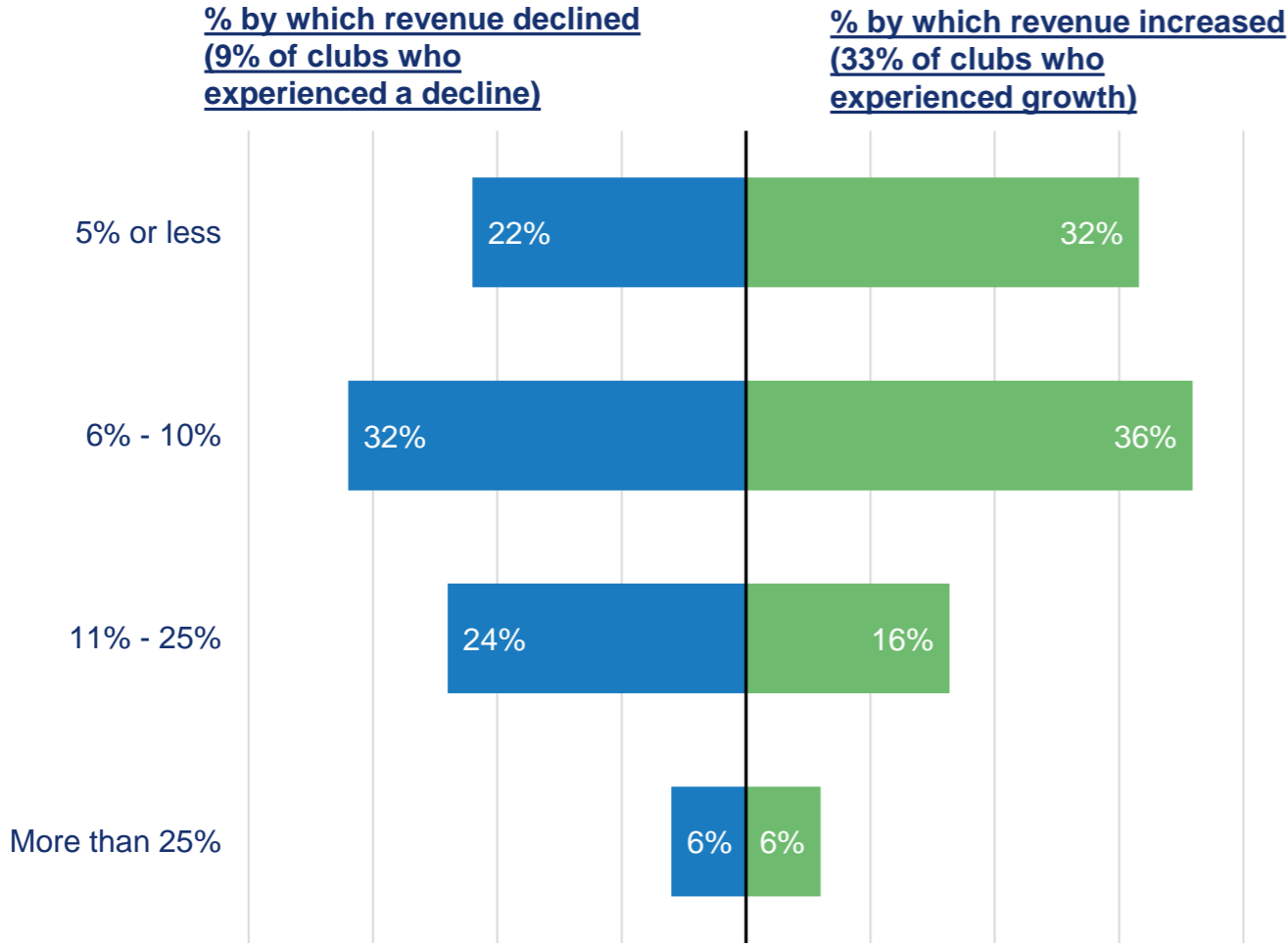


Year on Year Expenditure Trend – by Positivity About the Future



'In the 2023/24 financial year, how did your club's revenue change year on year, that is, compared to 2022/23?  
 In the 2023/24 financial year, how did your club's expenditure change year on year, that is, compared to 2022/23?  
 All replying: 1339/1198 , very positive 527 / 459, quite – 553 / 503, neutral or neg – 257/234

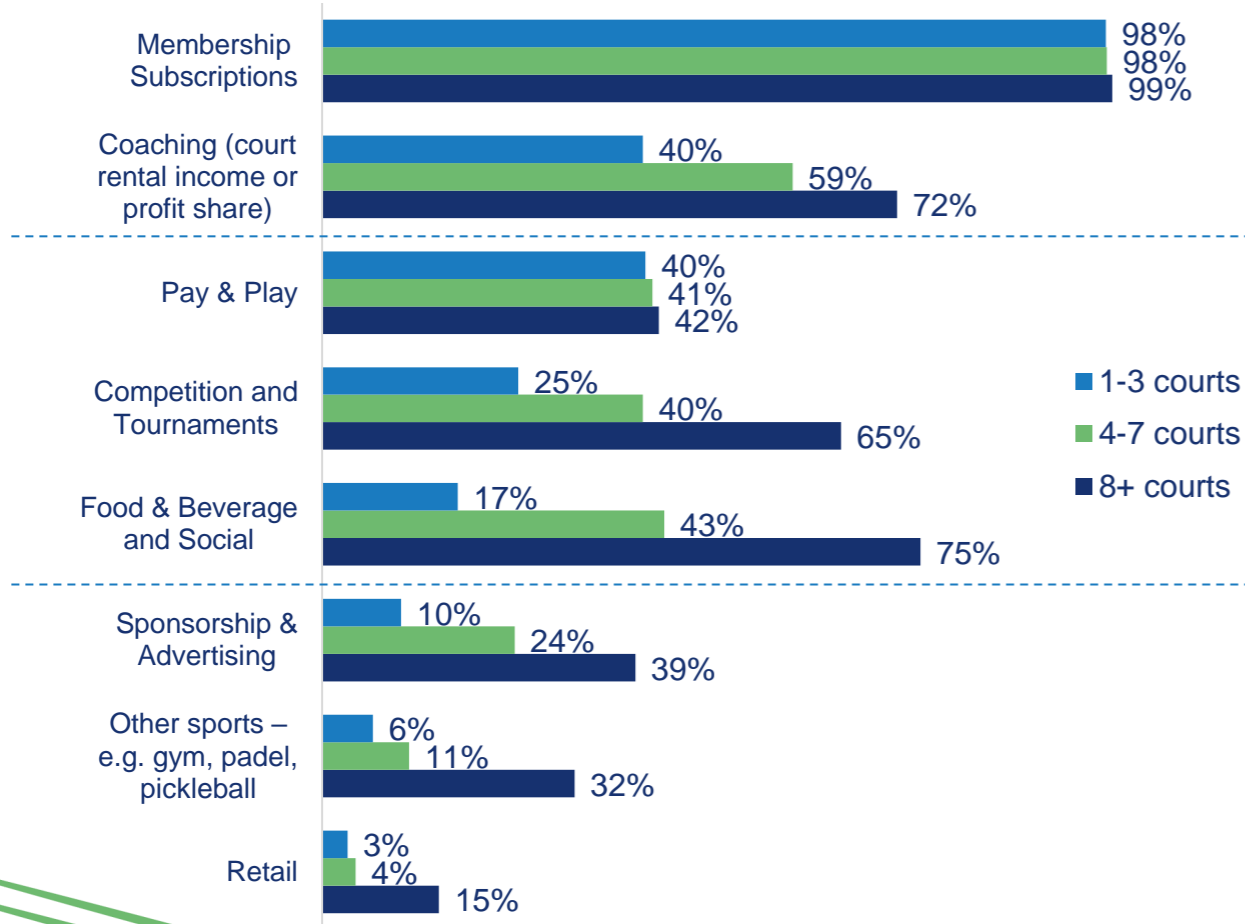
# REVENUE DECLINES TEND TO BE SOMEWHAT STEEPER THAN REVENUE INCREASES. THIS ISN'T THE CASE FOR EXPENDITURE TRENDS, BUT THIS MAY REFLECT E.G. ONE-OFF CAPITAL EXPENDITURES.



By approximately how much did your club's revenue grow in 2023/24? (n=440)  
 By approximately how much did your club's revenue (income) decline in 2023/24? (n=125)  
 By approximately how much did your club's expenditure increase in 2023/24? (n=505)  
 By approximately how much did your club's expenditure decrease in 2023/24? (n=101)

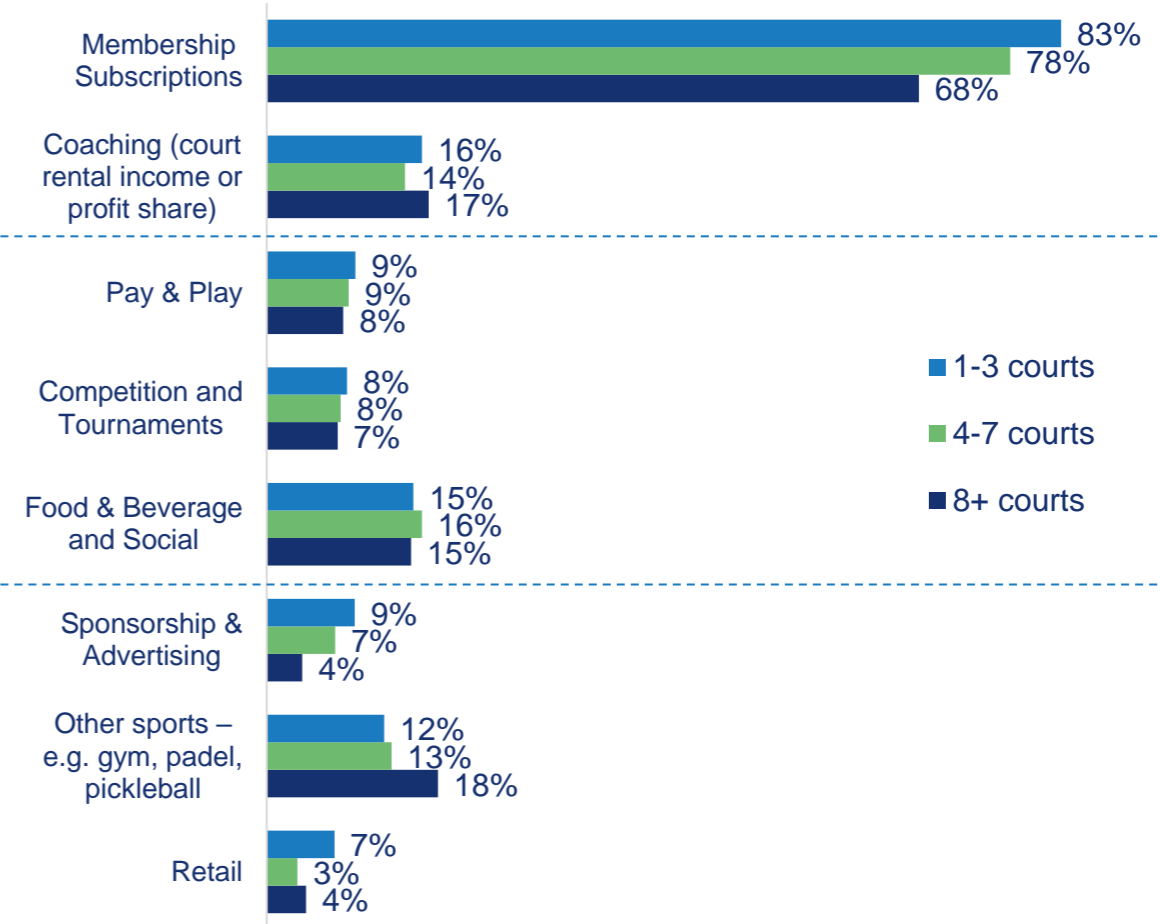
# WHILE ALMOST EVERY CLUB TAKES REVENUE FROM MEMBERSHIPS, THIS ACCOUNTS FOR A MUCH HIGHER SHARE OF TOTAL FOR THE SMALLEST CLUBS. COACHING CONTRIBUTES AROUND 15% OF INCOME, AND P&P WHEN OFFERED, JUST UNDER 10%

## Sources of Revenue



## Average share of revenue by category

(Among clubs with this revenue source – NOTE LOW SAMPLE SIZES FOR SOME ITEMS)



'What sources of revenue (income) does your club have?

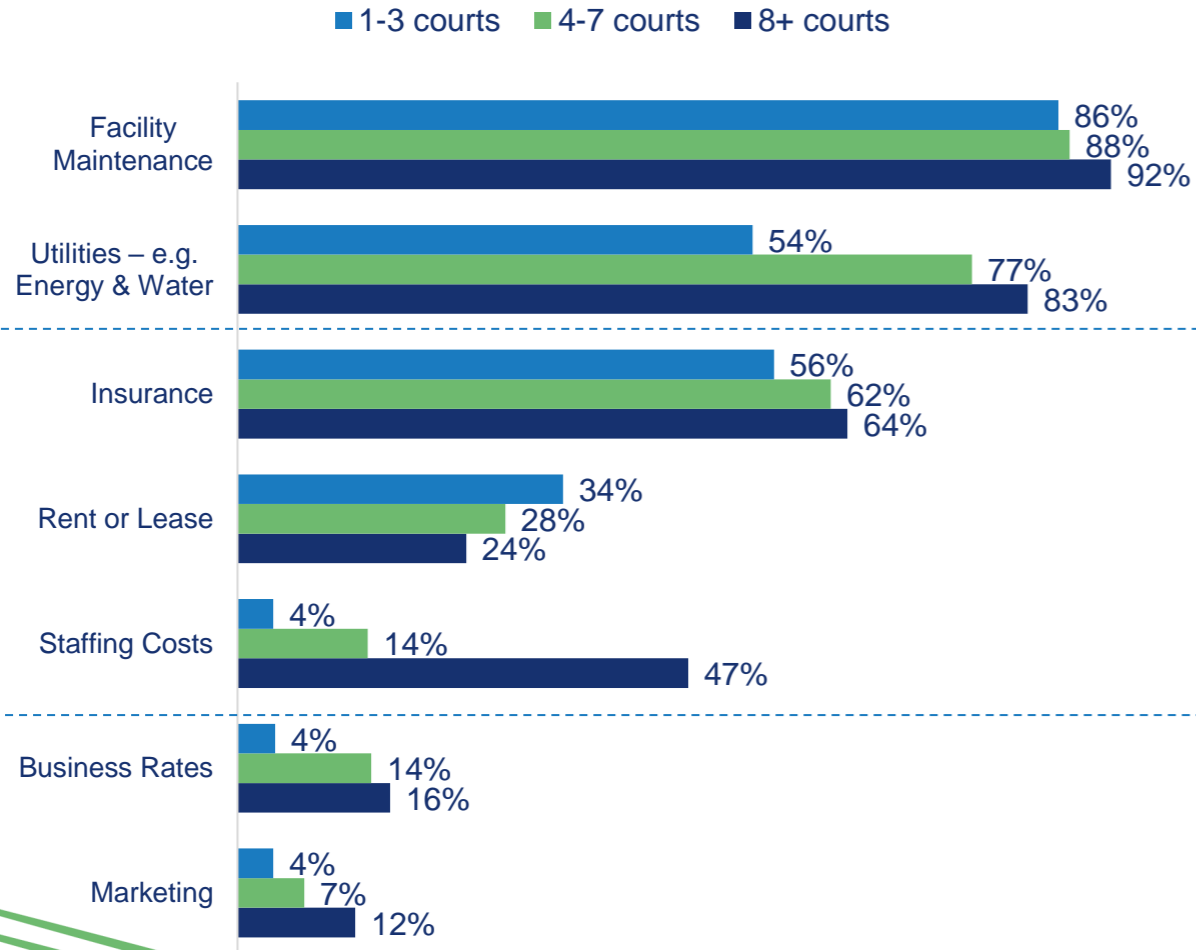
Total (1335) 1-3 courts (566), 4-7 courts (598), 8+ courts (171)

Approximately what percentage of your club's total revenue came from each of the following in the 2023/2024 financial year?

All clubs with that source of revenue: CAUTION LOW BASE SIZES

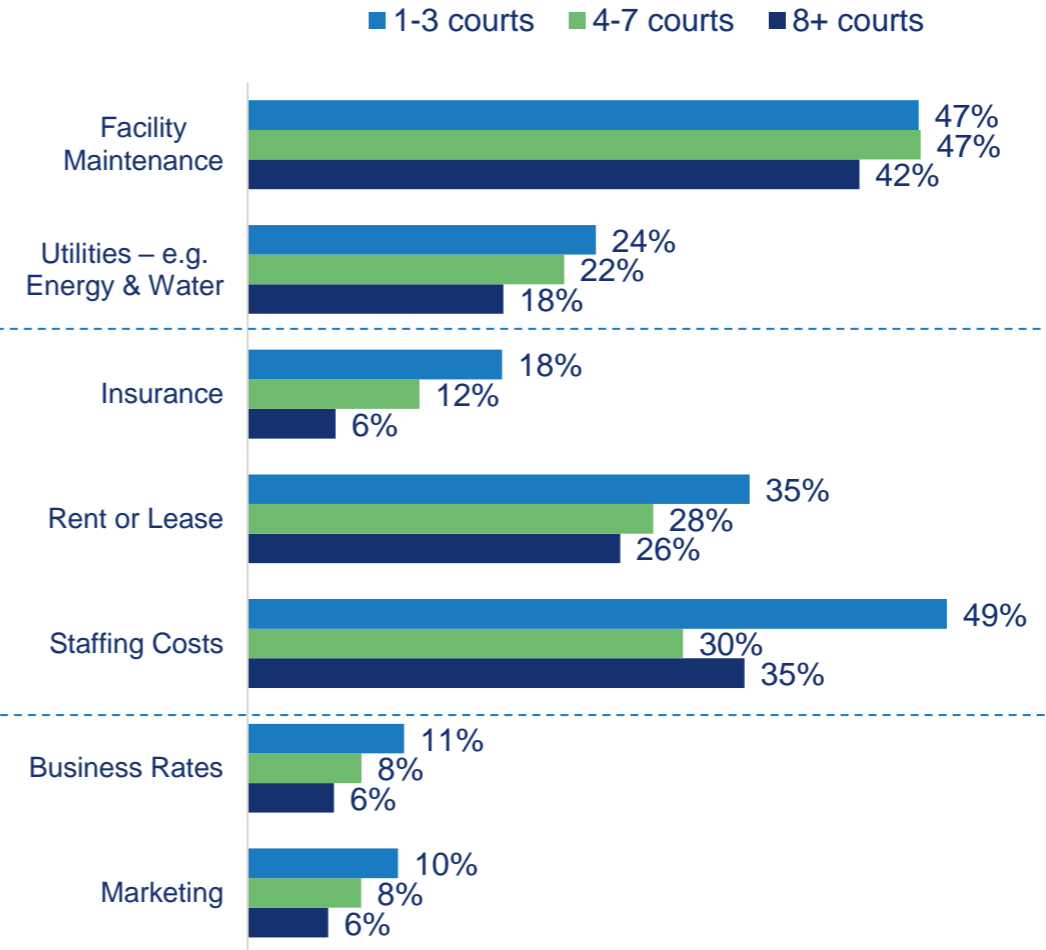
# THE THREE MOST COMMON EXPENDITURE ITEMS ARE FACILITY MAINTENANCE (C.50% OF TOTAL), UTILITIES (C.20%) AND INSURANCE (18% OF TOTAL FOR SMALLER CLUBS, BUT ONLY 6% FOR THE LARGEST)

## Sources of Expenditure



## Average share of expenditure by category

(Among clubs with this expenditure – NOTE LOW SAMPLE SIZES FOR SOME ITEMS)



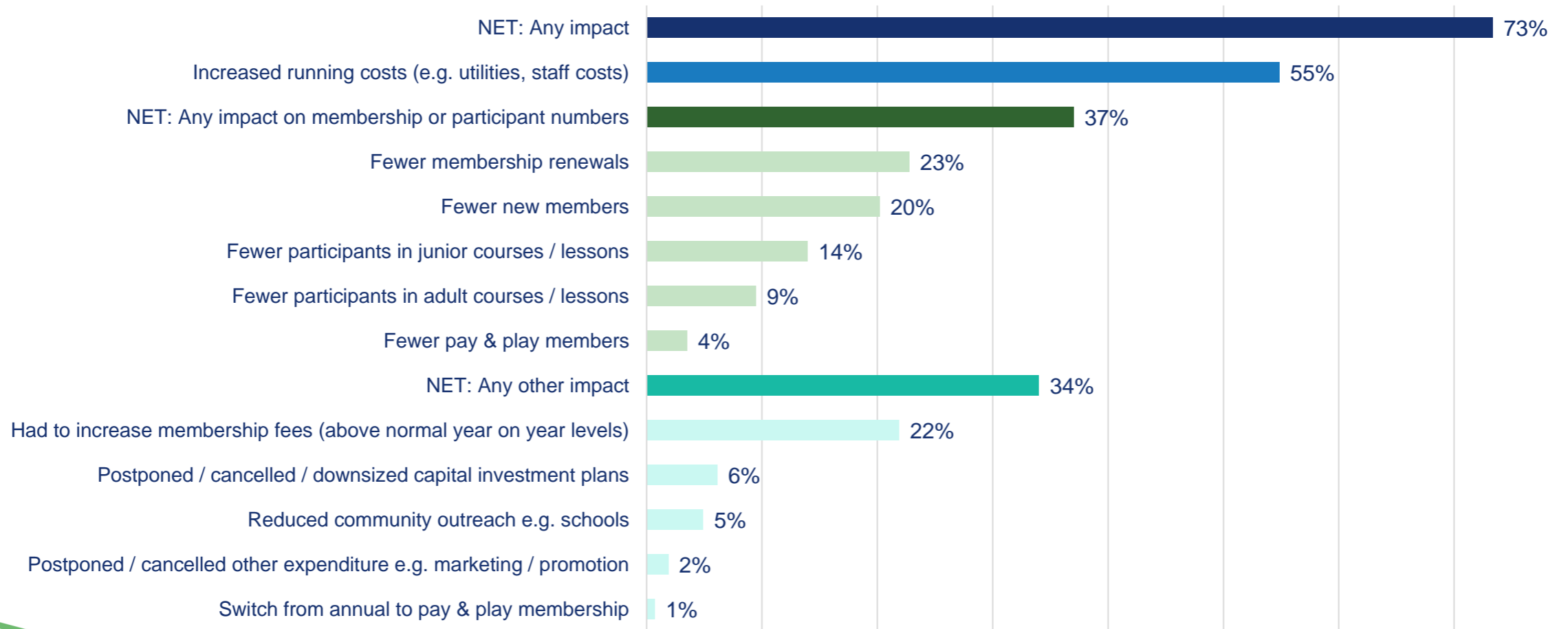
Which of the following major areas of expenditure does your club have? Please select all that apply  
 Total (1193) 1-3 courts (531), 4-7 courts (525), 8+ courts (137)





# 3/4 OF CLUBS HAVE BEEN AFFECTED BY THE INCREASED COST OF LIVING, WITH OVER HALF REPORTING INCREASED RUNNING COSTS, AND MORE THAN 1 IN 3 REPORTING SOME IMPACT ON MEMBERSHIP OR PARTICIPATION NUMBERS

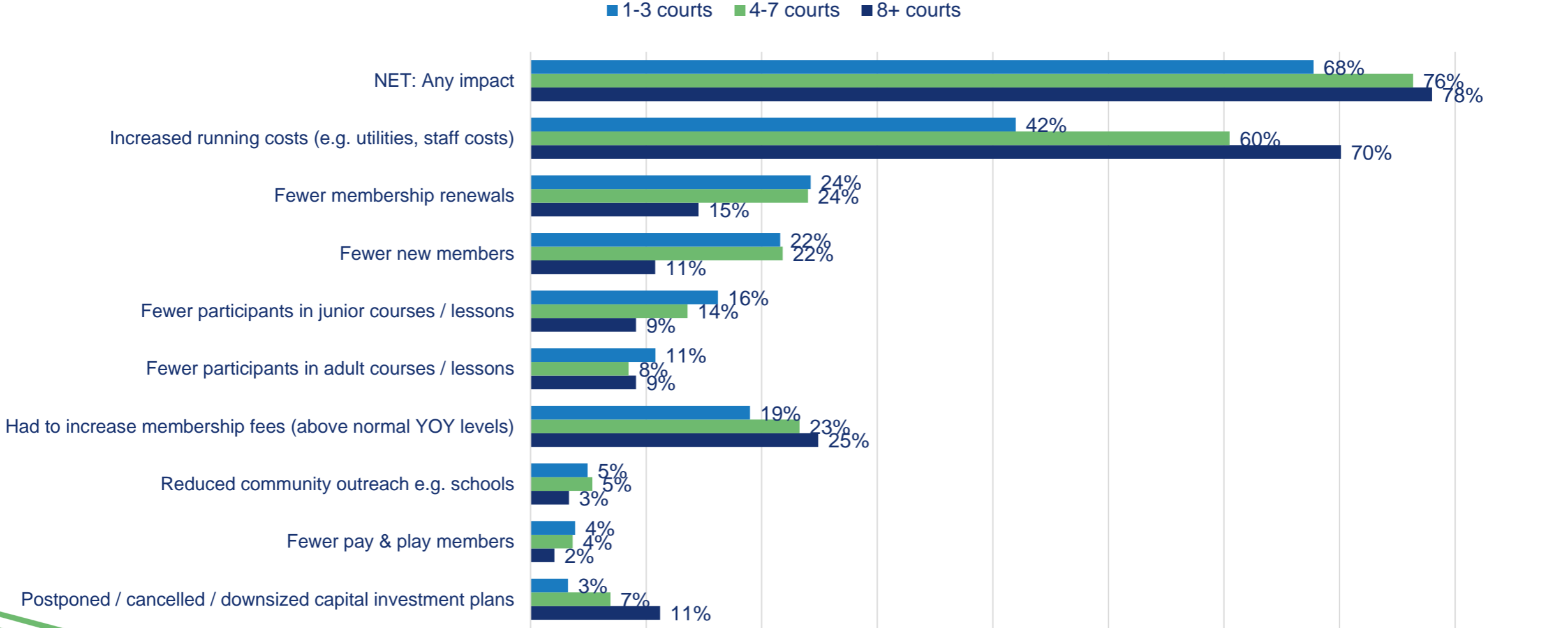
## Impacts of Increased Cost of Living



How, if at all, has your venue been impacted by inflation / the increased cost of living over the past couple of years? Please select all that apply. (1714)

# LARGER CLUBS ARE MORE LIKELY THAN OTHERS TO REPORT IMPACTS ON RUNNING COSTS, WHILE MEMBER / PARTICIPATION IMPACTS HAVE DISPROPORTIONATELY AFFECTED SMALLER AND MID-SIZE CLUBS

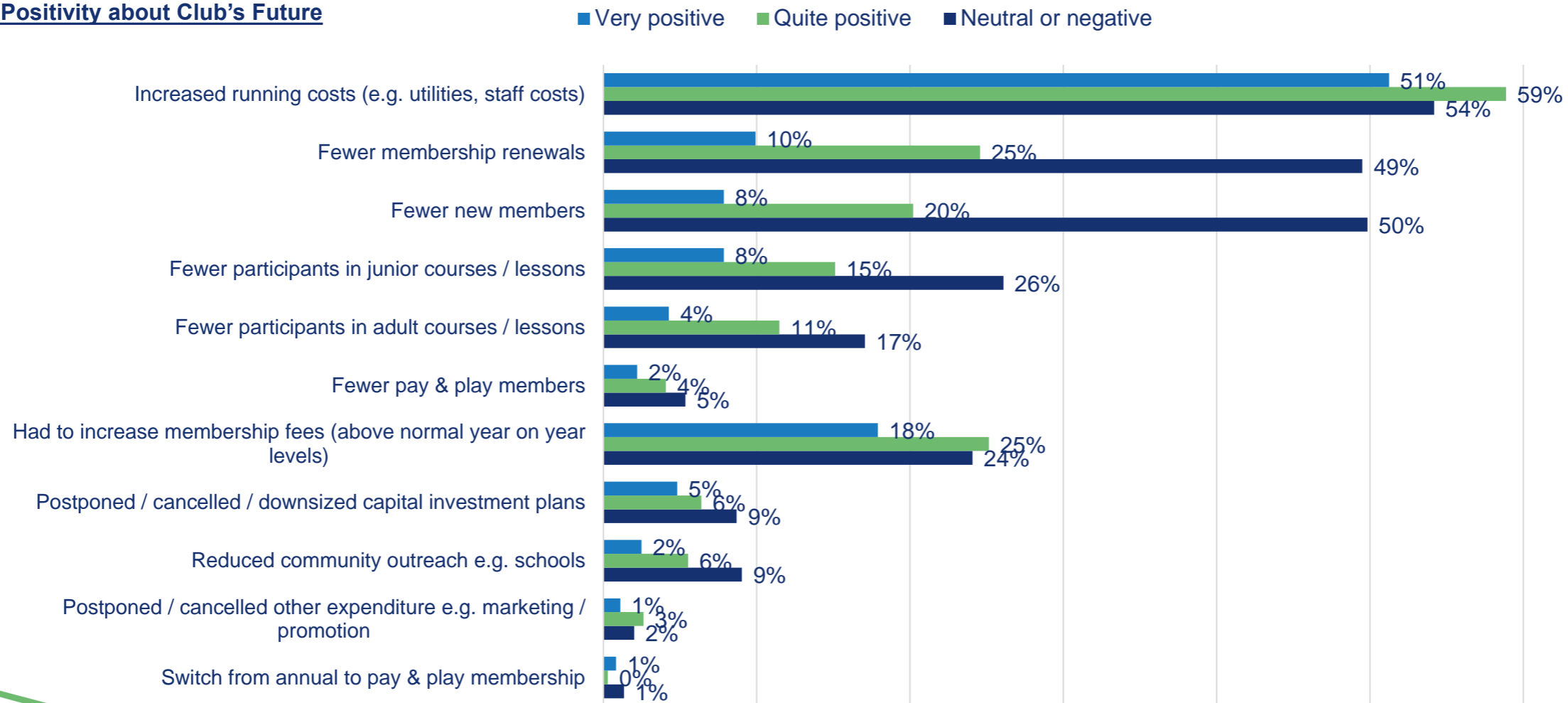
## Impacts of Increased Cost of Living



How, if at all, has your venue been impacted by inflation / the increased cost of living over the past couple of years? Please select all that apply. 1-3 courts (648), 4-7 courts (825), 8+ courts (241)

# THOSE WHO EARLIER EXPRESSED DOUBTS ABOUT THEIR CLUB'S FUTURE WERE MOST LIKELY TO SAY THAT IT HAD EXPERIENCED DECLINING MEMBERSHIPS AND RENEWALS.

## Impacts of Increased Cost of Living By Positivity about Club's Future



How, if at all, has your venue been impacted by inflation / the increased cost of living over the past couple of years? By positivity about the future of the club  
Very positive – 726, quite positive – 688, neutral or negative - 299

# WHAT HAPPENS NEXT?

## YOU SAID, WE DID...

We are often asked what we do with the information we get back from surveys. Everything we do to support you is informed by feedback we receive from clubs direct, either through these types of survey, via individuals working on behalf of the national, regional and county teams, or through our customer support centre.

We want to ensure that everyone completing the survey has access to the results. As well as helping us to improve our support, it may be helpful for you to see what is happening nationally.

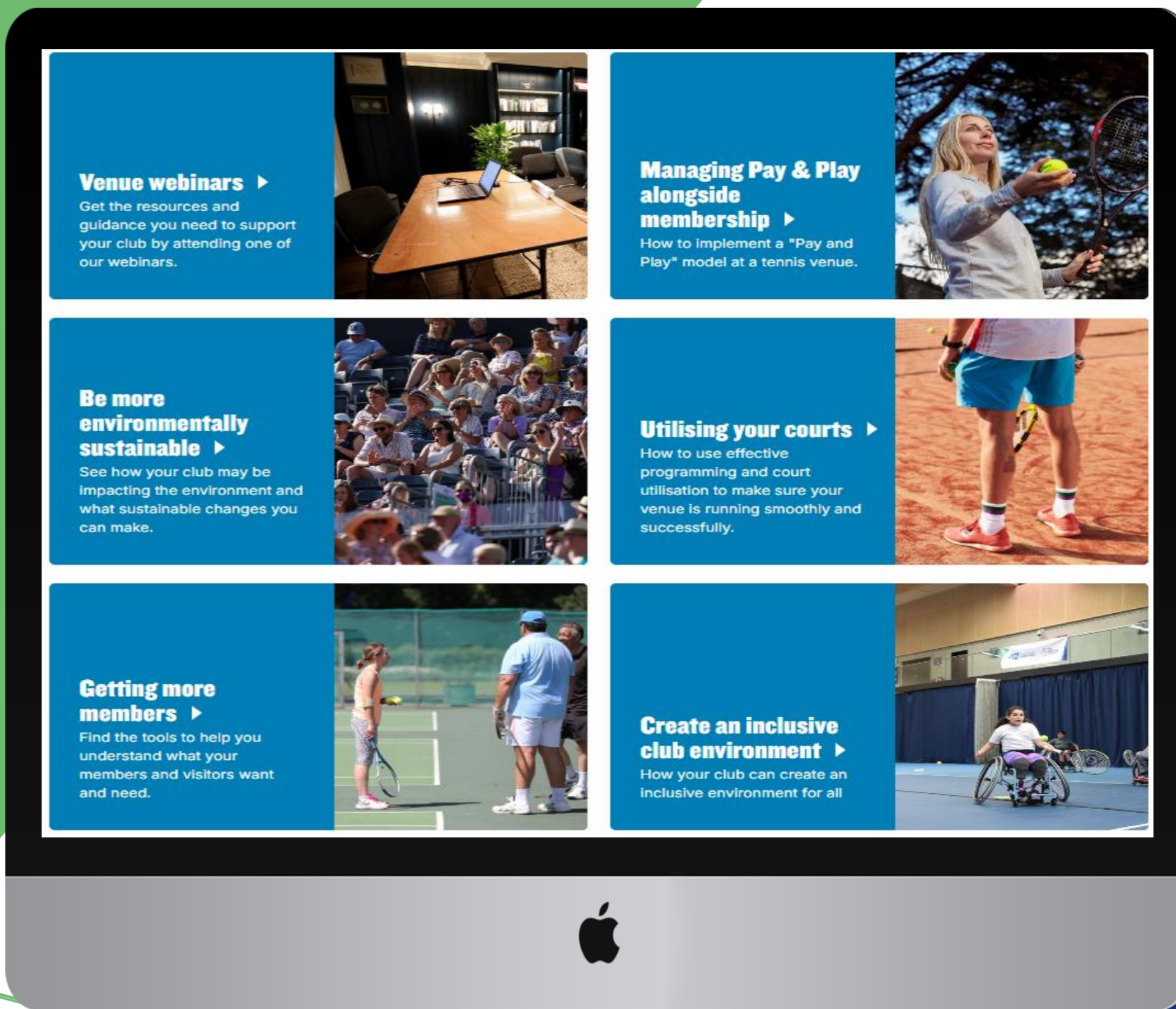
The next few pages cover the support we have around the points raised in the survey and on the hot topic.

# VENUE SUPPORT

We provide a good range of resources to support your club with understanding the opportunities around:

- [Membership Growth](#)
- [Generating income from Pay & Play](#)
- [Smaller Club Case Studies](#)
- [Smaller Club Case Studies](#)
- [Smaller Club Case Studies](#)
- [Financial Sustainability](#)
- [Self Service Guide to financial sustainability](#)
- [LTA Buying Group](#)

Click on the screen to find out more about the Venue Support Toolkit 





# THANK YOU

We hope you found these findings of interest. The next survey will go out in Q1 2025 – the findings will be made available in a similar way.