

FY2014 Report on the Tennis Environment in Japan

Summary of the Research Findings

March 2015

Japan Tennis Association

This is summary translation into English of the 66-page Japanese language report entitled “tenisu kankyotou jittai chousa houkokusho” (テニス環境等実態調査報告書), which was published by the Japan Tennis Association in March 2015 as a toto-sponsored project. This report features the following four topics:

1. State of tennis population in Japan
2. Survey on the Introduction of PLAY + STAY by Tennis Businesses
3. Survey on Certified Tennis Instructors
4. Survey on Tennis Club Activities at Junior High Schools

(1) The tennis-playing population is 3.99 million and has been in a downward trend over the long term; but there are some signs of recovery

The tennis population in Japan, defined as the number of people aged 10 or older who played tennis (excluding soft tennis) at least once in the past one year, is 3.99 million (estimate as of 2014). A look at the data in decade increments shows that the tennis population has been in a gently downward trend, although the new estimate represents a slight increase over the figure of 3.73 million logged two years ago. There are signs of a recovery among both teens and adults. In addition, those who gave tennis as a sport they would like to play (or continue to play) was more than twice the number of those who are actually playing, an indication of some significant potential demand. As the birthrate continues to fall and the society gets older, there is now even greater importance in taking steps to popularize the sport among the youth segment (including junior players) for the medium- and long-term popularization of the game.

(2) Tennis business are focusing more on the running of schools

Of the 598 tennis businesses who responded to the Japan Tennis Association's "Survey on the Introduction of PLAY + STAY by Tennis Businesses" (2014), 43.5% provided membership tennis clubs, 79.1% tennis schools, and 66.6% rental courts (percentages include multiple answers).

In the Japan Tennis Association's "National Tennis Business Operators Survey" (2012), of the 659 tennis businesses responding 43.9% had been providing membership tennis clubs, 75.6% tennis schools, and 66.4% rental courts. A comparison of the 2012 and 2014 surveys indicates that the percentage of tennis schools is in an upward trend (75.6% to 79.1%). And the average number of students per tennis school business increased from 450.1 in 2012 to 488.3 in 2014.

(3) Increased awareness of PLAY + STAY by tennis businesses

In an attempt to increase the tennis population, the Japan Tennis Association has been promoting the PLAY + STAY (P+S) program that incorporates the three kinds of balls recommended by the International Tennis Federation. According to the results of the Japan Tennis Association's "Survey on the Introduction of PLAY + STAY by Tennis Businesses" (2014), 73.1% of tennis businesses indicated awareness of P+S. In the Japan Tennis Association's "National Tennis Business Operators Survey" (2012), the awareness rate was 66.3%. Among tennis businesses the awareness of P+S is on the increase, a trend that is particularly pronounced among businesses running tennis schools only.

(4) Slightly over half of tennis businesses have used PLAY + STAY instruction during the past one year

According to the results of the Japan Tennis Association's "Survey on the Introduction of PLAY + STAY by Tennis Businesses" (2014), 51.5% of tennis businesses responded that they used PLAY + STAY (P+S) instruction during the past one year. It was confirmed that P+S instruction is being offered in all regions. In fact, it is used by about three-fourths of businesses running tennis schools only. As those answering that they started to offer P+S instruction sometime after 2012 accounted for a percentage in the 40-49% range, it can be concluded that the introduction of P+S has grown during the last few years.

Of the businesses that offer P+S, 98.7% provide it to players aged 10 and under and 73.7% to those aged 11-12 years old, an indication of how much P+S is being utilized in instruction at the upper elementary-school level. It was also revealed that PLAY + STAY is being utilized in instruction for junior high and high school students, adults, and those age 65 years old and over as well (percentages include multiple answers).

Of the reasons for not offering P+S instruction (percentages include multiple answers), "Programs such as sponge ball and short tennis have already been established" was given most (37.9%). "There are no (few) instructors with the knowledge or experience to provide P+S instruction" was given by 26.6% of businesses, which indicates that there is more than ample room to introduce more by providing P+S courses to instructors.

(5) Experienced and certified PLAY + STAY tennis instructors are located nationwide

Of the 2,044 certified tennis instructors who responded to the Japan Tennis Association's "Survey on Certified Tennis Instructors" (2014), 82.6% indicated an awareness of PLAY + STAY (P+S). And half of certified tennis instructors had P+S instructional experience. It was determined that there are certified tennis instructors with P+S instructional experience located in all 47 prefectures across Japan.

Female instructors indicated somewhat less awareness of P+S than their male counterparts, although they had more instructional experience with the program than men. Female instructors are using the P+S program for ad-hoc instruction for those with no tennis experience, etc.

Despite the important role they play in popularizing tennis, certified instructors and senior instructors indicated somewhat lower levels of both P+S awareness and instructional experience than those with other certifications. Based on the fact that many gave as reasons for not offering P+S instruction as "My knowledge and experience are inadequate for providing P+S instruction" and "I'm not aware of the details of what P+S is about," the offering of P+S courses for instructors and senior instructors will be important for further popularization of the program. The role played by regional and prefectural associations is critical here, as evidence by the fact that the highest percentage of instructors and senior instructors were aware of P+S cited "courses offered by regional and prefectural associations" as the P+S courses they had experience in attending.

(6) The junior high schools with tennis clubs number 1,062; slightly more than

60% of them are public junior high schools

According to data from the Japan Tennis Association's "Survey on Tennis Club Activities at Junior High Schools" (2014), it was confirmed that 1,062 junior high schools throughout the nation have tennis clubs. 61.4% was public junior high schools and 38.4% was private junior high schools; it indicates private junior schools are more likely to have tennis clubs. **From these findings, it could be inferred that while only about 10% of all the junior high schools nationwide have tennis clubs, the figure among private junior high schools (slightly more than 50%) dwarfs that of public junior high schools (about 7%).** The junior high schools with tennis clubs are most numerous in Tokyo (277 schools), Kanagawa (157 schools), and Osaka (133 schools). The top-ranked number of members of these clubs, in order from the most numerous, is Tokyo (10,895), Osaka (5,733), and Kanagawa (3,545). In Kanagawa there are many relatively small tennis clubs.