

Increasing the Capacity of Tennis in Boulder, Colorado

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Colorado and Boulder are the Place to Play Tennis

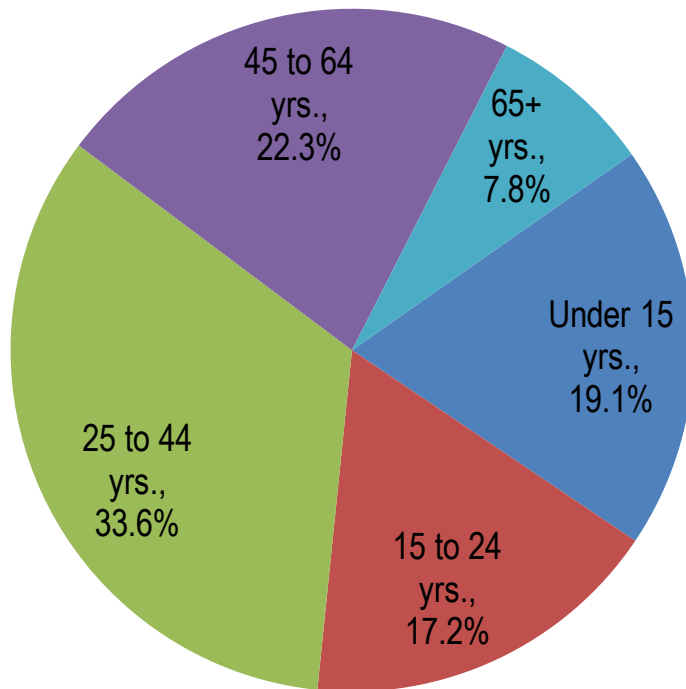
The purpose of this presentation is to illustrate that Boulder and Colorado are ideal places to play tennis. Unfortunately, there is a shortage of indoor courts in the Boulder vicinity. There are three private tennis facilities with indoor courts north of I-70 and west of I-25 in the Denver-Boulder Combined Metropolitan Statistical Area. As well they is a small covered facility in Longmont.

- Boulder has a population with demographics suited to play tennis.
- Colorado is a place where people like to work, live, and play tennis.
- Colorado is a healthy, active state.
- Boulder is a highly educated county.
- Boulder residents have the means to play tennis.

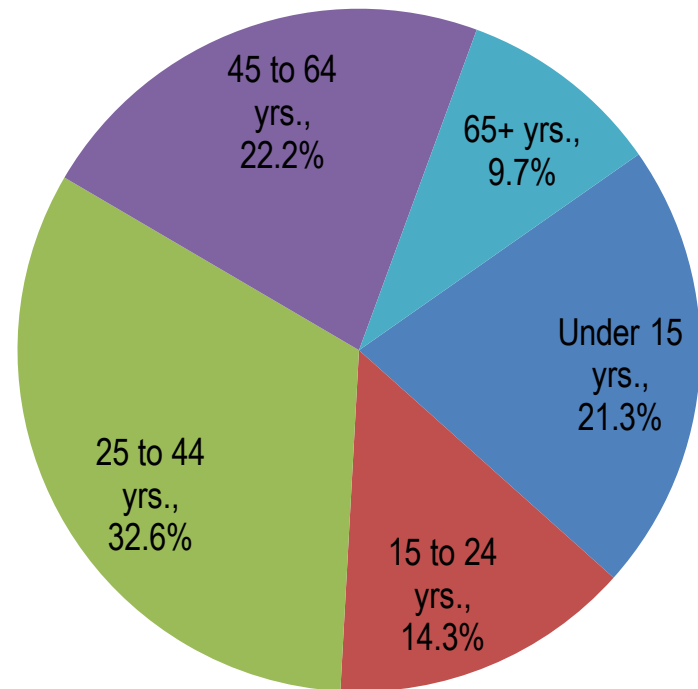
Boulder has a Population Suited for Tennis

Colorado vs. Boulder County

Age Breakdown – Boulder County



Age Breakdown – Colorado



Boulder County has a younger population than Colorado. It has a younger median age (33.4 years vs. 34.3 years) and a higher percentage of people in the 25 to 64 category (73.1% vs. 69.0%).

Source: U.S. Census.

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Colorado is a Place Where People Like to Live, Work, and Play

In 1970 Colorado had a population of 2.2 million. In 2012 it will be 5.3 million. This is an annualized rate of growth of 2.1% compared to the U.S. which is about 1.0%.

The population increases by two means.

- First, the natural increase is the difference between births and deaths. As the population has grown, the natural increase has gotten larger.
- Second, net migration is the difference between the number of people who move into the state and the number who move out of the state.

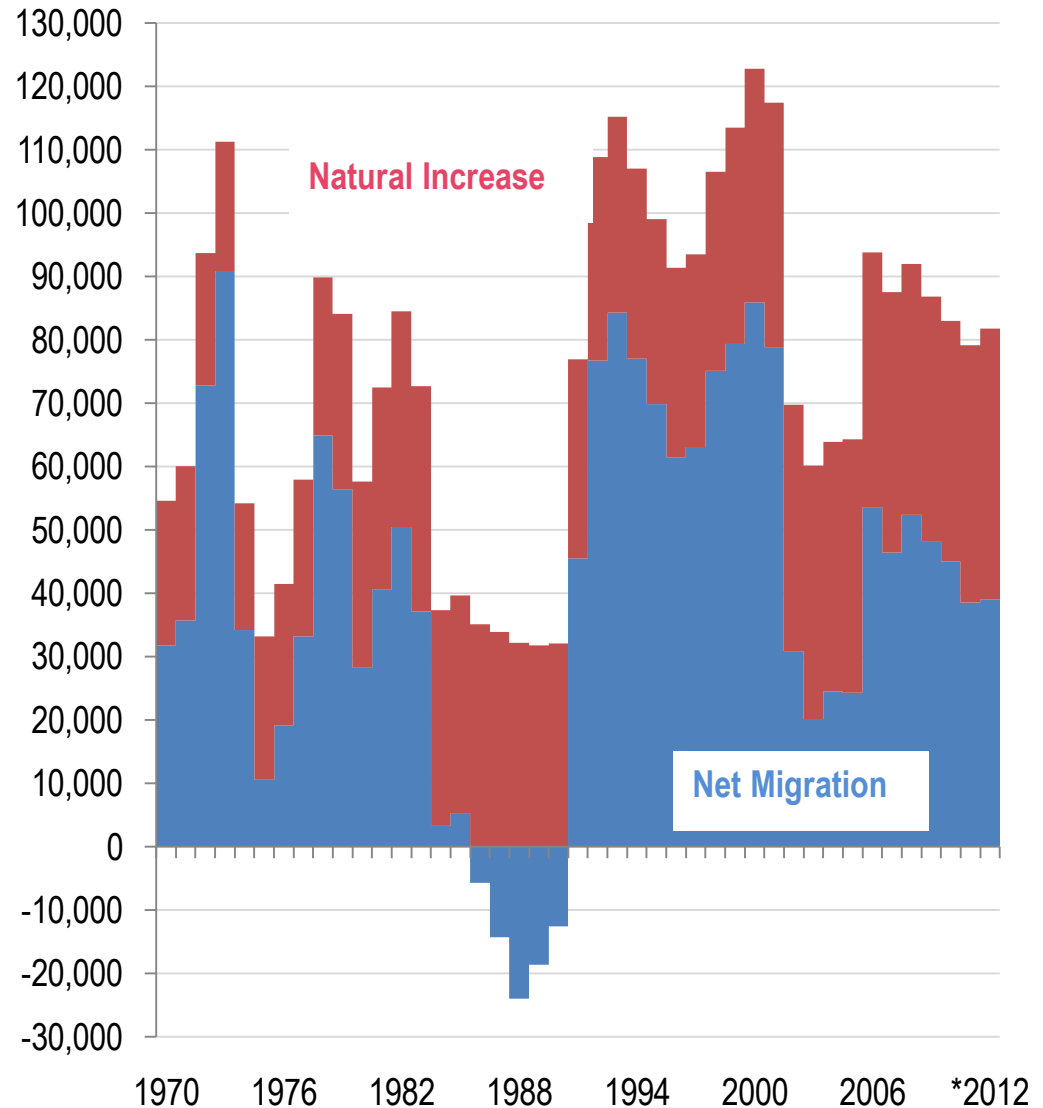
For the past decade the natural increase has been in the range of 38,000 to 43,000. More importantly, During the Great Recession the more people moved to Colorado than left. Net migration ranged between 20,000 and 54,000.

Colorado is a Place Where People Like to Live, Work, and Play!

Source: Colorado State Demography Office.

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Colorado Change in Population



Colorado is an Active, Healthy State

In the report *State Indicator Report on Physical Activity 2010*, The Center for Disease Control states that Colorado is ranked:

- 5th most active state
- 11th most highly active state
- 4th best state for leisure time activity.

The study, titled "F as in Fat: How Obesity Threatens America's Future 2010", calculated the state's adult obesity rate to be around 19.1%, making Colorado the only state to have an obesity rate of under 20%. The study was funded by the Trust for America's Health and the Robert Wood Johnson Foundation.

Colorado was ranked 13th in the 2010 Americas rankings.



Source: http://www.cdc.gov/physicalactivity/downloads/PA_State_Indicator_Report_2010.pdf,
<http://www.americashealthrankings.org/yearcompare/2009/2010/CO.aspx>, <http://healthyamericans.org/reports/obesity2010/>

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Boulder County Demographics

Boulder County, Colorado, and US People and Business Demographics

People and Business Demographics	Boulder County	Colorado	United States
Population, 2010	294,567	5,029,196	308,745,538
High school graduates, percent of persons age 25+, 2005-2009	93.40%	88.90%	84.60%
Bachelor's degree or higher, pct of persons age 25+, 2005-2009	56.60%	35.50%	27.50%
Veterans, 2005-2009	17,080	411,402	22,894,578
Mean travel time to work (minutes), workers age 16+, 2005-2009	21.4	24.1	25.2
Housing units, 2009	124,910	2,167,850	129,969,653
Homeownership rate, 2005-2009	65.10%	68.20%	66.90%
Median value of owner-occupied housing units, 2005-2009	\$350,600	\$234,100	\$185,400
Households, 2005-2009	115,180	1,869,276	112,611,029
Persons per household, 2005-2009	2.48	2.53	2.6
Median household income, 2009	\$63,757	\$55,735	\$50,221
Persons below poverty level, percent, 2009	12.90%	12.60%	14.30%
Private nonfarm employment, 2008	140,870	21,217,181	120,903,551
Private nonfarm establishments, 2008	11,499	156,684	7,601,169
Non - employer establishments, 2008	32,892	414,663	21,351,320
Retail sales per capita, 2007	\$13,660	\$13,609	\$12,990
Land area, 2000 (square miles)	742.46	103,717.53	3,537,438.44

Boulder County and Colorado are more highly educated and have a higher median income than the United States.

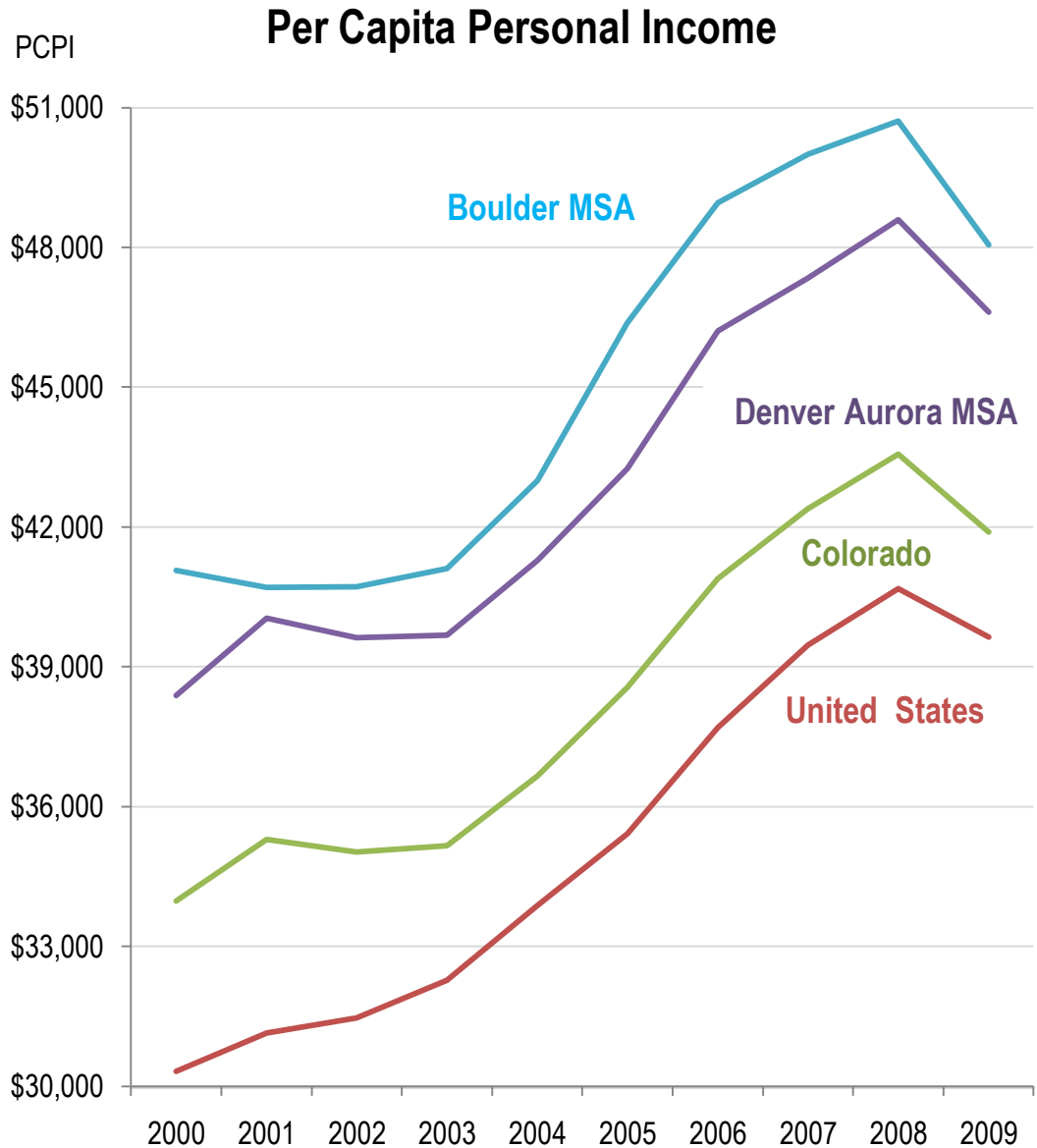
Source: U.S. Census.

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Boulder County and Colorado Residents Have the Means to Play Tennis

Colorado has a higher Per Capita Personal Income (PCPI) greater than the U.S.

The Boulder MSA (Boulder County) has a higher PCPI than the Denver-Aurora MSA, Colorado and the U.S.



Source: BEA.

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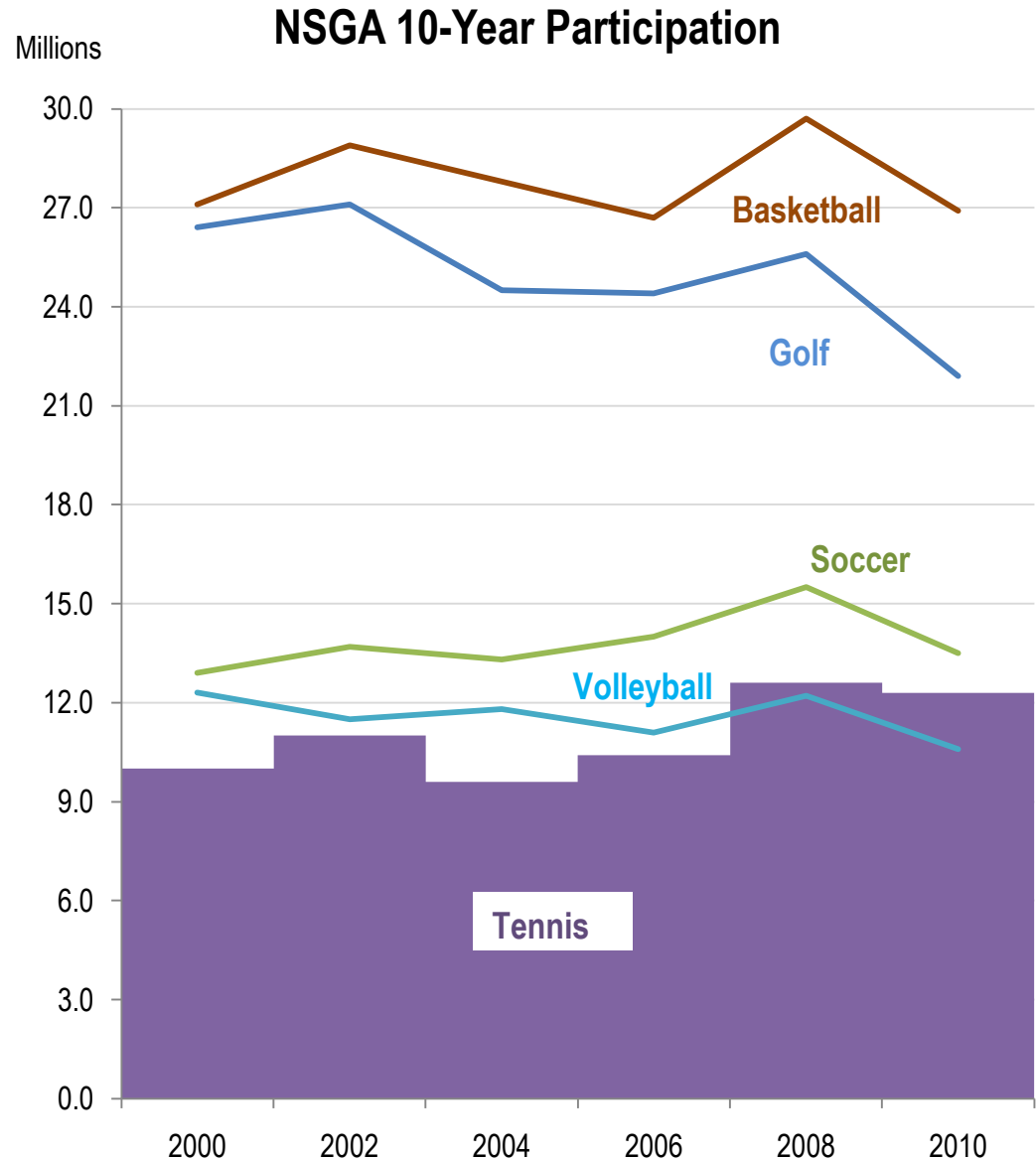
Colorado is a Tennis State

- Despite the economic challenges faced by the country and state, tennis is in a growth mode.
- Tennis has recently increased in popularity among juniors and Baby Boomers.
- Colorado has a higher than average concentration of tennis players.
- Colorado has the infrastructure in place to support future growth of the tennis industry.

Tennis Participation Up

The National Sporting Goods Association conducts annual surveys on the participation rates in sports. Because their survey uses the same methodology to measure participation in a variety of sports, its results are included in the *U.S. Statistical Abstract*.

Their results show that over a 10 year period that participation in volleyball and golf declined and basketball remained flat. Soccer posted a slight gain, while tennis posted the most significant increase in participants.



Source: NSGA.

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Tennis Posts Gains During Recessionary Times

The NSGA tracked reported participation for 42 sports over the 10-year period 2000 to 2010. Tennis was ranked 21st in 2010. The adjacent summary includes the 24 sports that had more than 10 million participants in 2010.

There were 10 sports that increased participation over this 10-year period. Tennis is one of those sports.

Despite gains and decreases, basketball ended up with about the same number of participants in 2010 as it had in 2000.

The remaining 13 sports posted declines over this period.

Aerobic exercising was the only sport to post a gain between 2008 and 2010, a testimony to the impact of the Great Recession.

Ten Year History of Sports Participation
Participated More than Once (7 Years and Older)

Sport	2000	2002	2004	2006	2008	2010
Exercise Walking	86.3	82.2	84.7	87.5	96.6	95.8
Exercising with Equipment	44.8	46.8	52.2	52.4	63.0	55.3
Swimming	60.7	53.1	53.4	56.5	63.5	51.9
Camping (vacation/overnite)	49.9	55.4	55.3	48.6	49.4	44.7
Bicycle Riding	43.1	39.7	40.3	35.6	44.7	39.8
Bowling	43.1	42.4	43.8	44.8	49.5	39.0
Aerobic Exercising	28.6	29.0	29.5	33.7	36.2	38.5
Hiking	24.3	27.2	28.3	31.0	38.0	37.7
Workout at Club	24.1	28.9	31.8	37.0	39.3	36.3
Running/Jogging	22.8	24.7	26.7	28.8	35.9	35.5
Fishing	49.3	44.2	41.2	40.6	42.2	33.8
Weight Lifting	24.8	25.1	26.2	32.9	37.5	31.5
Basketball	27.1	28.9	27.8	26.7	29.7	26.9
Billiards/Pool	32.5	33.1	34.2	31.8	31.7	24.0
Golf	26.4	27.1	24.5	24.4	25.6	21.9
Boating, Motor/Power	24.2	26.6	22.8	29.3	27.8	20.0
Target Shooting	14.8	18.9	19.2	17.1	20.3	19.8
Hunting with Firearms	19.1	19.5	17.7	17.8	18.8	16.3
Soccer	12.9	13.7	13.3	14.0	15.5	13.5
Baseball	15.6	15.6	15.9	14.6	15.2	12.5
Tennis	10.0	11.0	9.6	10.4	12.6	12.3
Backpack/Wilderness Camp	15.4	14.8	15.3	13.3	13.0	11.1
Softball	14.0	13.6	12.5	12.4	12.8	10.8
Volleyball	12.3	11.5	11.8	11.1	12.2	10.6

Source: NSGA.

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NSGA Data Shows Tennis is Popular with Young Players and Baby Boomers

Other NSGA shows:

- The number of female players increased from 5.3 million to 5.9 million between 2005 and 2010.
- Despite the increase, the percentage of female players slipped from 48.1% to 47.9%.
- Between 2001 and 2010 the number of people aged 45 to 54 increased from 38.6 million to 44.7 million, a gain of 15.7%. During this same period, the U.S. population grew from 251.2 million to 280.2 million, or 11.5%.
- Between 2001 and 2010 the number of tennis players in the 45 to 54 age bracket increased from 1.22 to 1.45 million, a gain of 18.8%. During this same period, the tennis population expanded from 10.9 million to 12.3 million, or 12.5%.
- Between 2001 and 2010 the number of 7-11 year olds has increased from 728,000 to 1,474,000. The number of 12-17 year olds has dropped off slightly from 1,963,000 to 1,859,000.
- The mean age for male players is 30.1 and 30.8 for women.
- Tennis is equally popular with men and women. It has increased in popularity in recent years with young players (7-11) and Baby Boomers!

Source: NSGA.

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NSGA Data Shows Colorado has an Above Average Concentration of Tennis Players

Other NSGA shows:

- NSGA has created a sports participation index. Any value greater than 100 indicates the state has a higher participation in that sport. Colorado has a participation index score greater than 100 in the following sports:
 - (Secondary sport) Skiing (Alpine) 226
 - (Secondary sport) Mountain Biking/Off-Road 183
 - Hiking 183
 - Tennis
 - Backpacking/Wilderness Camping 174
 - Bicycle Riding 146
- **Colorado has an above average concentration of tennis players!**

Source: NSGA.

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Findings From the United States Tennis Association



Tennis is a killer sport for all ages!

Source: CTA.

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The tennis industry conducts its own participation survey. It has a different methodology from the NSGA (both are proper and implemented professionally). They both show that the sport is expanding.

In the fall of 2010, the Colorado Tennis office provided the following information from the 2009 national study. Data is compared to the prior year, 2008.

- *Total participation* for 2009 rose from 26.9 million to 30.1 million, an increase of 12%.
- *New player participation* increased from 5.9 million players to 7.1 million.
- *Continuing players* rose from 15.1 million to 16.1 million.
- About 6.9 million *former players* came back to the game in 2009, up from 5.9 million.
- Participation grew in *all age groups* under the age of 50.
- Participation is up within *all ethnic groups*.

Findings From the Colorado Tennis Association (CTA)

- Adult league participation increased at an impressive annualized rate of 3.5% since 1999. Just over 28,137 players compete in 9 recreational leagues offered at all ability levels throughout Colorado in 2009.

- Junior league participation for youngsters ages approached 5,000 players in 2009, with annualized growth of 2.5% since 2006.

- Adult and junior tournament participation have grown at an annualized rate of 2.8% over the last five years.

- USTA membership for adults & juniors in Colorado has increased at an annualized rate of 1.8% since 1999. On their website, the CTA claims to have over 22,000 members and estimates that the state has more than a half million players.

Source: NSGA.

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The Growth of Tennis in Colorado, as documented by the CTA, is impressive given that employment in June 2010 is below June 2001 employment. Over that period population has increased at an annualized rate of 1.6%.



**This is the future of tennis!
These and other upcoming players need a place to play, certified professionals to provide instruction, and programs and events to play in.**

Conclusions

- Boulder is the place to play tennis.
- Colorado is an active tennis state and the industry is in a growth mode despite the recession.