



The Business of Tennis

The gender gap
Who scoops the most money among players?

EARNINGS Page 2



Tough going
Game takes its toll on modern gladiators

COMMENT Page 4

Social play
Upstart padel offers a fresh lease of life

NEW GAME Page 4



Friday June 24 2016

www.ft.com/reports | @ftreports

The next kings and queens of the court

As the reign of Djokovic and Williams nears an end, *Giles Wilkes* looks for usurpers

The history of tennis is divided into periods of dynastic rule. Novak Djokovic and Serena Williams are reigning monarchs, unbeatable by most other players, as were Rafael Nadal, Justine Henin, Roger Federer and Martina Hingis before them. The old ruler usually lasts long enough to duel with the eventual usurper — at length, as with Federer, Nadal and Djokovic. Or sometimes fleetingly — remember how Steffi Graf wrested dominance from Martina Navratilova between 1987 and 1989, or a 19-year-old Federer beat Pete Sampras that one time they met, at Wimbledon. Such moments are poignant, and promising too. The king is dead; long live the king.

But where are the next king or queen of the court? Perhaps nowhere, or not yet even to have played a professional match. No one approaching a Williams, Djokovic or Nadal has made themselves known. Their era lulled tennis into



expecting the extraordinary as standard. While Djokovic and Williams will eventually abdicate, worn down by the toll the game takes on the thirtysomething body, nothing guarantees that anyone as great will take over.

Look at the ATP top rankings and you can see that most full-time tennis professionals lose day in, day out. Only the top 50 avoid losing half the time they play. Victories are hogged by the best — a select few able to win 70 or 80 per cent of their matches.

A Djokovic or a Williams are on another plane altogether, going whole seasons winning nine out of every 10.



Look below established stars and there is a worrying absence of challenge

Fans know they are seeing something extraordinary: once-a-decade talent, the sort you tell your grandkids about.

But there have been gaps where no such dominance arose, such as the years before Federer's arrival — an interregnum after Sampras and Graf, when the number one slots were passed around like a tin crown.

Tennis has no system for producing all time greats. None of them take the same path. Nadal and Williams were nurtured by family, Federer by his domestic tennis academy, Djokovic in nearby Germany. Several countries have good tennis systems, but the most



Court royalty: (from left) Roger Federer, Borna Coric, Belinda Bencic and Serena Williams

Getty Images, ABACA Press France, AFP/Getty Images



prolific can still fail to produce a top winner. Germany, France, Italy, the US and Russia account for a third of top male players, according to ATP rankings, yet for a decade none that have threatened the top of the rankings.

The last man from these countries to win a Grand Slam (the four most prestigious tournaments in the game: the Australian, French and US Opens and Wimbledon) was Russia's Marat Safin, in 2005.

Look below the established stars and there is a worrying absence of challenge from those 10 years younger. The average age of the top 10 in male tennis has

never been higher, at almost 30. True greats usually arrive before they are 21, an age at which Björn Borg, John McEnroe, Federer, Graf, Monica Seles all had won Grand Slams. Several much hyped contenders have risen but stalled: the Bulgarian Grigor Dimitrov, hailed as the next Federer but beaten five times by the Swiss already, or Australia's Bernard Tomic, now 23 and losing 80 per cent of the time against top 10 opponents.

Perhaps one or two younger players might break through: Croatia's Borna Coric beat Nadal and Murray before he was 20, and the Australian Nick Kyrgios knocked an off-key Nadal out of Wimbledon in 2014, aged 19. These players might step up a level, but they need to do more to trouble Djokovic, let alone replace him. The women's game looks just as sparse. Belinda Bencic, from Switzerland, and Madison Keys from the US are young and moving up the top 20 — but neither have even reached a Grand Slam final.

Greatness does not come about as a matter of course. The recent dominance of Djokovic and Williams may be the last flowering of a unique era, not succeeded by a dynasty but a period of ferment. National tennis systems, even the best such as Spain's or France's, are factories for producing decent players — even Britain has 28 in the top 1,000. However, none has yet to work out how to turn out a genius.



WHEN YOUR TRADITIONS ARE KNOWN TO ALL, YOU'VE MADE HISTORY.

This watch is a witness to epic battles on Centre Court. Worn on the wrists of those who have made Wimbledon's traditions great. It doesn't just tell time. It tells history.



OYSTER PERPETUAL DATEJUST 41



THE CHAMPIONSHIPS, WIMBLEDON
THE ALL ENGLAND LAWN TENNIS CLUB, LONDON
JUNE 27TH TO JULY 10TH, 2016

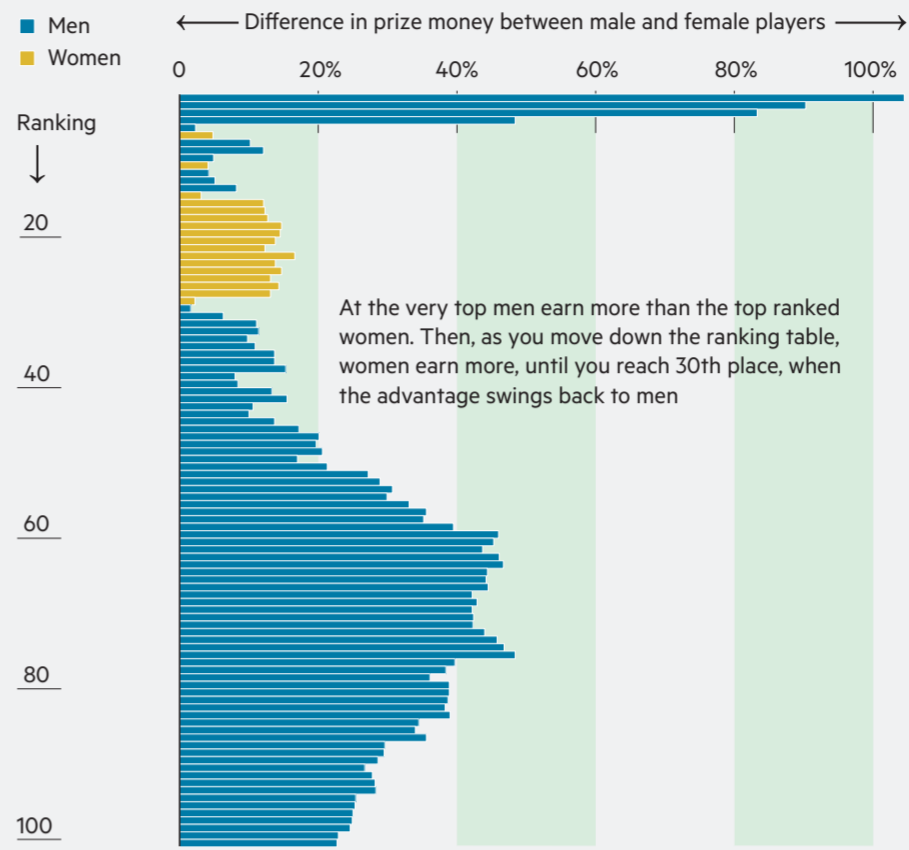


The Business of Tennis



Men still earn more than women overall

At almost every rank, male tennis players are awarded more prize money than women. Prize money may have been equalised at the Grand Slam tournaments, but disparities persist both within and between tournaments, allowing the top men's players to pocket millions of dollars more than their female counterparts



The pay gap A small group of very good male players scoop most of the prize money and endorsement fees

Despite the fact that the top four events in tennis known as Grand Slams have awarded equal prize money to both sexes since 2007, men still earn more than women overall. At the very top, Novak Djokovic won \$21.6m in 2015, compared with Serena Williams' \$10.6m. Although the top four men in the world earned a combined total of \$45m in 2015 — the same as the top 11 women — you would be far better off being a woman ranked 20th than a man. As this chart of percentage differences in prize money won by men and women in the top 100 last year shows, the very top men earn far more than

the top ranked women. Then, as you move down the ranking table, women earn more, until you reach 30th place, when the advantage swings back to men. Why is this? The first thing to note is that this is not a blip. The explanation is that a small group of very good male players dominate the big events, skewing the winnings to the elite few.

Is it so different for men and women when it comes to endorsements? The data here are less readily available than prize money. But it seems endorsements are not that closely linked to recent winnings. Rafael Nadal won "just" \$4.5m in 2015, his

lowest total since 2006. But he still earned more than \$30m off court, according to Forbes' latest ranking, published in June.

This is because endorsements are more closely tied to longer-term career performance and other factors important to marketers such as regional appeal and name recognition. Japan's Kei Nishikori for example now earns twice as much in sponsorship money as Britain's Andy Murray — \$30m compared with \$15m according to Forbes. This in spite of the fact the Japanese player boasts far fewer career titles and no majors to match

Murray's Grand Slam wins. Still top of the pile, with \$60m in endorsements, is Roger Federer. The current number three earned more off-court than top-ranked Djokovic in winnings and sponsorship combined. Maria Sharapova's drugs ban and lower on-court winnings cost the Russian her mantle for the past 11 years as the world's most highly paid sportswoman. Williams has seen her endorsement earnings rise by \$7m to \$20m in the past 12 months. Her winnings of more than \$10m put the American in front for the first time since 2004.

Rob Minto and John Burn-Murdoch

Contributors

Giles Wilkes
FT Lex writer

David Shaftel
Freelance journalist

Peter Aspden
Former FT arts writer

Charles Morris
Former FT journalist

Peter Wells
FT journalist in Hong Kong

Hugo Greenhalgh
FT Wealth correspondent

Renée Schultes
Freelance journalist

Rob Minto
Digital editor for audience engagement

John Burn-Murdoch
Data visualisation journalist

Production team

Ruth Lewis-Coste
Commissioning editor

Steven Bird
Designer

Alan Knox
Picture editor

Paul McCallum
Graphics designer

For advertising details, contact:
Danielle Erb, 001 917 551 5206,
danielle.erb@ft.com, or your usual FT representative.

All editorial content in this report is produced by the FT. Our advertisers have no influence over or prior sight of the articles.

Latest spin on equipment set to change game

Technology Endorsements and innovation are king in a competitive market, says *Charles Morris*

The tennis equipment industry is confronting what it regards as two unhappy birthdays. Roger Federer is 35 in August and Rafael Nadal was 30 this month, which means both are approaching the end of their careers.

Player endorsement is a crucial factor in selling tennis gear and these charismatic stars have proved highly effective in that regard.

"Federer and Nadal are the two that can really sell products," says Rohun Davda, manager of Wigmore Sports, a London specialist tennis retailer.

Federer receives a reported \$2m a year from Wilson, the US manufacturer, to use its rackets. Both he and Nadal have longstanding deals to wear the clothing of Nike, which is the world's market leader in tennis clothes, followed by Adidas.

Jolyn de Boer, executive director of the US Tennis Industry Association, says the pair also inspire people to play the game. "And the more people play, the more they will buy equipment," she says.

Nadal has also played a significant part in the rapid rise of Babolat, the French company, having used its rackets throughout his career. "During the last 15 or so years Babolat have gone from nothing to number one brand in the world," Mr Davda says.

The Lyon-based company, founded in 1875, began as a racket string manufacturer. It made its first rackets in 1994. At that time the global industry had been dominated for years by Wilson and Prince, also of the US, and Head, the Dutch-Austrian manufacturer.

Babolat began a strong marketing campaign that signed leading juniors around the world to use its rackets, it kitted out club coaches and crucially hit the jackpot in the top players it sponsored. Carlos Moya won the French Open in 1998 using a Babolat racket and was followed by grand-slam title winners Andy Roddick, Kim Clijsters and Nadal.

Head estimates that global racket sales were 7.9m in 2015, with a wholesale value of €290m. Racket manufacturers do not release their sales figures,

but the industry consensus is that Babolat and Wilson top the world list, with Head third and Japan's Yonex fourth.

The leading brands have innovated to remain at the top. In 2013, Head became the first to produce a racket made of graphene, the substance that is 200 times stronger than steel yet ultra light and flexible.

More recently Babolat introduced a racket with an integrated sensor that records a player's strokes digitally (see sidebar) and Wilson has aimed to provide greater spin on shots with a new stringing system.

While Nike and Adidas lead the tennis clothing market over old rivals such as Fila, Lacoste and Lotto, bold entries have been made by Under Armour of the US and Uniqlo of Japan. The Japanese company signed current world number one Novak Djokovic in 2012 and Under Armour began a four-year, £15m deal with Andy Murray last year.

The clothing sector has gained a significant boost this century from the replacement of cotton by polymer materials, such as polyester, that absorb sweat and move it to the fabric's surface where it evaporates, allowing players to feel cooler and more comfortable.

It is shoes, however, that are the most important equipment item for tennis players after the racket. Comfort, cushioning, support and grip for feet facing the varying challenges of hard, clay and grass courts are crucial.

Footwear is also the biggest earner of all tennis equipment. The US Tennis Industry Association says total spending in 2014 on shoes by tennis players in the US, the world's biggest tennis market, was \$227.8m compared with \$188.4m on clothing and \$174.6m on rackets.

Djokovic in particular has highlighted the importance of shoes. After ending his clothing deal with Adidas in 2009, he switched first to Italian brand Sergio Tacchini before uniting with Uniqlo, yet throughout these two changes has refused to wear anything other than his favoured Adidas footwear.

The world's best player has found the make that suits him best, and he is sticking to it.



Data control: Sensors are being developed to help players improve. From top left, a smart racket from Sony; Qlipp's performance recorder; the pro mount by Zepp Labs and Babolat's play app

Gadgets Digital revolution

Wimbledon may epitomise tennis tradition with its grass courts, all-white dress code and blazered officials, but the wider game is in the grip of a digital revolution.

Changes in racket technology have predominantly been about materials, progressing over the past 40 years from wood to aluminium, steel and then graphite and graphene. The most recent development, however, has been digital sensors that attach to rackets and record a player's shot selection, power, spin and ball contact accuracy.

Leading technology company Sony, and smaller ones such as Zepp Labs in California and 9 Degrees Freedom of Singapore with its Qlipp brand, have all produced such gadgets. These stream the data to players' smartphones or computers, helping them to analyse their game.

The sensors are attached to the base of the strings or slot on the end of the handle, or as in Babolat's case, are integrated in the handle.

Tennis courts have also been digitised. American company PlaySight has built more than 400 "smart" courts around the world and this year is set to install more at the US Tennis Association's new campus near Orlando, Florida.

Such courts have high-definition cameras and sensors around them, providing real-time and post-match video data similar to that provided by racket sensors and automated line calling.

All this content is uploaded to the "cloud" to be pored over by the players and their coaches.

Jolyn de Boer, US Tennis Industry Association executive director, says such technology "is a game-changer for tennis" in helping players to improve and creating an "online community".

People will be able to put their playing data online and find opponents of similar level, she says, thereby creating near-perfect matches.

CM

China awaits inspiration from its next big star

Growth Emergence of a great male player is probably the missing piece of the puzzle, says *Peter Wells*

The only thing that might have been louder than the cheers of the crowd at the French Open in 2011 when Li Na won the women's final was the collective sound of an inspired China picking up rackets to hit tennis balls.

To the outside observer, Li Na's victory in Paris, or at the Australian Open in 2014, may have seemed like a spark that would ignite a wave of Chinese interest and excellence of tennis.

But extrapolating from her success is too simplistic an assessment of the game's growth in the world's most populous nation. Participation and interest in the sport had been on the rise for many years. According to the International Tennis Federation (ITF) there are 14.98m "core" tennis players in China, which is defined as playing 10 or more times each year.

A solid platform for growth exists thanks to the efforts of the Chinese Tennis Association (CTA), the governing body, and a growing number of professional tournaments being staged in the country — not forgetting the Beijing Olympics in 2008.

China had an early taste of success at the Athens Olympics in 2004, when Li Ting and Sun Tiantian won the gold medal in the women's doubles. But in Li Na, the country found a superstar with the potential to help tennis grow even faster.

National superstars can definitely drive interest in sport, but the reality is they come and go. Li Na retired in 2014, though she remains a prominent ambassador for the game.

While helpful, "an iconic player is additive, but it's not necessary for tennis' success", says Charles Smith, the Shanghai-based director for the Association of Tour Professionals (ATP) and the managing director of Juss Event, China's largest sports and events management company. "The development of the game in China is running independently of waiting for any one player to break through."

In part, that development is driven by China's growing middle class. More than just a global sport, tennis is seen as a status symbol for the socially ambitious. But participation, whether inspired by a famous athlete or not, is limited by access to resources and facilities.

There are an estimated 30,000 tennis courts for a country of 1.36bn people.

That is just 2.3 times the number of courts in Australia, with a population of 24m people, according to Tennis Australia, the sport's national governing body.

The potential for growth is vast. A relatively small proportion of China's population play tennis, when compared to developed countries such as the US and UK, and an increase in participation would boost opportunities for sports clothing and equipment brands.

The ATP now has three tour events in China and the WTA eight. That is not counting the lower-tier Challengers and Futures tournaments.

Stadiums or upmarket clubs, however, are not much help when it comes to broadening participation. Authorities need to focus on making tennis more accessible through school programmes and community courts.

Despite the claim that tennis is running independently of waiting for a player to break through, a burst of popularity of the sport could still be inspired by a male star. Alison Lee, the ATP's executive vice-president for the international tour, points to the potential of Zhizhen Zhang, a 19-year-old who had risen to 398 in the world by last November, having started 2015 ranked 1,295.

"If someone like Zhang, who is 193cm tall, speaks English and is very

One reason for the lopsided male/female success is the [discarded] one child policy

marketable, can break through [into the top 100] in the next couple of years, that will create massive change in men's tennis not just in China, but globally," she claims.

In April, the 24-year-old Wu Di attained an ATP ranking of 140 in the world, a record high for a male Chinese national. In contrast, there are five Chinese women among the WTA's top 100 — a ranking generally considered a threshold for success for both sexes.

One possible reason for the lopsidedness of male/female success is China's one child policy that Beijing recently decided to scrap after three decades. This policy meant parents tended to make sure their sons pursued an academic education rather than taking a risk on niche activities, such as tennis. Almost by default, that policy meant that girls had a better opportunity to take up the sport.

Nonetheless, attitudes have begun to shift. The international success of female players like Li Na are helping to create a career pathway that parents can identify with and their children can aspire to.

Raonic gets set for a strong Wimbledon challenge

Interview John McEnroe adds to the Canadian's armour on grass, as *David Shaftel* discovers

It is hard to imagine two players with more contrary demeanours than John McEnroe and Milos Raonic. On court, the big serving Raonic, a 25-year-old currently ranked seventh in the world, is known for a stoic, some say robotic, approach to his powerful game.

McEnroe, once known as "McNasty", was the rare player who could use negativity — tantrums, verbal abuse, extended sulks — to elevate his play, in an era when finesse was more common than raw power.

It was noteworthy when, last month during the French Open (where Raonic made it only to the fourth round), McEnroe announced he would be joining Raonic's team as a coach to help him through Wimbledon, which starts on Monday. He availed himself of a segment on Eurosport, the television channel, to pick up a guitar and sing: "I just want to consult, be part of this team, add a little bit if I can on his quest on grass. Milos is a guy I think can win majors."

Raonic concedes their personalities appear opposed. "John was probably a lot more outspoken than I am," he says, in an interview before the Aegon Championships at The Queen's Club in London, where he lost in the final against Andy Murray.

In part due to the Balkan conflict, Raonic moved with his family to Canada from Montenegro in 1994. He is the first tennis player in his family, indeed the first real tennis star from Canada. His father is an electrical engineer and his mother has a degree in computer engineering — parental backgrounds which could have influenced Raonic's methodical approach to the game.

But Raonic says he and McEnroe are not as different as it may seem. "I was quite negative and brash with my words when I was younger. I realised that if I wanted to win I had to dial that down and become this sort of flatline on court. I find if I get too positive I can get negative really fast. . . I've tried to tuck it away."

On a tactical level, McEnroe has a lot to impart. He is considered one of the best serve-and-volley players of all time and one of the most aggressive, and Raonic says he needs to finish more points at the net if he wants to challenge

players such as Murray, Roger Federer and Novak Djokovic, whose recent dominance of the sport has been total. "John was never the guy that would stay back and be like, 'OK, I'll just break this guy down,'" Raonic says.

"He was looking to create, and he had many ways of doing it. He would never give the same ball twice, he'd always keep the other guy off rhythm," he adds. "That's the most appealing thing for me to add to my game. I don't want my opponents feeling comfortable."

Paul Annacone, a former player who has coached Pete Sampras and Federer, sees many benefits to the McEnroe addition. With the former world number one on his team, Raonic now has "arguably one of the greatest grass court tennis players, a guy with first-hand knowledge of not just technique but also about big points and big matches he's played in, and what's worked and what hasn't," Annacone says. "That's truly a huge added value."

McEnroe is now the third coach on Raonic's team, alongside the Italian trainer Riccardo Piatti and Carlos Moya, the former Spanish world number one. Annacone, who is now an analyst on the Tennis Channel, sees potential for concern about the combination.

"Milos needs to make sure all the technical stuff is on the same page, so that the different voices don't create confusion or distraction. Communication has to be on the highest level," he says.

Raonic says he hopes McEnroe's input will "complement" the other two coaches, but he acknowledges that the responsibility to play well is ultimately his. "At the end of the day nobody is going to win those points for me," he says. "I have to be able to step up to those situations. But there is a lot of useful information that I can learn from John, Ricardo, Carlos."

So far, Raonic says McEnroe is a good fit. "We both have strong personalities," he says.

"John likes to have things his way. I understand that he's seen a lot of tennis, but rather than us talking at each other, we actually discuss things."

Raonic points out his own reputation for being emotionless is not entirely accurate. "I can be very serious and



methodical on court," he says, but off the court, "I make a lot more jokes and I am always very light-hearted and let things go a lot easier."

The grass of the All England Lawn Tennis Club, the fastest Grand Slam surface, represents Raonic's best chance to capture his first major title. "Physically I feel well, mentally I feel very eager and hungry to get going," he says, adding that the collaboration with McEnroe has invigorated him. Things have been "a little bit more exciting and I'm very positive about playing a lot of matches on grass," he says.

Annacone believes that Raonic is one to watch at Wimbledon, pointing out that he reached the semi-finals there in 2014, which should give him confidence.

"Outside of the suffocating group that seems to win everything," he says of Djokovic, Murray, Federer and Rafael Nadal "on a grass court, with his weaponry, he's right there."

Though it is unlikely Raonic will slam his racket on the ground or call an umpire "the pits of the world", he is hoping to emulate McEnroe in a different way: by challenging for a Wimbledon title as his new mentor once did.

Stoic: Milos Raonic, ranked number 7 in the world, and working with John McEnroe in the run-up to Wimbledon

by KC Armstrong

'I can be very serious and methodical on court but off the court I make a lot more jokes and am always light-hearted'

Players under stress from a full calendar

Expense

Emerging players need an average of \$40,000 a year to compete, finds *Hugo Greenhalgh*

Tennis is one of the few truly global sports. It has 62 tournaments of top-level events in 31 countries, set up by the Association of Tennis Professionals (ATP), which is responsible for the men's Masters series as well as the Grand Slams.

The Women's Tennis Association (WTA), founded in 1973 by four-times Wimbledon champion Billie Jean King, performs the same global task for women's tennis.

And then there is the International Tennis Federation (ITF), the governing body for world tennis, wheelchair tennis and beach tennis, which is affiliated with 211 national tennis associations and six regional bodies.

Even within the ATP Challenger Tour, the circuit that is one step down from the World Tour, there are more than 100 tournaments around the world, from Bukhara in Uzbekistan to Surbiton in England. Add in the several hundred on the ITF tour and you have a circuit that is truly global in both scale and ambition.

The series of tours can be gruelling physically for all levels of players. The Argentine Diego Schwartzman, ranked 69 in the world, ceded his first-round match in this year's Australian Open to 66th ranked home player John Millman as crippling cramp forced him to retire.

Even top-flight players are affected. Andy Murray has long battled a back injury and Rafael Nadal, a former number one player, has seen his ranking slip due to numerous injuries, not least to his wrist, hampering his renowned backhand returns.

Along with physical fitness it is as paramount to be able to afford the tour. For players looking to break into the top ranks even competing at the lower levels can be financially as well as physically taxing. "Tennis is one of the toughest professional sports to break into," says Kris Dent, senior executive director for professional tennis at the ITF. "It costs an average of \$40,000 a year to compete."

The problem is that there are simply too many tournaments.

Players chasing ranking points spend most of their time, and money, travelling the world to increasingly obscure places, from the Prime Cup Aberto de São Paulo in Brazil, for example, to the Zagreb Open in Croatia.

And for the lower-ranked players, who will naturally find it more difficult to attract sponsors, there is the pressure of knowing that if they do not do well

Tennis in numbers

- In 2013, there were 8,874 professional male players (3,896 of whom earned no prize money) and 4,862 professional female players (2,212 of whom earned no prize money)
- Break-even point on the earnings list (where average costs meet actual earnings) was 336 for men and 253 for women in 2013.
- Time taken from earning the first ranking point to entering the top 100 from 2000 to 2013 is increasing (3.7-4.8 years for men; 3.4-4.1 years for women)
- There are significantly more professional events for players to compete in, with that growth of events being driven by Europe.

Source: International Tennis Federation

and progress up the rankings, their national associations are likely to turn off the financial tap.

The ITF conducted a review in 2014 with the aim of raising prize money and player earnings. It found that there were almost 9,000 male players on the its World Tour in 2013 and just under 5,000 female professionals. Of the men, almost half earned no prize money at all; a similar proportion of women also went away empty-handed in 2013.

Men still have the potential to earn more: the total pot of all the tournaments in 2013 stood at \$162m for the male players, \$120m for the women.

To break even, male players needed to be seeded 336th in the world and above; and for women, 253rd and higher.

Are there just too many players chasing too little money? The ATP is just about to embark on its own review, ranging from how many players can make a living from the tour, to determining the optimum number of tournaments in each year.

Chris Kermode, ATP chairman, is at pains to stress that the tour has never been in better financial health, after bringing in a record \$160m in sponsorship to be spread over the next three years. Yet he also recognises the pressures that players face. "It has always been a difficult sport to break into professionally," he says. "The global nature of it makes it harder, as there's more travel. This is something we are looking at: whether we should be increasing the money at challenger level.

"But it's not just about the money," he adds. "It's also about the support network around it. So we're looking at providing lower-ranked players with access to physiotherapists, coaches, trainers — if they can't afford it."

A slice of Grand Slam expansion puts pressure on schedules

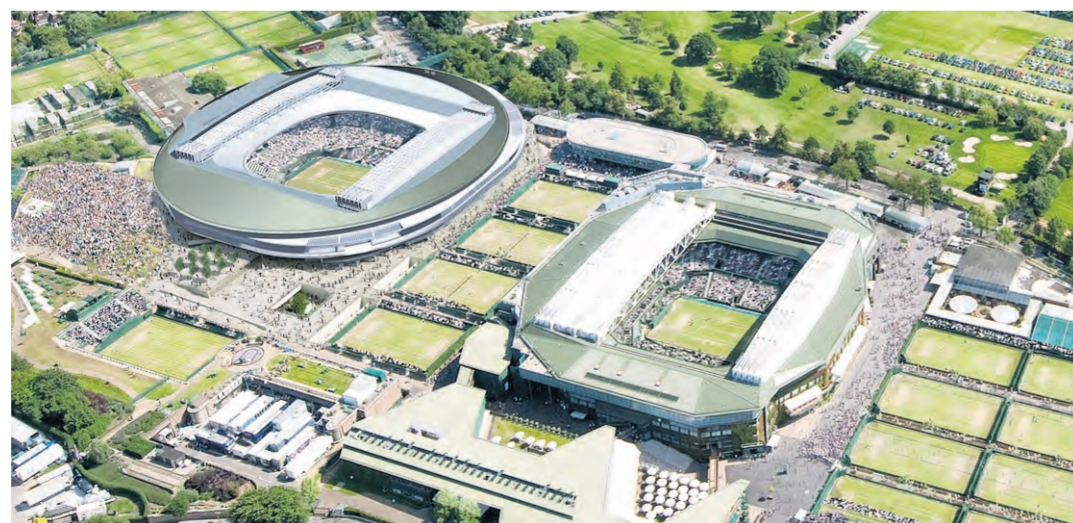
Growth Better facilities and moving tournaments are set to change the landscape, says *David Shaftel*

Compared with the other three more polished Grand Slams, the French Open can appear refreshingly anachronistic, with its intimate atmosphere and clay courts made from crushed red bricks, all tucked in next to an 18th century botanical garden in central Paris.

But much of the talk surrounding this year's French Open was not of its charm, but of the rain. The tournament was the wettest in recent memory and included an entire day of washed out play, with few places for the fans to take shelter, other than under umbrellas in the chilly grandstands.

Modernisation of the facility, most crucially the addition of a retractable roof for the 15,000-seat Philippe-Chatriot Court and expansion of the main public courtyard, the place des Mousquetaires, has been delayed by neighbours and environmentalists concerned about the tournament encroaching into the next-door Jardin des Serres d'Auteuil. "Welcome to France," tournament director Guy Forget told the Associated Press during one of the many rain delays, saying also that a roof is planned for 2020. "In other countries, things are quicker."

No doubt compounding Forget's frustration is the sense that, while any plans to modernise have become bogged down in red tape, the other three Grand



The challenge is 'having the Olympics and Davis Cup crammed into the six weeks of summer'

Slam tournaments — Wimbledon, the US Open and Australian Open — are forging forward with improvements to their facilities and events. And away from the Slams, the wider pro tour is taking steps to adapt to an expanding tennis landscape.

After a stretch of five straight rain-postponed men's finals between 2008 and 2012, the US Open, which begins at the end of August, will finally feature a new retractable roof on its Arthur Ashe stadium, the event's largest court, as well as a new grandstand stadium. After this year's tournament, the second largest court, the Louis Armstrong stadium, will be demolished and replaced with a bigger, roofed structure to be completed in 2018.

The Australian Open, which now features three courts with retractable roofs to help players and fans beat the heat and the rain, is also in the middle of a two-phase redevelopment that includes an ambitious new training facility. "We

no longer look at ourselves as a [tennis] federation, we look at ourselves as a large entertainment company. These are global entertainment events, so you cannot have weather conditions stop your show," says Craig Tiley, the Australian Open's tournament director.

Wimbledon, which starts next week, has had a roof on Centre Court since 2009. In 2011 it unveiled a "master plan" for improvement of the grounds that includes plans for a retractable roof on No. 1 Court, its second largest court.

Perhaps the biggest change at the All England Lawn Tennis Club, however, is not related to the venue, but the schedule. Last year, The Championships, as the tournament is known, were pushed back a week to give the players a longer rest after the French Open, and to extend the grass court season by an extra week.

When the change was announced, "shockwaves" were felt by stakeholders in the tournaments held later in the



Covered future: view of the planned retractable roof over No.1 Court at Wimbledon, left, and the Arthur Ashe stadium at the US Open, right

AELTC/Tom Lovelock/USA Today Sports

summer, said Todd Martin, a former player and chief executive of the Tennis Hall of Fame in Newport, Rhode Island, which hosts a grass court tournament beginning one week after Wimbledon.

"For the sport, it was a good thing to extend the grass court season," Martin said. "It gives the players an extra week of rest. It's still not enough rest between the French Open and Wimbledon."

But scheduling Wimbledon a week later has meant Davis Cup ties are pushed back a week too and now overlap with Newport. "This means certain players are not . . . even going to consider coming to play a tournament here [in Newport] that week," Martin said.

Complicating matters further are the Olympic Games in Rio de Janeiro in early August. The challenge is "having the Olympics and Davis Cup crammed into the six weeks of the summer, and that's frankly too much," Martin says.

Despite some concessions, such as the ATP Tour Finals (the last event of the

calendar year for the Association of Tennis Professionals, the body that oversees the men's professional game) being moved forward a week in recent years, the length and intensity of the men's schedule has long been a bone of contention with the players.

"We've been complaining about it for 35 years," says Brad Gilbert, a former player and analyst for ESPN. "The ATP is made up of . . . individual tournaments, so nobody is fighting together. They don't want to shorten things because [the tournaments] are afraid . . . they'll get eliminated," he says. Gilbert, however, remains wary of further unchecked expansion. "Until the sport gets a commissioner who speaks for the Slams, the International Tennis Federation [which governs the Davis Cup], the ATP — all the . . . entities coming together — there will never be anything done about it," he says.

But Justin Gimelstob, a player representative on the ATP board, says the needs of top-ranked players, who may want a shorter season, have to be balanced with those of lower ranked players, who might want to play more in order to accumulate ranking points and prize money.

Amid this busy schedule, tournaments are looking to pioneer emerging tennis markets, says Fernando Soler, managing director of the tennis division at IMG, a talent management agency that owns eight tournaments worldwide. "South America deserves a Masters series," Soler says, adding that the greatest potential for expansion lies in the East. "We've invested in countries like India and Malaysia and Japan."

Fitting it all into an already packed schedule will, however, be tricky.

The Business of Tennis

Upstart padel offers incumbent a new lease of life

Future Cost-effectiveness of setting up a court is an attraction for investors, says *Renée Schultes*

Henri Leconte picked up his first padel racket 10 years ago in the “Mecca of padel”, Marbella, Spain. His opponent was Spain’s Manolo Santana, the 1966 Wimbledon champion and one of the first tennis players to take up what claims to be Europe’s fastest growing sport.

An offshoot of tennis, padel is played on a court roughly half the size of a tennis court with a walled edge and modified equipment. “At first I was amused by this strange sport,” recalls former professional tennis player Leconte, who has opened padel courts in France and lends his name under licence to the World Padel Club in Australia. “Yet I instantly became a fan.”

“Four years ago there were around 100 courts in Europe outside Spain,” says Matt Barrelle, the club’s chief executive who has spent a career at the intersection of sport and business. “Now there’s 1,000 and that’s doubling every year in terms of the growth rate.”

Italy boasted 178 padel courts in April, up 278 per cent over the previous year, while France recorded 210 courts, up 94 per cent, according to La Comisión Española para la Industria del Padel, an industry body. The UK had 32 courts dotted around the country, according to British Padel.

Even more striking, by 2014 padel overtook tennis to become Spain’s second biggest participation sport after football, according to the World Padel Club. But outside Spain the padel business remains in its infancy.

Investors are counting on the relative simplicity of the new game — whose effect they compare to five-a-side’s benefits to football — to export it into new markets in Europe and Australia, beyond the Spanish-speaking markets where it has been popular since the 1990s (see box).

Whereas tennis is dependent on an individual’s physical aptitude and technique, the progression curve in padel is smoother, notes Leconte. “You can enjoy a game after two hours of play, even if you had never held a racket in your hands. So the public is potentially wider. In Spain, 40 per cent of the players are ladies.”

There is no tennis-serve to master: a padel serve is underarm. The smaller court size means rallies are longer and padel supporters claim the sport is twice as aerobic as tennis where more time is wasted between points.

Barrelle cites over 35s as a target demographic. “Padel forms an adjunct to tennis at the point at which people are not as competitive playing tournaments and want something more social,” says Barrelle.

“In tennis clubs in France and Italy we are seeing more people pick up a padel racket, which counts towards more participation in tennis, and it recycles players



Ease of play: at the World Padel Club in Sydney, head coach Matt Thomas trains with playing partner Alexandra Coste. The padel racket is very different than for tennis — James Horan



back into the game.” That could be as players or spectators.

Padel’s wide appeal has potential to be a strong commercial proposition for tennis clubs, many of which are losing members to other leisure activities such as crossfit, the fitness programme, or yoga.

In padel, each player pays, rather than the standard one court fee between players in tennis. A smaller court size means eight people can play at once on a piece of real estate the size of one tennis court. At roughly €30,000 (\$34,000) a court including installation, they are a relatively cost-effective investment for clubs.

World Padel Club, whose backers include Barrelle’s business partner Andrew Knox and their Monaco-based investors, has a multi-million-dollar fund to take the game into new markets. It acquired a padel club in Birmingham and opened

‘You can enjoy a game after two hours of play, even if you had never held a racket in your hands’
Henri Leconte

in Genoa in Italy last year, while its first club in Sydney started in January. More clubs are to come on Australia’s Gold Coast, in Barcelona and in the south of France.

However, one of the biggest challenges in introducing padel to new markets remains how to give the sport greater legitimacy. In France, for example, padel is overseen by the French Tennis Federation, which lends its know-how in organising events and helps develop the sport at a national level through its network of clubs.

In the same vein, World Padel Club in Sydney is hopeful that padel will eventually fall under the auspices of the country’s local tennis association, Tennis Australia.

“We see the value of working with tennis and they see the value in terms of starting off juniors,” says Matt Thomas, manager and head coach of the Sydney club.

“In a lot of other countries the local tennis federations haven’t wanted to liaise with padel because they don’t think the two sports are compatible. Racket sports should support one another; it’s about getting more people on courts.”

With a near boundless choice of competing leisure activities that is a compelling reason for the tennis establishment to serve up padel.

The Spanish court

Industrialist Enrique Corcuera is credited with inventing padel in the 1960s at his home in Acapulco, Mexico. Confining by the size of his garden, he had a small, enclosed court built. The concept was then taken to Spain by Prince Alfonso de Hohenlohe who had visited Corcuera in the early 1970s. He refined the game and opened the first padel court at his hotel in Marbella.

Padel grew rapidly in Spain in the 1990s, helped by the participation and sponsorship by José María Aznar, the then prime minister.

In the world’s biggest padel market, 5m people played the game in Spain in 2014, up from 1m in 2007, according to World Padel Club.



Alarm bells ringing as the gladiators find the going tough

COMMENT

Peter Aspden

There has always been a gladiatorial element to history’s greatest tennis matches. But never was the description more accurately applied than in the Australian Open final of 2012, when Novak Djokovic beat Rafael Nadal in a gruelling five-set match of fluctuating fortunes and high drama.

The long, draining rallies sapped the strength of the spectators, never mind the players. Djokovic and Nadal, playing their third consecutive Grand Slam final, contested every point with ferocity. The Serb clinched the match, winning the final set 7-5, after a record-breaking five hours and 53 minutes on court. The players were unable to remain standing during the presentation, forcing chairs to be hurried on court so they could sit down.

“It was obvious on the court for everybody who has watched the match that both of us, physically, we took the last drop of energy that we had from our bodies,” said Djokovic at 2am. “We made history tonight.” Steve Tignor, a writer for Tennis magazine, described the contest as “a 15-round fight and a marathon all in one”.

It may have been the most intense match ever played. But it also set alarm bells ringing. Were the fitness levels of top tennis players today turning the game into a dangerous one? Were Djokovic and Nadal operating beyond the safe limits of physical endurance?

Nadal, 30, went on to win four more Grand Slam titles, three of them on his favoured clay surface at Roland Garros, home of the French Open. But he has also gradually begun to succumb to the physical demands on him. He will be missing from Wimbledon next week because of a wrist injury, which forced him to withdraw from this year’s French Open. His troubles recall the prescient comment made by Andre Agassi 11 years ago, when the American lost to the taurine Spaniard: “He is writing cheques that his body can’t cash.”

Nadal’s greatest rival Roger Federer, approaching 35, has also missed part of this season, taking a month off to solve a back problem. Federer’s more graceful style has kept him at the top for longer



Wrist injury: Rafael Nadal

than most of his contemporaries. But the rigours of the professional circuit are finally catching up with him, too.

Other top players have also found the modern game tough going.

The Argentine Juan Martin del Potro, US Open winner in 2009, has missed large parts of the tour over the past few years because of a wrist injury. The Serb Janko Tipsarevic, a former world No 8, has recently returned to the game following a 17-month absence due to a recurring foot injury.

It is not only the men’s game that is suffering: the women’s WTA season this year started without the participation of Serena Williams (knee injury), Simona Halep (ankle), Garbiñe Muguruza (foot), Maria Sharapova (forearm) and Petra Kvitová (stomach virus).

There are two, complementary, reasons why players are suffering in this way. One is that, as in most sports, tennis has demanded that its players are fitter, stronger and quicker. Racket technology has made previously unreachable shots “gettable”. Rallies are longer. Just watch any YouTube footage

‘He is writing cheques that his body can’t cash’ — Andre Agassi, after losing to Rafael Nadal in 2005

of tennis in the 1970s and it can look like a club tournament.

The second reason is that players are victims of the game’s success. The demands to play as many tournaments as possible during the year can bring great financial rewards, but also make the tour physically draining. Ironically, December, the month set aside as a break from the tour, is now used by the

players for extra strength and stamina training.

It is because of this that a player’s “team”, always extravagantly acknowledged in victory speeches and press conferences, has become crucial in keeping body and soul together. Specialist fitness coaches, physiotherapists and masseurs follow players on their travels. They have been joined recently by so-called mentors — former champions who can lend their psychological support to aspiring Grand Slam winners.

This has produced some intriguing coupling. Ivan Lendl and Andy Murray, laconic introverts from different generations, have renewed their partnership after a two-year hiatus. Boris Becker quietly roots for Djokovic in the players’ box. “The fifth set is not about tennis, it’s about nerves,” says Germany’s genial Becker, highlighting the importance of mental fortitude.

The urbane John McEnroe has started helping the somewhat stiff Milos Raonic (see interview P3), a compelling combination of personalities. Last week’s Aegon Championship final at The Queen’s Club in London between Murray and Raonic inevitably captured the public imagination as a surrogate clash between former rivals Lendl and McEnroe.

But there is a darker side to the fact that players need more help than ever in their year-long travails. Earlier this month, Sharapova was banned from tennis for two years by the International Tennis Federation for a doping violation.

The sentence, which has prompted an appeal from Sharapova to the Court of Arbitration for Sport, was unexpectedly severe. But the ITF made clear that there was no grey area in which the player could deflect responsibility on to a misunderstanding with her team. Fellow players have been no more sympathetic to Sharapova’s plight: Murray said she had “no valid excuse” for her infringement; Federer called for zero tolerance. “It doesn’t matter if you did it on purpose or didn’t know about it,” he told The Guardian. “You’re not allowed to do it.” The Sharapova case is a cloud that threatens to dislodge our admiration for the new gladiators of tennis.

Sometimes, it reminds us, you can try too hard for your own good.

The author is the FT’s former arts writer

The world’s leading superyacht authority.

BURGESS

WWW.BURGESSYACHTS.COM

SALE & PURCHASE | CHARTER | TECHNICAL SERVICES | MANAGEMENT