

Membership Growth

Members'
Advisory
Group

Player Retention & Returners

Members' Advisory Group

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Liam McTiernan

Neil Hurford

Sandy Nash

John Andrews

Contents

Exam Question: *How can TTE drive membership growth via driving new members, player drop out and increasing returners back to the sport?*

Background

- Increasing the membership & player retention was identified by the board as an **important strategic challenge**
- An action was given to MAG to provide a **strategic assessment** of the drivers and generate a set of recommendations
- This analysis will serve as complementary to the prior TASS report on 'Female Engagement' and support development of the new overarching TTE strategy

Approach

- Set-up **dedicated MAG project team**
- **Created & circulated a survey to the membership with 127 responses**, representing all ages, genders, ethnicities, players, ex-players, returners, coaches, volunteers etc.
- **Quantitative analysis**, dissecting the composition of the membership
- **Qualitative research** incl. interviews with the membership

Contents

1. **Context:** Drivers of TTE membership
2. **Diagnosis:** Insight into player drop-out & returners
3. **Strategic options:** Strategic framework & initiatives to drive growth
4. **Final recommendation & next steps:** Focus areas & actions to progress and implement

Exec Summary (1)

Background

- The Table Tennis England membership is driven by new members (<16 age group), drop-outs (18-25 age group) and returners (40+ age group)
- In order to understand in more detail the issues that related to drop-outs and returners, MAG undertook both quantitative and qualitative research

Quantitative Research

- Having detailed information about the profile of the membership is key to ensuring targeted activity on recruitment and retention. Recruitment and retention strategies that are in tune with the realities of the membership profile – particularly the age-profile – are more likely to meet their objectives
- TTE membership grows rapidly in the over 10 years of age category, peaking at age 15. Thereafter it declines rapidly, with 80% of our members having left the sport by the age of 22. Players start returning from age 40 onwards, creating a second peak at age 55
- The age-profile is ubiquitous across our sport, showing a similar profile for females as for males, and rural and urban leagues exhibit broadly similar age-profiles. We should see this age-profile with peaks at 15 and 55 as an opportunity to be exploited
- A widely-held assumption within the table tennis community is that the sport needs to recruit more young players. Whilst that should undoubtedly continue, an analysis of the age-profile of the sport suggests that more benefit will be gained if more players in the age-range 15-25 could be retained in our sport. Encouraging players to return to table tennis at an earlier age (ie less than 40) is also a priority

Exec Summary (2)

Qualitative Research

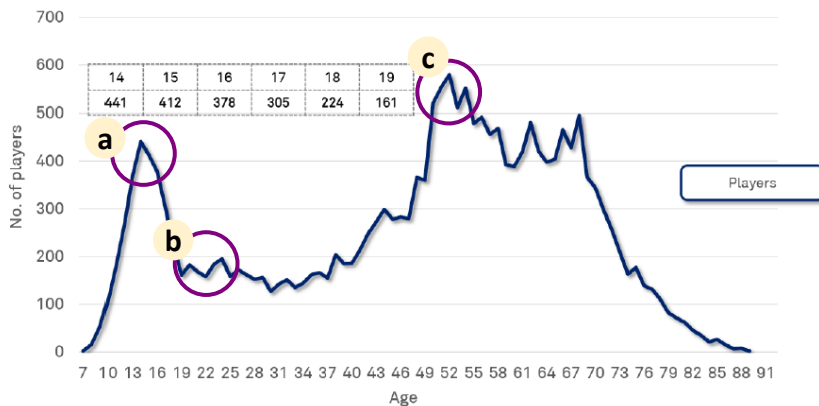
- The qualitative research involved an extensive Facebook survey of both current and former members
- Current members continue to engage with the sport due to enjoyment, health & because Table Tennis is linked to their identity
- Although work / other commitments is the main reason members drop-out, other significant drivers include competition structure, access to clubs & training and performance & ranking, which TTE has the ability to influence
- These drivers largely overlap with the drivers associated with returners to the sport and new members, with a few exceptions including Media & perception being an extremely important factor for attracting new members

Growth Strategy and Next Steps

- Therefore, the TTE membership growth strategy impacts each of these areas, underpinned by four pillars: 'Reinvented' competition structure, focus on clubs & development, performance & ranking and focus on media & perception
- Based on analysis & insight MAG recommends several initiatives based on the pillars to drive membership growth over the next 3-5 years incl. upgrade competition ratings, introduce social tournament, widen the England performance set-up, refine the ranking list and form media partnerships as well as pushing TTE's direct-to-consumer media proposition
- Next steps are to align on this output, communicate to the TTE Senior Leadership Team and initiate workstreams. Collecting age-profile membership data annually would be useful going forwards

Membership is driven by new members, drop-outs and returners

TTE membership demographic breakdown¹



There is a high-drop out rate in the 18-25 age range, followed by high returners at 40 years+

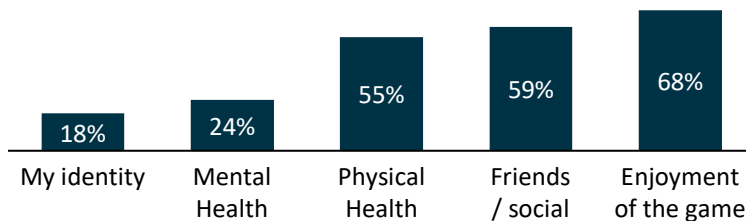
- a** Rapid rate of new members age <16 years old as new young players introduced to the sport & clubs
- b** Large player drop-out at ages 18-25 as members leave junior age groups & begin university and careers
- c** High number of returners back to the sport from age 40+ as players have more free time and prioritise health & social

80%² of members rate their experience of playing Table Tennis in England as at least 7/10

There are three key motivations for current members which need to be at the forefront of any future decisions

1. Enjoyment / social aspects
2. Health
3. Table Tennis being linked to identity

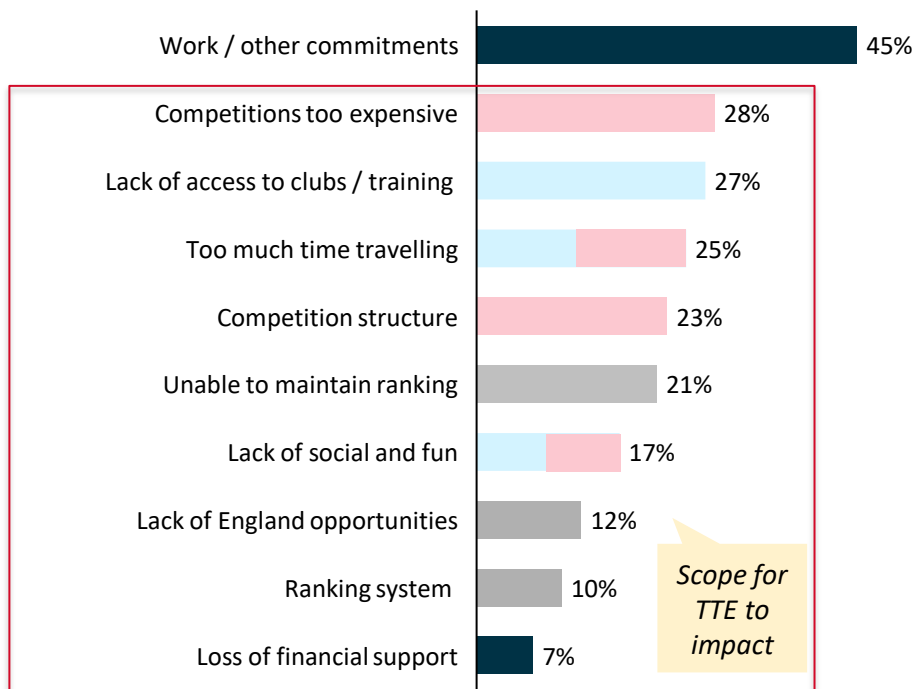
Reasons for continuing to engage with the sport²



There is a need to explore why players join, drop-out & return and where TTE need to focus to grow overall future membership

There are several 'controllable factors' that have driven drop-out

TTE have the ability to influence the majority of drop-out drivers



Reasons for drop-out can be grouped into 3 main buckets

a

Competition structure not fit-for-purpose

- Doesn't provide the right incentives to compete
- Issues with travel due to geographical spread
- Not always fun & enjoyable
- Too expensive

b

Lack of access to clubs & training

- Clubs too far away and doesn't provide enough playing
- Lack of sufficient training opportunities

c

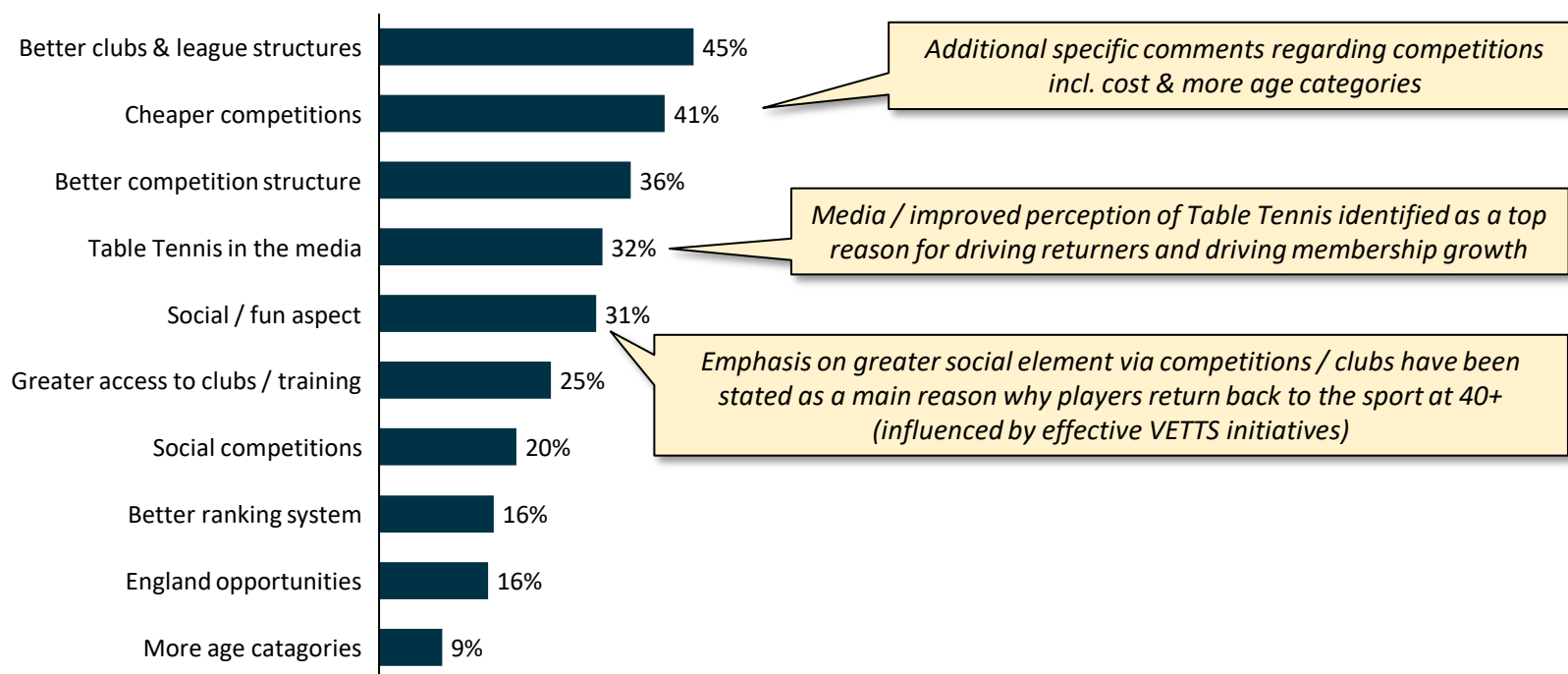
Issues with ranking & performance

- Ranking system doesn't incentivise competing (able to lose points / come away net negative from expensive tournaments)
- Lack of opportunities to represent England, receive mentoring or be involved with the England set-up

Approach to reduce player drop-out need to focus on competition structure, access to clubs & training and improvements in ranking & performance

Driving returners back, centre on similar points raised by drop-outs

Several factors are vital in driving current or prospective returners back to the sport



Factors to drive returners back to the sport are broadly in-line with reducing player drop-out, sharpening TTE focus

TTE strategy & initiatives should impact all 3 membership drivers

Membership drivers

New member growth



Reducing drop-out



Driving returners back



Membership growth strategy should focus on four pillars

1 'Reinvented' competition structure



Make competitions cost-effective, enjoyable, rewarding and inclusive

2 Focus on clubs & development



Support local clubs & regions to grow membership via regional hubs, shared expertise & local focus approach

3 Performance & ranking



Introduce initiatives to retain high-standard players & ensure the ranking system provides the right incentives









4 Focus on Media & perception of the sport



Drive greater & wider appeal and perception of the sport via tactical and strategic initiatives





There are several initiatives which we recommend Table Tennis England implement to underpin the four pillars and growth overall membership

'Reinvented' competition structure







Initiative	Description	Benefit	Ease of implementation
1. Reduce cost of entries	<ul style="list-style-type: none"> Reduce entry price especially for under-25's (enabled by reduction in expenditure e.g prize money) 	<ul style="list-style-type: none"> Greater entries from 18-25 age-group 	<ul style="list-style-type: none"> Requires trade-off & cost reduction 
2. Improve geographical spread	<ul style="list-style-type: none"> Support local competitions & leagues and ensure sufficient competitions require minimal travel 	<ul style="list-style-type: none"> Greater membership uptake at grass roots looking to compete Loss aversion to drop-out 	<ul style="list-style-type: none"> May require working with local clubs & resources beyond volunteers 
3a. Upgrade tournament ratings	<ul style="list-style-type: none"> Upgrade current tournaments e.g Grand Prix's from 2* rated to 4* rated 	<ul style="list-style-type: none"> More entries / improved incentives Higher competition & membership revenue 	<ul style="list-style-type: none"> Ability to implement 'overnight' – may require some regulations to be relaxed (e.g min umpires) 
3b. Introduce social / fun competitions	<ul style="list-style-type: none"> Introduce new social competitions into the annual calendar e.g non-ranking, university partnerships, social event in the evening 	<ul style="list-style-type: none"> Higher membership conversion from large pool of non-playing members Reduced drop-out, greater incentives 	<ul style="list-style-type: none"> Competitions team to propose new format and introduce 

Note: workstream currently underway incl. TTE-led competition review and MAG-led deep dive into improving competition cost-effectiveness

Focus on Clubs & Development

Initiative	Description	Benefit	Ease of implementation
<p>1. Create set of dedicated resources to support clubs</p>	<ul style="list-style-type: none"> • Support local clubs for them to drive membership and reduce drop-out • Share knowledge & improve funding e.g to create 24/7 clubs, set-up clubs network 	<ul style="list-style-type: none"> • Less TTE resource intensive in long-term and clubs drive membership growth 	<ul style="list-style-type: none"> • First-step to create central set of available resources e.g pdf, contacts on TTE website 
<p>2. Introduce specific, targeted initiatives e.g return to play, schools, coaching etc.</p>	<ul style="list-style-type: none"> • Work in partnership with local clubs on new initiatives e.g <ul style="list-style-type: none"> ➤ Return to play ➤ Intro taster sessions ➤ Introducing clubs within schools ➤ volunteering, umpiring, coaching etc. 	<ul style="list-style-type: none"> • Targets specific segments e.g returners, drop-outs to drive overall membership • Knock-on benefits of increasing volunteers & coaches 	<ul style="list-style-type: none"> • May require working with local clubs & schools and provide dedicated resource (staff beyond volunteers) 

Performance & ranking

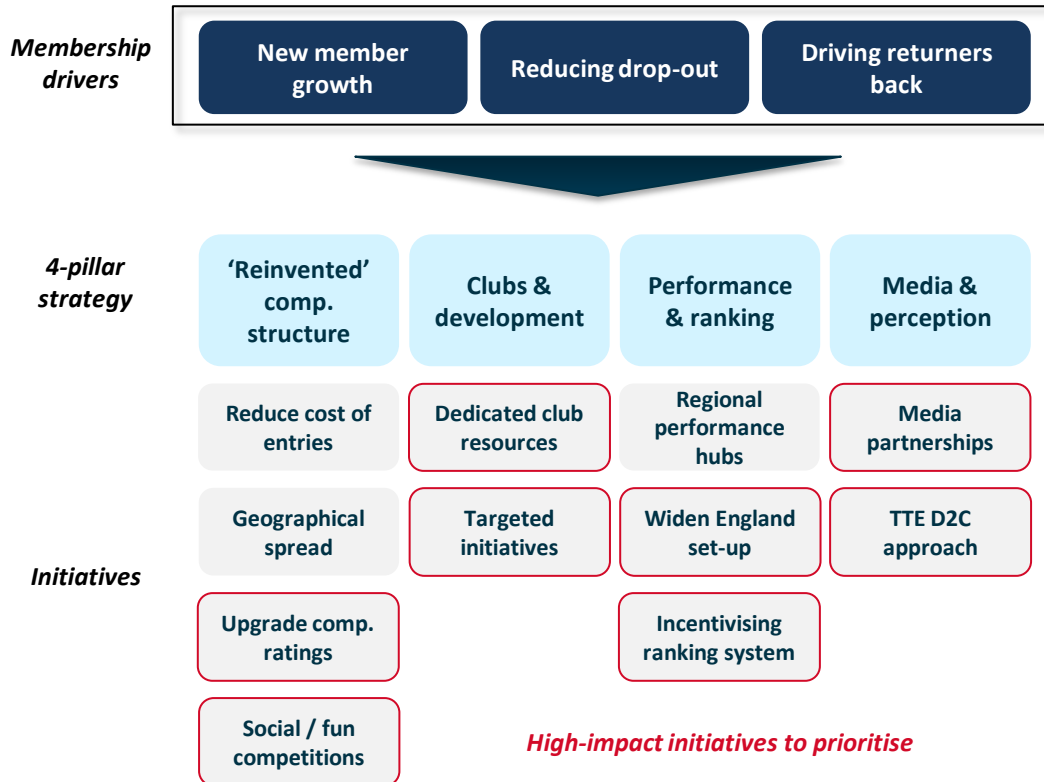
Initiative	Description	Benefit	Ease of implementation
1. Regional performance hubs	<ul style="list-style-type: none"> Re-introduce regional performance hubs for juniors / young seniors to maintain level & increase accessibility to training 	<ul style="list-style-type: none"> Greater entries from 18-25 age-group  	<ul style="list-style-type: none"> May require additional funding from TTE 
2. Widen England set-up	<ul style="list-style-type: none"> Widen Junior & Senior England set-up to include more current & past top players incl. adding Under 21 squad Mentoring programme for past top juniors to mentor current players Involve past England players as coaches, volunteers etc. 	<ul style="list-style-type: none"> Huge learning opportunities for current top juniors / young seniors learn from current & past top players  Reduce drop-out of top juniors 	<ul style="list-style-type: none"> Ability to invite players on non-funded basis (i.e players outside core squad fund themselves) 
3. Ensure ranking list creates right incentives	<ul style="list-style-type: none"> Significantly reduce the ability to lose large amounts of ranking points deterring some players from investing in competitions & annual TTE memberships 	<ul style="list-style-type: none"> Greater retention / returning of players struggling to maintain level due to other commitments  	<ul style="list-style-type: none"> Easy to implement in practice (even on trial basis) – but some internal challenge likely 

Focus on Media & perception

Initiative	Description	Benefit	Ease of implementation
1. Media partnerships	<ul style="list-style-type: none"> • Develop strong direct partnerships with major media & broadcast distributors (and encourage local clubs & leagues to form their own): <ul style="list-style-type: none"> ➤ Linear providers (BBC, ITV, Eurostar, Sky Sports, BT Sport) ➤ Streaming providers (Netflix, Amazon Prime, others) ➤ National & local newspapers 	<ul style="list-style-type: none"> • Huge multiplier benefit, large scale improvement in new membership growth, retention & returners from 'halo' effect of association with popular sport 	<ul style="list-style-type: none"> • First-step to focus large resources on forming partnerships • Build business case for partnering with TTE
2. Table Tennis England Direct-to-Consumer approach	<ul style="list-style-type: none"> • Improved approach to drive awareness, perception & appeal via owned channels: <ul style="list-style-type: none"> ➤ Social media promotion (Facebook, TikTok, Instagram etc.) ➤ Direct streaming at competitions (e.g YouTube, Facebook, via other partnerships) ➤ Mass-scale national marketing campaigns & advertisement 	<ul style="list-style-type: none"> • Drive membership growth via greater incentives to compete • Greater appeal within current Table Tennis community, reducing drop-out 	<ul style="list-style-type: none"> • Relatively short-term easy quick-wins i.e social media channels, streaming at events – build roadmap

Summary

Based on insight, we have identified a 4-pillar strategy to grow TTE memberships & recommended several initiatives



Next Steps

Next Steps

- 1. Board to align on final output: insight, strategy & recommendations**
- 2. Board to communicate strategy to Senior Leadership team**
- 3. MAG project team to meet with relevant TTE staff with a view to initiating relevant workstreams**
- 4. MAG & Board to support & monitor progress on specific initiatives, ensuring implementation**

APPENDIX

TTE membership data – members by age group

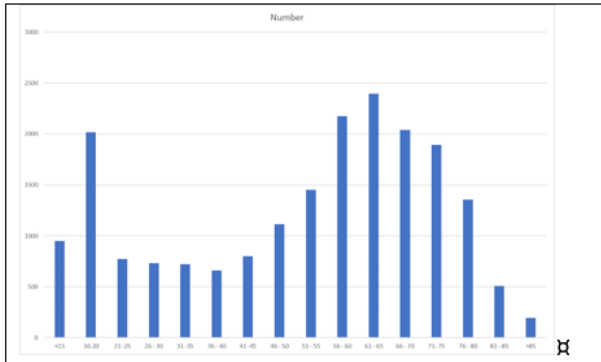


Fig.1—Age Profile—5—85 years

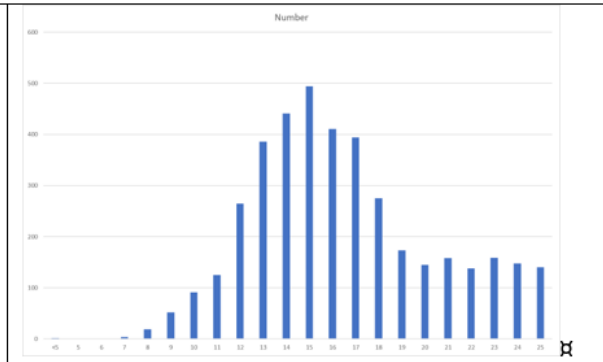


Fig.2—Age Profile—5—25 years

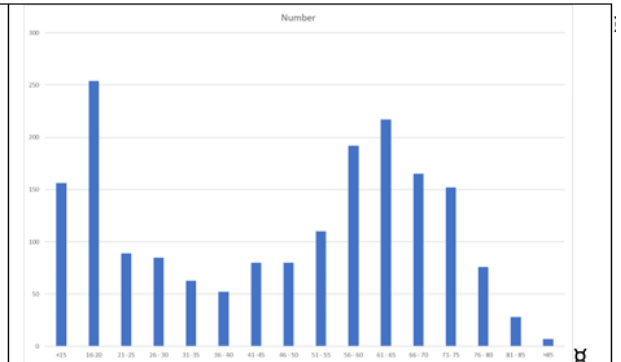


Fig.3—Age Profile—Females

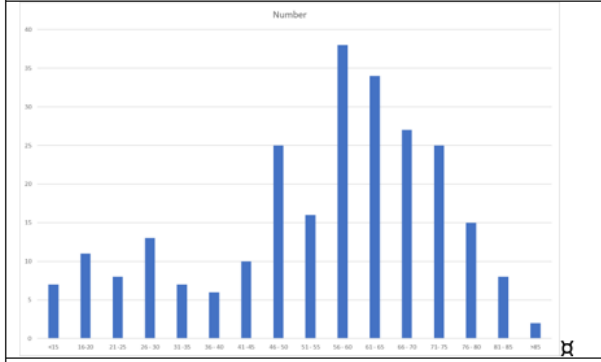


Fig.4—City League—No Major Club

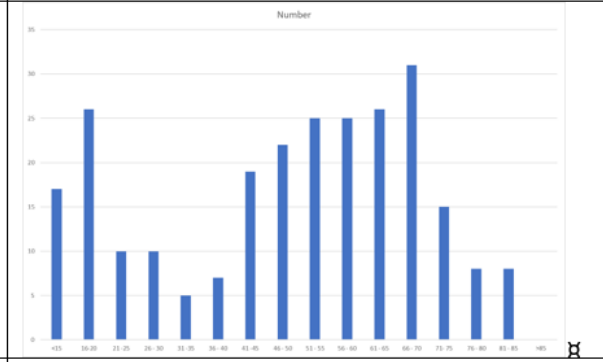


Fig.5—City League—Major Club

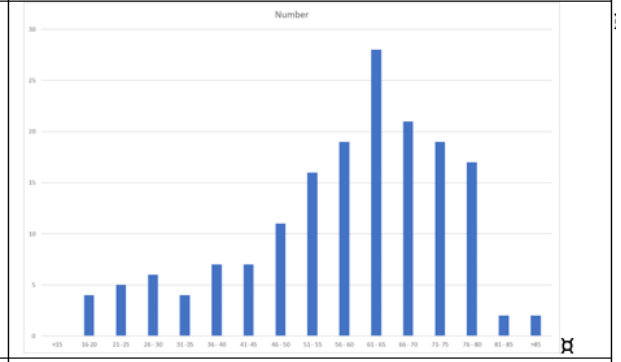
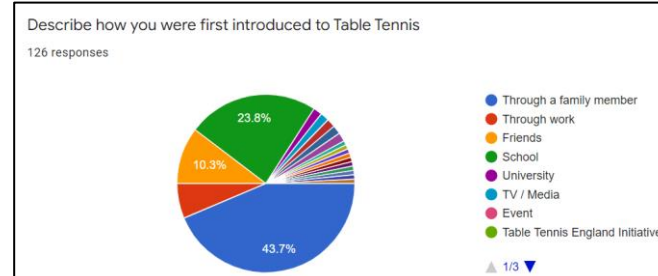
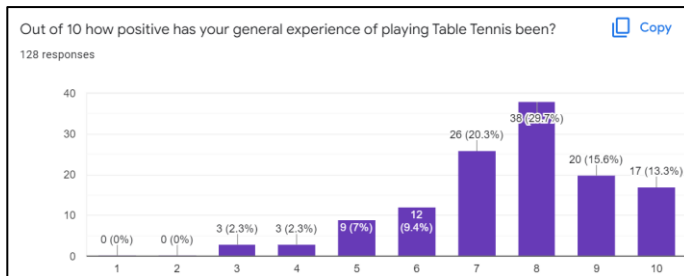
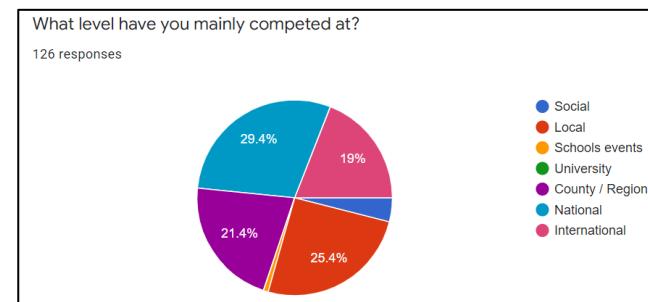
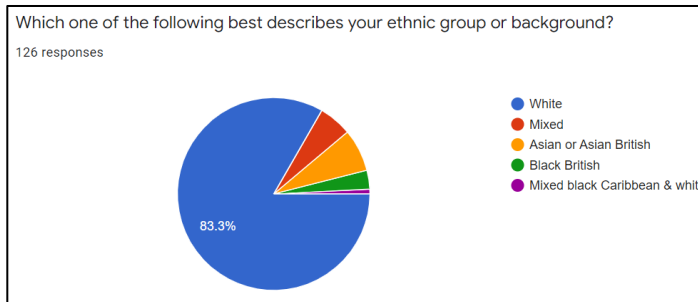
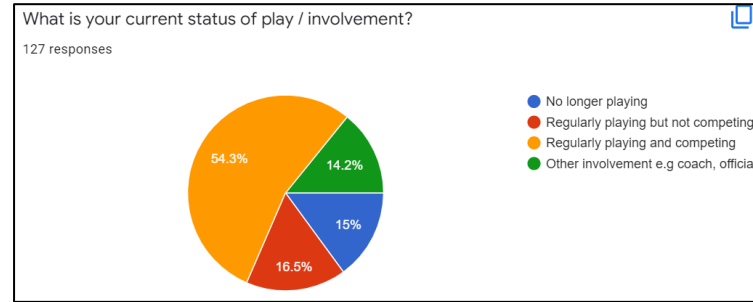
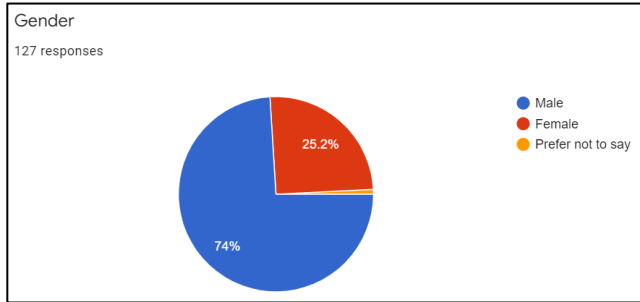
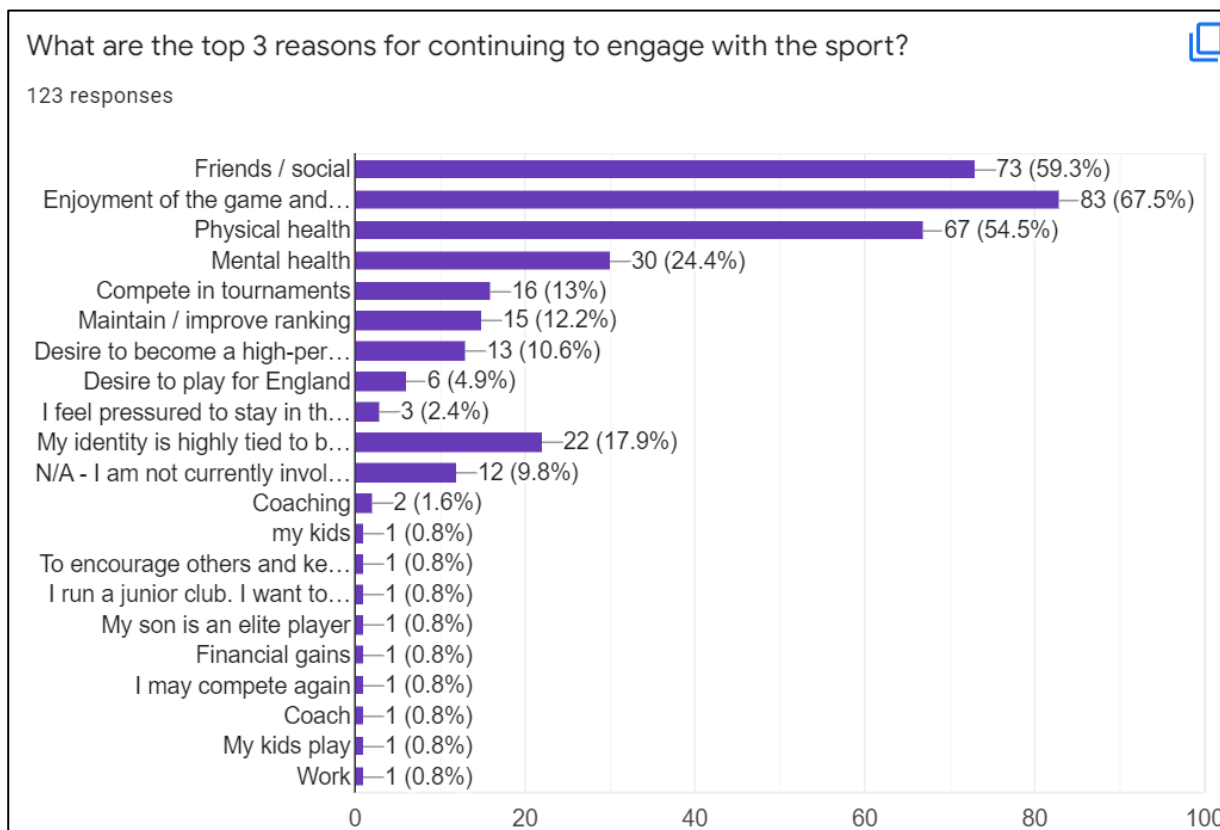


Fig.6—Rural League

Survey detail (1)



Survey detail (2)

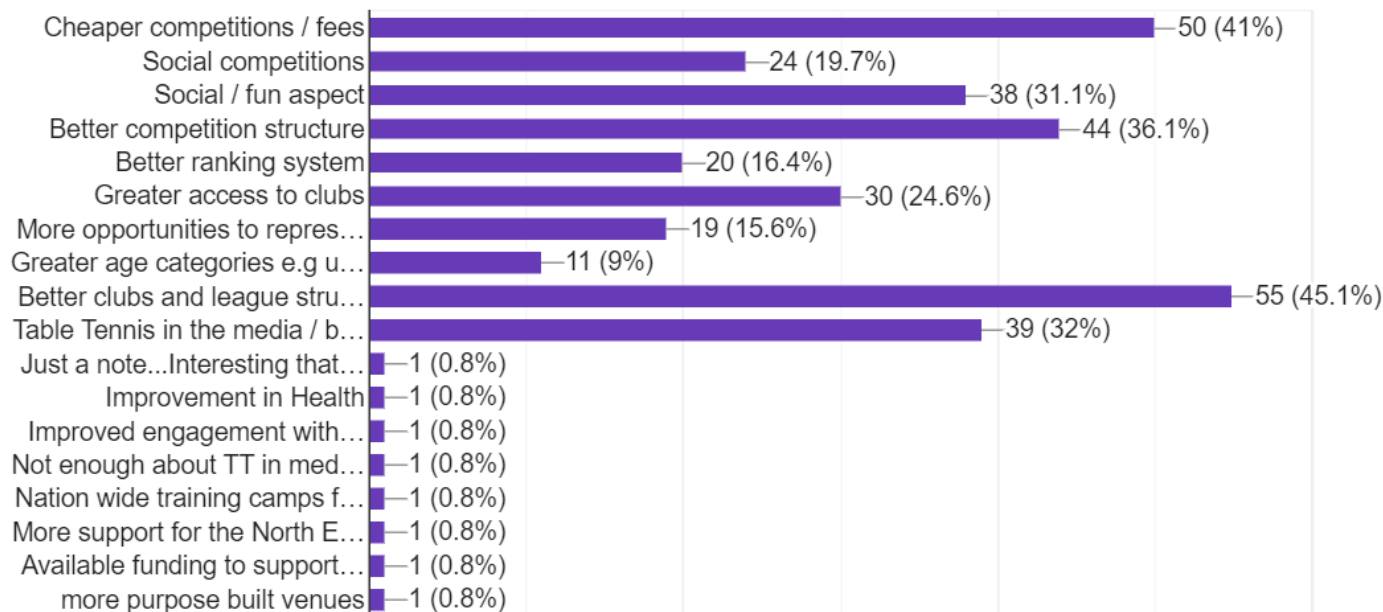


Survey detail (3)

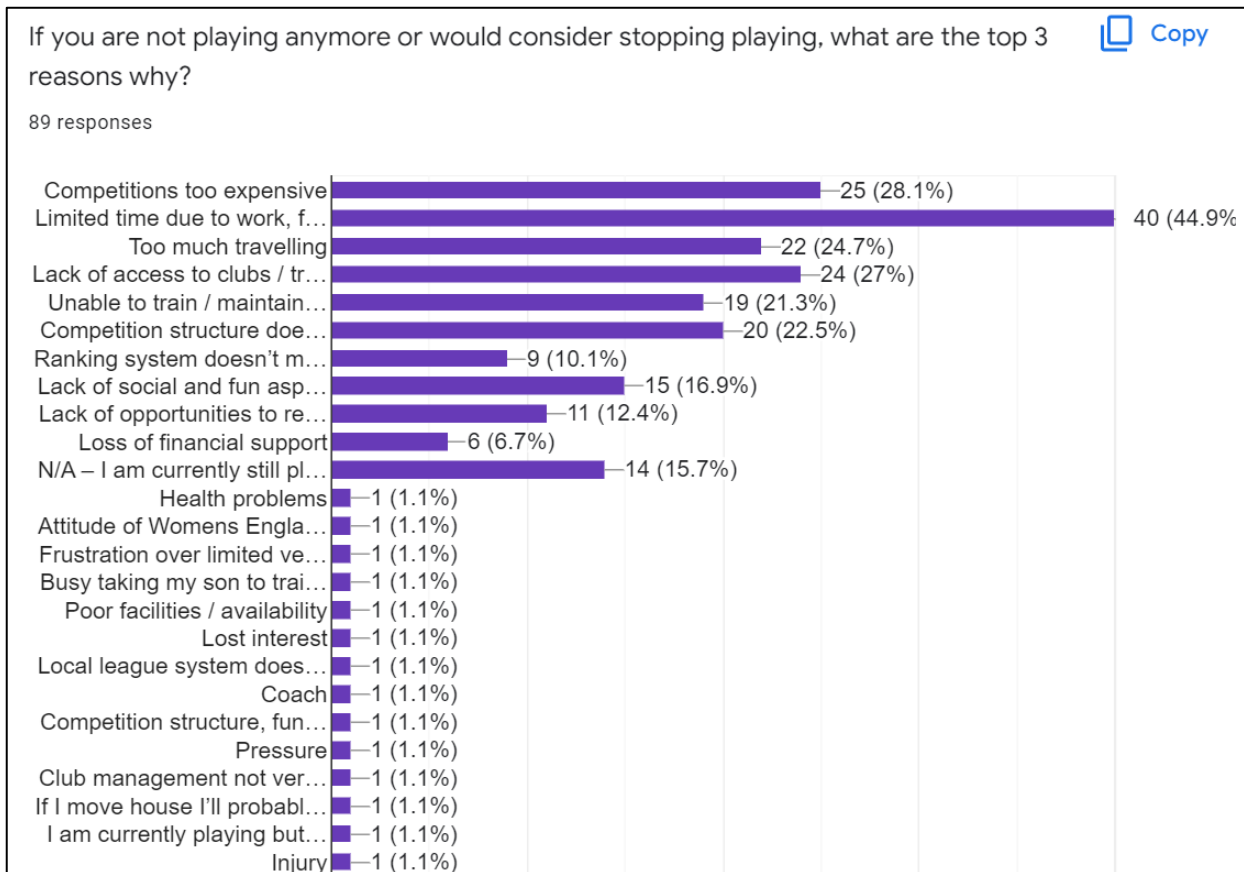
What would be the top 3 reasons to incentivise you to stay in the sport / interest you in playing and competing again?



122 responses



Survey detail (4)



Survey detail (5)

What specific ideas / initiatives do you have that TTE could implement to introduce more people into the sport?

83 responses

More/better support for clubs as this is where most people start
people at the beginners level such as school children should be exposed to high level table tennis maybe through demonstration of top level similar aged children. this will inspire them greatly as most people are unaware what high level table tennis is due to lack of representation of the sport in media and major news channels compared to Europe and Asia.
More tv coverage including a specific programme for the sport with coaching and top 10 rallies of recent tournaments, interviews etc
Advertise it more
1.Improve marketing of the Sport to the wider population. For example- social media marketing such as instagram, Tiktok to get the younger generation involved.
2.Table tennis events should be live streamed on youtube. For example - Tournaments / Grand prix etc.
3.England table tennis teams competitions should be shown on Television more
The creation of Development centres creates a marginalisation of certain groups. For example Joola Plymouth pulled out of the Plymouth League for Table Tennis due to being quite elitist and not want to play in the league. This doesn't give players (young & old) to experience different kinds of players and get experience
Find the people that want to and are capable of growing the sport locally, and give them the resources they say they need to do so locally. Not always a national 'one size fits all' programme, but local effective support.
Removing the current board and chair.
more local events (competitions/ league) for very young players say age 11 and below
None
Better calendar of EVENTS, not just basic competitions. Incorporate social aspects, fun categories, more marketable content. From my experience, there are actually a lot of people playing the sport... Just maybe not tied to a club/association and don't compete in leagues etc. We need to try make that transition from 'regularly booking a sports centre with friends or regularly playing on a lunchtime at work' to actually

Higher Media Exposure
Market the sport more effectively.
A much greater focus on schools TT with clear pathways into competitive play like leagues and 1*/2* competitions. Very few PE teachers even know TT competitions exist
Have taster events at schools universities and public places to attract people to the sport
Listen to the leagues and the popular coaches that do so much to promote the sport. The spat with TT365 did nothing for the sport and although I probably don't know what the cause of this was, the perception (I have) is that TTE portrayed was that of a bitter, self interested body. Badly dealt with and unprofessional in my opinion.
Make it more fashionable to play the sport. Up the profile
Bring back tt365 it was perfect!
Competitions/open training sessions for non TTE members
Better venues, younger coaches, needs to be available at schools.
Better communication and public relations to increase media presence
Support local tt. Local clubs are continually ignored
Advertising
In terms of tournaments they should segregate them to make them better quality example 1 star tournaments up to 300 points Two star tournaments 300 to 600 points Four-star tournaments 600+ points only
More TTE camps in the North East

Survey detail (6)

What specific ideas / initiatives do you have that TTE could implement to reduce player drop-out?

85 responses

Cheaper competition fees

Better Grand Prix tournament system to enable fringe players to carry on playing without feeling like they are either wasting their time entering or not gaining from playing.

More u21 competition, more games at the competition, more incentives for younger adults to stay in the game such as prize money for competition sponsorship

More localised tournaments with grading system. A specific TTE department to run and organise such things without charging exorbitant fees.

Have more competitions with prize money

1. This can link back to the marketing question, The bigger the sport, The more people will stay involved

2. Improve Local league clubs - training sessions, Social/fun sessions

Look at issues on a local level, what are TTE doing to support the implementation of stronger local

Support players better. Especially those who were borderline national team, to keep in touch with them and make them feel like TTE care about them. There are stories were international players don't hear from TTE when they are injured or are going through a hard time which they find discouraging. Rather they felt like it was an excuse for them to not be looked at anymore as an international player.

Nothing that I would share for free.

Regional training squads instead of so called elite squads with handful of players. create more opportunities for players and encourage competition among grass roots as well as at very higher level. TTE should show that they recognise talent and players are valued... This has to happen off ranking system which does not say how good a player is.

Reduce coists of Equipment

Discounted entry fees for under 25s at Grand Prix events. There's a reason that Grand Prixs are full of under 18's (funded by parents) and over 30 (funded by themselves). They're too expensive for those on small incomes or students.

Engage with players listen to their ideas rather than create surveys that inhibit that exchange of ideas. Give players channels with which to engage TTE.

TTE needs to value all players not just a few elite players

Supporting players into other aspects of the sport such as coaching

Engage with the the people that are vociferous on the various TT websites which I am sure you are aware of. Get round a table for a few days in person.

Increase daytime involvement. Involve families.

Support local leagues and clubs

More under 21 events and better regional training structures . Past junior age there is no opportunities for training and progression .

More venues

Cheaper fees not playing the same people all the time

Better competition structure to cater for more players needs locally

Aim to help leagues to become bigger central venues.

Regular feedback completion

Pick the players According to the ranking list for England international otherwise what's the point in playing tournaments to get a good ranking if you don't get picked

Make more accessible less about who can afford the sport

Treat their players better

Survey detail (7)

What specific ideas / initiatives do you have that TTE could implement to drive returners back to the sport?

61 responses

Sort out British League- entry fees far too expensive; is there really a need for umpires? Why not hold BL weekends at some of the larger clubs and utilise their facilities putting money back into local clubs.

Same as above but more local competitions too, when women players have children it is difficult to attend competition that are far away

More local facilities, earlier start times for league matches where possible and/or more leagues offering 2 side leagues as well as/instead of 3 a side

1. Free TTE membership for returning members

An amateur competition, where players from a county's lowest division compete and then this goes to a National Level

Include them in training camps/ have opportunities for them to practice and not just focusing on the younger players. We need players of all ages as we can't just keep trying to bring up new players and hope they are better than the older ones. The older players can inspire and increase the standard to push the younger ones to be better.

Invest on grassroots/ school training and regional centres

Don't know

Better social media and marketing team. Making table tennis more popular online will put it in front of people's faces and hopefully make them miss playing the sport.

Find out what will bring them back to the sport. One of the biggest loses is a result of higher education taking players away from home and their studies take them away from the sport and there is no easy route back as they embark on the beginnings of their career.

Have targeted initiatives to get sports centres promoting TT and engaging with local leagues to run things like the super league BATTs does.

Free practice session for returners

Get some effective regional developers back that actually visit clubs/leagues. The current initiatives do little to get people playing league and the perception amongst membership is that TTE are really not

Promote our sport much better and glamorise our sport . Peoples perception of us as nerds needs to change . Prize money or better trophies for winners . More events in each region to reduce costs i.e accommodation and travelling times .

Very low cost competitions (free entry perhaps) every 3/4 months with fewer ranking points available maybe. Cost would probably be main reason people don't want to continue playing. Equipment prices are also very expensive.

More media presence

Cheaper tournaments, aim at keeping players in the sport in late teens/early 20's

Advertising

Don't pick juniors or cadets to play in adult internationals when there are adult women who are better and higher ranked

Less travel for camps etc
Have 2 camps 1 in the North East 1 in the South

Could run 'return to TT' taster event.
Offer a free years TTE membership to incentivise
We encourage ex players to come and work with juniors as there is less commitment / pressure if they have families or are working.

fun leagues

Facilities

Buddy up with other sports. Winter sport, summer sport. Golf and cricket mix well with Table Tennis abilities

Small local non-ranking tournaments

More social aspects at grand prix's/ senior tournaments

Introduce more local and flexible options that don't require the level of commitment that eg league play requires

Qualitative research

"Table Tennis became too expensive and I wasn't getting enough out of it"

"I didn't have the skills or confidence to co-ordinate training and competitions once leaving the juniors"

"Hi, I am interested in coming along to the club to have a game. I have tried a few clubs local to me but the issue that I am finding is that they are male dominated, there doesn't seem to be any ladies at these clubs. I enjoy the game and want to get back into table tennis but I would like to attend a session where there were other ladies"

"I felt left after leaving juniors and not being selected for England anymore"

"Table Tennis wasn't enjoyable anymore. Once I stopped winning and couldn't train as much I didn't want to play"

TASS female player engagement 18-30 recommendations

1. COULD TTE PROVIDE MORE OPPORTUNITIES FOR FEMALE PLAYERS TO PROVIDE REGULAR FEEDBACK?

2. COULD TTE DEVELOP A FORUM FOR FEMALE PLAYERS TO VOICE THEIR CONCERNS?

3. COULD TTE DO MORE TO PROACTIVELY USE THE EXPERTISE OF THE 18-30 FEMALE GROUP?

4. COULD TTE DEVELOP A PROGRAMME FOR EXPERIENCED FEMALE PLAYERS TO MENTOR YOUNG ASPIRING FEMALES?

5. COULD TTE DO MORE TO BUILD, PROMOTE, AND SUPPORT MORE UNIVERSITY PATHWAYS FOR FEMALE PLAYERS?

6. COULD TTE INCREASE AND ADAPT THE COMPETITIVE OFFER FOR FEMALE PLAYERS IN THE 18-30 GROUP?

7. COULD TTE ASSIST THE DEVELOPMENT OF MORE FEMALE ONLY TABLE TENNIS CAMPS FOR ALL LEVELS OF PLAYERS?

8. COULD TTE OFFER MORE SUPPORT FOR HIGH-LEVEL PLAYERS UNDERTAKING KEY TRANSITIONS?

9. COULD TTE DEVELOP MORE AGE-GROUP FEMALE SQUADS?

10. COULD TTE DEVELOP A NETWORK FOR FEMALE PLAYERS?

11. COULD TTE DO MORE TO PROMOTE THE GAME TO FEMALES AT AN EARLIER AGE?

12. COULD TTE UPDATE GUIDANCE DOCUMENTS FOR FEMALE PLAYERS?






13. COULD TTE INCORPORATE THE FINDINGS OF THIS RESEARCH INTO COACH EDUCATION?

14. COULD TTE HELP ADVERTISE FEMALE OR ADULT ONLY SESSIONS AT CLUBS?

15. COULD TTE PROMOTE THE STORIES AND ACHIEVEMENTS OF FEMALE PLAYERS BOTH IN AND OUT OF TABLE TENNIS?

16. COULD TTE DO MORE TO GET FEMALE PLAYERS IN THE 18-30 GROUP INVOLVED IN COACHING AND OTHER AREAS OF THE SPORT?

Other solutions from brainstorming sessions

Solution	Description	Investment
Junior mentoring/education programme	<ul style="list-style-type: none"> Educating players (early age and England squad) of how TT can benefit their future lives (health, university, careers) and how to be self-sufficient and carry on when leaving the juniors (how to enter, train etc.) Sign up for young seniors to mentor juniors leaving the age group 	
More enjoyable tournaments for young adults (18-30)	<ul style="list-style-type: none"> Small number of 18-30 tournaments each year with potential social event in the evening (potentially non-ranking) <ul style="list-style-type: none"> BUCS university competition does extremely well here 	
Reducing fees for players aged 18-25	<ul style="list-style-type: none"> Reducing license or tournament fees for 18-25 age group Address the pain point around Table Tennis being 'too expensive' for them 	
Partnerships with Universities, colleges and 6 th forms	<ul style="list-style-type: none"> E.g Uni of Nottingham and TTE work together and find players coming out of juniors who can get a scholarship at university and carry on playing <ul style="list-style-type: none"> Partnerships with more academic institutions to find players 	
Greater emphasis on Under 21 and larger national squads	<ul style="list-style-type: none"> Greater emphasis on Under 21 to fill the gap Players felt 'left alone' once leaving juniors – possible self-funded training with the England squad available, also pushing current players 	
Better clubs and league structure	<ul style="list-style-type: none"> Greater decentralised guidance to clubs to encourage them to re-engage with their juniors/young seniors and tackle the problem <ul style="list-style-type: none"> Encourage an enjoyable pathway/training for their young seniors Encourage enjoyable British League teams e.g Table Tennis Daily Team 	