

The Accessibility and Quality Crisis in Tennis Coaching

Many aspiring tennis players face barriers that limit their access to quality coaching, including financial constraints and geographical challenges. Urban areas often have well-developed tennis academies and certified coaches, but rural and remote regions suffer from a severe shortage of qualified professionals, forcing players to travel long distances and incur high costs for training ([The Cliff Richard Tennis Foundation](#), [Tennis Australia](#)). **Studies indicate that over 35% of junior players in countries like Australia and the U.S. have limited or no access to qualified coaching, further hindering their skill development**([Tennis Australia](#)).

Traditional coaching methods also fail to provide the personalized, data-driven feedback necessary for consistent improvement. While elite players benefit from advanced performance tracking and tailored training plans, most amateur players rely on generalized advice that does not target their specific weaknesses([ar5iv](#), [The Cliff Richard Tennis Foundation](#)). Coaches, particularly at lower levels, often lack the tools to offer precise, real-time feedback, leaving players with generic advice and not enough one-on-one coaching. This gap between what elite players receive and what is accessible to the average player underscores the need for technology-driven solutions that provide personalized and location-independent coaching to players of all skill levels.

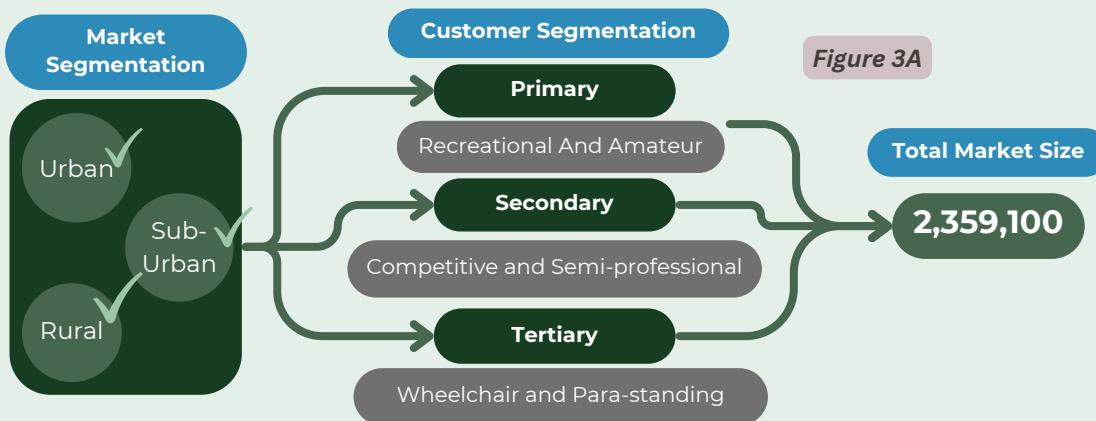
Figure 2C:



Over 35% of junior tennis players live where qualified coaching is either highly limited or completely unavailable

IV. CUSTOMER SEGMENTS

SMASH Labs targets a range of customer segments, primarily focusing on recreational players and tennis enthusiasts in Australia. The primary market includes casual players who seek affordable coaching and performance feedback, while the secondary market consists of competitive athletes, youth players, and tennis academies aiming to integrate advanced AI tools for training. By addressing these distinct needs, SMASH Labs can provide personalized coaching solutions and tap into a growing demand for digital and accessible tennis training options. This segmentation allows for precise targeting and maximized market penetration.



Benefits

Deliver targeted marketing messages: Understand what customers want and tailor messaging accordingly, leading to more relevant promotions and increased sales.

Optimize resources: Focus marketing efforts on specific customer segments, saving time and money.

Increase revenue: By meeting customer needs effectively and driving sales, businesses can see an overall boost in revenue.

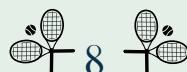
Primary Market: Recreational and Amateur Tennis Players in Australia

Size and Potential

Tennis participation in Australia has experienced robust growth, with over 1.53 million active players, including 1.23 million adults and 301,200 children. The sport has seen a 37% increase in adult participation and a 29% increase in children picking up the game, making it one of Australia's fastest-growing sports([Tennis Australia](#))([Australian Sports Commission](#)). These trends suggest a solid domestic user base for Smash Labs to initially target.

Demographics

The primary age group consists of adults aged 25 to 54, making up a significant proportion of Australia's tennis players. Male participants account for 57%, while females represent 43% of players. Tennis is particularly popular in urban and suburban areas, especially in Victoria and New South Wales, where major tennis events like the Australian Open take place([Tennis Australia](#)).



Psychographics

Recreational players are primarily motivated by the health, social, and fitness benefits of tennis. Many amateur players are looking for affordable ways to improve their game while balancing the desire for social interaction and fitness. This market is also open to technological innovations that make sports more accessible, making them a prime audience for AI-driven tennis coaching solutions ([Australian Sports Commission](#))

Secondary Market: Competitive and Semi-Professional Players in Australia

Size And Composition

The competitive and semi-professional market in Australia includes thousands of players who participate in local, state, and national tournaments. This segment is highly engaged with tennis, practicing regularly and competing for rankings. Australia is home to over 1,100 elite players who participate in professional and semi-professional tournaments([Tennis Australia](#))([Australian Sports Commission](#)).

Demographics

Competitive players are typically between the ages of 18 and 35 and are split evenly between men and women. These athletes are concentrated in urban centers such as Melbourne and Sydney, where access to high-level coaching and facilities is most prevalent([Tennis Australia](#)).

Psychographics

This market segment is driven by performance and achievement. Competitive players seek precise, data-driven feedback to improve their game, making them receptive to advanced technological tools like AI coaching that can provide personalized insights and performance metrics([Australian Sports Commission](#)).

Tertiary Market: Wheelchair and Para-Standing Tennis Players in Australia

Size And Composition

The market for wheelchair and adaptive tennis in Australia is growing, driven by increased participation through initiatives like Tennis Australia's National Wheelchair Loan Program and the Wheelchair Development Coach Program. Approximately 15,000–20,000 athletes with physical disabilities participate in adaptive sports annually in Australia, with wheelchair tennis being one of the prominent activities([University of Adelaide](#))([PwC](#)). Programs like the Paralympics and grassroots initiatives continue to push awareness and participation, providing a solid base for SMASH Labs to target.

Demographics

Adaptive tennis players typically range from 12 to 45 years and are evenly split between men and women. Similar to the general tennis market, urban hubs like Melbourne and Sydney are major centers of participation. However, underserved rural areas have substantial opportunities for growth due to limited access to qualified coaches.

Psychographics

Adaptive athletes are highly motivated by personal achievement, skill development, and a desire for competitive opportunities such as the Paralympics. Many disabled players seek advanced tools and technologies to improve performance and overcome coaching limitations caused by geography or lack of trained coaches. Participation in wheelchair and para-standing tennis fosters social inclusion and community building, appealing to players' broader goals of well-being and connection.

Although wheelchair tennis players make up the least amount of our customer segments with only 10%, we estimate that it will bring better customer loyalty, trust and

Global-Scaling Opportunities

After establishing a solid user base in Australia, Smash Labs has the potential to expand globally. Tennis is played in over 210 countries, with more than 87 million active players worldwide. The International Tennis Federation (ITF) projects an additional 30 million players by 2030, highlighting a growing global interest in tennis([Tennishead](#)) ([International Tennis federation | ITF](#)). Major regions for growth include the United States, which has around 18 million players, and Europe, where tennis continues to see strong participation and government support for grassroots initiatives([WorldMetrics](#))([Tennishead](#)). The global tennis market is valued at \$7.6 billion and continues to expand, driven by a rising interest in recreational tennis and an increased focus on technology and analytics within the sport ([WorldMetrics](#)). The Paralympics provides a key entry point for global expansion, as it showcases adaptive sports and increases demand for accessible coaching solutions worldwide. The overall adaptive sports market was valued at approximately \$2.3 billion in 2023 and is expected to grow to \$4 billion by 2030, with a CAGR of 6.7%. Wheelchair tennis, which has been a Paralympic sport since 1992, continues to grow in global participation and be a key player in the adaptive sports market. ([Paralympic Games](#))([International Tennis Federation | ITF](#)). With this context, Smash Labs has a prime opportunity to scale its AI-powered coaching model to meet the global demand for affordable and accessible coaching solutions.

