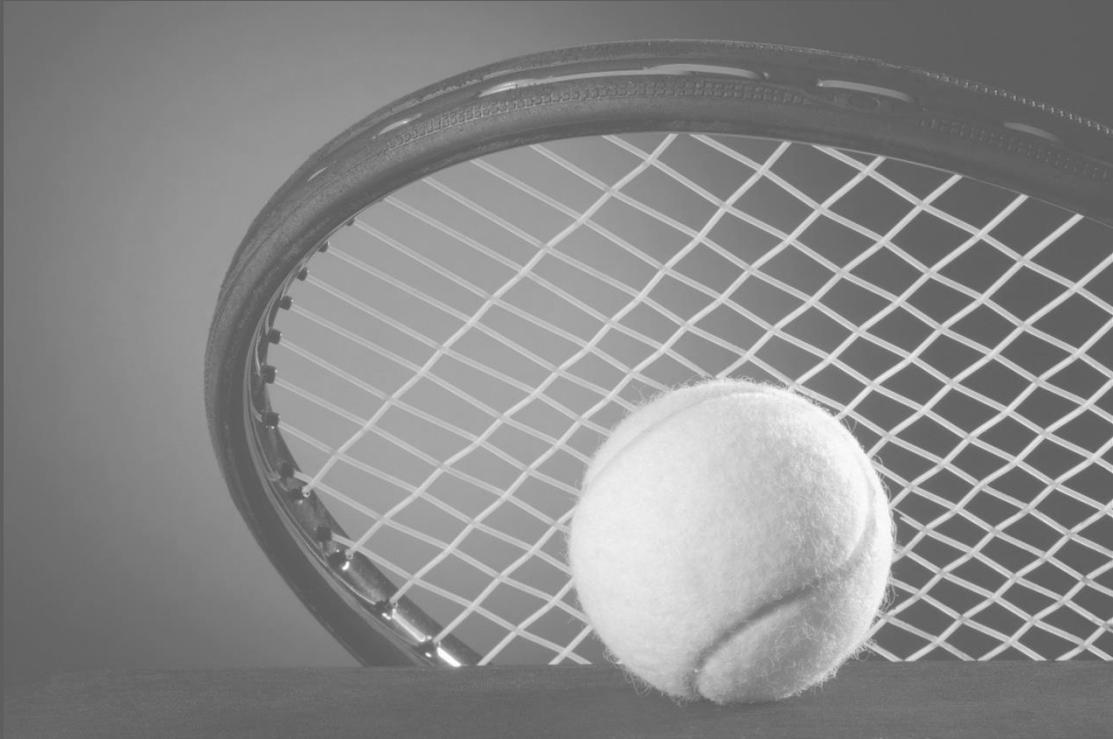


Hilton Head Island - Tennis Destination Study



A Study of Tennis Player Attitudes,
Perceptions & Behaviors

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Objective & Methodology

• **Objective**

The overall aim of this project is to provide the HHICC an in-depth analysis of behaviors, attitudes, and perceptions of Serious Tennis Players – and specifically as it relates to tennis travel and Hilton Head as a tennis destination. We will also examine the perceived strengths and weaknesses of the HHI tennis experience. Key areas of focus include tennis playing habits and motivations, the tennis travel experience, the travel buying process, destination consideration sets and awareness, perceptions of specific resort destinations (likes & dislikes), and other travel profiling (e.g. travel party size, average spend, additional activities, etc.)

• **Methodology**

Sports Marketing Surveys compiled survey interviews from three primary sources:

- TIA national database of tennis players derived from the tennisconnect court reservation and facility management software. These serious players are representative of the approximately 3 million “serious” players in the USA who typically play more than once a week, are more likely to play at private facilities and have the highest tennis expenditures.
- The Hilton Head Island Chamber of Commerce Database of individuals who have registered on hiltonheadisland.org.
- Hilton Head Resort sample – these interviews were from individuals on the databases of Hilton Head resorts (Palmetto Dunes, Port Royal and Van der Meer).

• **Analysis**

The main analysis groups for the report are as follows:

- USA Serious Players: This is the national sample solely from the TIA database.
- Hilton Head Island Chamber of Commerce (labeled - HHICoC): the total responses from solely from the HHI database.
- Hilton Island Resorts (labeled - Resort): the aggregated responses from all the participating resorts. Each resort will also receive an analysis of their own respondents.
- Type of tennis vacation: For analysis purposes, many of the report findings will be shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither.

Executive Summary

• Tennis Playing Habits - Serious Tennis Players (USA)

Most Serious Tennis Players have been playing for quite a while (78% for more than 10 years and 58% for more than 20).

Most find a way to play at least once a week

Most Serious Tennis Players play an average of at least once per week. Interestingly, 51% claim they play over 100 times per year, equating to approximately twice per week.

This play frequency is higher among those who have travelled specifically for tennis.

Recreational play is the primary way Serious Tennis Players get their tennis in (54%). We see some differences among the tennis travel group – League play is more common (29%) among those who have taken vacations for tennis than in other groups.

Four in 10 (40%) Serious Tennis Players describe their skill level as “advanced.” As we would expect, a very small number perceive themselves as beginners (3%). Nearly 7 in 10 (68%) currently have an NTRP rating (66% have a rating between 3.5 and 4.0).

We see an association between skill level and tennis travel. Those who have taken a tennis specific vacation, or played tennis while on vacation/business are more likely to be advanced – or have an NTRP rating.

Serious Tennis Players utilize private clubs to play tennis – 37% play most often at a private tennis club, 9% at a private country club, 6% at a private community court (total of 52%). Commercial / pay for play clubs are used most often by 26%.

Har-Tru is the most preferred surface of Serious Tennis Players (33%), followed by Cement (30%) and Acrylic (25%).

It’s all about Fun! The most important thing about playing tennis to a Serious Tennis Player is having fun. Exercise is also very important (second in rating). The challenge and competition follow in importance and the social aspects rate medium in importance.

*Serious or not,
it’s all about the fun!*

Executive Summary

• Media & Vacation Planning – Serious Tennis Players (USA)

Most digital device usage time is spent on a personal computer (56%). The smartphone is second at 28%, followed by the tablet at 16%. Smartphone usage is higher (38%) among those under 40 years of age.

Tennis Magazine is read often by over half of Serious Tennis Players (53%) – and read at least occasionally by 82%. Approximately 4 in 10 read USTA magazine often. - All readership frequency is increased among those who travel for tennis.

Over half the “serious” eyes are on Tennis Magazine often

USTA.com is regularly accessed by 68% of Serious Tennis Players. Tenniswarehouse.com is the highest mentioned retail site at 62% accessing it regularly.

Regular tennis website access is higher among those who travel for tennis, especially for the top 6 sites mentioned (USTA.com, tenniswarehouse.com, midwestsports.com, tennischannel.com, tennisexpress.com, holabirdsports.com)

General search engines are the way the typical Serious Tennis Player initiates the quest for tennis travel information. The specific websites noted most were Tripadvisor.com (33%) and Expedia (33%).

Nothing beats the all powerful “Word of Mouth”

“Word of Mouth” plays the most influential role in helping Serious Tennis Players decide on their tennis travel destination. Comparatively, “Social Media” has relatively low influence (Facebook, Twitter, Pinterest)

More Serious Tennis Players watch ESPN/ESPN2 regularly than any other TV channel. This is especially true among those who have taken a tennis specific vacation (80%) in the past 5 years. OF NOTE: 60% mention watching Tennis Channel regularly.

Nearly half (46%) of Serious Tennis Players indicated having watched ‘Destination Tennis’ on the Tennis Channel at some point. Of those who had watched, 69% agreed that they feel inspired to visit a resort after it has been featured on the Tennis Channel’s ‘Destination Tennis’ show.

Nearly 6 in 10 (57%) of those who had taken a vacation for tennis in the past 5 years indicated having watched ‘Destination Tennis’ – 75% of them claimed it inspired them.

Executive Summary

• Travel Profile – Serious Tennis Players (USA)

Almost 4 in 10 Serious Tennis Players have vacationed specifically for tennis in the past 5 years (38%), and more still -- find a way to play tennis while on vacation (a strong 84% in past 5 years). And we can know these players are serious about their tennis when 37% indicate having played tennis while travelling on business within the past 5 years.

*Where there's a will,
there's a way...
(to enjoy some tennis
away from home)*

Further, 64% of Serious Tennis Players indicate having travelled to see a tennis tournament in the past five years (39% within the past year).

In most cases, Serious Tennis Players will travel to see a professional tournament (ATP or WTA) once a year (59% and 51% respectively). Travel to view USTA / ALTA events, when done, is done more frequently.

Just like we saw with playing tennis in general, when playing tennis while travelling its also - all about Fun! Exercise is also very important again (second in rating). The social aspects rate medium in importance, while the competition/tournaments rate comparatively low.

Serious Tennis Players are most likely to take a tennis trip with their spouse/significant other or their friends. Interestingly, men are more likely to take a tennis trip with their spouse/significant other (65%) while women are more likely to take a tennis trip with their friends (53%).

*Tennis travelers are likely
divisible by 2*

Tennis trips are most likely taken in multiples of 2 people (32% two people and 21% four people) – not surprising when you consider the singles and doubles game play types. 9% note they typically travel alone for tennis trips, while 24% indicate being part of larger groups of 5 or more.

Most Serious Tennis Players prefer to book tennis travel on-line (59%), but many have no preference (30%) either way.

A full service hotel is the preferred accommodation mentioned most often (36%), but several Serious Tennis Players feel that this depends on the type of tennis trip they are planning.

Serious Tennis Players typically plan their tennis trips well in advance, with 32% booking 3-6 months out and 14% booking 6 or more months out.

Executive Summary

- **Travel Profile – Serious Tennis Players (USA) -continued**

When choosing a tennis trip destination, ‘accommodation quality’ is the king “general attribute” for Serious Tennis Players. When considering actual tennis related attributes, the ‘cost’ associated with the tennis is most important. However, court surfaces and the number of courts at the facility are not far behind in importance.

Often what is NOT important can be as interesting as what is important. We can see that nightlife, cultural activities and watersports are not important general characteristics when choosing a tennis trip destination. Also, junior programming and tournament participation are not very important tennis related destination attributes.

Outside of playing tennis on their tennis trip, Serious Tennis Players want to relax. They also want to enjoy good dining and possibly some time on the beach. Women showed more interest, in general, for many of these secondary activities.

Family Circle Tennis Tournament (Charleston, SC):

11% indicated they have attended the Family Circle Tennis Tournament at some point in the past. Of those, 55% played tennis while they were in the area attending the tournament. So there is additional economic impact for area facilities.

Overwhelmingly, 92% feel that attending the Family Circle Tournament makes the Charleston area a more attractive destination.

92% of those attending the Family Circle Cup felt it made Charleston a more attractive destination

Executive Summary

• Tennis Trip Destination - Consideration Set

Hilton Head Island, SC is the tennis trip destination that appears most in the consideration sets of Serious Tennis Players (65%). Other destinations appearing often are Charleston, Palm Beach, Ft. Myers, Myrtle Beach and Destin.

Hilton Head Island, SC is also the tennis trip destination that Serious Tennis Players have been to most (22%). Other top destinations visited were Charleston, Palm Beach, Orlando, and Ft. Myers.

• Southeastern Tennis Destinations

31% of Serious Tennis Players recall seeing a promotion for Hilton Head Island, SC as a destination in the past 6 months (35% of men recall seeing a promotion).

Among those who indicated seeing a promotion for Hilton Head Island, SC as a destination, 60% recall a magazine ad, 37% recall a TV ad, 26% recall an internet ad. 29% recall being direct marketed to either via e-mail or standard mail. Destin, FL showed the highest percentage of direct marketing recall (36% e-mail and standard mail combined).

Hilton Head Island promos have reached over 30% of USA Serious Players

Serious Tennis Players (with travel experience to the destination) indicate spending the most money per person at Amelia Island (\$874) – followed by Sea Island (\$781) and Hilton Head Island (\$755).

The most affordable destinations (money spent per person) appear to be Myrtle Beach (\$513) and Destin (\$548).

Executive Summary

• Southeastern Tennis Destinations (continued)

Primary reasons for selecting certain tennis trip destinations vary widely. Looking at the top reasons (bold) for each destination individually can give us a snapshot of the lure of each place for the Serious Tennis Player.

- **Amelia Island** – Easy to get to, Weather, **Activities other than tennis**
- **Destin** – Easy to get to, **Enjoyed it before**, Weather
- **Hilton Head Island** – **Enjoyed it before**, Easy to get to, **Accommodations**
- **Charleston** – Easy to get to, Weather, Enjoyed it before, **Restaurants**
- **Myrtle Beach** – Easy to get to, **Affordable**
- **Sea Island** – Easy to get to, **Accommodations**, **Reputation**

If we focus on the main attribute of “fun” (what it’s all about), and we look at the top row “enjoyed it before”, we can see that this is the top reason Serious Tennis Players gave for selecting Hilton Head Island (37%).

Dislikes of certain tennis trip destinations also vary widely. Looking at the top dislikes for each destination individually can give us a snapshot of the pitfalls of each place for the Serious Tennis Player.

- **Amelia Island** – Expensive, **Facility poorly managed**, did not enjoy level of competition,
- **Destin** – Expensive, **Restaurants too crowded**, bad weather
- **Hilton Head Island** – Expensive, **Nightlife dead**, Restaurants too crowded
- **Charleston** – Expensive, **Courts too busy**, Nightlife dead
- **Myrtle Beach** – **Run down facility**, **Accommodation below expectation**, Courts too busy
- **Sea Island** – Expensive

Serious Tennis Players (with travel experience to the destination) have the highest likelihood to recommend the Charleston, SC area (score of 8.7 out of 10). Most destinations scored 8.0 or above, which are typically good “recommendation scores”. However, Myrtle Beach returned a concerning score of 6.8 from those who have taken a tennis trip there.

Executive Summary

• Hilton Head Island, SC – Travel Profile & Perceptions

45% of Serious Tennis Players would normally fly to Hilton Head Island, while 37% would normally drive and the remaining 17% are unsure.

If driving, many would have a trip of over 7 hours in front of them (54%), a high percentage of these individuals would likely fly.

Most Serious Tennis Players are unsure about their airport of choice inbound to Hilton Head Island (54%), but among those with a preference, Savannah HHI is the leading choice followed by Hilton Head Island, SC. 9% prefer to fly into Charleston and take the drive.

The airline of lowest cost will win over for most Serious Tennis Players. Among those with a preference, American/US Airways and Delta top the list.

Remember this: tennis trip travelers find “Having Fun” most important about the tennis - and they value “Relaxing” most as an activity other than the tennis --
- So it is highly encouraging that the top two adjectives associated with Hilton Head Island by Serious Tennis Players are “Relaxing”(35%) and “Fun” (33%).

*“Relaxing” and “Fun”
- highly associated with
Hilton Head Island*

Most agree that Hilton Head Island also has great golf courses to offer. Leveraging the perception could be valuable. This could provide an opportunity to key in on those individual that “cross-participate” in both tennis and golf.

Most also agree that Hilton Head Island would be a great destination for an ATP or WTA pro tournament.

29% of Serious Tennis Players indicate that they are at least “likely” to visit Hilton Head Island in the next 2 years (9% “very likely”).

Executive Summary

• Player Demographics – Serious Tennis Players (USA)

Serious tennis players do not heavily skew toward one gender. Men account for slightly more (at 53%), but the gender profile of serious tennis players is much less skewed than we see in some other sports - like golf, where over 8 in 10 Core golfers are men (-*National Golf Foundation*).

Tennis travel by gender also appears fairly distributed – with the only notable difference being among the Non-Traveler group, where 60% are men.

Over 6 in 10 (61%) Serious Tennis Players are between the ages of 40 and 60. Naturally, this group accounts for the lion share of tennis travel - with the 50-59 age group leading the way (42% have taken a vacation specifically for tennis within the past 5 years).

Serious tennis players are highly educated – 82% have reached at least a 4 year college graduate level, with nearly 4 in 10 having a post graduate degree. Education level does not appear to significantly impact tennis travel behavior (the Non-traveler shows only a slightly less likelihood of post graduate study).

Among those still working, middle to upper management occupations appear the norm (consistent with expectations from education level). A surprising number of Serious Tennis Players note that they are “self employed” – 18%. Along with the “retired” group, this is the group that notes the highest rate of tennis travel.

Not surprisingly, Serious Tennis Players report significantly higher than average annual household incomes (average \$171,000). Considering the current estimate of the average annual household income in the U.S. is \$62,500 (U.S. Census Bureau), Serious Tennis Players are far more affluent than the national average. This affluence impacts tennis travel, with those group who have travelled reporting higher incomes.

Tennis does NOT have the “gender issue” other sports face

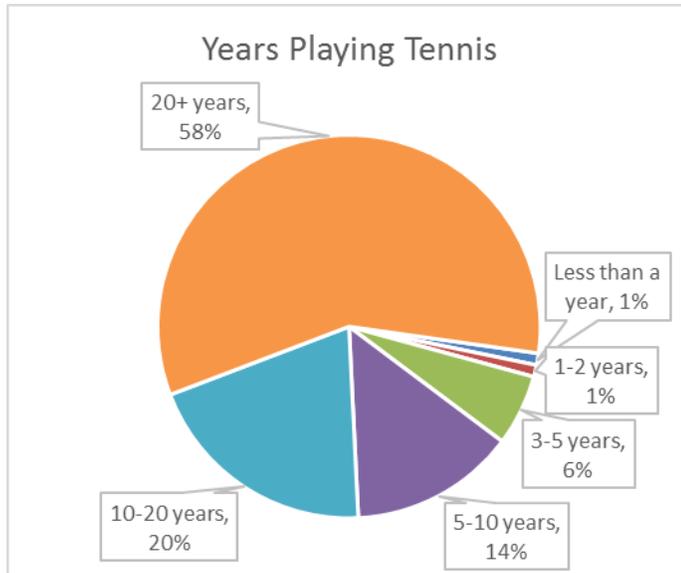
Tennis Playing Habits



Tennis Playing Habits

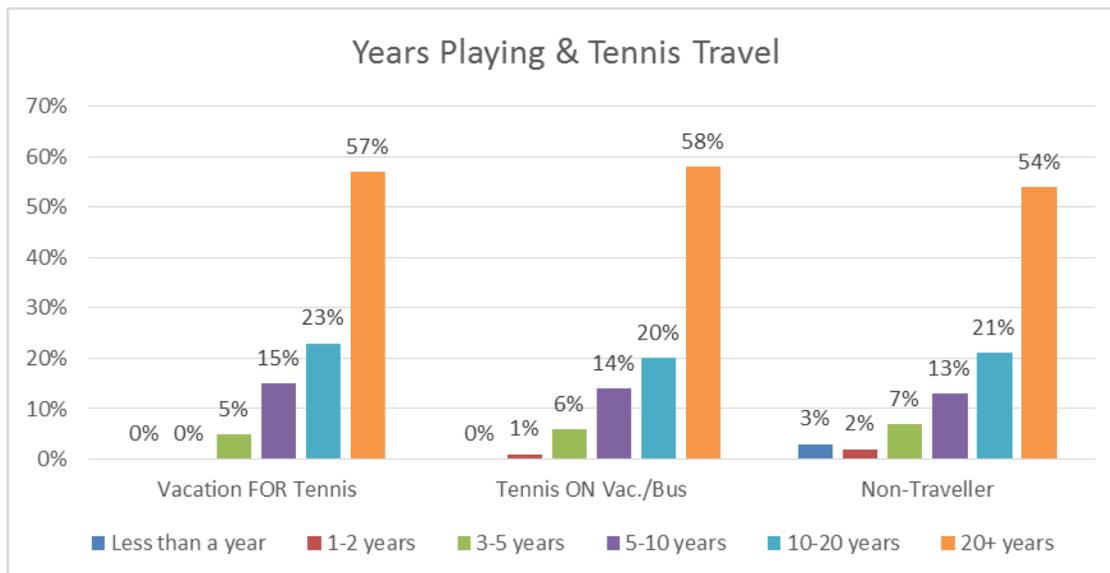
- **Playing History of Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)



Most Serious Tennis Players have been playing for quite a while (78% for more than 10 years and 58% for more than 20).

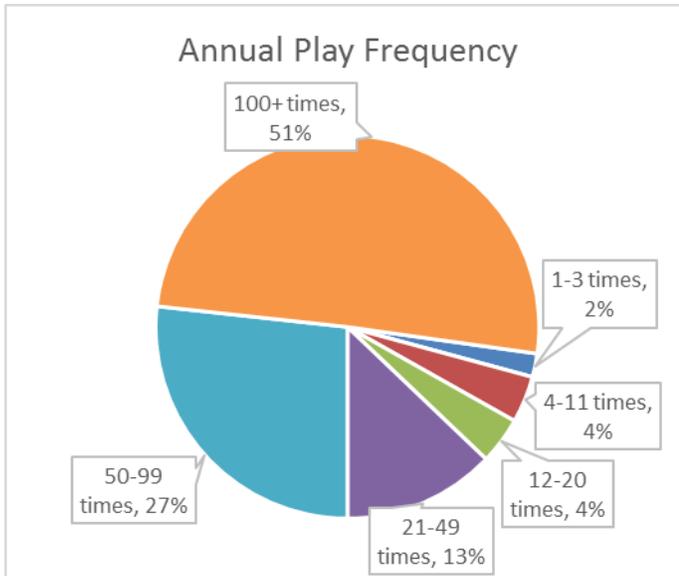
This distribution appears similar when investigating tennis travel by years playing (see below)



Tennis Playing Habits

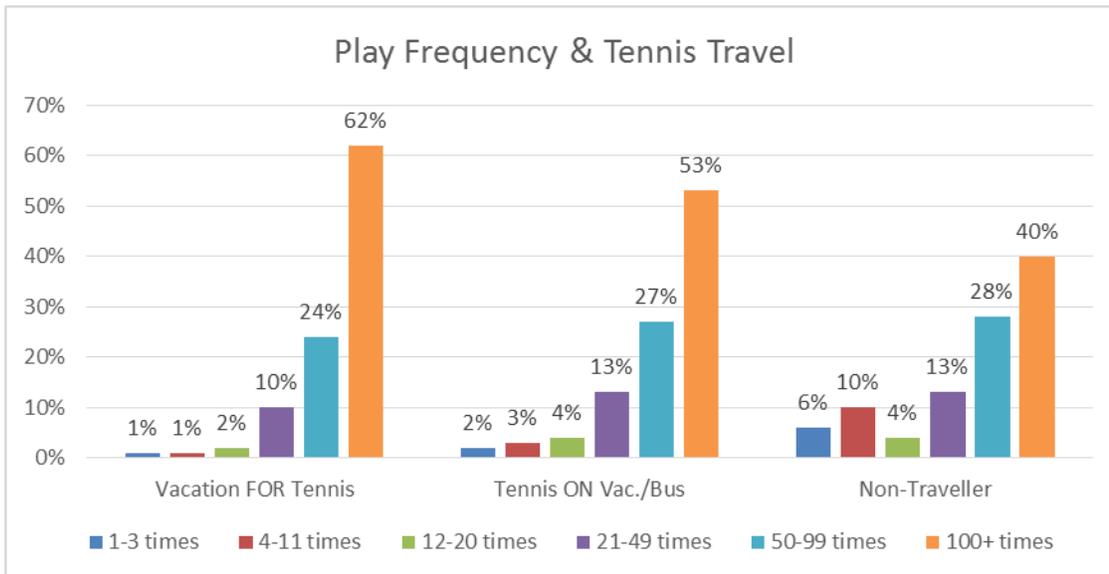
- Play Frequency of Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)



Most Serious Tennis Players play an average of at least once per week. Interestingly, 51% claim they play over 100 times per year, equating to approximately twice per week.

This play frequency is higher among those who have travelled specifically for tennis - Vacation FOR Tennis (see below)

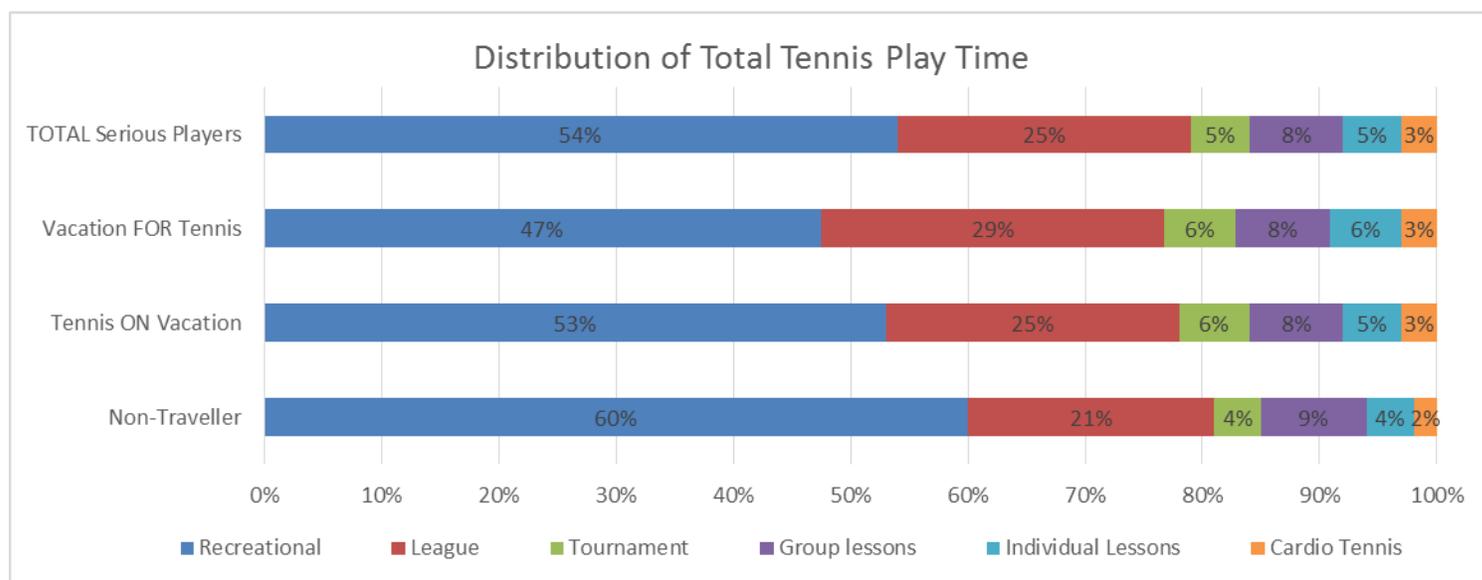


Tennis Playing Habits

- **Play Time Distribution of Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

Recreational play is the primary way Serious Tennis Players get their tennis in (54%). We see some differences among the tennis travel group – League play is more common (29%) among those who have taken vacations for tennis than in other groups.



Total Serious Tennis Players

	Recreational	League	Tournament	Group lessons	Individual Lessons	Cardio Tennis	
Average	54%	25%	5%	8%	5%	3%	100%
1-10%	9%	9%	24%	16%	18%	7%	
11-20%	8%	10%	6%	10%	5%	3%	
21-30%	10%	12%	4%	6%	3%	2%	
31-40%	5%	7%	1%	3%	1%	0%	
41-50%	15%	10%	1%	2%	2%	1%	
51-60%	6%	4%	0%	1%	0%	0%	
61-70%	5%	5%	0%	0%	0%	0%	
71-80%	9%	4%	0%	1%	0%	0%	
81-90%	8%	2%	0%	0%	0%	-	
91-99%	3%	0%	0%	-	-	-	
100%	17%	0%	0%	-	0%	0%	
None	7%	36%	64%	61%	70%	87%	

Tennis Playing Habits

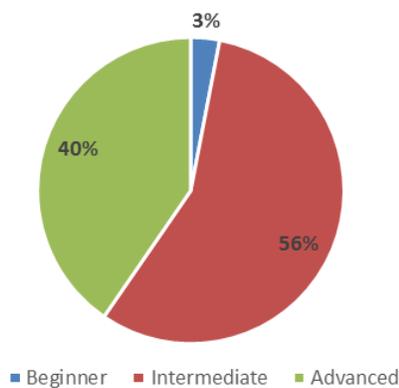
• Skill Level of Serious Tennis Players (USA)

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

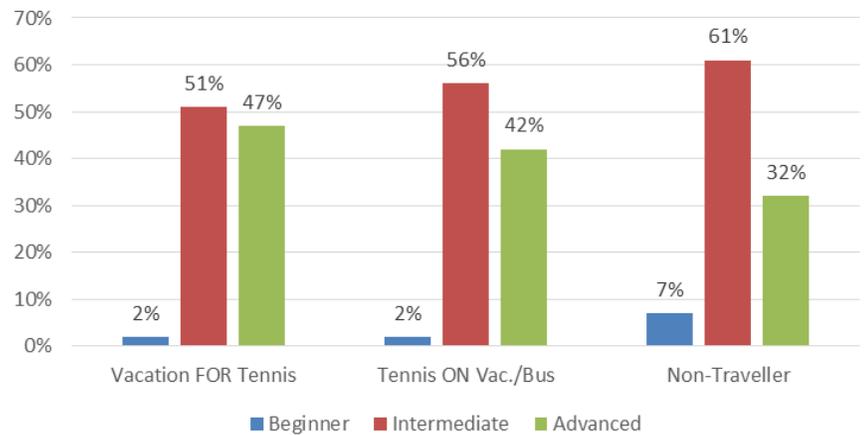
Four in 10 (40%) Serious Tennis Players describe their skill level as “advanced.” As we would expect, a very small number perceive themselves as beginners (3%). Nearly 7 in 10 (68%) currently have an NTRP rating (66% have a rating between 3.5 and 4.0).

As you can see illustrated in the charts below, there is an association between skill level and tennis travel. Those who have taken a tennis specific vacation, or played tennis while on vacation/business are more likely to be advanced – or have an NTRP rating.

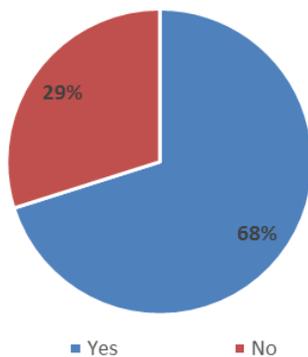
Self Described Skill Level



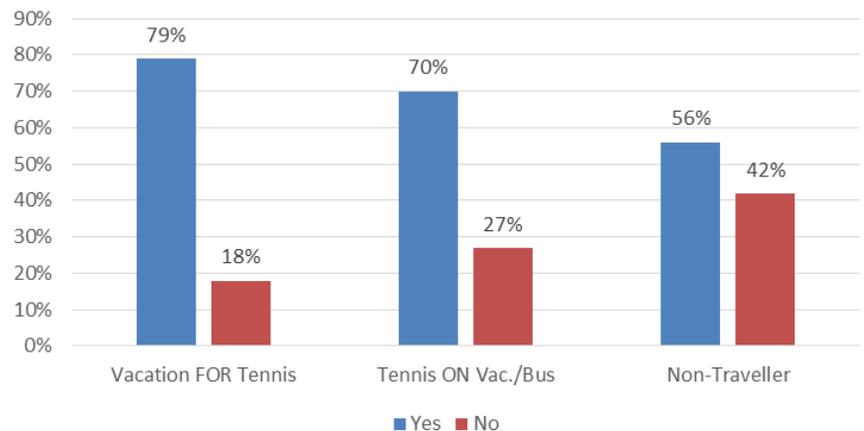
Skill Level & Tennis Travel



Have NTRP (Natl. Rating)



Have NTRP & Tennis Travel



Tennis Playing Habits

- Facility Usage of Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

Serious Tennis Players utilize private clubs to play tennis – 37% play most often at a private tennis club, 9% at a private country club, 6% at a private community court (total of 52%). Commercial / pay for play clubs are used most often by 26%.

Har-Tru is the most preferred surface of Serious Tennis Players (33%), followed by Cement (30%) and Acrylic (25%).

<u>Facility Most Frequently Used:</u>	USA Serious Players	Vacation FOR Tennis	Tennis ON Vac./Bus	Non-Traveller
A private tennis club where a membership is required	37%	42%	40%	26%
A public, school, or park court	26%	22%	25%	36%
A commercial club open to the public or pay for play	16%	16%	16%	17%
A private country club where a membership is required	9%	11%	10%	8%
Private community court	6%	5%	6%	9%
At your own court at home	1%	2%	1%	1%
On a court at an apartment or condo	1%	1%	1%	2%
A hotel or resort when on vacation or business	1%	0%	1%	1%
Other Community Court/Park	1%	1%	0%	-

<u>Preferred Surface:</u>	USA Serious Players	Vacation FOR Tennis	Tennis ON Vac./Bus	Non-Traveller
Har-Tru	33%	35%	34%	30%
Hard (cement)	30%	27%	29%	35%
Hard (acrylic)	25%	23%	24%	26%
Red Clay	8%	10%	8%	7%
Grass	1%	1%	1%	-
Carpet	1%	1%	1%	1%
Green/Grey Clay (Rubico)	1%	2%	2%	1%

Tennis Playing Habits

- The “Why” - from Serious Tennis Players

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

It’s all about Fun! The most important thing about playing tennis to a Serious Tennis Player is having fun. Exercise is also very important (second in rating). The challenge and competition follow in importance and the social aspects rate medium in importance (see table below).

Average Importance Rating - To Playing Tennis

<u>Tennis Attribute Importance:</u>	USA	<i>Vacation FOR Tennis</i>	<i>Tennis ON Vac./Bus</i>	<i>Non- Traveller</i>
	Serious Players			
Fun	4.7	4.6	4.7	4.7
Exercise / staying healthy	4.6	4.6	4.6	4.6
Improving my game	4.2	4.4	4.3	4.1
Challenging my skill set	4.1	4.1	4.1	4.0
Competition	3.8	3.9	3.8	3.7
Socializing	3.6	3.7	3.6	3.6
Meeting new people	3.4	3.5	3.4	3.4
Gets me out of the house	3.3	3.2	3.3	3.3
Family time together	2.9	3.0	3.0	2.7
Matches don't take too long	2.6	2.6	2.6	2.6

Scale of 1 to 5 with 1 = Not at all important and 5 = Very important.

Media & Vacation Planning

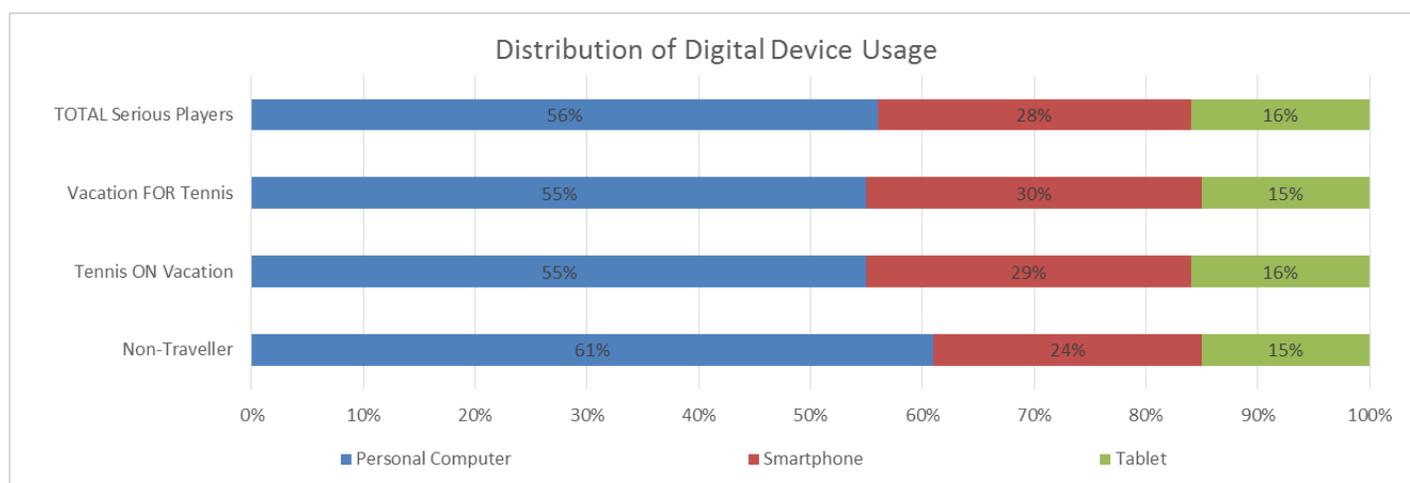


Media & Vacation Planning

- Digital Device Usage of Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

Most digital device usage time is spent on a personal computer (56%). The smartphone is second at 28%, followed by the tablet at 16%. Smartphone usage is higher (38%) among those under 40 years of age.



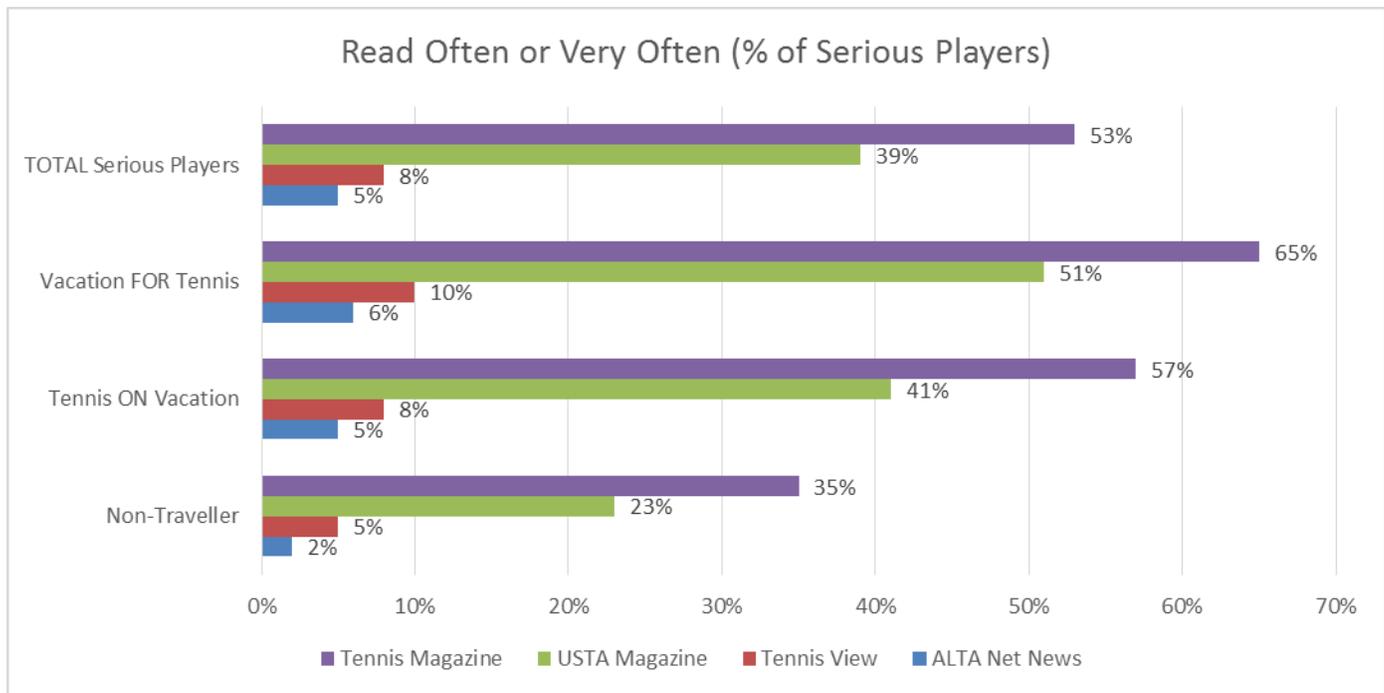
	Personal Computer	Smartphone	Tablet	
Average	56%	28%	16%	100%
None	3%	23%	46%	
1-10%	7%	8%	16%	
11-20%	6%	13%	9%	
21-30%	8%	16%	11%	
31-40%	10%	12%	7%	
41-50%	18%	17%	6%	
51-60%	8%	3%	2%	
61-70%	7%	3%	1%	
71-80%	12%	3%	1%	
81-90%	5%	1%	1%	
91-99%	2%	0%	0%	
100%	14%	0%	1%	

Media & Vacation Planning

- **Tennis Publication Readership - Serious Tennis Players (USA)**
(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

Tennis Magazine is read often by over half of Serious Tennis Players (53%) – and read at least occasionally by 82%. Approximately 4 in 10 read USTA magazine often.

All readership frequency is increased among those who travel for tennis (see chart below)



Readership Frequency:	ALTA Net News	Tennis Magazine	Tennis View	USTA Magazine
Never	87%	18%	77%	29%
Occasionally	6%	18%	10%	20%
Not Often	2%	11%	5%	13%
Often	2%	16%	5%	17%
Very Often	3%	37%	3%	22%

Media & Vacation Planning

- Tennis Website Browsing - Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

USTA.com is regularly accessed by 68% of Serious Tennis Players. Tenniswarehouse.com is the highest mentioned retail site at 62% accessing it regularly.

Regular website access is more likely among those who travel for tennis, especially for the top 6 sites mentioned (see table below). Advertising on these sites would be a great way to reach those who vacation FOR tennis.

<u>Tennis Websites Accessed Regularly:</u>	USA Serious Players	Vacation FOR Tennis	Tennis ON Vac./Bus	Non-Traveller
USTA.com	68%	75%	70%	50%
TennisWarehouse.com	62%	67%	63%	54%
MidwestSports.com	35%	42%	36%	24%
TennisChannel.com	35%	40%	36%	23%
TennisExpress.com	34%	40%	35%	28%
Holabirdsports.com	26%	31%	27%	27%
TENNIS.com	21%	20%	22%	15%
Atpworldtour.com	18%	21%	18%	16%
Tennis15-30.com	17%	20%	18%	10%
WTAtennis.com	12%	13%	12%	7%
Others (Single mentions)	5%	4%	5%	5%
Busted Racquet (yahoo tennis blog)	4%	4%	4%	3%
Playtennis.com	4%	3%	4%	2%
TennisResortsOnline.com	4%	7%	5%	-
Tennis Link	1%	1%	1%	-
Tennis Recruiting	1%	1%	1%	1%
USPTA	1%	0%	1%	-
USTA (Local divisions)	1%	1%	1%	1%

Media & Vacation Planning

- **Website Browsing (Tennis Travel Info Gathering) - Serious Tennis Players (USA)** *(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)*

General search engines are the way the typical Serious Tennis Player initiates the quest for tennis travel information. The specific websites noted most were Tripadvisor.com (33%) and Expedia (33%).

<u>Websites Accessed Regularly For Tennis travel:</u>	USA	Vacation FOR Tennis	Tennis ON Vac./Bus	Non- Traveller
	Serious Players			
Search engines (Google, Yahoo!, Bing etc.)	49%	53%	50%	40%
Tripadvisor.com	33%	35%	34%	24%
Expedia	33%	34%	34%	27%
Priceline	18%	19%	18%	15%
TennisChannel.com	18%	21%	19%	12%
Kayak	17%	18%	17%	18%
Facebook	14%	14%	14%	7%
TennisResortsOnline.com	13%	18%	14%	4%
Tenniswarehouse.com (Talk Tennis forum)	10%	8%	10%	4%
Tennis blogs	6%	8%	7%	-
Pinterest	3%	4%	3%	4%
Other Named Sites	2%	3%	2%	-
Epinions.com	1%	1%	1%	-
Hotels.com	1%	1%	0%	1%
Orbitz	1%	1%	0%	1%
Hotels/Resorts	1%	1%	1%	-

Media & Vacation Planning

- Influential Sources in Tennis Travel Destination Choice:**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

“Word of Mouth” plays the most influential role in helping Serious Tennis Players decide on their tennis travel destination. Comparatively, “Social Media” has relatively low influence (Facebook, Twitter, Pinterest)

<i>Mean Rating (Scale of 1 to 5 with 5 = Very Influential and 1 = Not at all Influential)</i>	USA	<i>Vacation</i>	<i>Tennis ON</i>	<i>Non-</i>
	Serious Players	<i>FOR Tennis</i>	<i>Vac./Bus</i>	<i>Traveller</i>
Friends	3.3	3.7	3.4	2.7
Spouse/partner	3.3	3.5	3.4	2.8
Search engines (Google, Yahoo!, Bing etc.)	3.0	3.2	3.0	2.6
Online travel reviewers/bloggers	2.6	2.9	2.7	2.1
Travel industry experts	2.4	2.6	2.5	2.0
TV travel shows	2.4	2.6	2.5	1.9
Children	2.4	2.4	2.4	2.0
Other family members	2.3	2.3	2.3	2.0
News media	2.3	2.5	2.3	1.8
Travel Agent	2.0	2.1	2.1	1.7
Facebook	2.0	2.1	2.0	1.7
Visitor and Convention Bureau	1.9	2.0	2.0	1.7
Information from Chamber of Commerce	1.8	1.9	1.9	1.7
Pinterest	1.7	1.7	1.7	1.5
Twitter	1.6	1.6	1.6	1.5

Media & Vacation Planning

- **TV Channels Watched Regularly – Serious Tennis Players (USA)**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

More Serious Tennis Players watch ESPN/ESPN2 regularly than any other TV channel. This is especially true among those who have taken a tennis specific vacation (80%) in the past 5 years. OF NOTE: 60% mention watching Tennis Channel regularly.

	USA Serious Players	Vacation FOR Tennis	Tennis ON Vac./Bus	Non- Traveller
ESPN (or ESPN2)	72%	80%	74%	62%
ABC	63%	64%	64%	60%
CBS	61%	62%	62%	58%
NBC	60%	61%	61%	57%
Tennis Channel	60%	69%	63%	43%
Fox / Fox News	36%	37%	36%	36%
Fox Sports	34%	37%	34%	32%
USA Network	34%	38%	36%	28%
History Channel	33%	37%	35%	22%
The Discovery Channel	30%	36%	31%	22%
Food Network	29%	31%	30%	23%
HGTV (Home and Garden TV)	28%	29%	28%	28%
TNT (Turner Network Television)	27%	28%	27%	25%
The Weather Channel	27%	28%	28%	22%
HBO (Home Box Office)	26%	29%	27%	20%
TBS	25%	27%	26%	21%
A&E Television Network	24%	25%	24%	18%
National Geographic	22%	24%	23%	17%
Bravo	18%	22%	19%	15%
CNBC	18%	19%	18%	15%
Travel Channel	18%	22%	20%	12%
Golf Channel	17%	17%	17%	16%
Showtime	17%	18%	18%	14%
MSNBC	16%	17%	16%	16%
Lifetime	15%	19%	15%	15%
NBCSN (NBC Sports Network)	15%	17%	15%	16%
TLC (The Learning Channel)	15%	19%	16%	6%
Comedy Central	14%	17%	14%	15%
The Sci-Fi Channel	13%	13%	13%	12%
Starz	9%	9%	9%	5%
Outdoor Channel	5%	5%	5%	5%
MTV (or MTV2)	4%	4%	4%	3%
beIN Sport	1%	2%	1%	1%
Canadian TV Channels	1%	1%	1%	-

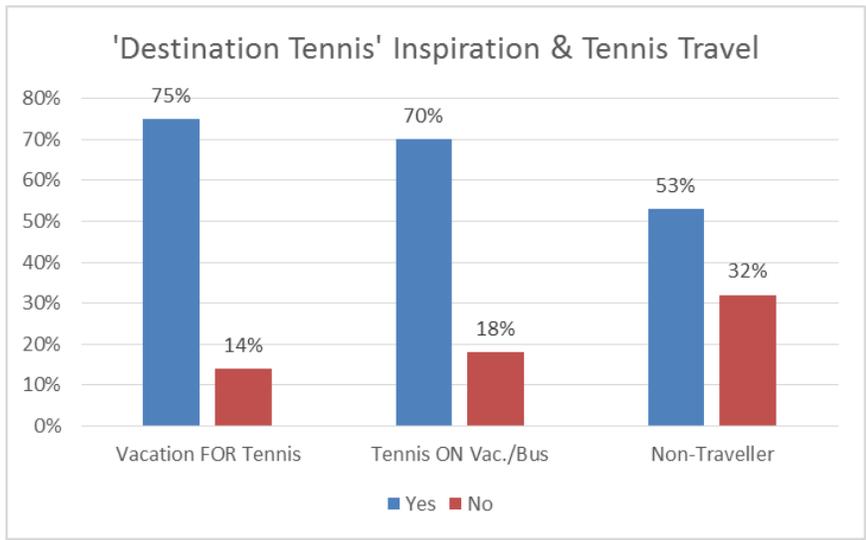
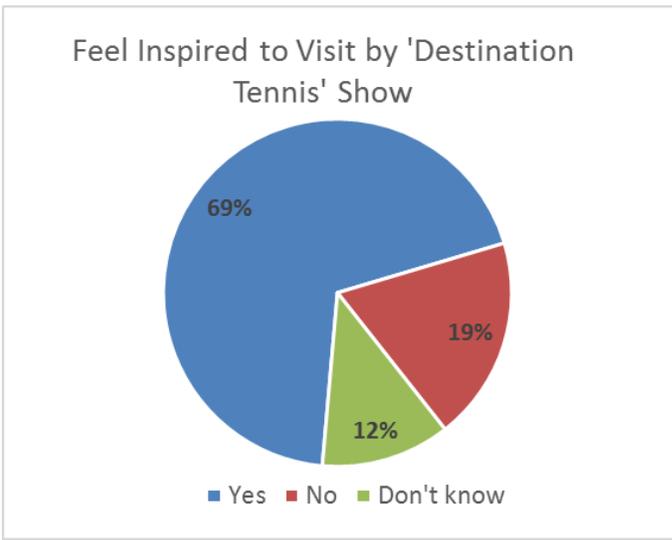
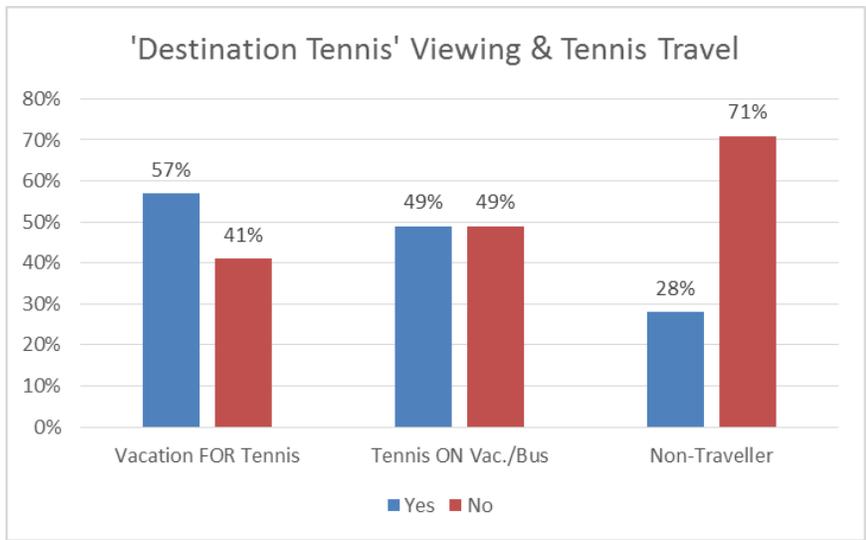
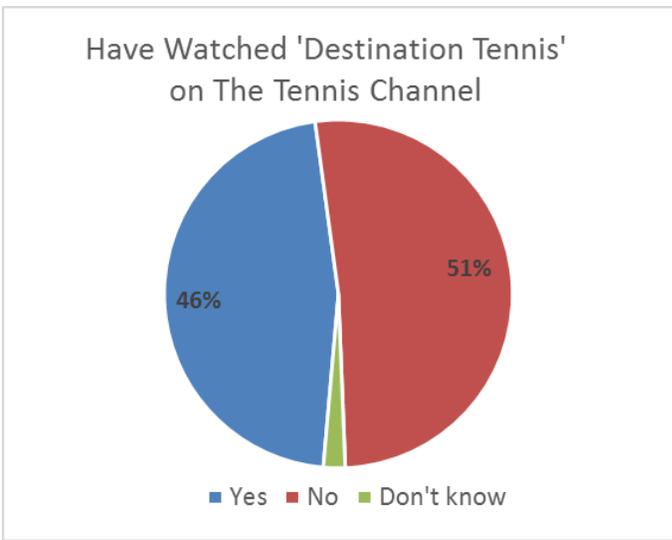
Media & Vacation Planning

- Destination Tennis – on the Tennis Channel**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – past 5 years)

Nearly half (46%) of Serious Tennis Players indicated having watched ‘Destination Tennis’ on the Tennis Channel at some point. Of those who had watched, 69% agreed that they feel inspired to visit a resort after it has been featured on the Tennis Channel’s ‘Destination Tennis’ show.

Nearly 6 in 10 (57%) of those who had taken a vacation for tennis in the past 5 years indicated having watched ‘Destination Tennis’ – 75% of them claimed it inspired them.



Tennis Travel



Tennis Travel

• Travel Profile – Serious Players (USA)

Almost 4 in 10 Serious Tennis Players have vacationed specifically for tennis in the past 5 years (38%), and more still, find a way to play tennis while on vacation (a strong 84% in past 5 years). And you know these players are serious about their tennis when 37% indicate having played tennis while travelling on business within the past 5 years.

Further, 64% of Serious Tennis Players indicate having travelled to see a tennis tournament in the past five years (39% within the past year).

	Tennis ON Business	Tennis ON Vacation	Vacation FOR Tennis	To See Tennis Tourney
In the last 12 months	18%	55%	20%	39%
Within the last 5 Years	19%	28%	18%	25%
No	63%	16%	62%	36%

Average Annual Travel Plays 3.3 5.1 5.1 2.0* **Number of Trips*

• Tennis Tournament Viewing (Travel) – Serious Players (USA)

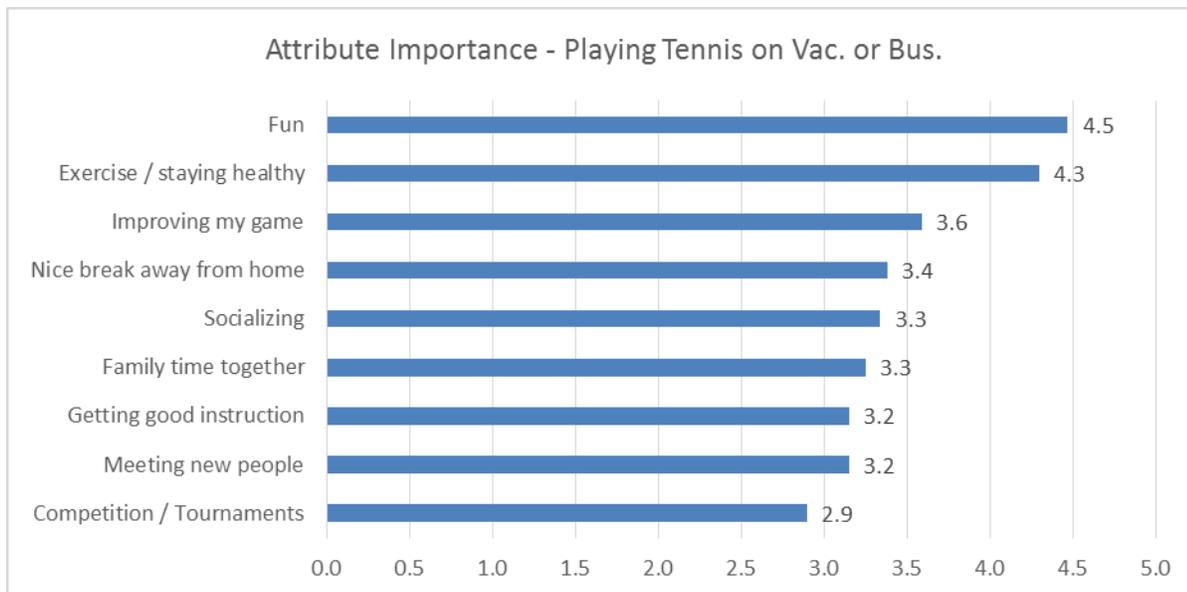
In most cases, Serious Tennis Players will travel to see a professional tournament (ATP or WTA) once a year (59% and 51% respectively). Travel to view USTA / ALTA events, when done, is done more frequently.

	Professional ATP	Professional WTA	USTA / ALTA
Mean	2.0	1.6	2.7
None	10%	28%	34%
1	59%	51%	37%
2-3	25%	16%	14%
4-5	4%	3%	7%
6-10	0%	-	4%
11-20	1%	1%	1%
21-50	0%	1%	2%
Over 50	0%	0%	0%

Tennis Travel

- Attribute Importance – While playing tennis on vacation or business.

Just like we saw with playing tennis in general, when playing tennis while travelling its also - all about Fun! Exercise is also very important again (second in rating). The social aspects rate medium in importance, while the competition/tournaments rate comparatively low (see table below).



Other motivators for playing tennis while on vacation or business:

	USA Serious Players
Love of the game	13%
New environment/Different surroundings	13%
Availability of different surfaces	10%
Exercise	8%
Keep game in shape/Improve	8%
Enjoyment/Fun	8%
Weather	7%
Availability of courts	6%
Activity for all the family/All can play	6%
Location/Scenery	6%
Availability of coaches/Tennis clinics	4%
Quality of courts	4%
Stress relief	4%
Availability of partners	4%
Company/Social	4%
Cost of courts	3%
Partners of same ability	3%
Meet new people	3%
Getting out	3%
Convenient location	3%

Tennis Travel

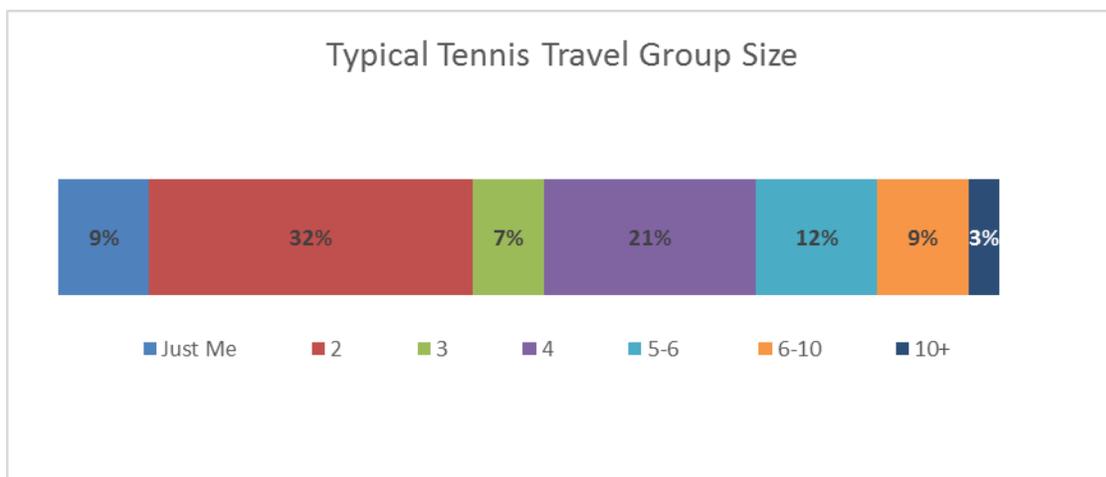
• Typical Travel Group – For Tennis Trips

Serious Tennis Players are most likely to take a tennis trip with their spouse/significant other or their friends. Interestingly, men are more likely to take a tennis trip with their spouse/significant other (65%) while women are more likely to take a tennis trip with their friends (53%) - (see table below).

OF NOTE: 24% indicate typically taking tennis trips with their league team – 31% among women.

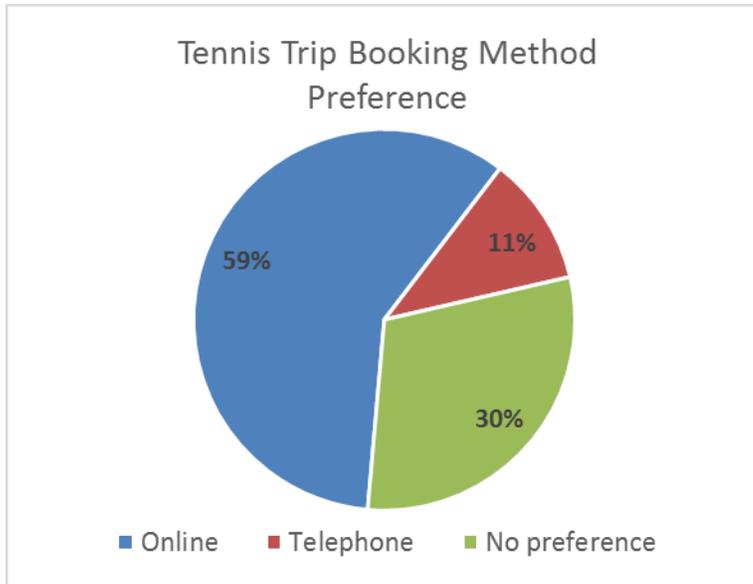
	USA Serious Players	Male	Female
Spouse / significant other	57%	65%	48%
Friends	46%	39%	53%
League team	24%	17%	31%
Children	21%	21%	21%
Family	19%	17%	21%
Business associate/s	4%	6%	2%
Alone	3%	4%	1%

Tennis trips are most likely taken in multiples of 2 people (32% two people and 21% four people) – not surprising when you consider the singles and doubles game play types. 9% note they typically travel alone for tennis trips, while 24% indicate being part of larger groups of 5 or more. So the vast majority of travelers do not need to find people to play with at the destinations.



Tennis Travel

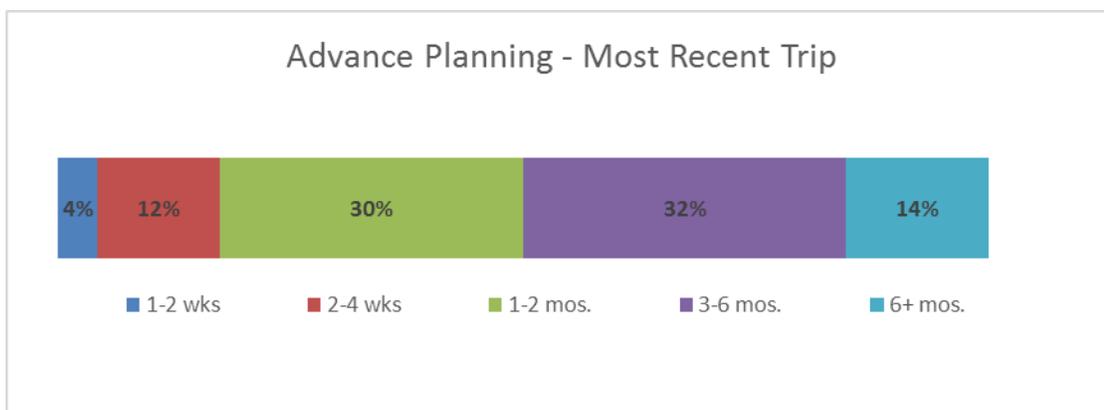
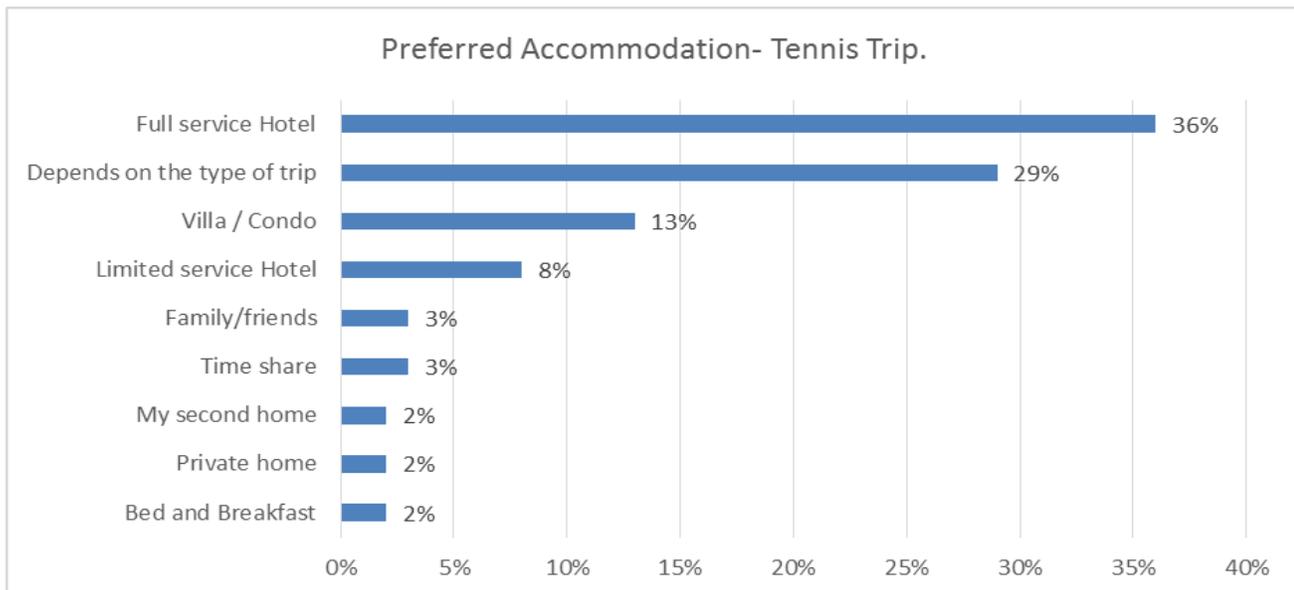
• Booking Tendencies – For Tennis Trips



Most Serious Tennis Players prefer to book tennis travel on-line (59%), but many have no preference (30%) either way.

A full service hotel is the preferred accommodation mentioned most often (36%), but several Serious Tennis Players feel that this depends on the type of tennis trip they are planning (see middle chart).

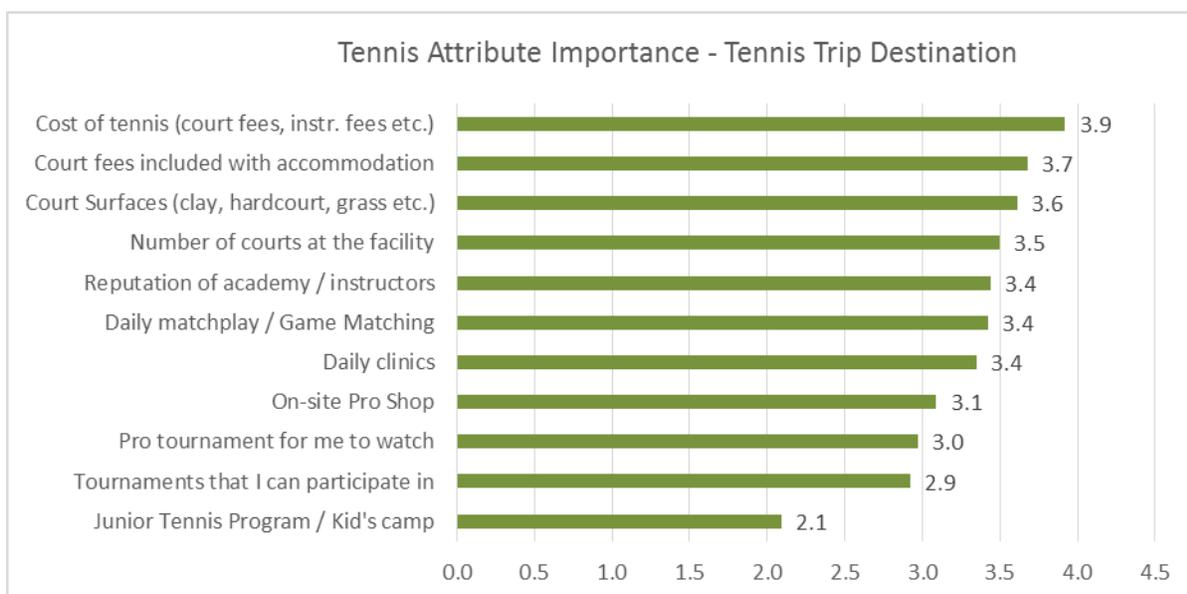
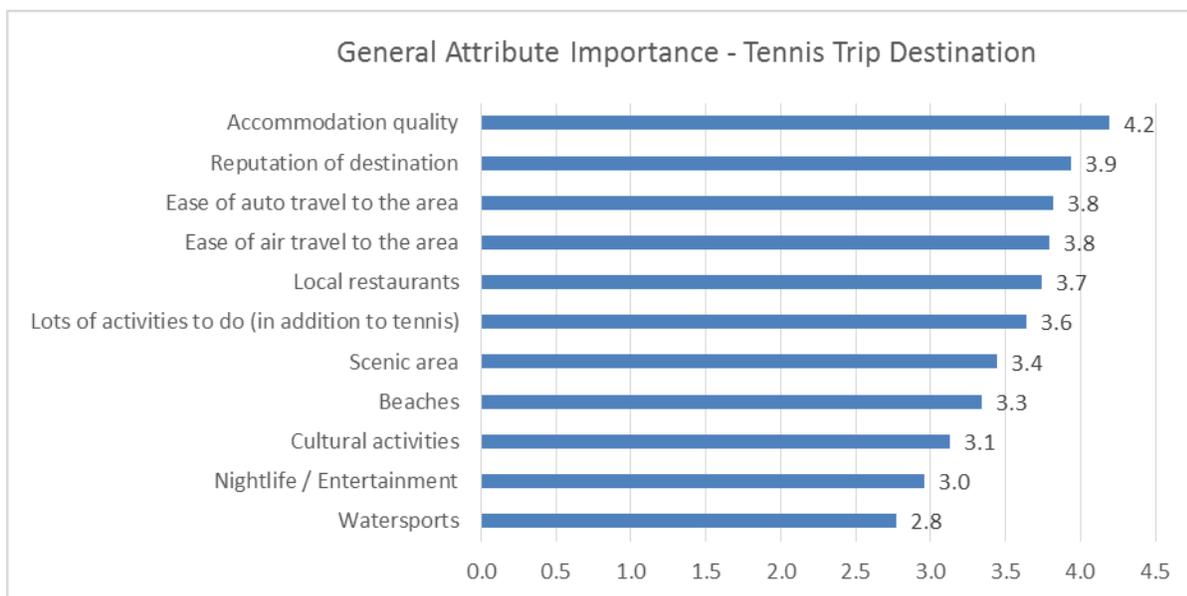
Serious Tennis Players typically plan their tennis trips well in advance, with 32% booking 3-6 months out and 14% booking 6 or more months out. (see distribution at bottom)



Tennis Travel

• Destination Attribute Importance – Tennis Trip

When choosing a tennis trip destination, 'accommodation quality' is the king "general attribute" for Serious Tennis Players. When considering actual tennis related attributes, the 'cost' associated with the tennis is most important. However, court surfaces and the number of courts at the facility are not far behind in importance.



Often what is NOT important can be as interesting as what is important. We can see that nightlife, cultural activities and watersports are not important general characteristics when choosing a tennis trip destination. Also, junior programming and tournament participation are not very important tennis related destination attributes.

Tennis Travel

- Tennis Destination – Interest in Activities Other Than Tennis

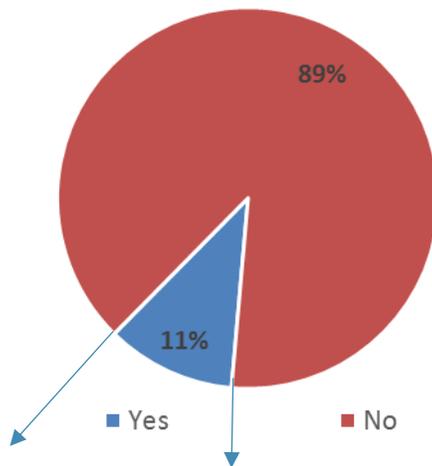
Outside of playing tennis on their tennis trip, Serious Tennis Players want to relax. They also want to enjoy good dining and possibly some time on the beach. Women showed more interest, in general, for many of these secondary activities.

	USA Serious Players	Male	Female
Relaxing	79%	75%	84%
Dining	72%	71%	75%
Beaches	68%	65%	70%
Shopping	46%	36%	56%
Historic sights	43%	45%	41%
Spas & Wellness	39%	31%	48%
Nature-based activities	30%	27%	34%
Local festivals	29%	25%	33%
Visiting family / friends	27%	29%	26%
Attending sports events	27%	30%	24%
Biking	25%	23%	27%
Museum/historical tours	25%	27%	23%
Parks	20%	22%	19%
Golf	20%	25%	13%
Walking tours	18%	16%	21%
Performance / visual arts	15%	15%	16%
Boating/sailing	13%	12%	14%
Children's activities	10%	12%	9%
Fishing	8%	10%	6%
Dolphin tours	7%	4%	10%
Business/work	5%	8%	3%

Tennis Travel

- Family Circle Tennis Tournament – Daniel Island, SC

Ever Attended Family Circle Tourney on Daniel Island, SC

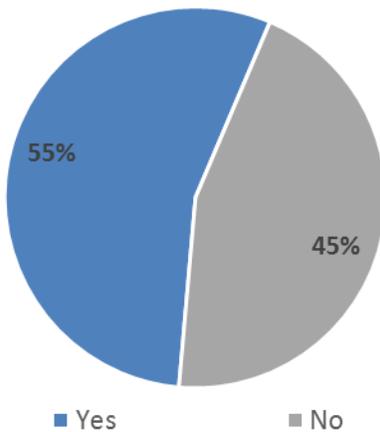


11% indicated they have attended the Family Circle Tennis Tournament at some point in the past.

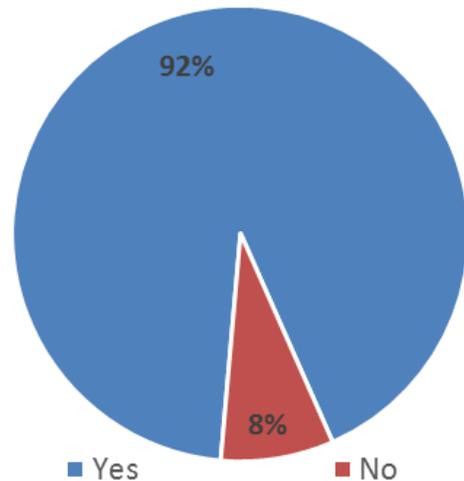
Of those, 55% played tennis while they were in the area attending the tournament.

Overwhelmingly, 92% feel that attending the Family Circle Tournament makes the Charleston area a more attractive destination.

Played Tennis While There
(% of those attending Family Circle)



Does Attending Family Circle Tourney Make Charleston Destination More Attractive?
(% of those attending Family Circle)



Tennis Destinations



Tennis Destinations

- **Destination Consideration Set**

(also shown by Gender & from alternative samples of HHI Chamber of Commerce and Resort Specific)

Hilton Head Island, SC is the tennis trip destination that appears most in the consideration sets of Serious Tennis Players (65%). Other destinations appearing often are Charleston, Palm Beach, Ft. Myers, Myrtle Beach and Destin.

Consideration Set:	USA	Male	Female	HHI CoC	Resort
	Serious Players				
Hilton Head Island (SC)	65%	66%	66%	81%	92%
Charleston (Kiawah, Wild Dunes, Seabrook, Daniel Island, SC)	55%	54%	57%	58%	69%
Palm Beach / Ft. Lauderdale / Miami (Southeast, FL)	34%	33%	36%	25%	23%
Ft. Myers/Naples (Southwest, FL)	31%	33%	29%	27%	29%
Myrtle Beach (Litchfield, SC)	30%	30%	31%	33%	29%
Destin / Pensacola / Panama City (Panhandle, FL)	29%	28%	30%	26%	29%
Sarasota / Bradenton (West, FL)	27%	28%	26%	21%	22%
Sea Island / St. Simons (Coastal, GA)	27%	25%	29%	32%	36%
Orlando (Central, FL)	22%	23%	20%	23%	16%
Tampa Bay (FL)	22%	24%	20%	19%	17%
Gulf Shores (Gulf Coast, AL)	19%	19%	20%	23%	18%
Pinehurst / Sandhills (NC)	19%	19%	20%	19%	21%
Jacksonville / Daytona / Palm Coast (Northeast, FL)	18%	21%	15%	15%	21%
None of the above	9%	11%	8%	6%	3%
Other Named	1%	1%	0%	0%	1%
Other (gen)	1%	1%	1%	1%	0%

Tennis Destinations

- Destinations – Have Been To In Past 5 Years

(also shown by Gender & from alternative samples of HHI Chamber of Commerce and Resort specific)

Hilton Head Island, SC is also the tennis trip destination that Serious Tennis Players have been to most (22%). Other top destinations visited were Charleston, Palm Beach, Orlando, and Ft. Myers.

	USA Serious Players	Gender		HHI CoC	Resort
		Male	Female		
Hilton Head Island (SC)	22%	24%	19%	48%	83%
Charleston (Kiawah, Wild Dunes, Seabrook, Daniel, SC)	17%	17%	17%	17%	28%
Palm Beach / Ft. Lauderdale / Miami (Southeast, FL)	15%	17%	13%	6%	8%
Orlando (Central, FL)	12%	13%	11%	14%	9%
Ft. Myers/Naples (Southwest, FL)	11%	12%	10%	9%	9%
Destin / Pensacola / Panama City (Panhandle, FL)	9%	10%	9%	8%	9%
Sarasota / Bradenton (West, FL)	9%	9%	8%	6%	6%
Tampa Bay (FL)	9%	10%	8%	6%	7%
Jacksonville / Daytona / Palm Coast (Northeast, FL)	8%	10%	5%	7%	10%
Gulf Shores (Gulf Coast, AL)	7%	6%	8%	6%	5%
Myrtle Beach (Litchfield, SC)	7%	8%	5%	12%	9%
Pinehurst / Sandhills (NC)	4%	4%	4%	2%	5%
Sea Island / St. Simons (Coastal, GA)	4%	4%	3%	4%	4%
Other	1%	2%	1%	2%	3%
None of the above	44%	43%	46%	34%	11%

Southeastern Tennis Destinations



Southeastern Tennis Destinations

- Promotion Recall – seen promotion in past 6 months**

(also shown by Gender & from alternative samples of HHI Chamber of Commerce and Resort specific)

31% of Serious Tennis Players recall seeing a promotion for Hilton Head Island, SC as a destination in the past 6 months (35% of men recall seeing a promotion).

	USA Serious Players	Gender		HHI CoC	Resort
		Male	Female		
Hilton Head Island, SC	31%	35%	26%	63%	71%
Charleston (Kiawah, Wild Dunes, Seabrook, Daniel, SC)	20%	22%	17%	25%	31%
Amelia Island, FL	17%	17%	16%	15%	20%
Myrtle Beach (Litchfield, SC)	12%	15%	8%	24%	14%
Destin, FL	8%	8%	9%	11%	9%
Sea Island, GA	5%	5%	4%	5%	5%
None of the above	57%	53%	60%	30%	22%

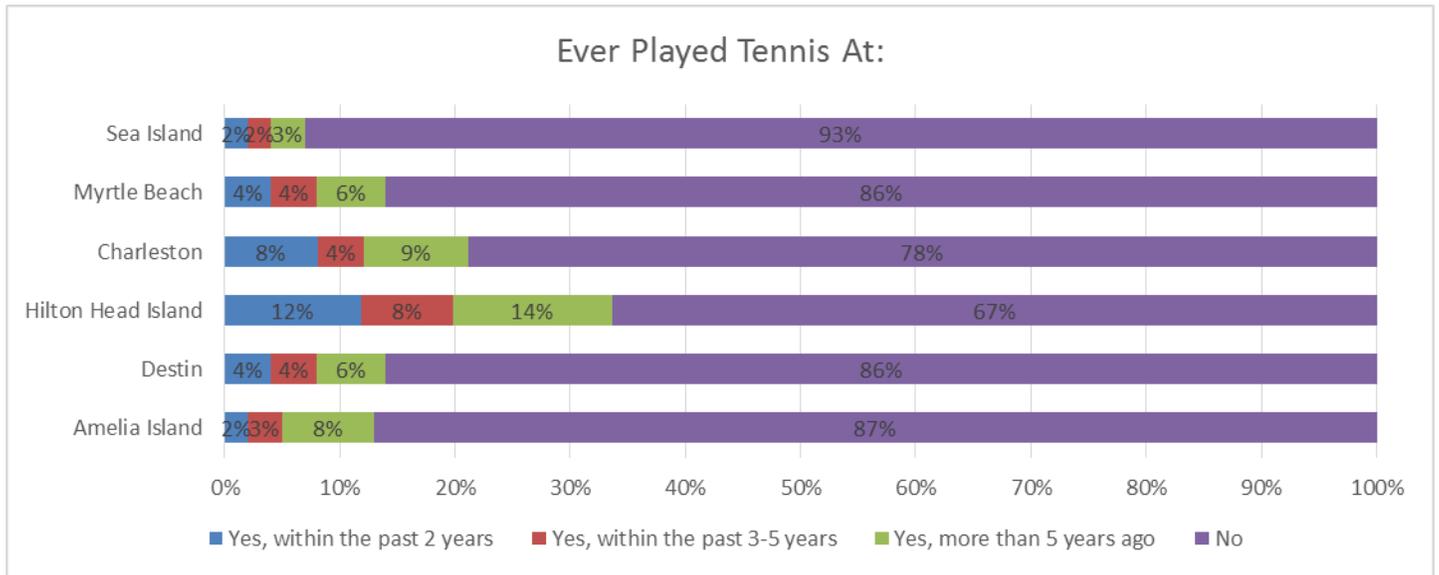
- Type of Promotion Recall – Among those who saw a promotion**

Among those who indicated seeing a promotion for Hilton Head Island, SC as a destination, 60% recall a magazine ad, 37% recall a TV ad, 26% recall an internet ad. 29% recall being direct marketed to either via e-mail or standard mail. Destin, FL showed the highest percentage of direct marketing recall (36% e-mail and standard mail combined).

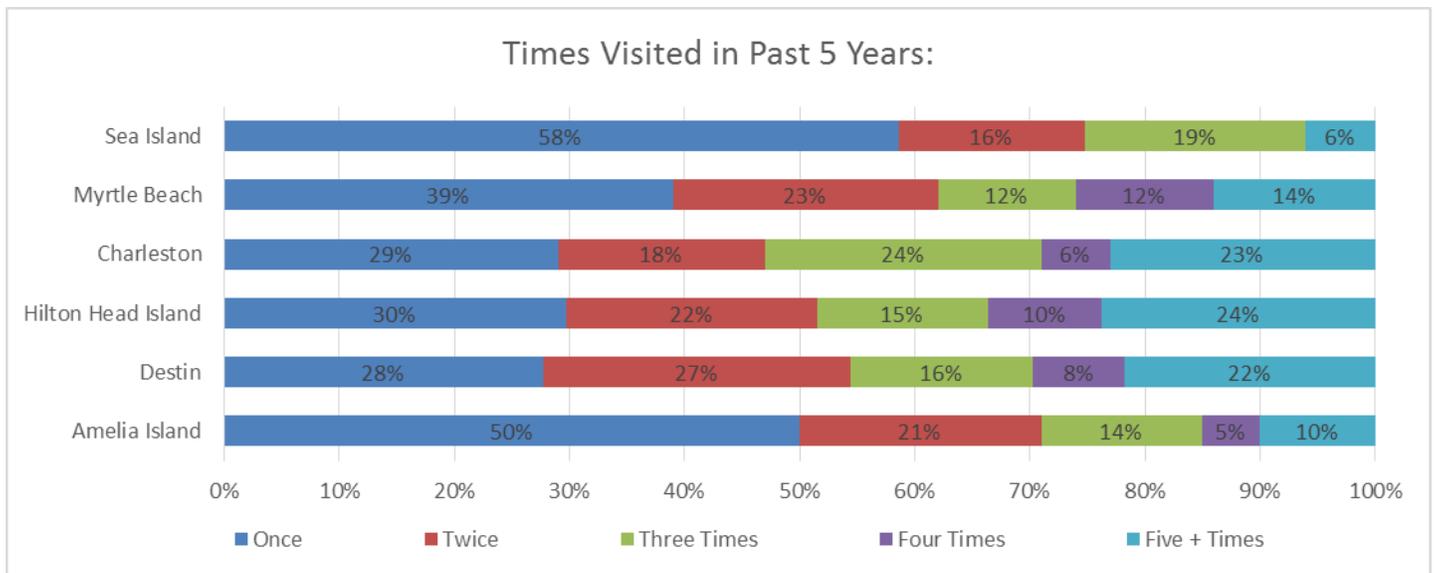
	Amelia Island	Destin	Hilton Head Island	Charleston	Myrtle Beach	Sea Island
Magazine	63%	56%	60%	60%	57%	67%
Television	31%	25%	32%	37%	35%	16%
Internet (Google/Bing/Yahoo)	16%	19%	21%	26%	23%	20%
Email	10%	23%	13%	16%	14%	11%
Direct Mail Marketing	4%	13%	8%	13%	7%	4%
Facebook	5%	5%	3%	3%	3%	-
Newspaper	3%	5%	3%	7%	4%	7%
Mobile	1%	1%	1%	1%	-	-
Radio	-	1%	1%	3%	1%	-

Southeastern Tennis Destinations

- Have Played Tennis at Southeastern Destinations

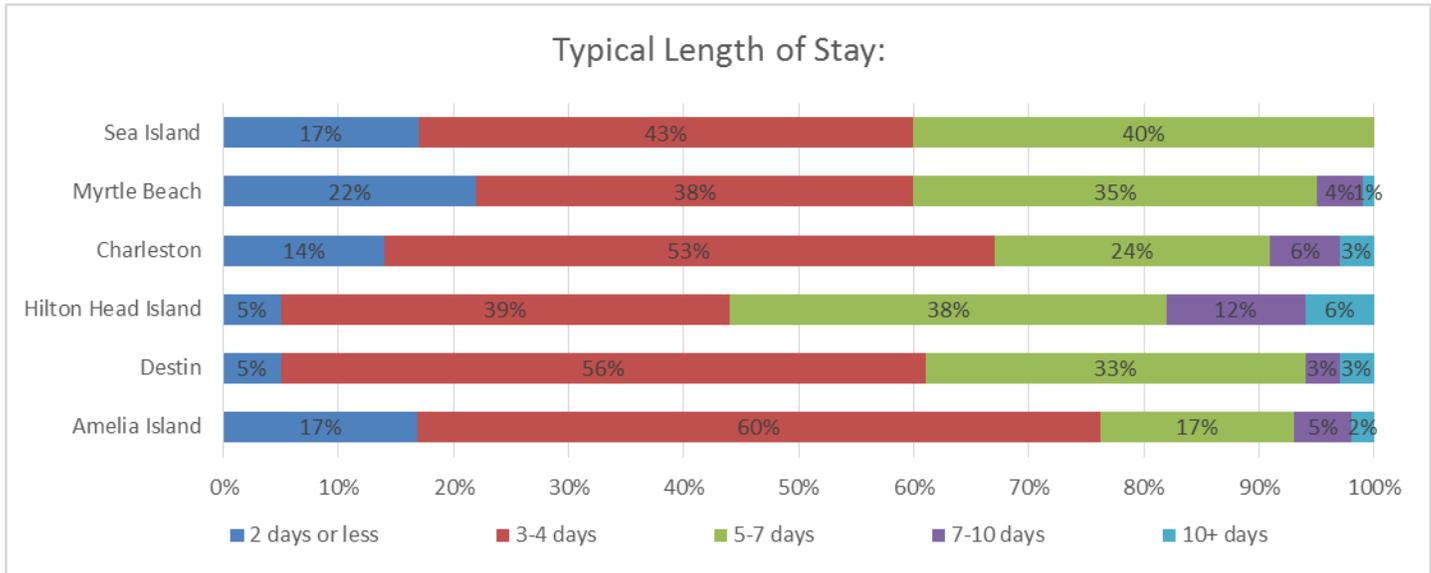


- Quantity of Visits to Southeastern Destinations (past 5 years)

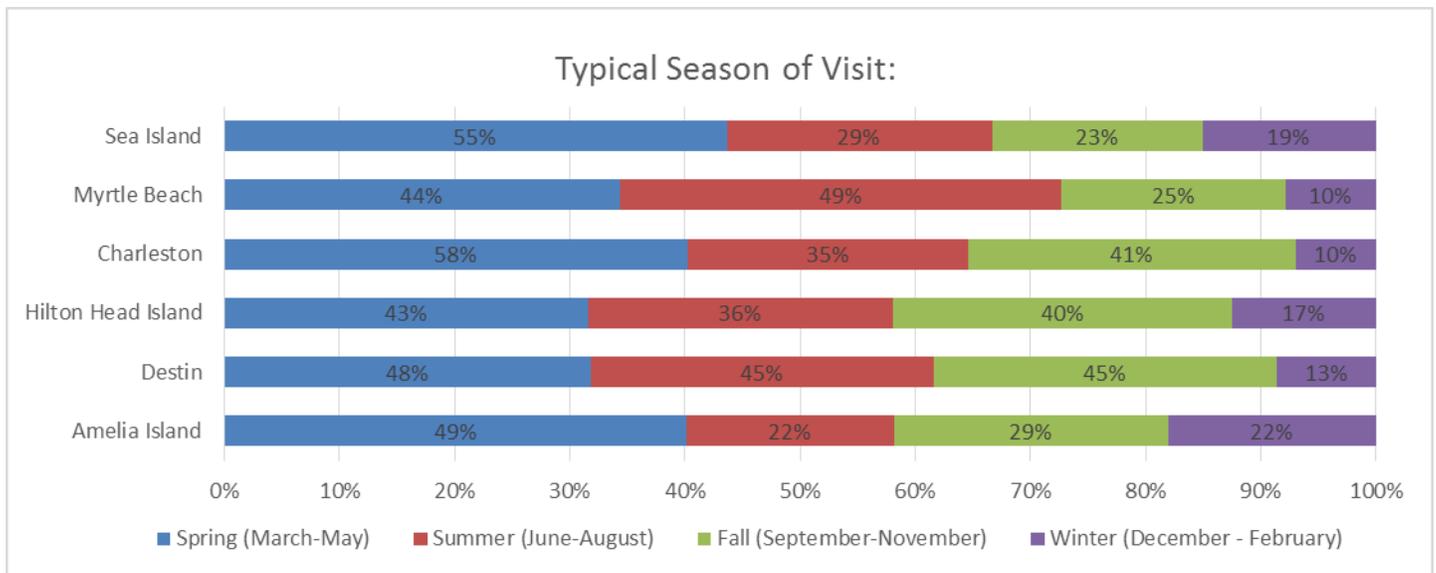


Southeastern Tennis Destinations

- Typical Length of Stay at Southeastern Destinations



- Typical Season of Visit to Southeastern Destinations

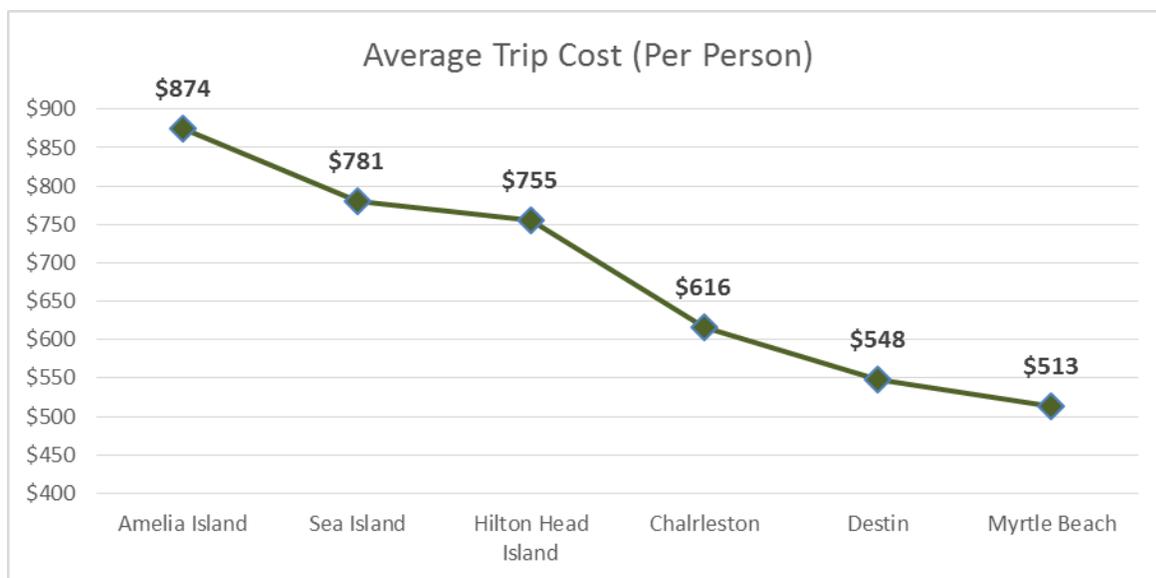


Southeastern Tennis Destinations

• Comparative Cost Per Trip at Southeastern Destinations (Per Person)

Serious Tennis Players (with travel experience to the destination) indicate spending the most money per person at Amelia Island (\$874) – followed by Sea Island (\$781) and Hilton Head Island (\$755). It should be noted this is an average and considerable numbers of travelers spend within the \$201-\$500 range.

The most affordable destinations (money spent per person) appear to be Myrtle Beach (\$513) and Destin (\$548).



TRIP COST	Amelia Island	Destin	Hilton Head Island	Charleston	Myrtle Beach	Sea Island
Average	\$874	\$548	\$755	\$616	\$513	\$781
\$200 or less	22%	8%	14%	20%	30%	11%
\$201-\$500	28%	62%	34%	41%	46%	37%
\$501-\$750	6%	10%	15%	18%	8%	15%
\$751-\$1000	19%	15%	23%	14%	11%	11%
\$1001-\$2000	22%	5%	12%	4%	3%	26%
\$2001-\$3000	-	-	2%	1%	-	-
\$3001-\$4000	-	-	-	-	-	-
\$4001-\$5000	3%	-	1%	1%	2%	-
\$5001-\$6000	-	-	-	-	-	-
Over \$6000	-	-	-	-	-	-

Southeastern Tennis Destinations

• Comparative Reasons for Selecting - Southeastern Destinations

Primary reasons for selecting certain tennis trip destinations vary widely. Looking at the top reasons for each destination individually can give us a snapshot of the lure of each place for the Serious Tennis Player.

- **Amelia Island** – Easy to get to, Weather, **Activities other than tennis**
- **Destin** – Easy to get to, **Enjoyed it before**, Weather
- **Hilton Head Island** – **Enjoyed it before**, Easy to get to, **Accommodations**
- **Charleston** – Easy to get to, Weather, Enjoyed it before, **Restaurants**
- **Myrtle Beach** – Easy to get to, **Affordable**
- **Sea Island** – Easy to get to, **Accommodations, Reputation**

If we focus on the main attribute of “fun” (what its all about), and we look at the top row “enjoyed it before”, we can see that this is the top reason Serious Tennis Players gave for selecting Hilton Head Island (37%).

	Amelia Island	Destin	Hilton Head Island	Charleston	Myrtle Beach	Sea Island
I've been before and enjoyed it	20%	43%	37%	32%	23%	29%
Easy to get to	39%	54%	33%	50%	43%	42%
Accommodations / room	20%	31%	30%	28%	18%	35%
Restaurants	20%	31%	29%	30%	22%	26%
The reputation of the destination	20%	31%	29%	23%	11%	32%
The weather	27%	42%	28%	34%	23%	29%
Lots of activities apart from tennis	23%	25%	26%	23%	23%	26%
I was part of a group/team that went there	16%	29%	25%	25%	22%	23%
Types of courts	14%	20%	25%	18%	8%	19%
Easy to get around once there	16%	23%	23%	25%	18%	29%
Affordable / value	11%	31%	21%	26%	32%	16%
Simple Vacation	20%	17%	17%	17%	22%	26%
Great golf courses	11%	8%	15%	13%	11%	6%
Easy to package the trip	7%	8%	11%	13%	5%	3%
Family sports planning (while kids compete)	7%	6%	10%	7%	9%	10%
I was in the area for business	11%	2%	9%	8%	3%	16%
Advertising	11%	9%	8%	9%	9%	10%
Travel Package	7%	12%	7%	8%	15%	13%
Article about it	7%	2%	6%	5%	3%	3%
Nightlife / Entertainment	11%	8%	6%	6%	9%	-
Tournament competition for myself	11%	11%	6%	14%	8%	6%
Outstanding customer service	14%	8%	5%	5%	5%	13%
Tournament competition for my kids	2%	5%	2%	3%	2%	6%
Friends/Family live here	2%	5%	2%	4%	-	3%
Pro tournament to watch	2%	2%	1%	15%	-	-

Southeastern Tennis Destinations

• Comparative Dislikes- Southeastern Destinations

Dislikes of certain tennis trip destinations also vary widely. Looking at the top dislikes for each destination individually can give us a snapshot of the pitfalls of each place for the Serious Tennis Player.

- **Amelia Island** – Expensive, **Facility poorly managed**, did not enjoy level of competition,
- **Destin** – Expensive, **Restaurants too crowded**, bad weather
- **Hilton Head Island** – Expensive, **Nightlife dead**, Restaurants too crowded
- **Charleston** – Expensive, **Courts too busy**, Nightlife dead
- **Myrtle Beach** – **Run down facility**, **Accommodation below expectation**, Courts too busy
- **Sea Island** – Expensive

Note: Percentages below are % of those travelers giving a dislike:

	Amelia Island	Destin	Hilton Head Island	Charleston	Myrtle Beach	Sea Island
Facility was not up to scratch / run down	10%	5%	8%	6%	26%	-
Facility poorly managed	24%	5%	5%	2%	6%	-
Quality of instructors	10%	5%	7%	4%	10%	-
Courts were too busy, difficult to get time	-	14%	12%	15%	16%	8%
It was expensive	33%	32%	20%	43%	10%	77%
Accommodation was below my expectation	10%	5%	10%	6%	23%	15%
Poor customer service	14%	9%	7%	9%	10%	8%
Did not enjoy the level of competition	19%	5%	5%	2%	3%	8%
It was not easy to get around once there	5%	5%	12%	9%	10%	-
The nightlife / entertainment was dead	10%	5%	18%	13%	3%	15%
Poor restaurants	-	-	3%	2%	3%	15%
Restaurants, but too crowded / long waits	14%	23%	17%	13%	6%	-
The weather was bad	19%	27%	15%	9%	10%	-
Nothing to do apart from tennis	5%	-	5%	2%	6%	8%
Tournament badly organized	5%	-	3%	-	3%	-

Southeastern Tennis Destinations

- Comparative Likelihood of Recommending - Southeastern Destinations

How likely would they be to recommend the following destinations to a friend or colleague for a tennis trip (scale of 1 to 10 with 1 = Not at all likely and 10 = Extremely likely)

Serious Tennis Players (with travel experience to the destination) have the highest likelihood to recommend the Charleston, SC area (score of 8.7 out of 10). Most destinations scored 8.0 or above, which are typically good “recommendation scores”. However, Myrtle Beach returned a concerning score of 6.8 from those who have taken a tennis trip there.



	Charleston	Hilton Head Island	Destin	Sea Island	Amelia Island	Myrtle Beach
Total	8.7	8.5	8.2	8.0	8.0	6.8
HHI CoC	8.6	9.3	7.9	8.2	8.0	7.1
Resort	8.5	9.3	8.2	8.8	7.9	7.0

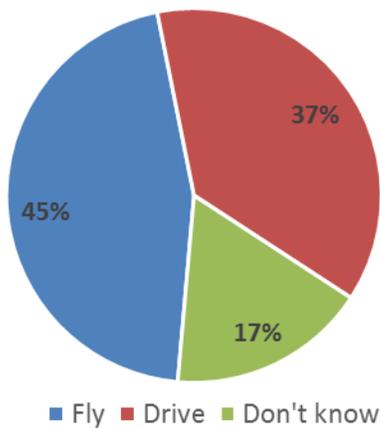
Hilton Head Island



Hilton Head Island

- Travel Methods / Drive Time – to Hilton Head Island, SC

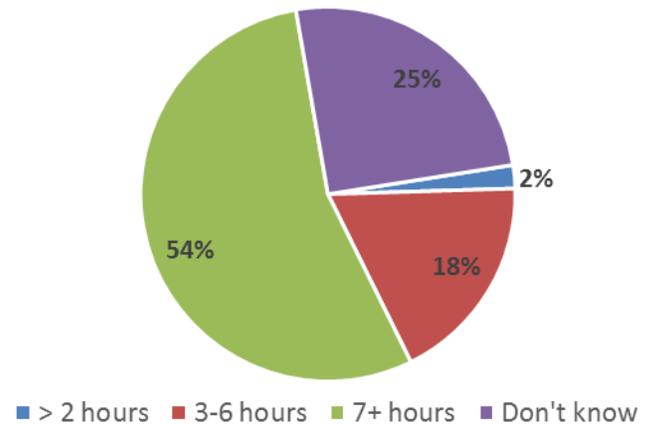
Travel Method to Hilton Head Island



45% of Serious Tennis Players would normally fly to Hilton Head Island, while 37% would normally drive and the remaining 17% are unsure.

If driving, many would have a trip of over 7 hours in front of them (54%), a high percentage of these individuals would likely fly.

Drive-Time to Hilton Head Island

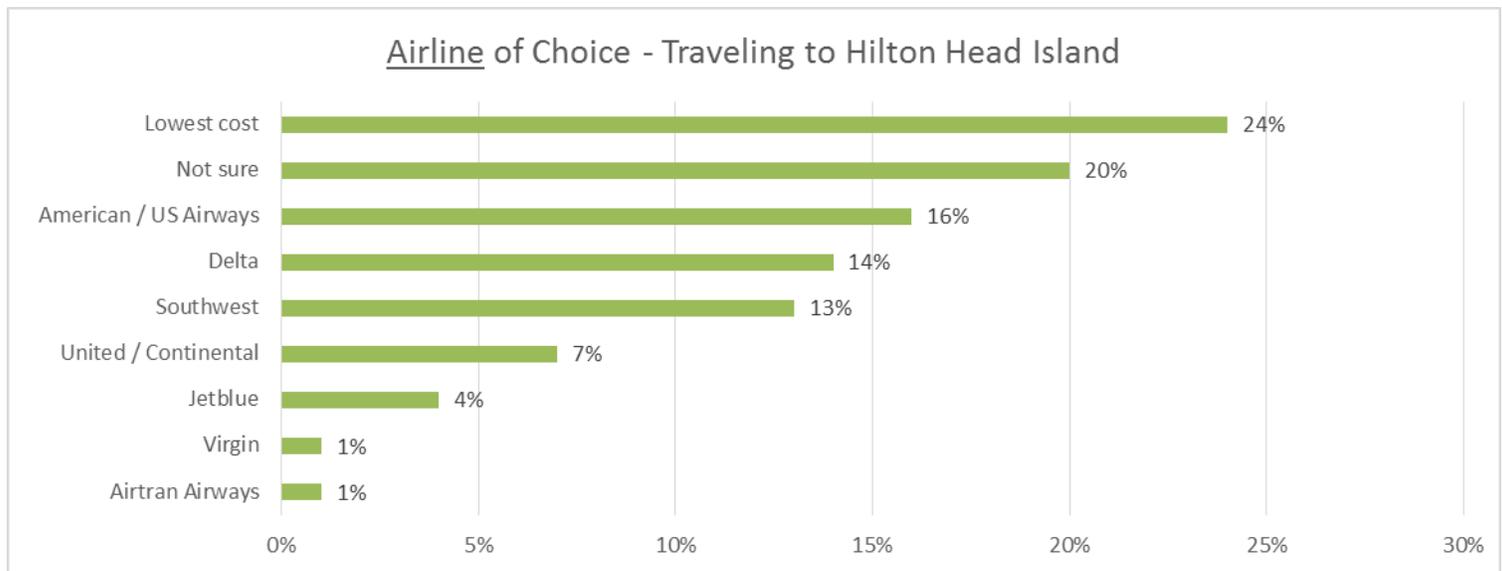
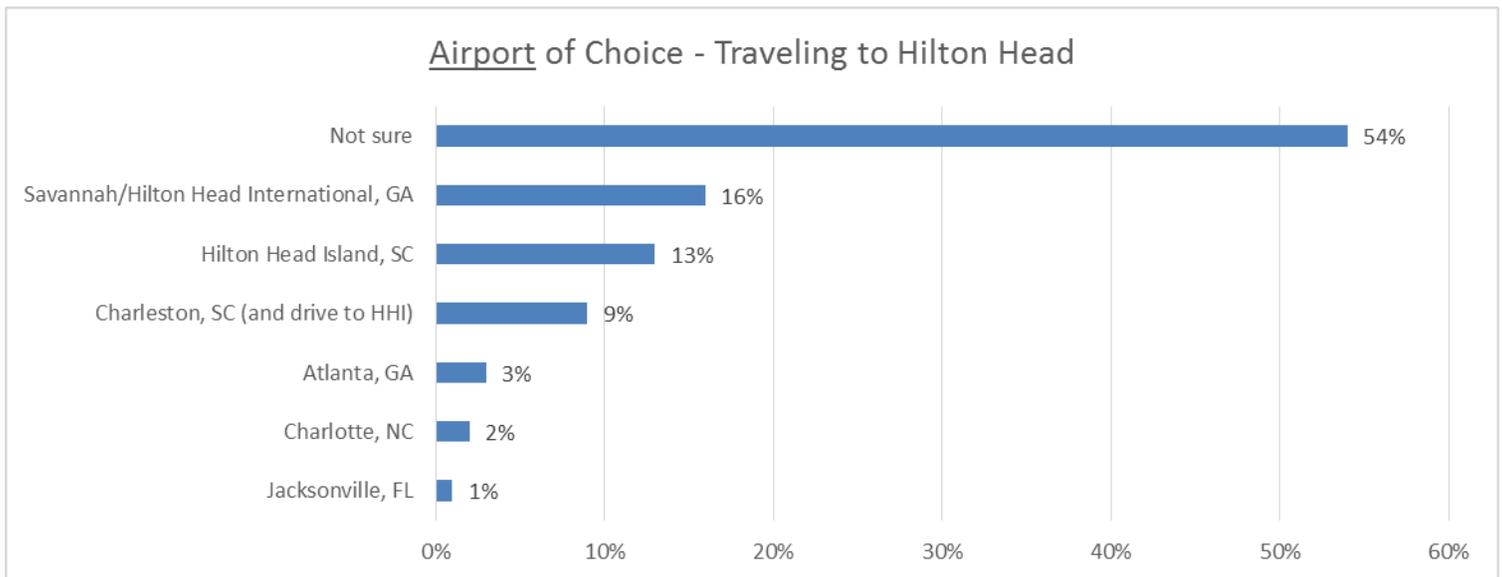


Hilton Head Island

• Air Travel Preferences – to Hilton Head Island, SC

Most Serious Tennis Players are unsure about their airport of choice inbound to Hilton Head Island (54%), but among those with a preference, Savannah HHI is the leading choice followed by Hilton Head Island, SC. 9% prefer to fly into Charleston and take the drive.

The airline of lowest cost will win over for most Serious Tennis Players. Among those with a preference, American/US Airways and Delta top the list.



Hilton Head Island

- Perceptions of Hilton Head Island (adjective description)

Remember this: tennis trip travelers find “Having Fun” most important about the tennis - and they value “Relaxing” most as an activity other than the tennis --- So it is highly encouraging that the top two adjectives associated with Hilton Head Island by Serious Tennis Players are “Relaxing”(35%) and “Fun” (33%).

	USA Serious Players	Male	Female	HHI CoC	Resort
Relaxing	35%	36%	35%	57%	56%
Fun	33%	31%	34%	43%	51%
Expensive	24%	20%	29%	16%	11%
Upscale	20%	18%	22%	16%	18%
Friendly	19%	19%	19%	28%	41%
Classic	16%	15%	17%	13%	10%
Luxurious	14%	12%	15%	12%	4%
Entertaining	12%	15%	10%	16%	13%
Traditional	10%	9%	12%	7%	5%
Commercialized	9%	9%	8%	4%	5%
Natural	7%	6%	9%	12%	17%
Adventurous	5%	3%	7%	9%	5%
Old fashioned	5%	6%	4%	1%	1%
Pristine	4%	3%	5%	6%	6%
Rejuvenating	4%	3%	5%	8%	10%
Snobby	4%	4%	4%	2%	2%
Cultured	3%	3%	3%	5%	4%
Eco-sensitive	3%	3%	2%	9%	11%
Romantic	3%	3%	2%	6%	3%
Boring	2%	3%	1%	1%	1%
Exhilarating	2%	1%	2%	3%	1%
Cheap	1%	1%	1%	0%	0%
Exotic	1%	1%	-	2%	0%
Unexploited	1%	1%	1%	2%	1%
None of the above	12%	14%	9%	1%	1%

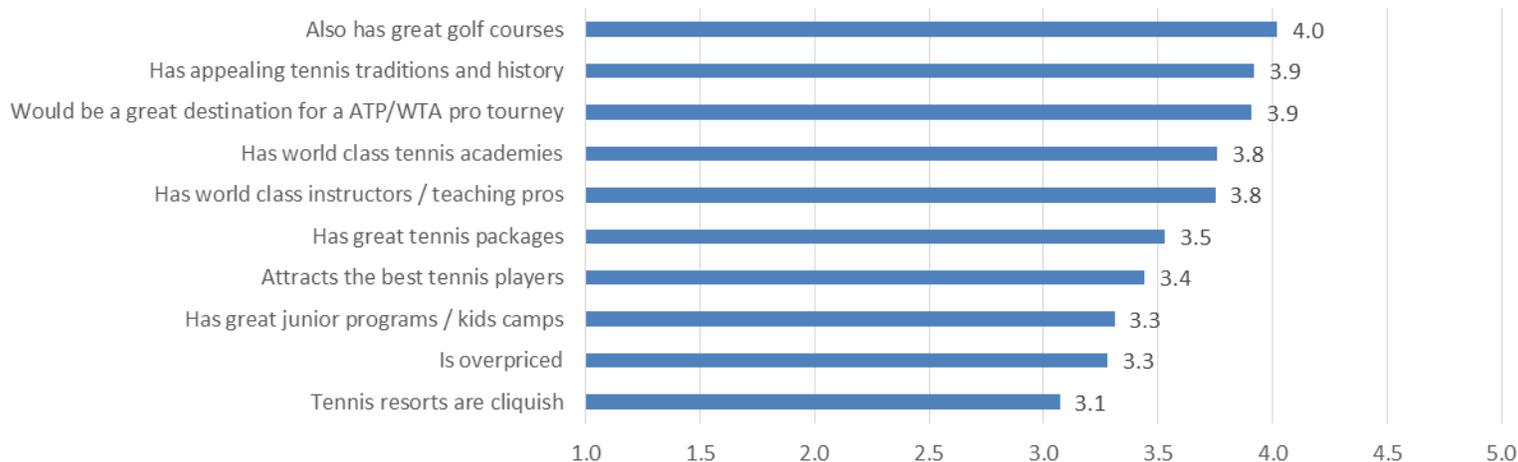
Hilton Head Island

- Perceptions of Hilton Head Island (agreement statements)

As illustrated in the chart below, most agree that Hilton Head Island also has great golf courses to offer. Leveraging the perception could be valuable. This could provide an opportunity to key in on those individuals that “cross-participate” in both tennis and golf.

Most also agree that Hilton Head Island would be a great destination for an ATP or WTA pro tournament.

Agreement Level - Hilton Head Island as a Tennis Destination



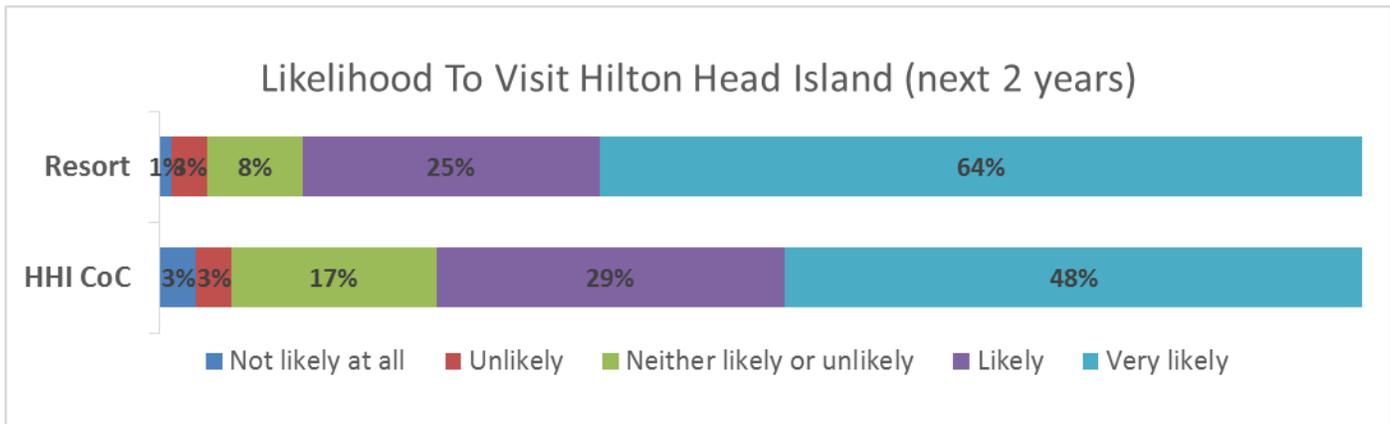
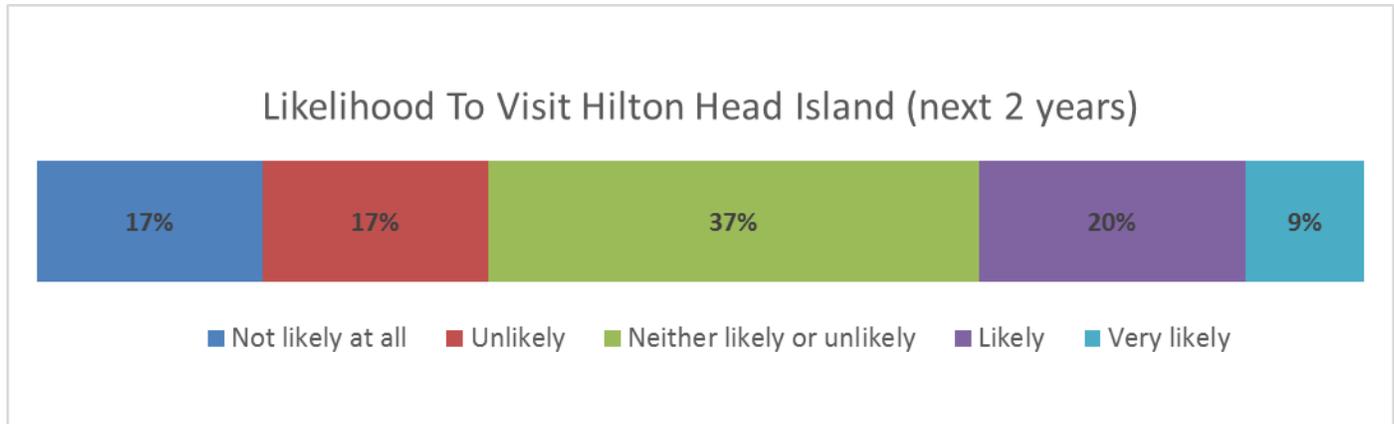
Awareness of favorite resorts on Hilton Head is fairly low. However, Van Der Meer Shipyard Tennis Resort, The Palmetto Dunes Tennis Center and the Sea Pines Racquet Club top the lists of favorites. Not surprisingly, awareness of resorts is higher in the HHI Chamber of Commerce sample.

	USA Serious Players	Male Female		HHI CoC
		Male	Female	
Van Der Meer Shipyard Tennis Resort	9%	12%	5%	8%
Palmetto Dunes Tennis Center at Oceanfront Resort	8%	7%	8%	16%
Sea Pines Racquet Club	8%	10%	7%	15%
Hilton Head Island Beach and Tennis	4%	4%	5%	11%
Port Royal Racquet Club	2%	2%	1%	4%
Smith Stearns Tennis Academy	1%	2%	1%	1%
Ivan Lendl International Junior Tennis Academy	0%	0%	1%	0%
Marriott Grand Ocean	0%	-	0%	1%
Others	1%	1%	1%	2%
Dont Know	66%	62%	71%	42%

Hilton Head Island

- Likelihood to Visit Hilton Head Island (in next 2 years)

29% of Serious Tennis Players indicate that they are at least “likely” to visit Hilton Head Island in the next 2 years (9% “very likely”).



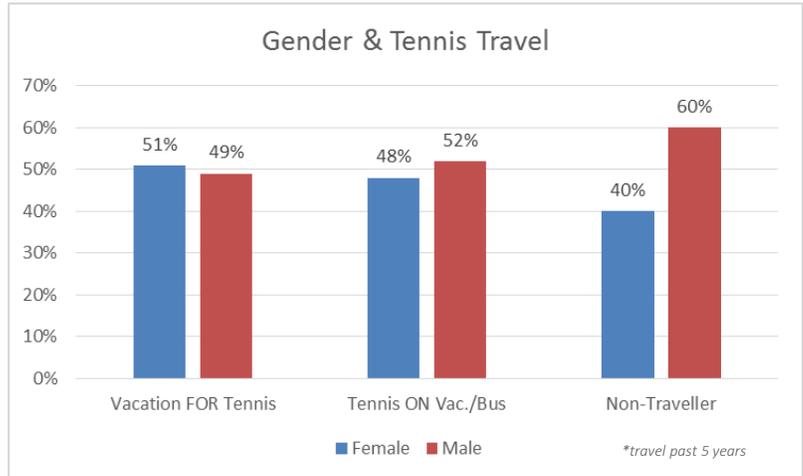
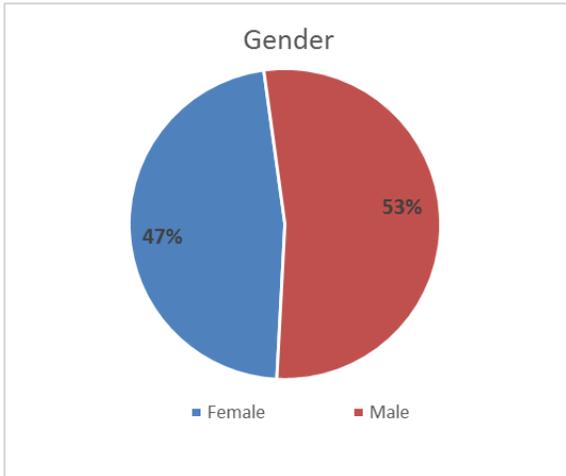
Player Demographics



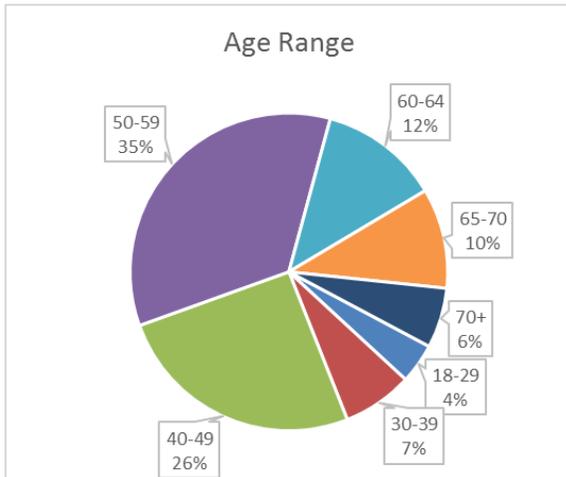
Player Demographics

- Demographic Make-Up of Serious Tennis Players (USA)

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – in the past 5 years)

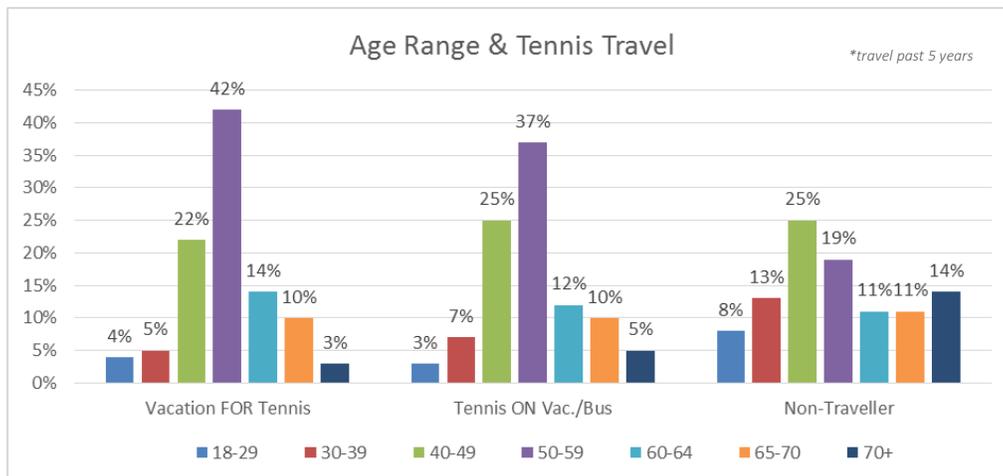


Serious tennis players are not heavily skewed toward one gender. Men account for slightly more (at 53%), but the gender profile of serious tennis players is much less skewed than we see in some other sports - like golf, where over 8 in 10 Core golfers are men (-National Golf Foundation).



Tennis travel by gender also appears fairly distributed – with the only notable difference being among the Non-Traveler group, where 60% are men.

Over 6 in 10 (61%) Serious Tennis Players are between the ages of 40 and 60. Naturally, this group accounts for the lion share of tennis travel - with the 50-59 age group leading the way - 42% have taken a vacation specifically for tennis within the past 5 years.



Player Demographics

• Demographic Make-Up of Serious Tennis Players (USA)

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – in the past 5 years)

Serious tennis players are highly educated – 82% have reached at least a 4 year college graduate level, with nearly 4 in 10 having a post graduate degree. Education level does not appear to significantly impact tennis travel behavior (the Non-traveler shows only a slightly less likelihood of post graduate study).

<u>Education:</u>	USA Serious Players	<i>Vacation FOR Tennis</i>	<i>Tennis ON Vac./Bus</i>	<i>Non-Traveller</i>
Post graduate degree	36%	37%	37%	33%
Post graduate study	10%	12%	11%	6%
Graduated from 4-year college	36%	32%	35%	40%
Graduated from 2-year college	5%	6%	5%	4%
Attended college but did not graduate	9%	10%	9%	8%
Graduated High School or equiv. (e.g., GED)	3%	3%	2%	8%
Less than high school graduate	1%	0%	1%	1%

Among those still working, middle to upper management occupations appear the norm (consistent with expectations from education level). A surprising number of Serious Tennis Players note that they are “self employed” – 18%. Along with the “retired” group, this is the group that notes the highest rate of tennis travel.

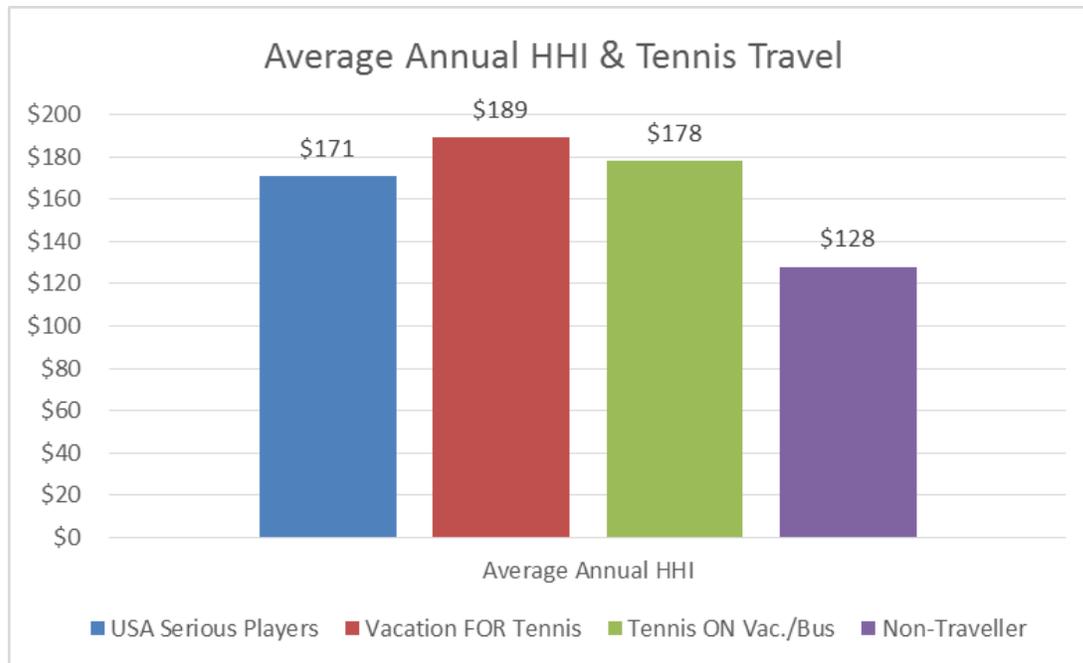
<u>Occupation/Employment Status:</u>	USA Serious Players	<i>Vacation FOR Tennis</i>	<i>Tennis ON Vac./Bus</i>	<i>Non-Traveller</i>
Self Employed	18%	22%	20%	10%
Retired	15%	15%	14%	22%
Administrative / Service Staff / Middle Management	11%	9%	10%	15%
Manager / General Manager	11%	9%	10%	13%
Academic / Teacher	9%	9%	9%	10%
Senior / Upper-Level Executive	8%	8%	9%	2%
Home Maker	7%	6%	7%	6%
C-level executive (CEO, CFO, COO etc.)	5%	6%	6%	3%
Government employee	3%	3%	3%	5%
Student	3%	3%	3%	4%
Medical / Health	2%	2%	2%	1%
Technician / Engineer / IT / Creative	2%	2%	1%	3%
Professional / Lawyer / Accountant	1%	1%	1%	3%
Sales / Marketing / Insurance	1%	1%	1%	-

Player Demographics

- Demographic Make-Up of Serious Tennis Players**

(also shown by those who have vacationed specifically for tennis, have played tennis while on vacation/business, and those who have done neither – in the past 5 years)

Not surprisingly, Serious Tennis Players report significantly higher than average annual household incomes. Considering the current estimate of the average annual household income in the U.S. is \$62,500 (U.S. Census Bureau), Serious Tennis Players are far more affluent than the national average. - This affluence impacts tennis travel, with those group who have travelled reporting higher incomes.



<u>Annual Household Income:</u>	USA Serious Players	<i>Vacation FOR Tennis</i>	<i>Tennis ON Vac./Bus</i>	<i>Non-Traveller</i>
Under \$50,000	6%	5%	5%	10%
\$50,000 to \$69,000	7%	6%	6%	13%
\$70,000 to \$89,000	9%	8%	9%	7%
\$90,000 to \$109,000	10%	8%	10%	12%
\$110,000 to \$129,000	9%	11%	9%	9%
\$130,000 to \$149,000	5%	6%	6%	3%
\$150,000 to \$199,000	10%	10%	10%	11%
\$200,000 to \$249,000	8%	9%	9%	2%
\$250,000 to \$499,000	7%	8%	8%	3%
\$500,000 to \$999,000	2%	3%	2%	2%
\$1,000,000+	1%	1%	1%	-
Prefer not to answer	25%	25%	24%	29%



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