

Who plays tennis?

Adult Segmentation
February 2016

Welcome

To build on our understanding of the world of tennis, the LTA has developed a detailed profiling of the types of people who play tennis, including how often, where, and what stops them from playing.

The following pages detail the knowledge of the segments so far.

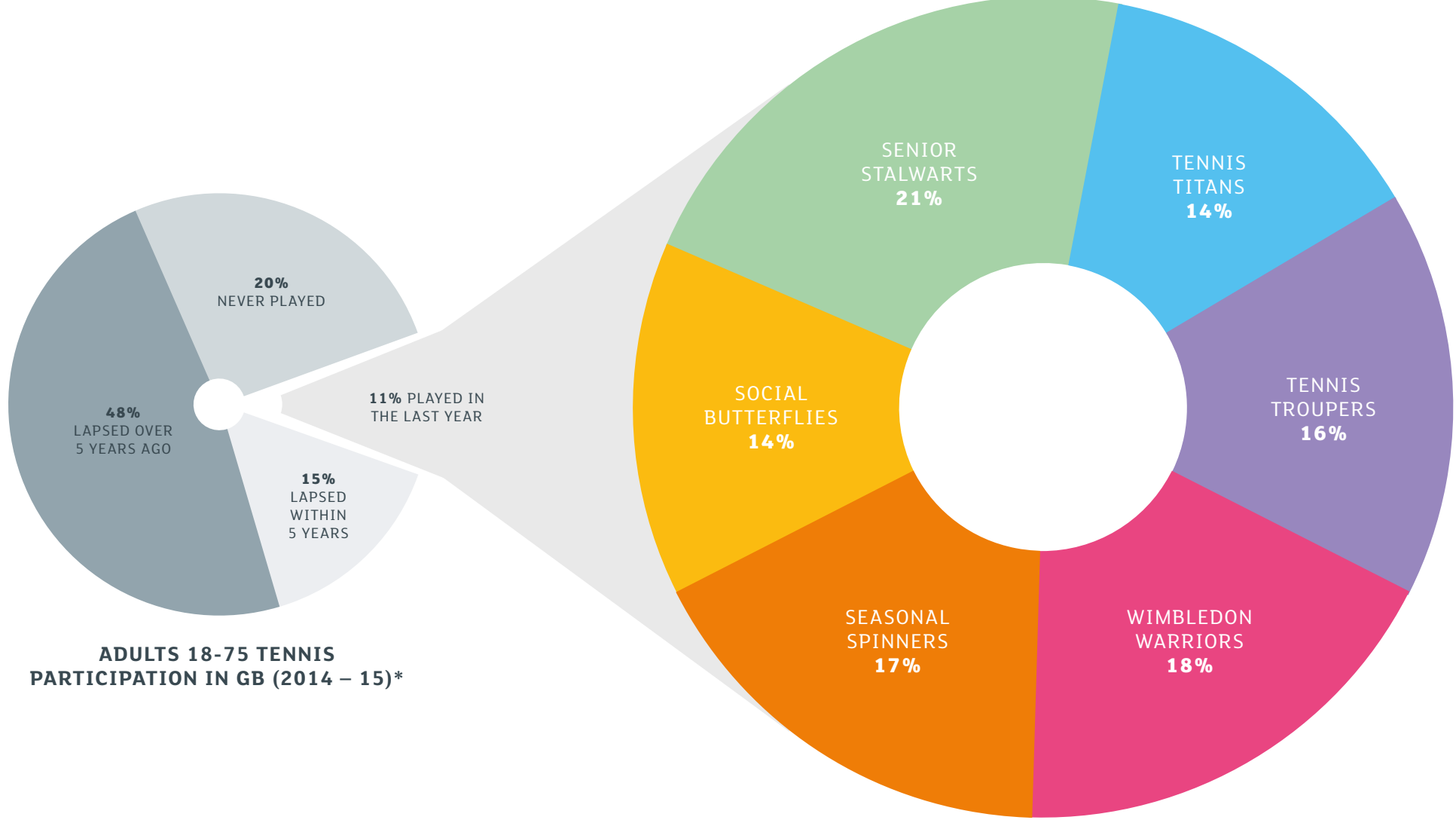
Who does our segmentation cover?

- Adults aged 18+ in Great Britain, who have played tennis at least once in the last 12 months
- This market accounts for 5.3m adults in Britain

How did we create our segmentation?

- Detailed analysis of all quantitative data on tennis participation
- Qualitative research on behaviours and attitudes among a range of audiences
- Quantitative surveys and creation of segments through statistical clustering methodology
- Qualitative testing of segments to sense check and stress test

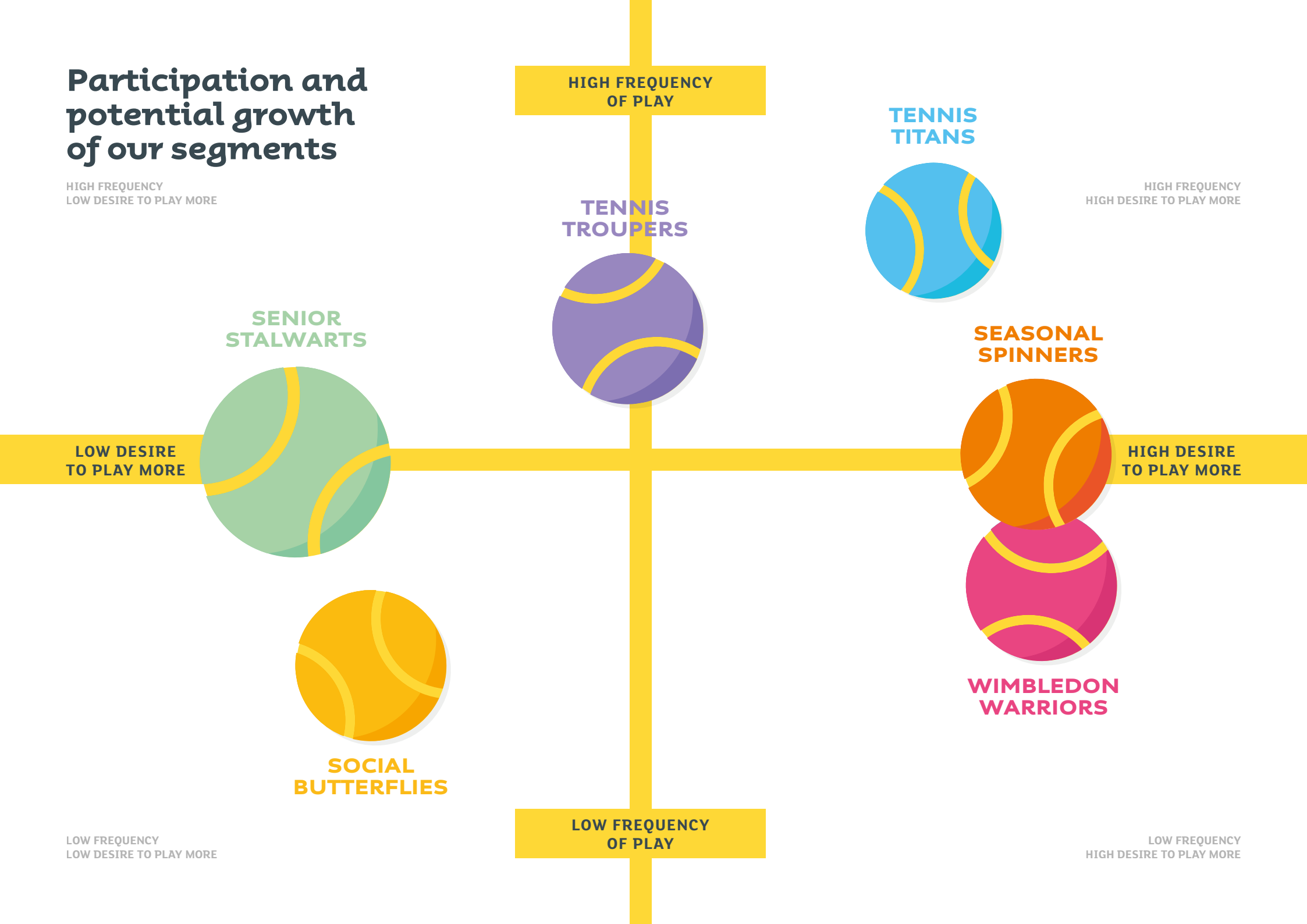
Sizing the market and the customer segments



SOURCE: BASELINE TRACKING SURVEY: TOTAL SAMPLE (37,000 INTERVIEWS)
*DATA EXCLUDES PEOPLE WHO SAID 'DON'T KNOW'
**BASED ON 43.9M ADULTS AGED 18-75 (2013 DATA)

Participation and potential growth of our segments

HIGH FREQUENCY
LOW DESIRE TO PLAY MORE



LOW FREQUENCY
LOW DESIRE TO PLAY MORE

LOW FREQUENCY
HIGH DESIRE TO PLAY MORE

5.3
million

Adults played tennis
in the last year





Tennis Titans

Profile:

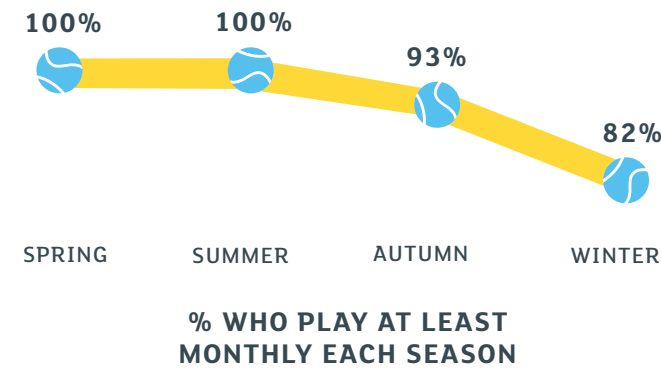
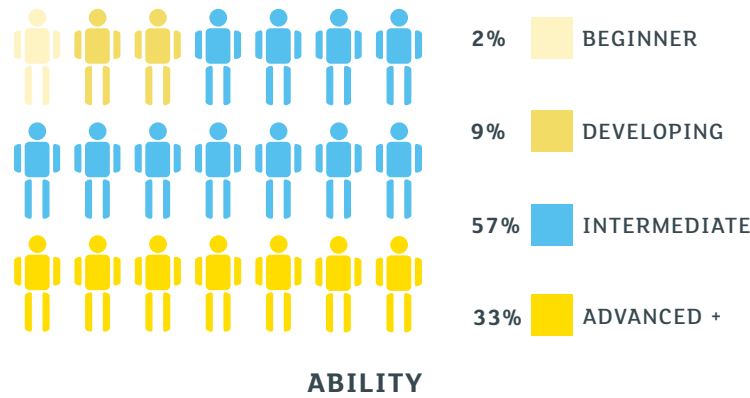
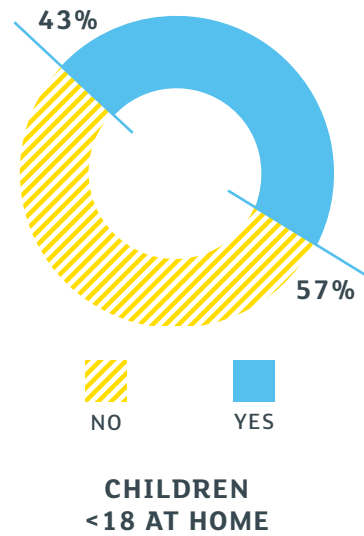
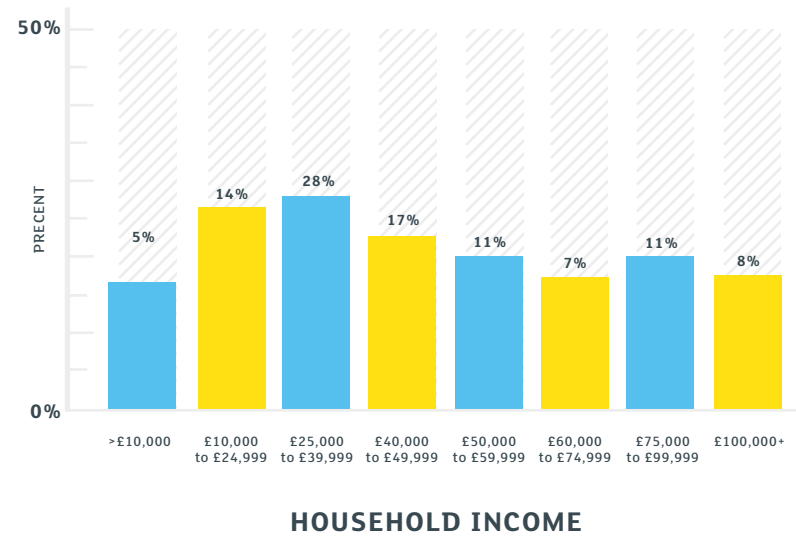
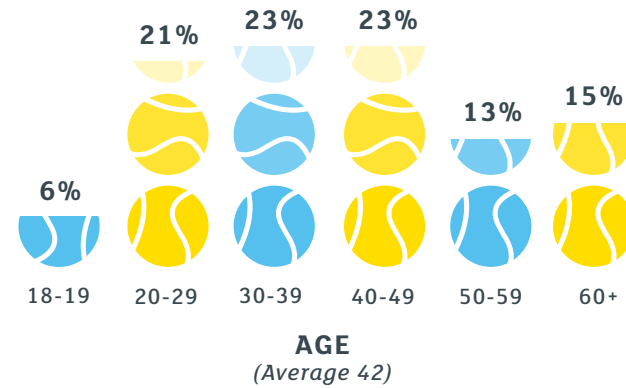
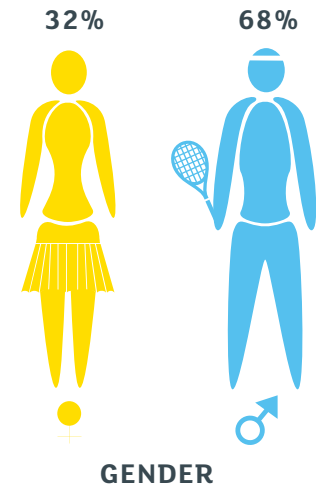
- Mix of men and women of all ages
- Tennis is their passion and main sport from childhood to older age
- Members of tennis clubs who play all year round and to a high standard and intensity
- They like to compete in leagues/competitions and have regular commitments to play

Current frequency of play: High

Desire to play more: High

Size of audience: 740,000 (14% of players)

Social grade: ABC1 70% / C2DE 30%



TENNIS TITANS

Location

Nearly all Tennis Titans are members of tennis clubs, and play most often in clubs. However, they also play occasionally in indoor centres and leisure centres.

Attitude and behaviour

- Tennis is their main sport and passion, regardless of age
- They will play until they are unable to
- Play all year round and have done since a young age
- Have a regular commitment to play tennis with friends/ acquaintances
- Many play in organised competitions and/or for a league team
- Majority have had some form of formal coaching
- They also tend to watch tennis on TV

Other sports / activities

Many run, swim, go to the gym and some also play badminton or squash.

Motivations

- To compete and to represent a team or their club
- Physical exercise combined with the mental and psychological challenge of matches
- The “feeling” that tennis can give, which is unique to the game
- Socialising through tennis is seen as a positive and differentiating outcome of tennis, and is a benefit of being a member of a tennis club, but it is not the primary reason they play

Barriers

- Lack of time - they already play a lot and have limited capacity for more
- Lack of available people (of a similar standard) to play with, especially for singles (e.g. Singles Box League)
- Some liable to complain that tennis clubs are geared too much towards doubles



Wimbledon Warriors

Profile:

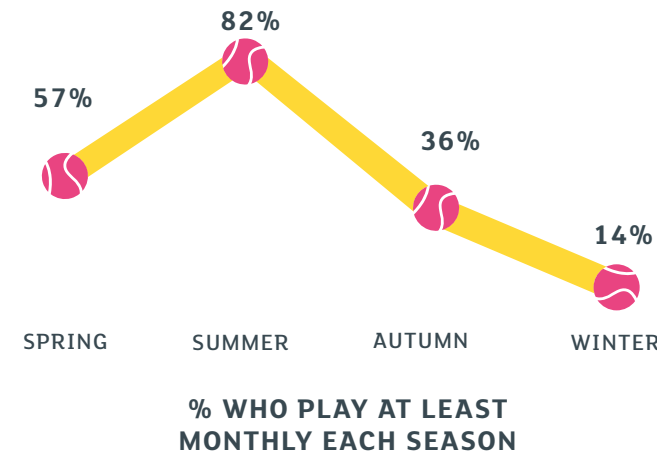
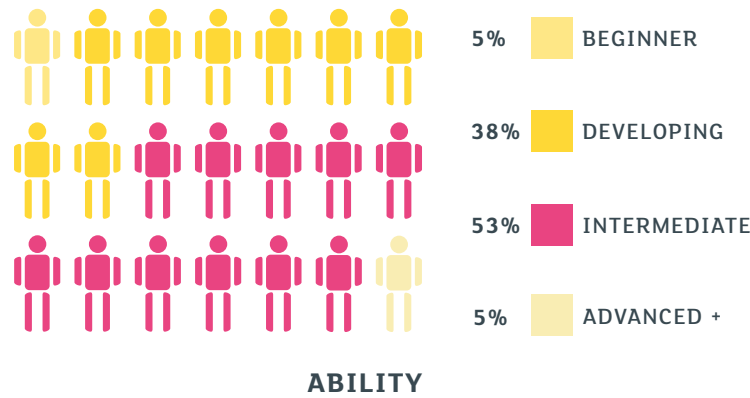
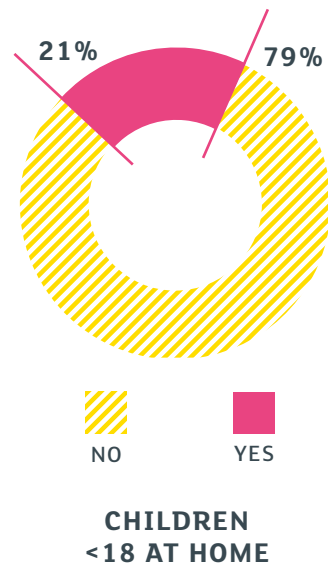
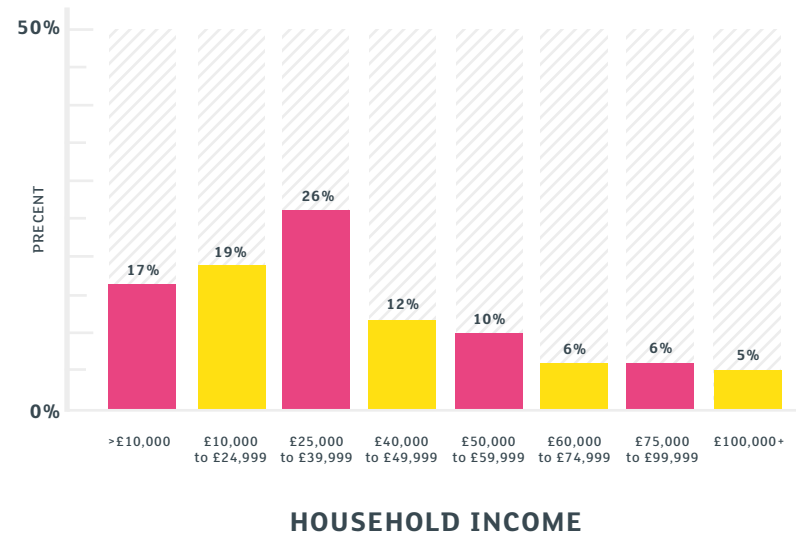
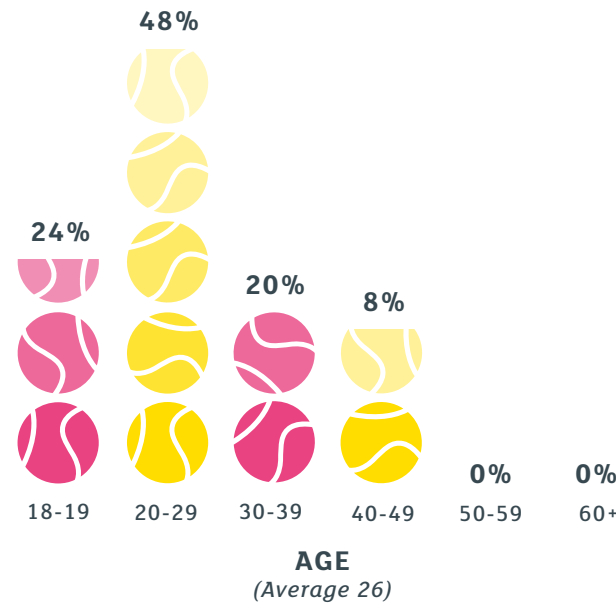
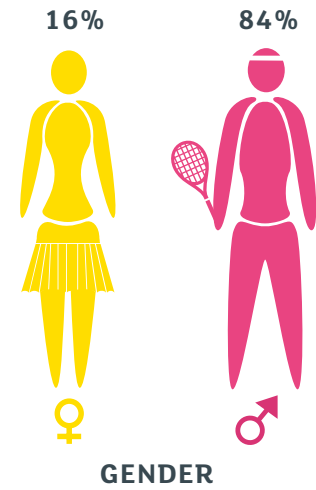
- Men under 32, average age 26
- Love any kind of sport, especially football
- Tennis currently confined to summer, predominantly July, in parks
- Play a few competitive matches against their good friends
- Lack of people to play with is a significant barrier

Current frequency of play: Low / Medium

Desire to play more: High

Size of audience: 950,000 (18% of players)

Social grade: ABC1 65% / C2DE 35%



WIMBLEDON WARRIORS

Location

Majority of Wimbledon Warriors play in parks.

Attitude and behaviour

- Tennis seen as a seasonal and outdoor sport played in the summer, mostly in July
- Tends to be spontaneously organised on a Friday or Saturday morning when the sun's out
- Reliant on a small number of friends and/or family member to play with
- Usually play a competitive game/match of singles
- Many describe themselves as intermediate but some are likely to exaggerate their ability
- Not currently involved in competitions, leagues or coaching

Other sports / activities

Majority play football in the winter. Also enjoy jogging, cycling, swimming and the gym.

Motivations

- To be competitive with friends
- Satisfaction at getting better at tennis to win against friends
- Physical and mental release
- Relish the power of their shots
- Improving accuracy and imitating what they see on TV during Wimbledon
- Keeping healthy and being outside in the sunshine
- Socialising with friends after the game

Barriers

- Tennis seen as a summer sport, many only play in July
- Many only prompted to play when Wimbledon is on TV
- Lack of online booking systems for courts
- Dissatisfaction with park court surface/facilities
- Poor weather conditions
- Some believe tennis is an expensive sport
- Tennis clubs seen as expensive, exclusive and "not for them"
- Like Spinners, need someone to de-mystify what clubs are before they would join one



Seasonal Spinners

Profile:

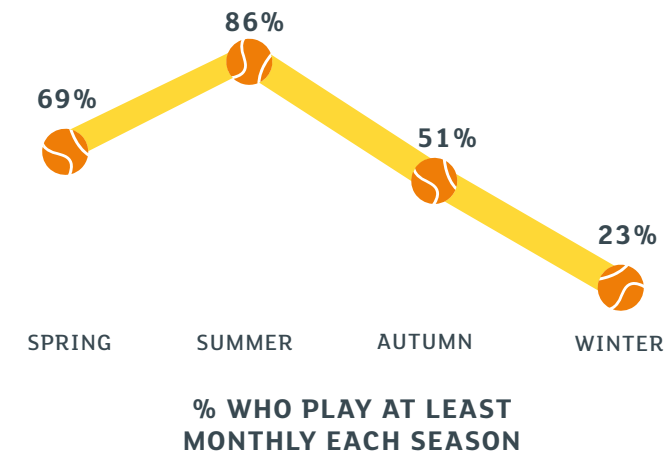
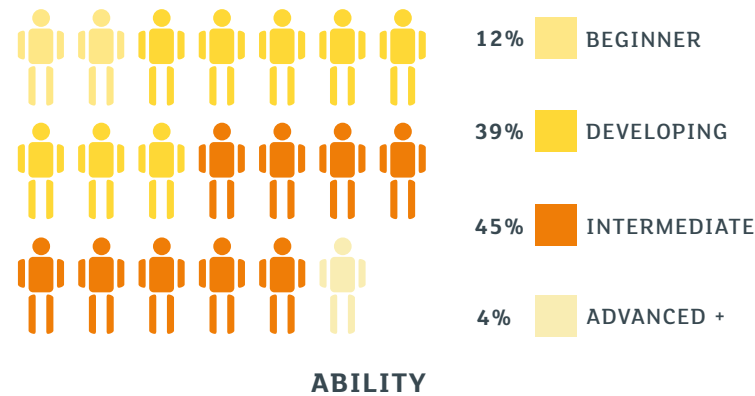
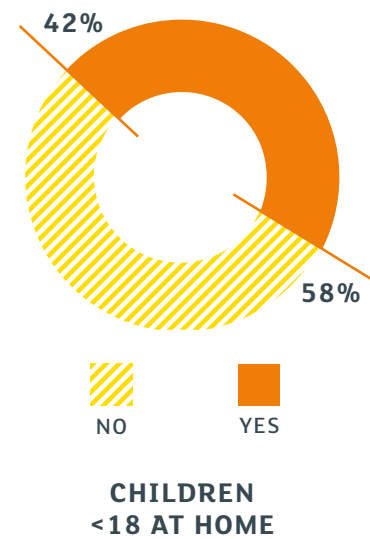
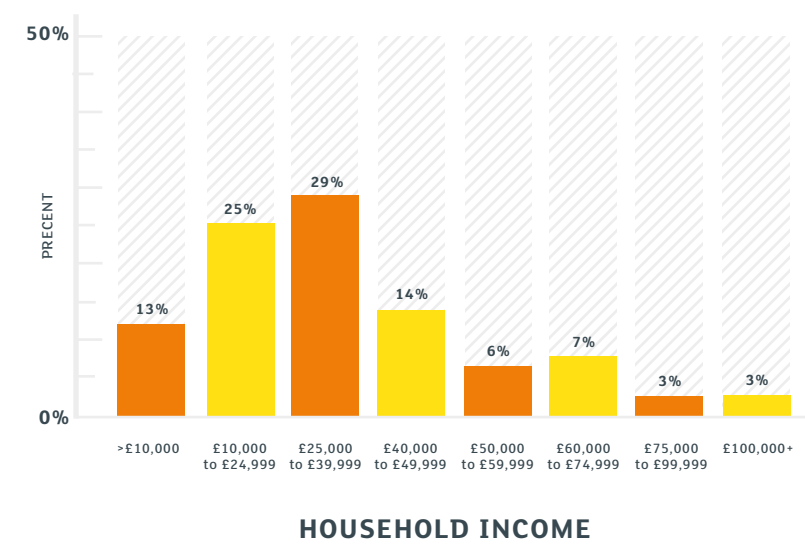
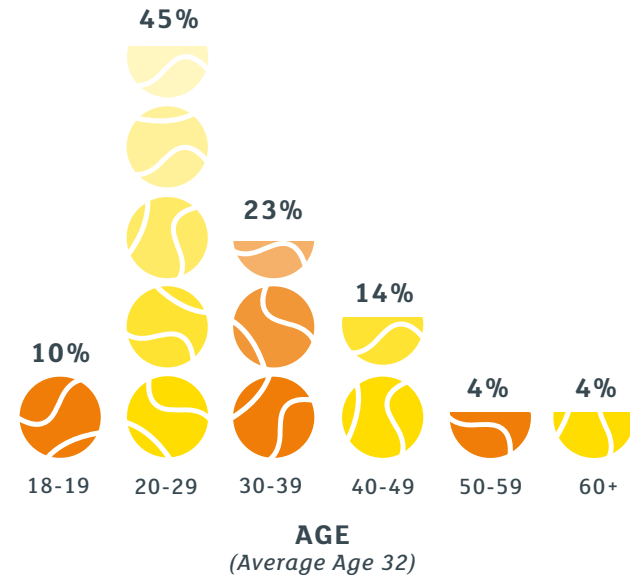
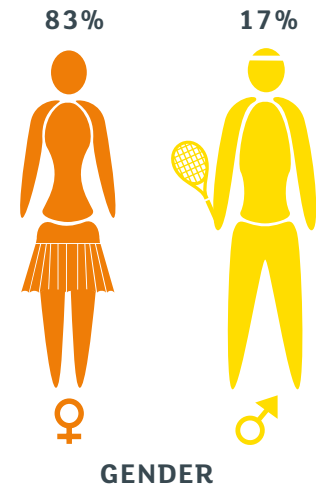
- Women under 40, average age 32
- Love tennis because it's seen as a great mix of keeping fit, developing skills and socialising
- Regarded as a seasonal activity with most playing in parks during spring and summer
- Gym is a big part of their lives (including fitness classes)
- Lack of people to play with is a significant barrier

Current frequency of play: Medium

Desire to play more: High

Size of audience: 900,000 (17% of players)

Social grade: ABC1 59% / C2DE 41%



SEASONAL SPINNERS

Location

Most Seasonal Spinners play in parks, although some play in leisure centres.

Attitude and behaviour

- Tennis seen as a seasonal and outdoor sport played in the summer, although some play in spring too
- Reliant on a small number of close friends, partner or family member to play with
- Some play spontaneously, but many plan ahead a few days in advance
- Usually play rallies, points or singles matches

Other sports / activities

Most attend the gym and fitness classes, as well as jog, swim or cycle in their spare time.

Motivations

- To keep fit and feel good
- Socialise with friends
- Get better at tennis and the physical release
- Mental and psychological challenge
- De-stress

Barriers

- Lack of available people (of a similar standard) to play with
- Tennis seen as a spring/summer sport only, with many waiting until the major event season starts
- Lack of online booking systems for courts
- Dissatisfaction with park court surface/facilities
- Poor weather conditions
- Some are nervous about their ability
- Few want to play with strangers
- Tennis clubs seen as expensive, exclusive and “not for them”
- Spinners need someone to de-mystify what clubs are before they would join one



Senior Stalwarts

Profile:

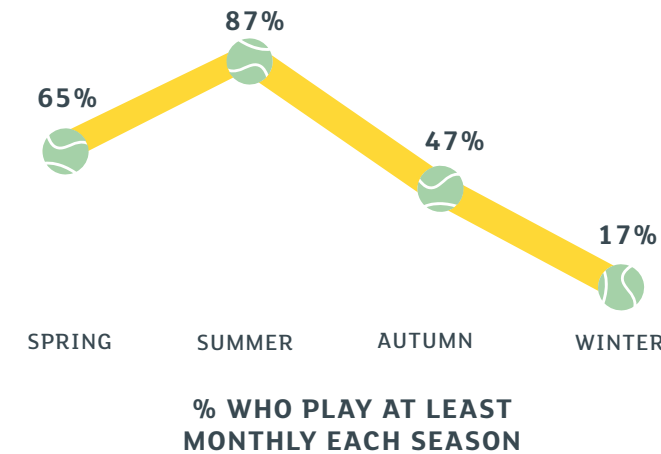
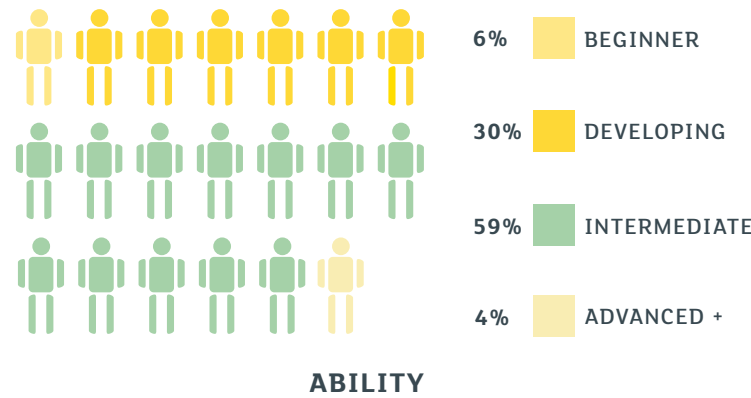
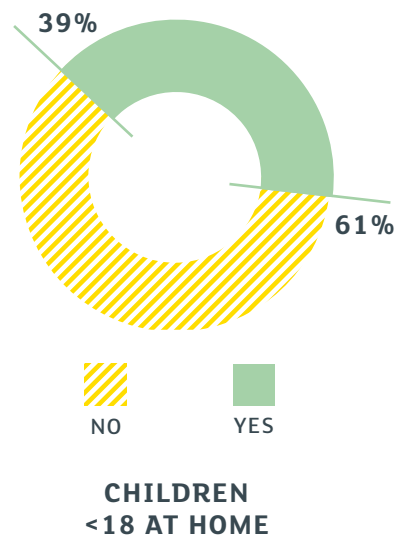
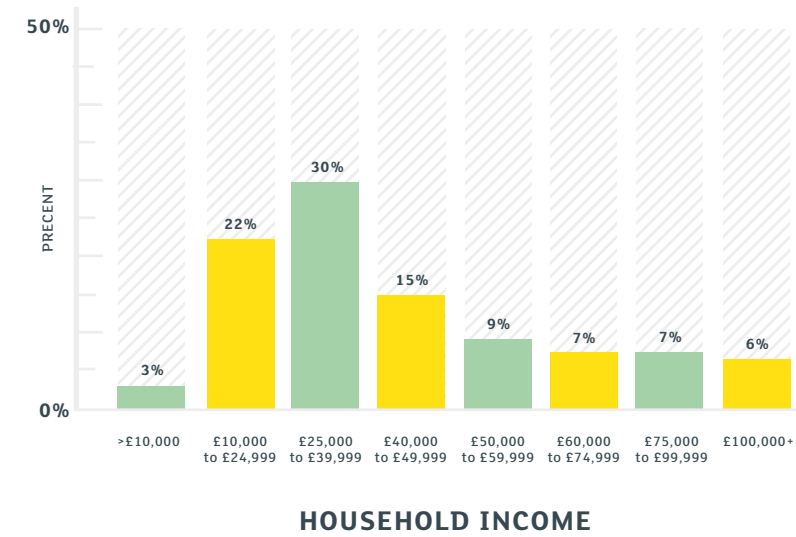
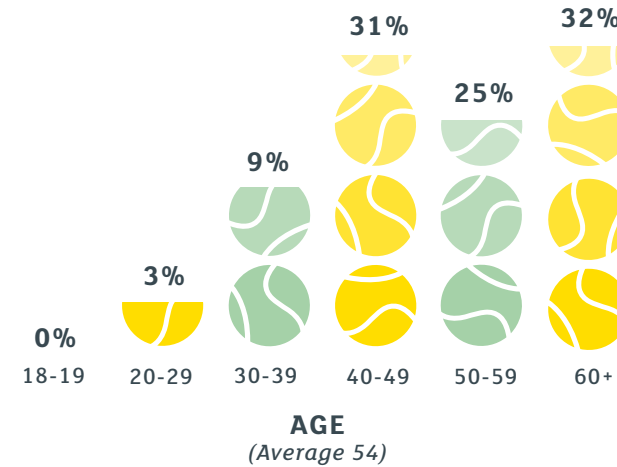
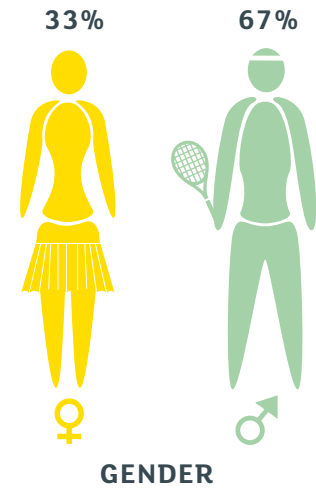
- Mostly 40+ year olds
- The frequent tennis playing Stalwarts play in clubs; the less frequent play in parks/leisure centres
- Tend to play with a regular group of friends
- Tennis seen as a gentle exercise which helps them keep healthy and socialise with friends

Current frequency of play: Medium

Desire to play more: Low

Size of audience: 1.1M (21% of players)

Social grade: ABC1 65% / C2DE 35%



SENIOR STALWARTS

Location

Frequent Stalwarts play in tennis clubs throughout the year; the less frequent Stalwarts play in parks and leisure centres, and mostly only in summer.

Attitude and behaviour

- Tennis is an ingrained part of life, especially in the summer
- They hope to play all their lives
- Usually play a game of doubles or singles, lasting around 1-1.5 hours, with (tennis) friends
- Many have a regular commitment with people to play with on weekdays
- Tennis is a gentle workout, appreciated for ensuring they stay healthy and active
- Some have started to reduce their tennis frequency
- Others expect to play less often in the next 12 months and certainly in the next 5 years

Other sports / activities

Cycling and swimming are popular with Stalwarts. Female Stalwarts may also attend fitness classes.

Motivations

- Keep fit and healthy outdoors
- Socialise with friends
- Not interested in coaching or taking part in competitions/leagues any more
- Enjoy playing with people they know

Barriers

- Mainly the recognition that they do not want to play more often
- Lack of available people (of a similar standard) to play with



Tennis Troupers

Profile:

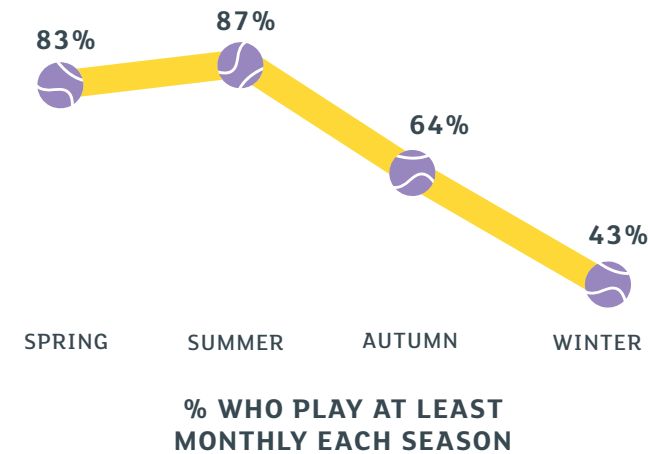
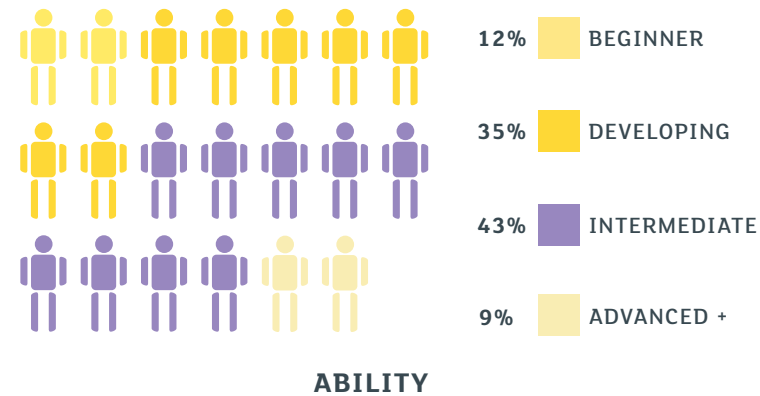
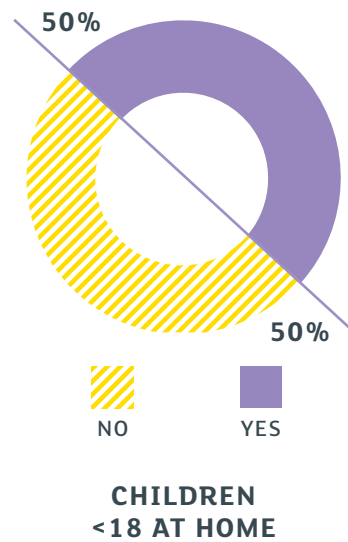
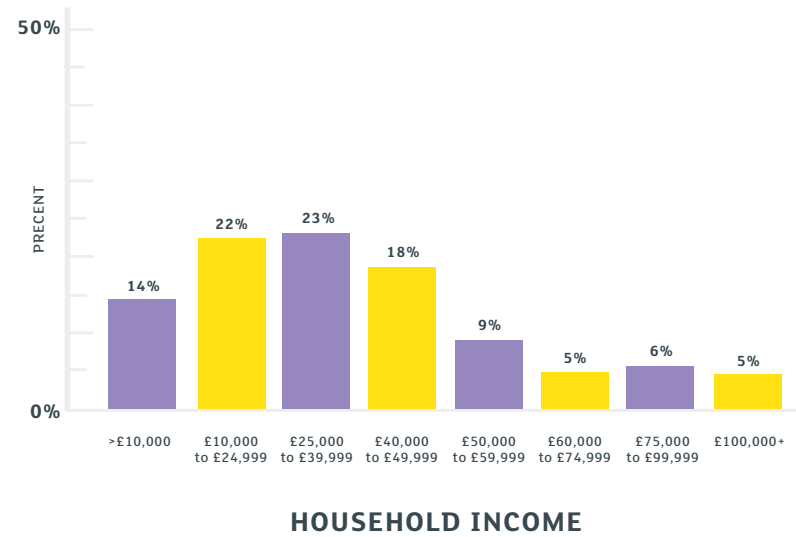
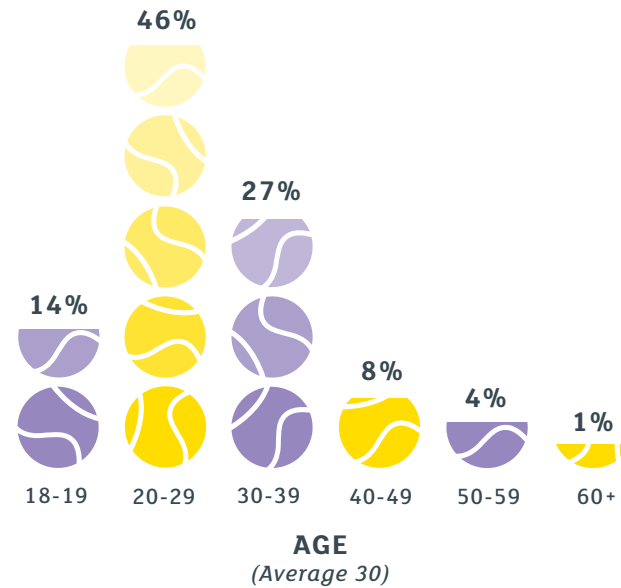
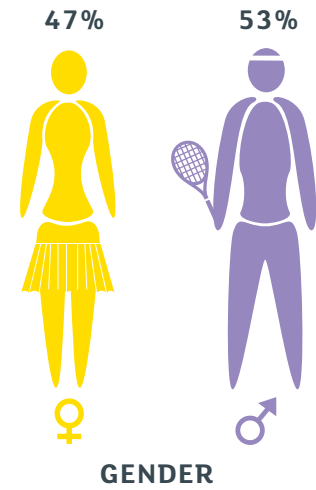
- Mostly under 40 years old
- Competent players, mostly play in clubs (especially if they have kids), but also in other venues too (e.g. David Lloyd or leisure centres)
- Tennis an important part of their lives, but not as passionate nor as confident and technically advanced as Titans
- Many are involved in competitions/leagues and play with a range of people: tennis friends, close friends, their partners and kids (if they have them)

Current frequency of play: Medium / High

Desire to play more: Medium

Size of audience: 850,000 (16% of players)

Social grade: ABC1 56% / C2DE 44%



TENNIS TROUPERS

Location

Most play in tennis clubs (especially if they have children), while others will play in DLL/VA, leisure/indoor centres, and parks. Younger tennis troupers also play on University/ College courts.

Attitude and behaviour

- Competent players, most have been coached at some point
- Tennis is an important part of their lives
- Not as passionate nor as confident and technically advanced as Titans
- Play singles/doubles with friends, partners or kids (if they have them)
- Many play in competitions and leagues (as well as box leagues)
- Like representing a team
- Play frequently in spring/summer, especially those with kids
- Happy with how often they play

Other sports / activities

Enjoy a range of sports including cycling, swimming, running, gym, football, netball and badminton/squash.

Motivations

- To play as part of an established sport routine
- Like to represent a team in leagues and competitions
- Share time with their partners, friends or kids
- De-stress from the busy nature of daily life
- If they have children, they want to get them to play tennis, to play tennis with them, and ensure they continue to play

Barriers

- Life gets in the way for time-pressured Troupers with children, especially as most are working full-time: tennis feels too difficult to organise unless it is already booked into their routine, and tennis competes with other sports/ activities and family days out
- Younger Troupers are less settled and have less money and this affects frequency, especially if this is combined with not being a member of club: they find it hard to find/ book courts to play on regularly; conversely, Troupers with families have much more of a routine
- Some still feel challenged by the technical aspects of tennis and find this frustrating, although some accept their “tennis level”
- Non-club Troupers can be negative about clubs (exclusive/snooty)



Social Butterflies

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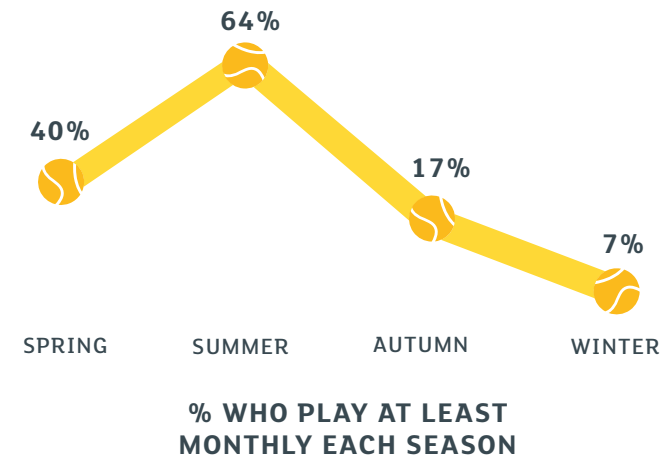
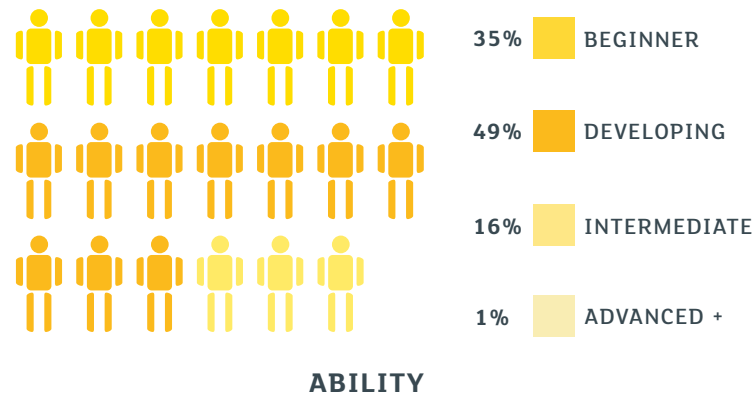
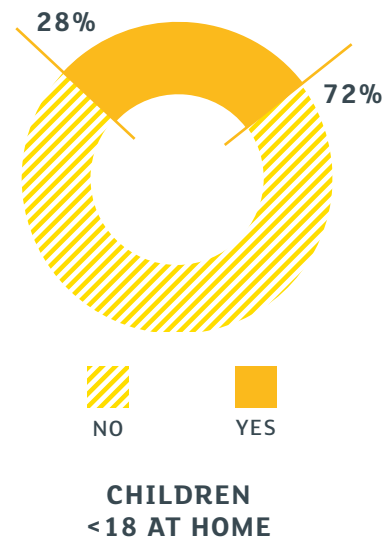
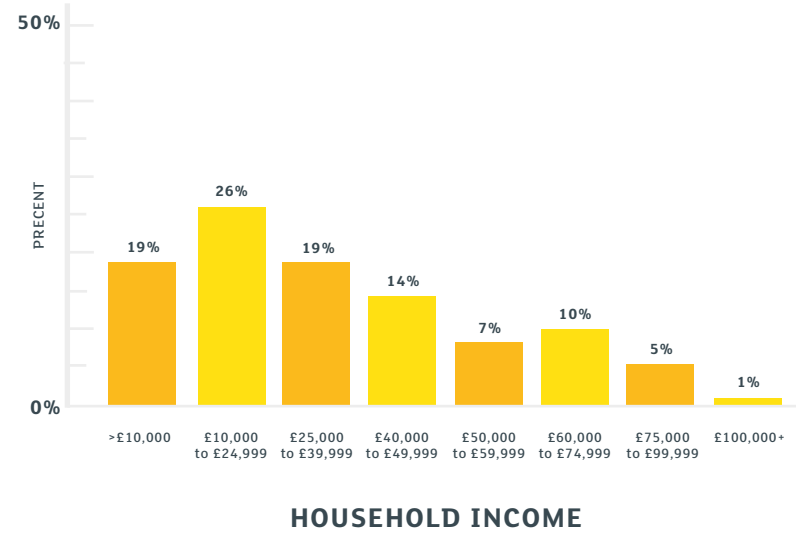
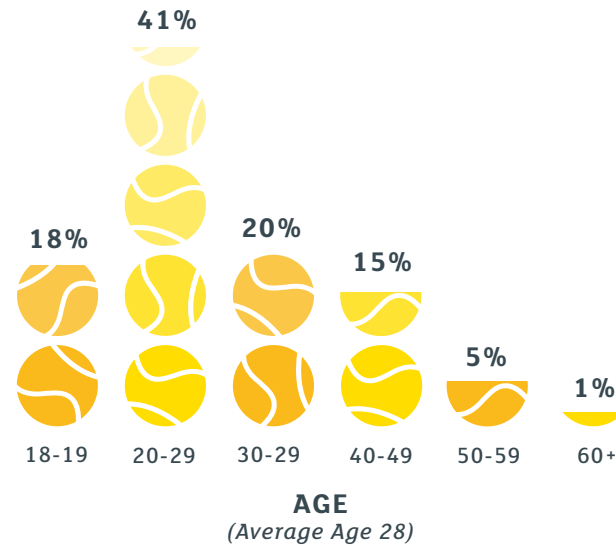
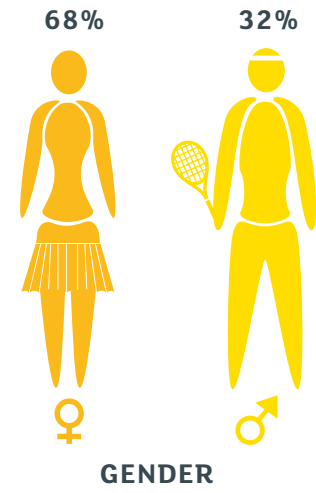
- Mostly women, some men, under 30, beginners or only slightly better
- They see tennis as just one of many summer things to do
- Play a few times during the summer at local parks as a way to socialise with friends
- No regular commitment to play and no great desire to play more

Current frequency of play: Low

Desire to play more: Low

Size of audience: 740,000 (14% of players)

Social grade: ABC1 62% / C2DE 38%



SOCIAL BUTTERFLIES

Location

Majority of Social Butterflies play in parks, some in leisure centres.

Attitude and behaviour

- Tennis is just one of their summer outdoor activities, and they are equally happy going to the pub or for a walk
- No regular commitment to play and no desire to play more times a year
- Usually play gentle rallies and hit balls with friends, although some do play points or sets

Other sports / activities

Not as sporty as Seasonal Spinners but Butterflies are most likely to go to the gym or fitness classes.

Motivations

- Socialising with friends when the sun comes out
- Tennis feels part of a summer activity to do with friends outside in parks
- Getting exercise is partly a motivation (exercise that does not feel like exercise) but is secondary to socialising

Barriers

- Tennis is not a passion so they have no desire to play more
- Some practical barriers, such as few friends to play with, lack of time or the weather
- Some find tennis too technically hard to give them the motivation to play more
- Some feel tennis can be too expensive or is 'posh'



For more information contact
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