



STATE OF FLORIDA TENNIS 2023

Inaugural Report

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"To Promote and Develop Tennis for All"
www.ustaflorida.com

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State of Tennis Play in Florida *(full report plus infographics)*

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Executive Message

The Importance of Research and Business Insights

Welcome to our inaugural State of Florida Tennis Report!

For the past six years, the team at USTA Florida has been working diligently to pull together more data and information to help us get a better picture of the landscape for tennis in Florida. While we have been tracking data on our programs for decades, we struggled for many years to pair that information with population, demographic and facility information to give us a clearer view of the opportunities, and challenges, that we face when growing the game.

This report is far from a complete view of the tennis landscape in Florida. But it does offer some compelling insights that we – and our partners in tennis across the state – can use to serve more people and communities.

The biggest takeaways from this report are the following:

1. **Population growth in Florida is at an all-time high and not slowing any time soon.**
2. **Demographics driving that growth differ by region and county.**
3. **Demand for tennis is at an all-time high among youth, adult and adaptive and underserved populations.**
4. **Growth in play and programs is stifled due to lack of courts.**
5. **Coaches are out there; we need them on public tennis courts.**

As we celebrate 75 years of USTA Florida and the storied history of tennis in the Sunshine State, this report is planting a seed for our future growth and delivery. We plan to add to these insights in the future, with more comprehensive data on facilities in Florida and the economic impact of tennis in the Sunshine State. Stay tuned for those reports later this year.

Until then, we welcome your interest, your analysis and your questions. Florida shines brightest when we all work together.



Laura Bowen
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Florida Leads in Population Growth

FLORIDA IS GROWING... and it's doing so at a record pace.

Anyone who lives in Florida can tell you that our population continues to grow at an unprecedented rate. According to recent data from the [U.S. Census Bureau](#), Florida has four of the nation's top five fastest-growing metropolitan statistical areas and three of the top 10 that gained the largest number of people from 2022 to 2023.

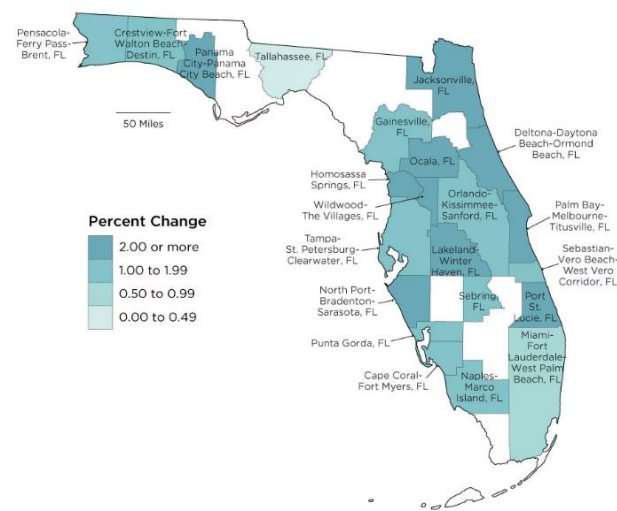
Even more impressive is that Florida in 2022 became the nation's fastest-growing state for the first time since 1957, according to the U.S. Census Bureau's Vintage 2022 population estimates. Florida's population increased by 1.9% to 22,244,823 between 2021 and 2022, surpassing Idaho, the previous year's fastest-growing state.

According to the University of Florida's Bureau of Economic and Business Research Projections, the long-range forecast for population growth in Florida is also bullish. By 2030 projected population is an additional 3.5M people or +23%. By 2050 projected population is an additional 9.3M people or +42%.

SOURCE:

<http://edr.state.fl.us/content/population-demographics/data/Estimates2023.pdf>

Figure 1.
Percent Change in Metropolitan Statistical Area Population:
July 1, 2022–July 1, 2023



Note: Metropolitan statistical areas are delineated by the Office of Management and Budget as of July 2023.
Source: U.S. Census Bureau, Vintage 2023 Population Estimates.

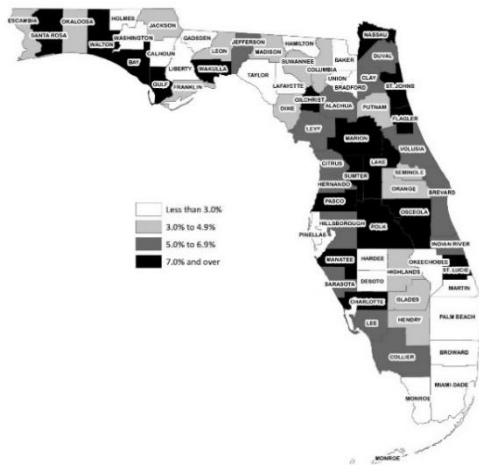
"Florida's percentage gains since 1946 have been impressive: its 2022 population is just over 9 times its 1946 population of 2,440,000... For the third most-populous state to also be the fastest growing is notable because it requires significant population gains."

~U.S. Census Bureau

Top Counties and Cities

A deeper look at county growth between 2020 and 2023 shows where municipalities are likely feeling pressure to improve or add infrastructure. It's important to consider both percentage change and total population change. While the panhandle of Florida is often overlooked, Escambia has both high population density and growth. Okaloosa-Walton-Bay counties are also seeing rapid growth as a percentage of population. These are key areas to focus on.

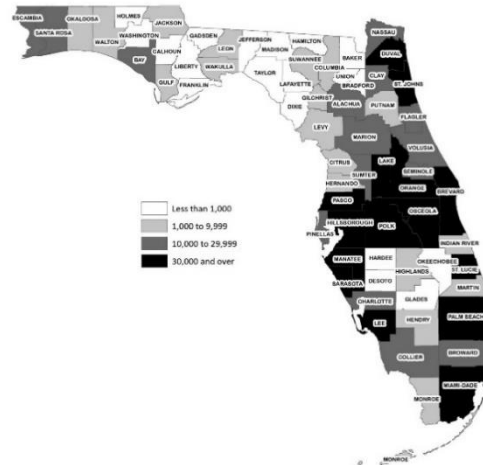
Figure 1. Percent Change in Population, 2020 to 2023



Bureau of Economic and Business Research, University of Florida

Florida Estimates of Population 2023 30

Figure 2. Population Change, 2020 to 2023



Bureau of Economic and Business Research, University of Florida

Florida Estimates of Population 2023 32

Projection: Top 10 counties for growth from 2020 to 2030:

- St. Johns (+39%)
- Osceola (+36%)
- Walton (+36%)
- Lake (+33%)
- Sumter (+32%)
- Flagler (+29%)
- St. Lucie (+28%)
- Nassau (+27%)
- Pasco (+25%)
- Polk (+25%)

Source: *Projections of Florida Population by County, 2025-2050, with Estimates for 2021* | B.E.B.R. - Bureau of Economic and Business Research (ufl.edu)

Demographic Trends

All counties and cities are NOT THE SAME.

The Villages and Ocala are driving incredible increases in population across Lake, Sumter and Marion counties. That growth is largely among adults, and that's also the case with Southwest Florida, from Manatee to Collier counties. When it comes to population growth among youth, the western panhandle, most of central Florida and Jacksonville area (Duval, Clay, Baker, Putnam) are leading the charge.

From central Florida south to Miami, you see a high percentage of Hispanic persons. Conversely, the Black population tends to be more predominant in North Florida (Tallahassee), as well as in Palm Beach, Broward and Hillsborough. In looking at the trends here, it's important to note what is driving population growth in each area, and where there is a convergence of many different demographics in a single market.

The key takeaway here is that Florida markets vary greatly in terms of demographics. Any business looking to reach them will need to understand those differences in demographics and additional nuances in serving each demographic.

Figure 3. Percent of Population Aged 17 and Younger, 2022



Figure 4. Percent of Population Aged 65 and Older, 2022



Figure 5. Black Population as Percent of Total Population, 2022

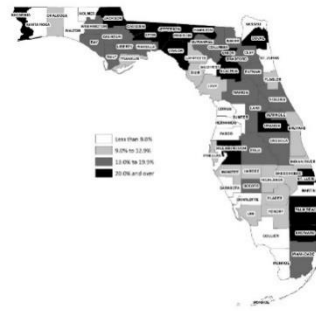
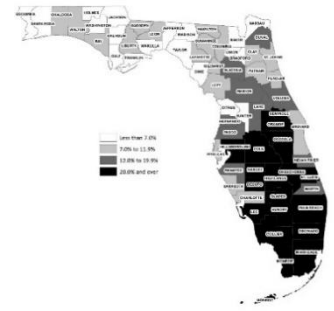


Figure 6. Hispanic Population as Percent of Total Population, 2022



“Domestic migration to South Florida has been remarkably high in recent years. This wave of migration is characterized by domestic migrants who have had notably higher incomes than in the past.” ~University of Florida Bureau of Economic & Business Research

Demand for Tennis in Florida

Still booming... but PUSHING THE COURT LIMITS.

The USTA Tennis Participation Study findings provide a very general view of tennis demand and demographics in Florida. Among the key points in the 2023 study are the following:

- The number of tennis players in Florida increased 4 percent year-over-year, to 1,721,000, marking at least 10 consecutive years of growth in the section. Since 2018, Florida has added at least half a million players to our count.
- The diversity of tennis players continues to grow, with 41 percent of all players in Florida being non-white and 28 percent of which are Hispanic/Latino.
- While tennis in Florida skews towards older folks, we see an increase in 18-34-year-olds playing tennis compared to 2022.
- Florida continues to be made up of the highest concentration of core players in the US (10+ days a year), and these players average the most days played per year of any section. This is a long-standing trend that puts greater pressure on our tennis courts year-round.

Demographics of Florida Players

The profile of the 2023 Florida Section tennis population is defined by its slightly older (45+ years old) and lower/middle-class income skew than the national player profile.

Table 4. Profile of Florida Section tennis players

	% of Section's Players	Index vs. U.S. Tennis Players	Index vs. Section Population
Male	59%	105	122
Female	41%	94	79
6-12 years old	12%	89	153
13-17 years old	9%	82	147
18-24 years old	12%	95	123
25-34 years old	17%	91	135
35-44 years old	13%	83	106
45-54 years old	13%	105	100
55-64 years old	11%	131	71
65+ years old	13%	170	56
Black/African-American	8%	78	64
Asian/Pacific Islander	2%	21	91
White, non-Hispanic	59%	100	103
Hispanic/Latino	28%	171	121
Other race-ethnicity	2%	68	53
Under \$25,000 income	11%	117	54
\$25,000-\$49,999 income	12%	91	60
\$50,000-\$74,999 income	19%	124	100
\$75,000-\$99,999 income	15%	95	115
\$100,000+ income	44%	93	156
Play primarily at public park	36%	85	
Play primarily at school/college	11%	72	
Play primarily at private tennis club	14%	112	
Play primarily at recreation center	14%	120	
Play primarily at private residence	8%	144	
Play primarily at country club	5%	102	
Play primarily at apartment/condo	9%	221	
Play primarily at other venue	3%	81	

USTA Section Play Frequency

Frequency of play in the Florida Section was more than 10 days higher than the national average in 2023—32.4 days was the highest frequency of play across sections. The Florida Section also had the highest share of Core players of any section.



Table 5. Tennis play frequency groups, by USTA section

	2023 Average Days	2022 Average Days	2023 Core Players	2023 Core % of Total	2022 Core % of Total
Total USA	22.1	22.0	11,747,000	49%	51%
Eastern	20.3	19.9	1,012,000	48%	49%
Florida	32.4	32.5	964,000	56%	57%
Hawaii Pacific	24.5	23.5	45,000	48%	57%
Intermountain	19.1	15.8	493,000	49%	40%
Mid-Atlantic	19.4	20.3	646,000	51%	53%
Middle States	16.9	20.4	511,000	46%	48%
Midwest	23.0	19.5	1,361,000	49%	48%
Missouri Valley	18.2	18.3	554,000	45%	43%
New England	17.0	17.0	521,000	50%	51%
Northern	14.0	16.6	185,000	40%	38%
Northern California	19.5	19.9	654,000	46%	47%
Pacific Northwest	16.1	19.2	587,000	46%	51%
Southern	26.7	24.9	1,708,000	52%	54%
Southern California	24.4	23.5	1,131,000	52%	54%
Southwest	25.6	28.6	266,000	44%	50%
Texas	21.6	22.4	1,109,000	49%	56%

Looking at our own program data, we see growth trends in many key areas. We also see where our recent growth is pushing the limits of court availability.

Junior play, which was hit hardest during the pandemic in 2020, has rebounded nicely, with consistent growth in team tennis and tournament play in 2023. Both programs are driven largely by providers and staff delivering in our various markets. Markets where coordination with staff and providers is high generally see growth. Florida continues to be tournament dominant when it comes to junior play, but team tennis is making a strong push in areas where facilities can accommodate it on their courts.

The addition of **Team Tennis programs** and staff in Orlando, Panama City and Sarasota allowed us to tap into growing youth demographics in those markets. Pressure for court time in Miami continues to be a challenge. Declines in other areas may also be due to facilities not having the court time available for match play due to other events and programs on the weekends.

Florida providers ran an impressive 1,029 **junior tournaments** in 2023. That’s an increase of 13 percent from the prior year, and another key indicator of how courts are being stretched. Unique participation in junior tournaments remained nearly flat from 2022 to 2023, but total registrations were up slightly from 2022 levels.

JTT County 2023 Totals
(compared to 2022)

Escambia/FWB – 447 (+317%)

Jacksonville/Duval – 421 (+23%)

Palm Beach – 265 (+24%)

Volusia/Flagler – 251 (-13%)

Pinellas/Hillsborough – 178 (+226%)

Broward – 174 (-11%)

Miami-Dade – 129 (-45%)

Marion/Ocala – 113 (-16%)

Brevard – 95 (-23%)

Martin/St. Lucie – 86 (-10%)

Orlando – 62

Panama City – 41

Sarasota – 32

Source: USTA Tableau/TennisLink

Youth Team Tennis Annual Growth

2023	2572 (+15%)
2022	2232 (+20%)
2021	1856 (+307%)
2020	603

Top 10 Counties for
Junior Tournaments

Palm Beach (Region 6)

Miami-Dade (region 8)

Broward (Region 8)

Orange (Region 4)

Pinellas (Region 3)

St. Johns (Region 2)

Osceola (Region 4)

Sarasota (Region 5)

Seminole (Region 4)

Collier (Region 7)

Source: USTA Tableau

Adult tennis programs continue to see impressive growth – driven by strong participation in entry level programs and in adult leagues. Across the board, formats that are more flexible appear to be attracting more players. It’s important to add that there are very strong non-USTA Leagues in several counties (Volusia, Orange, Seminole, Palm Beach) and many other adult beginner programs throughout the state (most facilities have them). While we do not track these programs, we believe our programs are key indicators that others are seeing growth, as well, which would add considerable counts to the figures presented here.

Love to Learn
Total Sessions – 69
Total Participants – 509

Love to Play
Total Session – 48
Total Participants – 375

Escambia (Region 1)
Participants – 43
Leon (Region 1)
Participants – 53
Alachua (Region 2)
Participants – 52
Hillsborough (Region 3)
Participants – 41
Pinellas (Region 5)
Participants – 112

SOURCE: USTA Florida

Adult Beginner Programs (Love To...) have proven to be a key leading indicator for adult participation growth. USTA Florida’s Love To Learn/Love To Play programs continue to fill up any time they are offered. Although we only track the programs we run, they are dispersed in different areas across the State and provide a good representation of what facilities typically are experiencing in terms of new players.

Although more **adult tournaments** were held in 2023, slightly fewer unique players participated in them. The bright spot in tournaments appears to be in the NTRP products, which facilitate more level-based play at tournaments. Palm Beach and Broward counties continue to be strong-holds in the adult tournament space, with the highest number of participants, with Orange and Collier counties following close behind.

Total # of Adult Tournaments (Comparison to 2022) – 215 (+12%)*

Total # of Unique Registrants – 8,106 (-6%)

Total # of Registrants – 13,549 (+1%)

**Includes NTRP and Family Tournaments/Source USTA Tableau*

Adult League participation was up slightly in 2023, reaching 56,981 – a new record for the section. We saw a slight decline in the number of teams. Women participants account for 32,919 of the total – more than twice the number of men participants. Region 1 (Escambia/Okaloosa/Walton/Bay) and Region 4 (Orange/Polk/Seminole) boast the strongest percentage growth in the state, driven largely by a commitment by local facilities to bring in new players through the Love To... program. Hillsborough tops all counties in numbers of participants. When it comes to age groups/format, Combo and 18 & Over Adult and Mixed Leagues are top in growth, with flexible format also coming in strong.

Total League Teams

4,144 (-5% from 2022)

Source: TennisLink and USTA Member records

County (Top 10 for Teams)

Broward (Region 8) - 506
Hillsborough (Region 3) - 408
Collier (Region 7) - 437
Miami-Dade (Region 8) - 413
Duval (Region 2) - 271
Brevard (Region 4) - 260
Pinellas (Region 3) - 167
Escambia (Region 1) - 166
Alachua (Region 2) - 162
Sarasota (Region 5) – 161

County (Top 10 for Participation)

Hillsborough (Region 3) - 7,074
Collier (Region 7) - 7,072 (-11%)
Duval (Region 2) - 6,946 (+3%)
Broward (Region 8) - 5,950 (+13%)
Miami-Dade (Region 8) - 5,565 (+1%)
Orange/Seminole/Lake/Volusia (Region 4) -
3,740 (+10%)
Sarasota (Region 5) - 3,166 (-6%)
Escambia (Region 1) - 2,465 (+8%)
Pinellas (Region 3) - 2,409 (-12%)
Alachua (Region 2) – 2,404 (-2%)

Growth in Participation by League Type (compared to 2022)

Adult 18 & Over – 15,391 (+4%)
Adult 40 & Over – 10,869 (-1%)
Combo – 10,093 (+5%)
Adult 55 & Over – 5,407 (-3%)
Mixed 18 & Over – 3,965 (-2%)
Tri-Level 18 & Over – 3,662 (+5%)
Mixed 40 & over – 3,505 (flat)
Adult 65 & Over – 1,554 (-7%)
Mixed Other – 1,227 (-26%)
Flexible Format – 998 (+99%)
Adult 18 – 39 – 124 (+18%)
Adult 70 & Over – 36 (no participants in
2022)

Host Facility (Top 10)

Roger Scott (Region 1, Escambia) – 127
Midtown Athletic (Region 8, Broward) – 101
HCC Tennis Complex (Region 3, Hillsborough) –
92
Fort King Tennis Center (Region 2, Marion) – 79
Frank Veltri Tennis Center (Region 8, Broward) –
79
Titan Tennis Center (Region 4, Brevard) – 72
Forestmeadows Park (Region 1, Leon) – 66
Jonesville Tennis Center (Region 2, Alachua) –
60
Lauderdale Tennis Club (Region 8, Broward) – 59
Sanlando Park (Region 4, Seminole) – 58

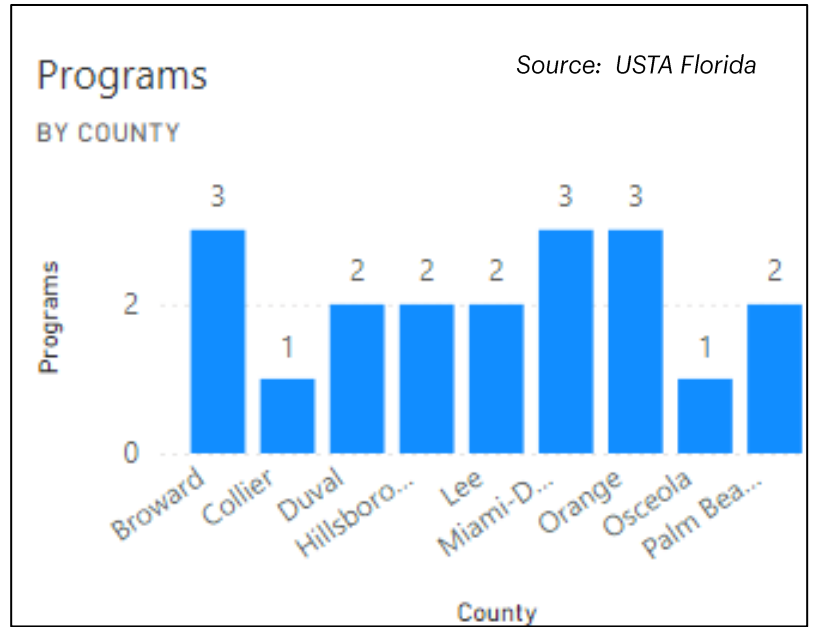
Adaptive Tennis Programs, which are run largely through our partners at Love Serving Autism, Special Olympic Florida, and other adaptive organizations also have experienced significant growth in the last few years.

In 2023, LSA had programs in 24 locations across the state of Florida and 435 total program participants. Special Olympics programs continue to expand in counties throughout the state. We welcomed more than 150 SOFL participants to the State Games in 2023, and this year, there are 485 athletes registered to play in programs in 24 different counties. Hillsborough leads all counties with more than 130 athletes.

We continue to receive requests to start new adaptive tennis programs and we are seeing healthy growth in both participants and volunteer coaches. This trend should continue, provided facilities are willing to give court time to these programs in the future.

Wheelchair Tennis Programs are experiencing slower growth. Some providers have difficulty sourcing players, and the highly seasonal nature of wheelchair play can make it difficult to keep momentum. The total number of tournaments in Florida dropped to just 9 in 2023 and we have only 8 tournament directors in the state to run these events. Unique participation fell 17% to 75 players. With very few indoor courts, events can only be held in cooler months, which is also a popular time for other programs on our courts.

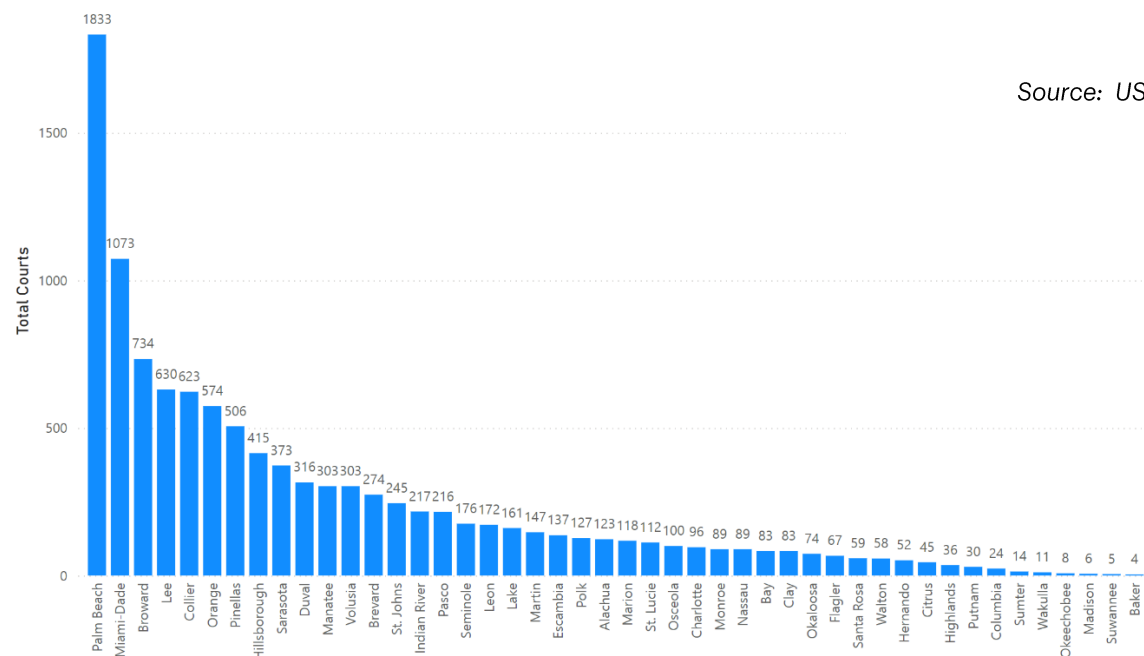
On a positive note, we continue to see interest from providers and parks who want to start wheelchair programs. In 2023, we awarded more than \$23,000 in grants to help start programs. We have programs running in nine different counties, providing opportunities to play in different areas of the state.



Opportunities for Growth/Investment

Perhaps the biggest (and most surprising) takeaway from our work developing this report is the lack of available, accurate data on the number and type of courts in the Sunshine State. There are several different methods for collecting court information in the U.S. and all have their deficiencies. It took some time and effort to comb through the data and analyze the number of courts and facilities in the State of Florida.

A current analysis shows we have nearly **11,000 tennis courts** in the state at roughly **1,600 facilities**. Palm Beach County leads the way by a large margin, with Miami-Dade and Broward claiming the next highest counts. Comparing the court data by county with the population growth, we can identify areas where pressure is likely high for court availability. Pasco, Lake, Manatee, Osceola and Polk Counties all fall into this high-pressure category, and it's no surprise that development is high in these areas – making them prime locations for future investment.



Source: USTA/USTA Florida

To fully assess our infrastructure needs, we need a more detailed inventory of our facilities by type, courts, programs and condition. This is something we will be investing time and energy in for future reports.

Coaching & Management Support

MAXIMIZING PLAY ON THE COURTS is equally important.

The landscape for coaching in Florida is much more difficult to assess. Tracking certified coaches in the state of Florida requires data from two tennis teaching organizations, and it is not readily available. While there is no centralized data available on the number of non-certified coaches in the state, we know from simple population and program data that we don't have nearly enough coaches on court to meet current or future demand for play. This is a problem that we noted in detail in our **Call for Coaches** last year.

Thanks to our USTA FL Community Coach Program, which was launched in 2022, we do have insights into who may want to coach and how we can bring them in through half-day training sessions. In 2023, we trained 270 unique coaches to run community-based programs. Of that total, 144 were women and 126 were men, and very few were already certified. Red/Orange/Green ball, Summer Camps, and Wheelchair programs were the most popular curriculums offered.

In 2022 and 2023 combined, we trained more than 500 community coaches. In the future, we hope to be able to track how many of these coaches are running programs and do a better job of following their pathway to the courts and to certification. We also need more information shared across the industry on coach demographics, employment and other insights that can help us do a better job of recruiting, training and developing coaches at all levels of the game.

2023 Community Coach Participants

Total # (Unique) – 224

Demographics

Average Age – 42

Male – 126 (47%)

Female – 144 (53%)

Non-Hispanic/Latino - 108 (44%)

Hispanic/Latino - 34 (14%)

Unknown – 102 (42%)

Unknown – 225 (92%)

White/Caucasian - 13 (5%)

Black or African American – 4 (2%)

Asian/Pacific Islander – 1 (1%)

Other – 1 (1%)

Source: USTA Florida

“Nothing – and we mean nothing – we do as a USTA section or industry will have a greater impact on the growth of tennis than solving the puzzle of coaching in the public park space. It will take all of us to change the way we think about coaching, who we recruit and how we train our coaches, to secure the future of this sport for the long term.”

~ USTA Florida Board

Future State of Florida Tennis

Tennis is THE SPORT OF CHOICE for Floridians. Its ECONOMIC IMPACT IS UNMATCHED. We NEED MORE ADVOCATES to raise their voices on key issues.

The State of Florida Tennis is Strong, Diverse and Growing

In looking at all the information in our report, one thing is consistently clear: Florida remains a driving force in tennis play in America. Population growth, the ability for most residents to play year-round, and our many program offerings are strengths that we have compared to other states.

Tennis Advocacy

More Public Park Support

Tennis starts in the **PUBLIC PARKS**

7+ years

Managing public tennis centers in 4 different cities in Florida

Free Management Assessments

Funding & Resources to help cities and developers invest in tennis infrastructure





At the same time, population growth is putting pressure on our existing infrastructure and we don't have enough coaches to deliver programs – especially in public parks.

To serve our growing and diverse population, we will need to add courts, add coaches and add programs that meet the needs of specific communities. And we will need to do a better job of facilitating play in some areas and advocating in others.

USTA Florida is dedicated to meeting these goals by working with public and private tennis centers and communities to help them meet these challenges head-on. Our facility

management team has been working alongside four municipalities in the state to manage their public tennis centers for the last 7 years. During that time, participation at those facilities has grown exponentially – all by hiring coaches and putting regular programs in place that meet the community needs.

To learn more about the services we offer to help grow tennis in your community, and how you can get involved, visit ustaflorida.com/tennis-advocacy.