USTA FLORIDA

# 2026 State of Florida Tennis Report

Who plays, where they play, and what it takes to keep Florida's courts full

**PREPARED BY USTA FLORIDA**
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# Executive summary

More Floridians are playing tennis, and many more want to. The 2026 State of Florida Tennis Report is United States Tennis Association (USTA) Florida's most complete picture yet of tennis in the state. It covers how many people play, who they are, where they play, who is interested but not yet playing, and the courts, coaches, and programs available to them. The headline is encouraging: Florida's player base has grown by more than half since 2019, and nearly as many Floridians again say they want to play.

This report draws on USTA Florida program records, the USTA's annual Physical Activity Council (PAC) participation study, Kinetica county estimates, Placer.ai foot traffic data, and state population projections. It is the first USTA Florida report to measure community and club leagues, court foot traffic, and player spending.

**1.95M**

**FLORIDIANS PLAYED TENNIS IN 2025, UP FROM 1.2M IN 2019 (PAC)**

**1.83M**

**MORE FLORIDIANS WANT TO PLAY BUT DON'T YET (KINETICA, 2025)**

**21%**

**OF COURTS ARE PUBLIC, YET THEY HOST 43% OF TOURNAMENT PARTICIPANTS (USTA FLORIDA, 2025)**

**6,175**

**RESIDENTS PER PUBLIC COURT, 2025; 7,462 BY 2050 IF NONE ARE ADDED (Bureau of Economic and Business Research (BEBR) MEDIUM)**

## PARTICIPATION

Florida's participation rate was 9.1% in 2025, up from 8.0% in 2024 and above the national rate of 8.8% (PAC). Florida's one-year gain of 1.1 points compares with 0.5 points nationally. From 2019 to 2025, Florida and the nation each gained 3.0 points. PAC counts about 1.95 million Florida players. Kinetica's county-level estimate of 1.99 million (9.00%) is within 2% and adds age and county detail: 1.61 million adults and 373,000 youth, and 45.2% of players in the five largest counties (Sections 1.1 and 2.1).

Another 1.83 million Floridians are interested in playing but don't yet, 92 for every 100 current players. Adults are the larger group, outnumbering interested youth nearly four to one, but youth show the biggest gap: 390,924 young Floridians want to play, more than the 373,378 who already do (Section 1.6).

## HOW FLORIDA PLAYS

- **Leagues and team play.** League play is bigger than USTA leagues alone. USTA leagues counted 59,786 participants in the 2025 league year (+2%), led by 2,287 volunteer captains. Community and club leagues, measured for the first time, added 41,814 participants in the 2025-26 season. Youth team tennis participants rose 16% from spring 2025 to spring 2026, and 497 schools in classes 1A to 4A fielded high school teams in 2025-26, down slightly from 503 (Section 1.3).
- **Tournaments.** USTA Florida sanctioned 1,206 tournaments with 93,360 participants in 2025, 84% of them junior. That is slightly below 2024, which had 8% more tournaments and 1% more participants. From January to September 2026, participants rose 6% over the same months of 2025, but women's adult participants fell 22% even as the events offered to them grew. Thirty-three counties, home to 1.9 million people, hosted no sanctioned tournament between January 2024 and September 2026 (Section 1.4).

- **Community programs.** Programs reach most Floridians but miss much of rural Florida. USTA Florida has 190 community program records, including Special Olympics Florida, autism, adaptive, and wheelchair programs, community tennis association (CTA)s (CTAs), and National Junior Tennis & Learning (National Junior Tennis and Learning (NJTL)) chapters. They reach 39 of 67 counties, home to 96% of Floridians. The 28 counties without one, all small or rural, are home to 928,674 residents (Section 1.5).
- **Coaching.** USTA Florida tracks two separate programs. 1,551 people enrolled in USTA Coaching between its August 2025 launch and September 2026. 1,097 people have trained through the Community Coach Program since 2022, counted as unique people; earlier USTA Florida figures counted session attendances. The Racquet Sports Professionals Association (RSPA) separately reports 1,377 certified tennis professionals in Florida. Community Coach training fell from 296 people to 94 in matched January to September periods, and 19 counties have no coach record in either program (Section 5).
- **Tennis academies.** Many academies use public courts. USTA Florida has 128 tennis academies on record at 146 facilities in 28 counties, and 59 of those sites (40%) are public, mostly parks. Thirty-nine counties, with about 40,000 youth players, have no academy on record, though the list is not a complete census (Section 6).
- **College tennis.** Florida has 60 college programs at 34 institutions, with 607 student-athletes. Among those whose status is known, 72% are international. Seven Florida campuses are USTA Collegiate Community Hubs that open courts and programs to the public (Section 8).

## COURTS AND ACCESS

Public courts carry far more than their share of play. Florida has 18,293 tennis courts on record, and 3,786 (21%) are open to the public, one for every 6,175 residents. Public facilities hosted 43% of 2025 tournament participants and 38% of USTA league participants, and seven of the ten busiest USTA league hubs are public. Placer.ai data shows about twice as many site visits per public court as per private court. The difference holds when event venues and campus recreation centers are left out, and when only sites without pickleball courts are counted (Sections 3.2 and 3.3).

*Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

Five counties hold 43% of all courts. Eighteen counties have fewer than 10 courts, and Liberty has none. Four counties (Baker, Dixie, Liberty, and Madison), home to 73,355 people, have no public court (Sections 3.1 and 3.4).

Growth will stretch that supply. Florida's population is projected to grow by 4.87 million by 2050 (BEBR Medium). Holding today's ratio of public courts to residents would take 248 more public courts by 2030 and 789 by 2050. Reaching one public court per 4,000 residents, the level recommended in USTA Florida's 2026 white paper, would take 2,059 more today. The white paper's call for at least 800 new or fully rehabilitated public courts over the next decade would more than cover the 436 needed to hold today's ratio through 2035. Pressure is sharpest in the 25 Mid-size counties, home to 31% of residents. They are projected to absorb 43% of the state's growth and have the lowest public share of courts, at 17%. Osceola, for example, is projected to add 1,011 residents per existing court by 2035, nearly seven times the state rate (Sections 2.2, 4.1, and 7).

## ECONOMIC AND HEALTH VALUE

Tennis supports Florida's economy and its health. Sanctioned tournaments and events generated $145.9 million in total economic impact in 2023 (Tourism Economics). Separately, Florida players spent an estimated $583.0 million on tennis in 2025, including court and membership fees, equipment, coaching, and events (Kinetica). The two figures measure different things and cannot be added together (Section 3.5).

Health is the most common reason league players give for playing: 57% of Florida respondents to the 2026 USTA National League Survey play for exercise and health. The Copenhagen City Heart Study, an observational study of 8,577 adults, associated tennis with up to 9.7 more years of life expectancy than a sedentary lifestyle, the largest association among the sports it measured (Sections 1.3 and 4.2).

## WHERE GAPS ARE CONCENTRATED

Gaps cluster in rural and small counties, and the same places tend to appear on every list. Eighteen counties have fewer than 10 courts, 28 have no community program on record, 33 hosted no sanctioned tournament from January 2024 to September 2026, and 19 have no coach record in either program. Rural counties have one public court for every 9,194 residents, against 6,051 in the rest of the state (Sections 1.4, 1.5, 3.4, and 5).

Taken together, these findings describe a state with more players than at any point since at least 2019, a comparable number of residents who say they would like to play, and a court and program network whose reach varies widely by county. The sections that follow set out the evidence behind them: participation and growth in Sections 1 and 2, courts and public court investment in Sections 3 and 4, and coaching, academies, markets, and college tennis in Sections 5 through 8. Methods, data notes, and caveats for each section are collected in Appendix F.

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# Data used in this report

This report combines USTA Florida's own records with licensed and public data. The table lists each source, what it provides, the period it covers, and where it is used. Full citations are in Appendix B.

| Source | What it provides | Period | Sections |
|---|---|---|---|
| USTA Florida Courts and Facilities records (Dynamics 365) | Tennis courts and facilities by type, public or private access, surface, county, and region | Export of October 2026, updated through October 25, 2026 | 1.4, 2.2, 3, 4, 7, 6 |
| USTA Florida tennis academy records (Dynamics 365) | Tennis academies and the facilities where they operate | Export of October 25, 2026 | 6 |
| USTA Florida program records (Dynamics 365) | USTA adult leagues, youth team tennis, sanctioned tournaments, wheelchair programs, community program lists, grants, USTA Coaching enrollees, Community Coach trainings | 2024 to September 2026 | 1.3 to 1.5, 3.2, 4, 5 |
| Tournament reviews: FEEFO and Medallia | Player ratings and Net Promoter Score (NPS) for sanctioned tournaments | FEEFO 2024 to Dec. 2025; Medallia Dec. 2025 to Sept. 2026 | 1.4.2 |
| Community, club, and flex league listings and Universal Tennis Rating (UTR) events (USTA Florida collection) | League teams and participants, including Tennis Record FL, TenniScores, and Palm Tennis Leagues; UTR events | 2025 to 2026 season; UTR snapshot April to May 2026 | 1.3.1, 1.4.3 |
| High school lists and Florida High School Athletic Association (FHSAA) assignments | Schools with boys and girls tennis teams by class, region, and county | 2024-25 and 2025-26 seasons | 1.3.3, 3.4 |
| Kinetica county catchments | Current players, participation rates, interest to play, demographics (Applied Geographic Solutions (AGS) 2025), player spending, and wellbeing value for all 67 counties. Not used for trends. | Sports & Recreation Localized Intelligence 2025 | 1, 2.2, 3.5, 4, 7 |
| USTA U.S. Tennis Participation Reports (PAC Study) | Year-over-year participation trends for Florida and the nation | 2025 and 2026 reports (2019 to 2025 data) | 1.1, 2.1, 4.1 |
| UF BEBR | April 1 population estimates and county projections to 2050 (Medium as headline, High noted) | Bulletin 203, February 2026 | 2, 3, 4, 7 |
| Placer.ai | Site visits, average stay, and peak times at Florida tennis locations | 2024, 2025, and 2026 to date | 3.2, 3.3, 4.1, 4.3, 7 |
| Tourism Economics (Oxford Economics) | Economic impact of sanctioned tournaments and events | 2023 events; report released December 2024 | 3.5 |
| UK wellbeing valuation guidance | Method behind the wellbeing dividend: HM Treasury Green Book wellbeing guidance, Sport England social value work | 2021 to 2025 publications | 3.5 |

| Source | What it provides | Period | Sections |
|---|---|---|---|
| U.S. Census American Community Survey (ACS); Florida Department of Health | County income, poverty, age, and vehicle access; rural county list | ACS 2020 to 2024; 2020 Census | 3.4 |
| Funding program documents | USTA Tennis Venue Services (TVS), Florida Recreation Development Assistance Program (FRDAP), Outdoor Recreation Legacy Partnership (ORLP), and other state and federal mechanisms | 2026 | 4.4 |
| USTA Florida white paper | The Case for Public Tennis Court Investment in Florida, used as the baseline that Section 4 updates | March 2026 | 4 |
| USTA Florida college tennis study | Programs, rosters, and international share for Florida college tennis | 2025-26 season | 8 |

## HOW THE FIGURES ARE COUNTED

- **Estimates and records stay separate.** Kinetica and PAC figures are survey-based estimates of everyone who plays. USTA Florida program counts are records of organized play. The two are never added together.
- **Figures are reported as published.** No new estimates are built by applying national ratios to Florida. Growth is shown as simple year-over-year change, not compound annual growth.
- **Trends come from PAC.** Year-over-year participation change uses the PAC Study, which measures every year the same way. Kinetica's localized data is designed to show the current local picture, so it is used for where Floridians play today and is not compared across releases.
- **Matched periods only.** Florida tennis is seasonal, so partial-year comparisons use January to September against January to September.
- **One court count of record.** All court and facility figures come from one USTA Florida Courts and Facilities export (October 2026, updated through October 25, 2026), and court counts are full-size (78-foot) tennis courts. Kinetica data is never used for courts. Closed facilities and pickleball courts are excluded, school courts are counted as private because they are almost always locked to the public, and play recorded at a county or city parks department counts as public.
- **Rounding.** Counts are reported in full. Percentages in the text are generally rounded to whole numbers. Participation, interest, and demographic rates keep the decimals their source publishes (two places for Kinetica, one for PAC) so small differences between counties stay visible, and some shares keep one decimal where rounding would hide a difference.
- **Placer.ai.** Placer.ai figures are supportive excerpts and carry the required attribution wherever they appear. Placer.ai does not report how often individual players return.

# 1. Participation landscape

Section 1 describes who plays tennis in Florida and how they play. It opens with the market view (how many people play statewide and in each county, and who they are), moves to the program view (how organized play is structured through teams, competition, and community programs), and closes with latent demand, which bridges into Growth Trends and the case for public court investment.

## TWO MEASURES OF HOW MANY FLORIDIANS PLAY

This section uses two independent, survey-based sources for statewide participation. Each has strengths the other lacks, so the report uses them together.

| | |
|---|---|
| **Kinetica county catchments** | County-level estimates for all 67 Florida counties, with separate adult (18+) and youth (6 to 17) players, participation rates, and interest to play, plus Florida and U.S. totals. This report uses Kinetica Sports & Recreation Localized Intelligence 2025, which also includes frequency and commitment measures. Strength: county and age detail for the current year. Kinetica designs this data to show the current local picture, not change over time. |
| **PAC Study (USTA U.S. Tennis Participation Report)** | The Physical Activity Council Study on Sports and Physical Activity has tracked tennis since 2007. It is administered by Sports Marketing Surveys USA and surveys 18,000 Americans age 6 and older each year, supplemented by the USTA and National Golf Foundation PLAY Study, with analysis by the National Golf Foundation. The USTA publishes national figures and an estimate for each of its 16 sections, including Florida. Strength: a consistent method year to year and a national ranking of sections. Limit: no county or Florida age detail, and a margin of error published only nationally. |
| **USTA Florida program records** | Counts of teams, captains, players, tournaments, and community programs from USTA Florida systems (Sections 1.3 to 1.5). These are records, not estimates. |

## FLORIDA AT A GLANCE

Both sources put Florida at about two million tennis players, or roughly 9% of residents age 6 and older. Kinetica estimates 1,987,130 players (9.00%) in its 2025 release, and the PAC Study estimates 1,949,000 (9.1%) for 2025. The PAC Study shows Florida's participation rate rising 1.1 points from 2024 to 2025, moving Florida from below the national rate to above it.

Florida is the sixth-largest of the 16 USTA sections by number of players, and its 9.1% PAC rate is seventh-highest, above the 8.8% national rate. Florida accounts for 7.1% of all U.S. tennis players in both sources.

Nationally, tennis reached a record 27.3 million players in 2025 according to the PAC Study, up 1.6 million (+6%) from 2024, a participation rate of 8.8%. Interest in the sport is especially visible in Florida markets: three of the ten U.S. metro areas with the highest online search popularity for tennis in 2025 are in Florida, with West Palm Beach–Fort Pierce ranked second, Miami–Fort Lauderdale seventh, and Fort Myers–Naples eighth.

*Sources: Kinetica Sports & Recreation Localized Intelligence 2025 (Florida and U.S. columns of the county catchment reports); Physical Activity Council Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data). PAC figures shown as published.*

## HOW THIS SECTION IS ORGANIZED

| | |
|---|---|
| **1.1 Overall Participation** | Statewide and county-level player counts and participation rates from the Kinetica catchments, cross-checked against the PAC Study. |
| **1.2 Demographic Breakdown** | Age, income, geography, and race and ethnicity of players, drawing on the county catchments where the data supports it and on USTA/PAC national data where it does not. |
| **1.3 Team Play** | Adult leagues (USTA, community, and club), youth team tennis, and high school tennis. |
| **1.4 Competitive** | USTA sanctioned tournaments, the player experience in tournament reviews, and UTR-rated tournaments. |
| **1.5 Community** | Adaptive programs, including Special Olympics, community tennis associations, NJTL chapters, and USTA Florida's grants and equipment support for community programs and schools. |
| **1.6 Latent Demand** | Floridians who are interested in playing but do not play today. |

### How to read the participation figures

- Kinetica and PAC figures are survey-based estimates of everyone who played, including casual and unorganized play. USTA Florida program counts in Sections 1.3 to 1.5 are records of organized play. The two are kept separate and never added together.
- PAC figures are reported as published. National PAC ratios are not applied to Florida or its counties to create new estimates; where only national PAC data exists (for example, some demographics in Section 1.2), it is labeled as national.
- The two sources measure slightly different things: PAC counts play in the calendar year, and Kinetica counts play in the past 12 months. They also use different population bases.
- Year-over-year change comes from the PAC Study, which uses the same method every year. Kinetica's localized data is designed to show the current local picture of participation and demand, so the report uses it for where Floridians play today and does not measure change between Kinetica releases.

## SECTION AT A GLANCE

| | |
|---|---|
| **Tennis players, age 6+** | 1,987,130 Floridians played tennis in the past 12 months (Kinetica, 2025 release) |
| **Participation rate** | 9.00% of Floridians age 6+ |
| **Adults (18+)** | 1,613,752 players (8.50%) |
| **Youth (6 to 17)** | 373,378 players (12.02%) |
| **Florida vs. U.S.** | Florida's 9.00% rate is above the U.S. rate of 8.73% on the same method, and Florida holds 7.1% of U.S. tennis players |
| **Change over time (PAC)** | PAC puts Florida at 1,949,000 players and a 9.1% rate in 2025, within 2% of Kinetica, and shows Florida's rate rising (8.0% to 9.1%, +1.1 points) on a method that is consistent from year to year |
| **Geographic spread** | The top five counties hold 45.2% of all players |
| **Trend source** | Year-over-year change uses the PAC Study; Kinetica 2025 describes the current county picture |

# 1.1 Overall participation

Florida's tennis base is large. Kinetica's 2025 release estimates that **1,987,130 Floridians** age 6 and older played tennis at least once in the past 12 months, about one in eleven residents in that age range (9.00%). Adults account for 1,613,752 players (8.50%) and youth ages 6 to 17 for 373,378 (12.02%), so young Floridians play at a higher rate than adults.

**Table 1.1 Statewide participation, 2025 (Kinetica)**

| Metric | 2025 |
|---|---|
| Total players (6+) | 1,987,130 |
| Adults (18+) | 1,613,752 |
| Youth (6 to 17) | 373,378 |
| Population base (6+) | 22,089,721 |
| Total participation rate | 9.00% |
| Adult rate | 8.50% |
| Youth rate | 12.02% |

*Source: Kinetica Sports & Recreation Localized Intelligence 2025. Totals are the sum of all 67 county catchments and reconcile exactly to the Florida figures in the report.*

## FLORIDA COMPARED WITH THE NATION

On the same Kinetica method, Florida's 2025 participation rate (9.00%) is above the U.S. rate (8.73%). Florida's adult rate is well above the national figure (8.50% vs. 7.94%), while its youth rate trails (12.02% vs. 12.87%). Florida accounts for 7.1% of all U.S. tennis players while holding about 6.9% of the U.S. population.

**Table 1.2 Florida vs. U.S., 2025 (Kinetica)**

| Metric | Florida | U.S. |
|---|---|---|
| Total players (6+) | 1,987,130 | 27,855,960 |
| Adult rate | 8.50% | 7.94% |
| Youth rate | 12.02% | 12.87% |
| Total rate | 9.00% | 8.73% |
| Florida share of U.S. players | 7.1% | |

*Source: Kinetica Sports & Recreation Localized Intelligence 2025 (Florida and United States columns of the county reports).*

## CHANGE OVER TIME: THE PAC STUDY

The USTA's annual U.S. Tennis Participation Report is built on the PAC Study on Sports and Physical Activity, which has tracked tennis since 2007. The study is administered by Sports Marketing Surveys USA and surveys 18,000 Americans age 6 and older each year, with quotas for gender, age, income, region, and ethnicity. The USTA supplements it with the PLAY Study (18,000 more respondents), and the National Golf Foundation combines and weights the two. The report publishes a participation estimate for each USTA section, and the Florida section covers the state.

The two sources do different jobs. Kinetica provides county-level detail and separate adult and youth figures, which PAC does not publish for Florida. Kinetica designs its localized data to give the most current view of participation and demand at the local level, not to track change over time. This report therefore uses Kinetica for where Floridians play today and PAC, which measures every year the same way, for how participation is changing.

The two agree closely on the current picture. For 2025, PAC estimates 1,949,000 Florida players and a 9.1% participation rate, against Kinetica's 1,987,130 and 9.00%, a difference of 2%. Both sources put Florida at 7.1% of all U.S. players.

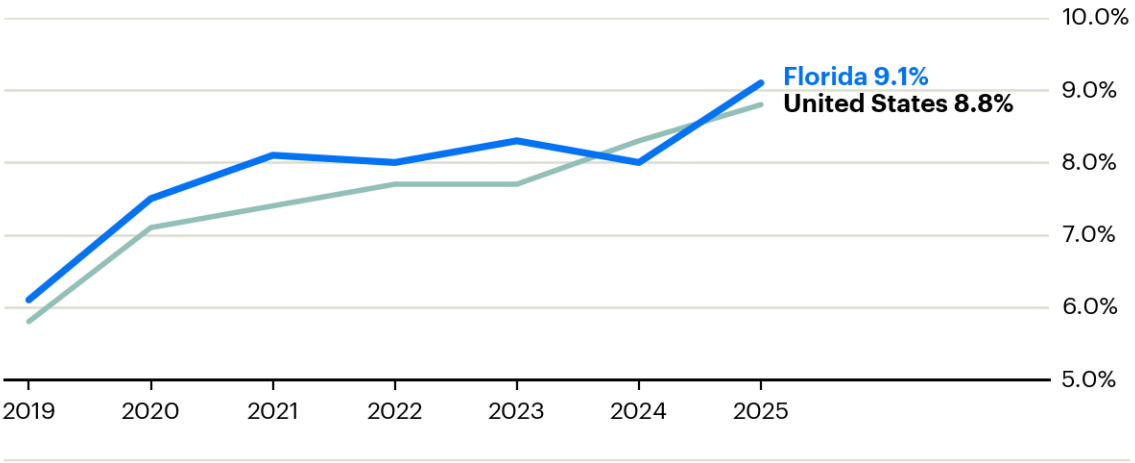
Over the longer span, Florida's participation rate rose from 6.1% in 2019 to 9.1% in 2025, the highest in the PAC figures published for those years. Florida sat above the national rate in every year from 2019 to 2023, dipped just below it in 2024 (8.0% against 8.3%), and moved back above it in 2025.

In the latest year, Florida's rate rose 1.1 points (8.0% to 9.1%) while the national rate rose from 8.3% to 8.8%, tied for the third-largest gain among the 16 USTA sections that PAC reports (the USTA has 17; the Caribbean section is not estimated because of its small sample). Single-year changes for one section carry sampling error: a peer reviewer estimated about plus or minus 1.1 points for a one-year change in Florida, which the National Golf Foundation, which weights the study, could confirm. The 2019 to 2025 trend is the stronger signal. Florida is the sixth-largest section by number of players, behind Southern, Midwest, Eastern, Southern California, and Texas, and its 9.1% rate is seventh-highest.

**FIGURE 1.1**

## Florida moved back above the nation

Tennis participation rate, age 6+, %, 2019 to 2025




Source: PAC Study, USTA U.S. Tennis Participation Reports, 2025 and 2026

*Figure 1.1 Tennis participation rate, age 6+, Florida section vs. U.S., 2019 to 2025 (PAC). Source: PAC Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data).*

**Table 1.3 Florida and U.S. participation, 2024 and 2025 (PAC)**

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Florida players (6+) | 1.7M | 1,949,000 | n/a |
| Florida participation rate | 8.0% | 9.1% | +1.1 pts |
| U.S. players (6+) | 25.7M | 27.3M | +1.6M (+6%) |
| U.S. participation rate | 8.3% | 8.8% | +0.5 pts |
| Florida share of U.S. players | | 7.1% | |

*PAC figures are shown as published. 2024 section player counts are rounded to 0.1 million in the source, so the change in Florida players is not calculated. Source: PAC Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data).*

Three differences between the sources are worth keeping in mind. PAC measures play in the calendar year, while Kinetica measures the past 12 months. The two use different population bases (PAC uses 311.3 million Americans age 6 and older for 2025; the Kinetica U.S. base is 319.2 million). And PAC publishes a margin of error only at the national level (±0.2% at the 95% confidence level, or about ±620,000 players), so the Florida section estimate carries more uncertainty than the national figure.

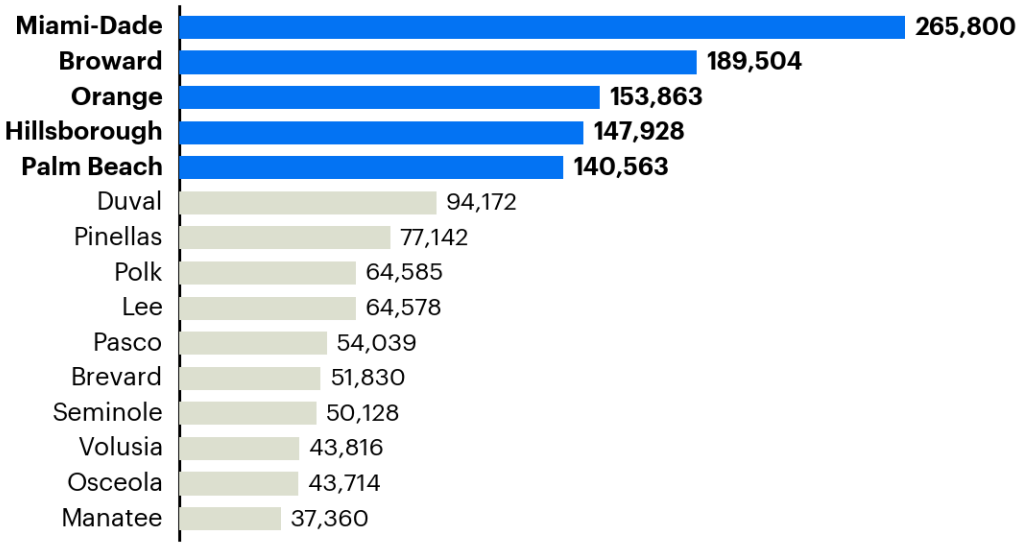
## WHERE FLORIDA'S PLAYERS ARE

Participation is concentrated in the large metro counties. The top five counties (Miami-Dade, Broward, Orange, Hillsborough, and Palm Beach) are home to 45.2% of all players statewide, and the top ten hold 63.0%. Miami-Dade alone has more than a quarter million players.

FIGURE 1.2

# Five metro counties hold almost half of all players

Tennis players age 6+, past 12 months, 2025, top 15 counties




Source: Kinetica Sports & Recreation Localized Intelligence 2025

*Figure 1.2 Top 15 counties by past 12-month tennis players (age 6+), 2025. Source: Kinetica Sports & Recreation Localized Intelligence 2025.*

**Table 1.4 Top 10 counties by number of players, 2025**

| County | Players | Share of Florida | Total rate | Adult rate | Youth rate |
|---|---|---|---|---|---|
| Miami-Dade | 265,800 | 13.4% | 9.96% | 9.47% | 12.97% |
| Broward | 189,504 | 9.5% | 9.88% | 9.33% | 13.11% |
| Orange | 153,863 | 7.7% | 10.69% | 10.16% | 13.57% |
| Hillsborough | 147,928 | 7.4% | 9.97% | 9.53% | 12.35% |
| Palm Beach | 140,563 | 7.1% | 9.39% | 8.86% | 12.85% |
| Duval | 94,172 | 4.7% | 9.58% | 9.27% | 11.21% |
| Pinellas | 77,142 | 3.9% | 8.32% | 7.88% | 11.99% |
| Polk | 64,585 | 3.3% | 8.12% | 7.71% | 10.26% |
| Lee | 64,578 | 3.2% | 7.89% | 7.44% | 11.06% |
| Pasco | 54,039 | 2.7% | 8.67% | 8.05% | 12.22% |

*Source: Kinetica Sports & Recreation Localized Intelligence 2025.*

### Participation rates by county

Rates vary by more than two and a half times across the state. St. Johns has the highest rate at 11.43%, followed by Alachua, Seminole, Orange, and Leon, all above 10%. Two of those five (Alachua and Leon) are home to major universities. At the other end, Glades (4.32%), Calhoun (4.82%), Putnam (5.05%), Holmes (5.08%), and DeSoto (5.21%) have the lowest rates. Thirteen counties sit above the statewide rate of 9.00%.

| Highest rates | 2025 rate | 2025 players |
|---|---|---|
| St. Johns | 11.43% | 36,366 |
| Alachua | 10.73% | 29,729 |
| Seminole | 10.72% | 50,128 |
| Orange | 10.69% | 153,863 |
| Leon | 10.39% | 29,619 |
| Hillsborough | 9.97% | 147,928 |
| Miami-Dade | 9.96% | 265,800 |
| Osceola | 9.92% | 43,714 |

*Table 1.5 Counties with the highest 2025 participation rates. Source: Kinetica.*

| Lowest rates | 2025 rate | 2025 players |
|---|---|---|
| Glades | 4.32% | 549 |
| Calhoun | 4.82% | 604 |
| Putnam | 5.05% | 3,672 |
| Holmes | 5.08% | 952 |
| DeSoto | 5.21% | 1,804 |
| Levy | 5.33% | 2,418 |
| Sumter | 5.37% | 8,160 |
| Dixie | 5.41% | 907 |

*Table 1.6 Counties with the lowest 2025 participation rates. Source: Kinetica.*

The gap between small and large counties is clear. Using the market tiers in Section 7, the 12 Large counties play at a combined 9.39%, the 25 Mid counties at 8.51%, and the 30 Small counties at 6.50%. Twenty counties have rates below 6%, and the rural counties discussed in Sections 3.4 and 4.2, an overlapping group, show the same gap.

### Depth of participation (2025 baseline)

The 2025 Kinetica release includes frequency and commitment measures, which describe how deeply Floridians play today. Statewide, 31.7% of players play weekly or more (3.5% daily or more), 48.3% play monthly but less than weekly, and 20.0% play less than monthly. Floridians logged an estimated 83.8 million tennis occasions, or about 42 per player per year. On commitment, 49.1% of players are classed as secure, 36.4% as stable, and 14.6% as at risk of dropping out; 5.6% of the age 6+ population are lapsed players. These figures sit close to the national profile (48.6% secure, 14.4% at risk).

PAC does not publish frequency or play occasions for Florida, and its national measures are defined differently (for example, PAC reports 23 play occasions per player nationally in 2025 and counts “core” players as those who play 10 or more times a year), so the Kinetica and PAC depth measures should not be compared directly.

# 1.2 Demographic breakdown

Section 1.1 established how many Floridians play: 1,987,130 people age 6 and older, or 9.00% of that population. This section asks who they are. It uses the same 67 Kinetica county catchments, so every demographic finding sits on the same geography and the same player counts as 1.1, and it brings in the USTA 2026 U.S. Tennis Participation Report (PAC and PLAY studies) where the catchments do not split players by age, income, or race-ethnicity.

**Key findings**

- **Florida plays above the national rate despite an older population.** Florida's participation rate is 9.00% in the Kinetica catchments and 9.1% in the USTA/PAC section figures, compared with 8.8% nationally, even though 21.8% of Floridians are 65 or older (18.0% nationally) and older adults play at less than half their share of the population.
- **Age 35+ is the growth engine.** Nationally, players 35 and older drove about 95% of 2025 growth and make up 46% of all players. Florida has a larger 35+ population than the nation: 63.8% of residents age 6+, compared with 59.6%.
- **Age 18 to 24 is a retention priority, not a current growth segment.** After leading 2024 growth, U.S. players age 18 to 24 dipped from 3.5 million to 3.4 million in 2025. Florida has proportionally fewer residents age 15 to 24 than the nation; its college counties, Leon and Alachua, are the exception.
- **Income and education draw the sharpest lines.** Youth in the highest-income quartile of counties play at 13.0%, compared with 7.4% in the lowest. Education and the share of residents 65+ together account for about 90% of the differences in adult participation between counties.
- **Florida is more Hispanic and more Black than the nation.** Hispanic residents are 27.7% of Floridians (19.2% nationally) and non-Hispanic Black residents 16.1% (13.2%). Nationally, Hispanic and Black participation have grown far faster than overall participation since 2020. At the county level, more diverse counties play more, but once education and age are accounted for, a county's racial and ethnic mix adds little to its participation rate.

## 1.2.1 AGE DISTRIBUTION

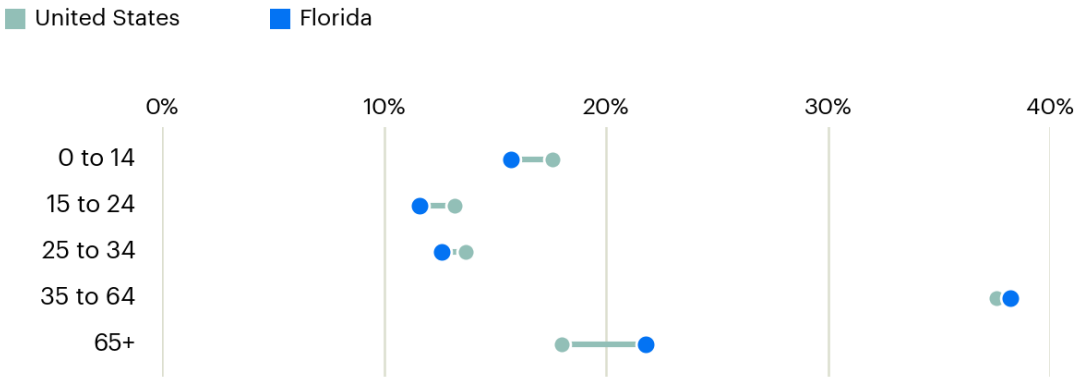
Florida's age profile is the single biggest demographic difference between the state and the nation. Residents 65 and older make up 21.8% of Florida's population, compared with 18.0% nationally, and 63.8% of Floridians age 6 and older are 35 or older (59.6% nationally). Young residents are the mirror image: 11.6% of Floridians are 15 to 24, compared with 13.2% nationally.

Age matters because participation falls steeply with age. Nationally, Americans age 18 to 24 make up 1.31 times as large a share of players as of the population (index 131), while those 65 and older make up less than half (index 45). Even so, Florida's rate of 9.00% (Kinetica) and 9.1% (USTA/PAC) is above the U.S. rate of 8.8%.

FIGURE 1.3

## Florida skews older than the nation

Share of residents by age band, %, Florida and United States, 2025




Source: AGS 2025 population, via Kinetica county catchments

*Figure 1.3. Share of residents by age band, Florida and U.S. Source: AGS 2025 population, as reported in the Kinetica county catchments.*

| U.S. players by age (2025) | 6-12 | 13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|---|---|---|---|---|---|---|---|---|
| Share of players | 13% | 12% | 12% | 18% | 15% | 12% | 10% | 9% |
| Index vs. population (100 = parity) | 138 | 165 | 131 | 123 | 107 | 96 | 69 | 45 |

*Table 1.7. Age profile of U.S. tennis players. Source: USTA 2026 U.S. Tennis Participation Report, Table 3. State-level player age data is not published.*

### The 35-plus growth segment

Established adults are carrying national growth. Players age 35 and older accounted for nearly 95% of the 1.6 million players the U.S. added in 2025, about 1.5 million players. The 35 to 44 group grew 13% (+488,000) and the 65+ group grew 14% (+299,000). Players 55 and older have more than doubled since 2019, from 1.9 million to 5.0 million.

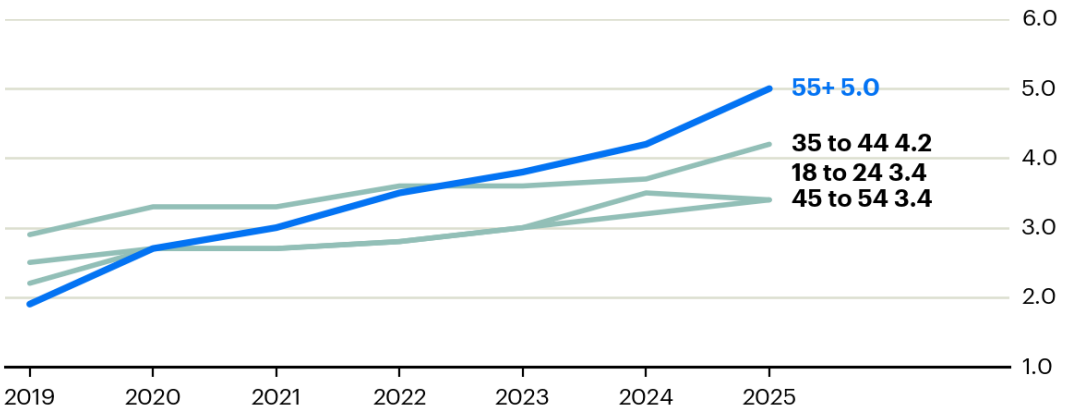
Florida is built for this segment. The state has 8.2 million residents age 55 and older. Among its oldest counties, participation ranges widely: Palm Beach (25% of residents 65+) plays at 9.39%, Manatee (29%) at 8.55%, Collier (34%) at 8.50% and Sarasota (38%) at 7.76%, while Charlotte (41%) plays at 5.91%, Citrus (37%) at 5.69%, Highlands (36%) at 5.55% and Sumter (57%) at 5.37%. The older counties with higher participation also have higher incomes and education levels (Section 1.2.2).

Nationally, players 35 and older make up 46% of all players (USTA 2026 report, Table 3). Florida-specific player counts by age are not published by Kinetica or USTA.

FIGURE 1.4

## Players 55 and older more than doubled

U.S. tennis players by age, millions, 2019 to 2025




Source: USTA 2026 U.S. Tennis Participation Report, Chart 5 (PAC Study)

*Figure 1.4. U.S. tennis players by age, 2019 to 2025 (millions). Source: USTA 2026 U.S. Tennis Participation Report, Chart 5 (values from chart labels, rounded to 0.1 million). Florida-specific age trends are not available.*

### The 18 to 24 segment

Players age 18 to 24 led national growth until recently, and the USTA 2026 report shows the trend: U.S. players age 18 to 24 rose from 2.5 million in 2019 to 3.0 million in 2023 and 3.5 million in 2024. The 2025 data changes that picture. The group dipped to 3.4 million in 2025, and its share of all players fell from 14% to 12%. The segment still plays at about 1.3 times its share of the population (index 131), so the opportunity is to keep and convert the young adults who came into the game, rather than to count on continued growth.

In Florida, the clearest young-adult markets are the two large college counties. About a quarter of residents in Leon (24.8%) and Alachua (24.2%) are 15 to 24, more than double the state share of 11.6%, and both have adult participation rates of about 10.3%, against 8.5% statewide. Across all 67 counties, a larger 15-to-24 share goes with higher adult interest in playing among non-players (correlation 0.55), while a larger 65+ share goes with lower interest (-0.62). This links directly to latent demand in Section 1.6.

### County view: share of residents 65+

| County quartile (% age 65+) | Counties | Range | Total rate | Adult rate | Youth rate | Share of residents 6+ | Share of players |
|---|---|---|---|---|---|---|---|
| Lowest | 17 | 13.5% to 17.8% | 10.01% | 9.54% | 12.62% | 39.9% | 44.4% |
| Second | 17 | 18.2% to 21.6% | 9.15% | 8.64% | 12.01% | 17.8% | 18.1% |
| Third | 16 | 21.8% to 25.9% | 8.44% | 7.94% | 11.58% | 18.8% | 17.6% |
| Highest | 17 | 26.1% to 57.2% | 7.60% | 7.15% | 11.09% | 23.5% | 19.8% |

*Table 1.8. Pooled participation by county quartile of residents 65+. Each quartile pools all residents and players in its counties. Source: Kinetica 2025 county catchments; AGS 2025.*

The youngest quarter of counties, which includes Orange, Miami-Dade, Hillsborough, Duval and Osceola, holds 40% of Florida's residents age 6+ and 44% of its players. The oldest quarter plays at 7.60%, about 2.4 points below the youngest.

### 1.2.2 INCOME AND EDUCATION

Income is the clearest dividing line in Florida tennis. When counties are grouped into four equal sets by average household income, participation climbs at every step, from 5.90% in the lowest-income quarter to 9.65% in the highest. The gap is widest for youth: 7.4% versus 13.0%, so a child in a high-income county is about 1.75 times as likely to play.

**FIGURE 1.5**

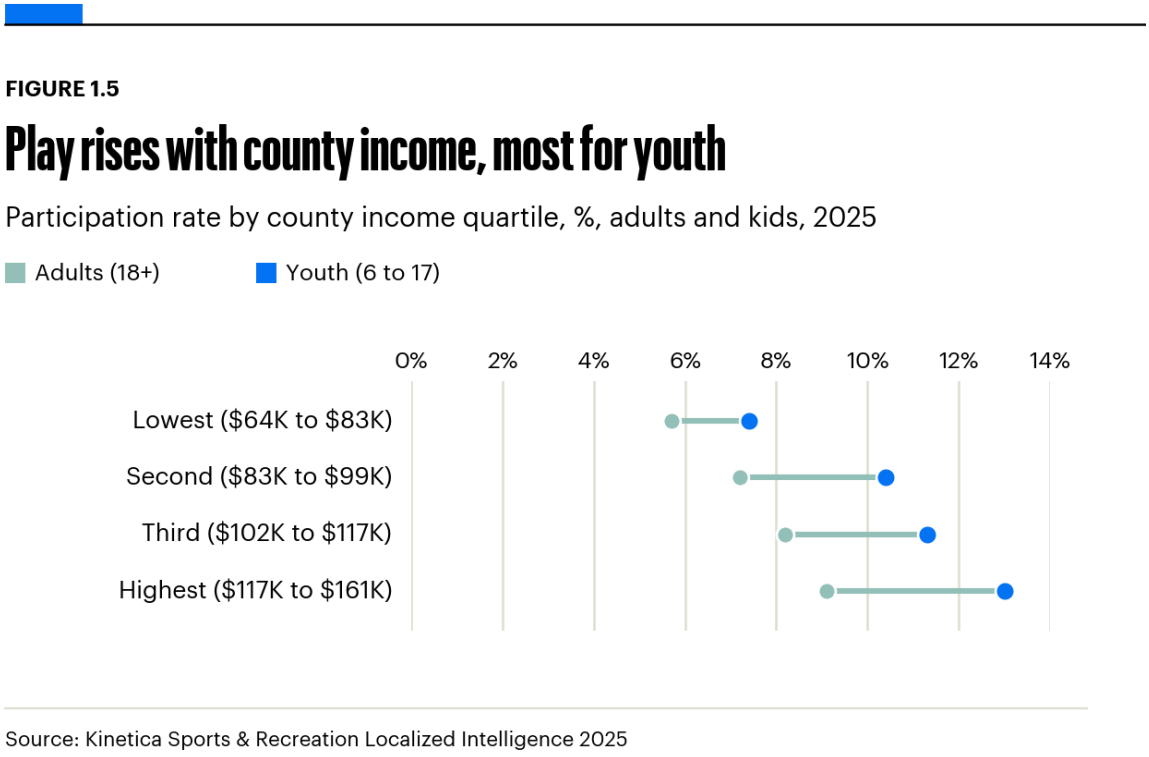



*Figure 1.5. Pooled adult and youth participation rates by county income quartile. Source: Kinetica 2025 county catchments; AGS 2025 average household income.*

| County quartile (avg. HH income) | Counties | Range | Total rate | Adult rate | Youth rate | Share of residents 6+ | Share of players |
|---|---|---|---|---|---|---|---|
| Lowest | 17 | $64K to $83K | 5.90% | 5.65% | 7.40% | 2.2% | 1.4% |
| Second | 17 | $83K to $99K | 7.67% | 7.21% | 10.36% | 15.2% | 13.0% |
| Third | 16 | $102K to $117K | 8.58% | 8.15% | 11.26% | 25.0% | 23.8% |
| Highest | 17 | $117K to $161K | 9.65% | 9.10% | 12.96% | 57.6% | 61.8% |

*Table 1.9. Pooled participation by county income quartile. Range = average household income of the lowest and highest county in each quartile. Source: Kinetica Sports & Recreation Localized Intelligence, 2025 county catchment reports.*

Spending follows the same pattern. The median county in the lowest-income quarter averages $189 a year in tennis spending per player, against $307 in the highest. The player-segment mix shifts too: the Non-Tennis segment is 41.4% of adults in the lowest-income quarter and 30.8% in the highest, while Dedicated

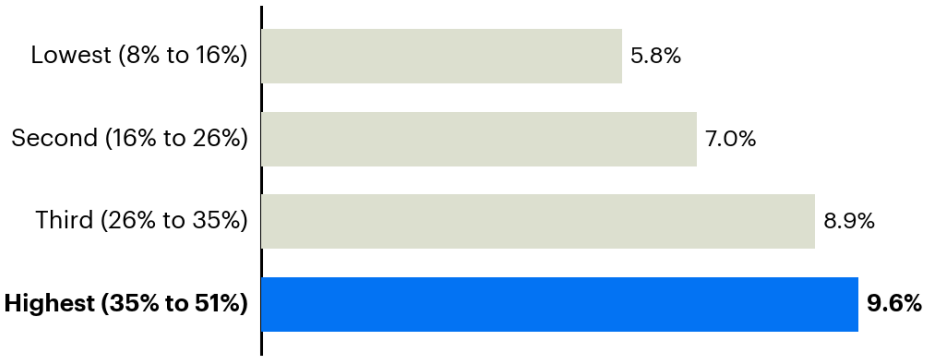
Enthusiasts rise from 6.1% to 9.2%. Counties with lower incomes also have a larger share of players at risk of dropping out (correlation with income: -0.57).

Education is an even stronger signal than income. The share of adults with a bachelor's degree correlates at 0.82 with county adult participation and 0.81 with youth participation. Together, education and the share of residents 65+ account for about 90% of the variation in adult participation across the 67 counties.

**FIGURE 1.6**

## Participation rises with education

Participation rate (age 6+) by county quartile of adults with a bachelor's degree, %




Source: Kinetica 2025 county catchments, education from AGS 2025

*Figure 1.6. Participation rate (age 6+) by county quartile of adults with a bachelor's degree or higher. Sources: Kinetica 2025; AGS 2025.*

Nationally, the same gradient holds for individuals: 39% of U.S. players live in households earning $125,000 or more, and people in households under $25,000 make up about half as large a share of players as of the population (index 51). Florida has fewer $125K+ households than the nation (27.8% vs. 31.2%), yet its participation rate is above the national rate.

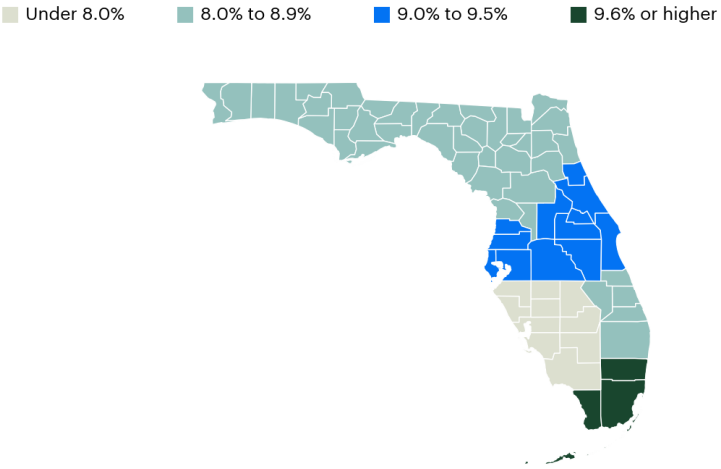
### 1.2.3 GEOGRAPHIC DISTRIBUTION BY COUNTY

County participation rates range from 4.32% in Glades to 11.43% in St. Johns. The map shows each county's rate for residents age 6 and older, with the statewide rate of 9.0% at the center of the color scale.

FIGURE 1.7

## Participation is highest in Region 8

Tennis participation rate (age 6+) by USTA Florida region, 2025




Source: Kinetica 2025, regional totals

*Figure 1.7. Tennis participation rate by USTA Florida region, age 6+. Source: Kinetica 2025 county catchments.*

Thirteen counties play at or above the statewide rate, and together they hold 55% of Florida's residents age 6+ and 61% of its players. They are the large metros (Orange, Miami-Dade, Broward, Hillsborough, Duval, Palm Beach), the high-education suburbs (St. Johns, Seminole), the college counties (Alachua, Leon), Osceola, and two Panhandle counties (Okaloosa, Santa Rosa). At the other end, 20 counties play below 6%. They hold 5% of residents and about 60,000 players. Most are rural counties in North Florida, along the Nature Coast, and in the interior of South-Central Florida, where incomes are lower and bachelor's degree shares are mostly below 18%; Charlotte, Citrus, Highlands and Sumter are older retirement counties. Across the 30 counties with fewer than 100,000 residents, the pooled rate is 6.5%.

### Highest and lowest participation counties

| County | Players | Rate (6+) | Avg. HH income | Bachelor's+ | Age 65+ |
|---|---|---|---|---|---|
| St. Johns | 36,366 | 11.43% | $158,677 | 51% | 22% |
| Alachua | 29,729 | 10.73% | $105,550 | 50% | 16% |
| Seminole | 50,128 | 10.72% | $122,779 | 44% | 17% |
| Orange | 153,863 | 10.69% | $119,135 | 40% | 14% |
| Leon | 29,619 | 10.39% | $106,367 | 50% | 16% |
| Hillsborough | 147,928 | 9.97% | $123,131 | 39% | 16% |
| Miami-Dade | 265,800 | 9.96% | $117,759 | 35% | 17% |
| Osceola | 43,714 | 9.92% | $97,521 | 30% | 13% |
| Broward | 189,504 | 9.88% | $121,431 | 38% | 19% |
| Okaloosa | 19,868 | 9.66% | $120,349 | 36% | 17% |

*Table 1.10. Ten counties with the highest participation rates. Source: Kinetica 2025; AGS 2025.*

| County | Players | Rate (6+) | Avg. HH income | Bachelor's+ | Age 65+ |
|---|---|---|---|---|---|
| Glades | 549 | 4.32% | $73,225 | 14% | 26% |
| Calhoun | 604 | 4.82% | $72,539 | 14% | 20% |
| Putnam | 3,672 | 5.05% | $71,993 | 16% | 24% |
| Holmes | 952 | 5.08% | $70,312 | 13% | 21% |
| DeSoto | 1,804 | 5.21% | $73,398 | 12% | 24% |
| Levy | 2,418 | 5.33% | $81,702 | 17% | 26% |
| Sumter | 8,160 | 5.37% | $102,876 | 37% | 57% |
| Dixie | 907 | 5.41% | $69,531 | 9% | 25% |
| Taylor | 1,122 | 5.48% | $84,029 | 16% | 22% |
| Highlands | 5,826 | 5.55% | $83,493 | 21% | 36% |

*Table 1.11. Ten counties with the lowest participation rates. Small-county rates rest on small player counts; treat close rankings within this group with care. Source: Kinetica Sports & Recreation Localized Intelligence, 2025 county catchment reports.*

This pattern points the facility and program story in Sections 2 and 3 at a specific set of places. The rural counties with the lowest rates are where the gap between a county's population and its participation is widest, and where the case for public court investment and entry-level programming is strongest.

### 1.2.4 RACIAL AND ETHNIC DIVERSITY

Florida is more Hispanic and more Black than the nation. Hispanic residents of any race make up 27.7% of the population (19.2% nationally) and non-Hispanic Black residents 16.1% (13.2%). Non-Hispanic Asian residents are a smaller share than nationally (3.3% vs. 6.6%), and non-Hispanic white residents make up 50.7% (57.6%).

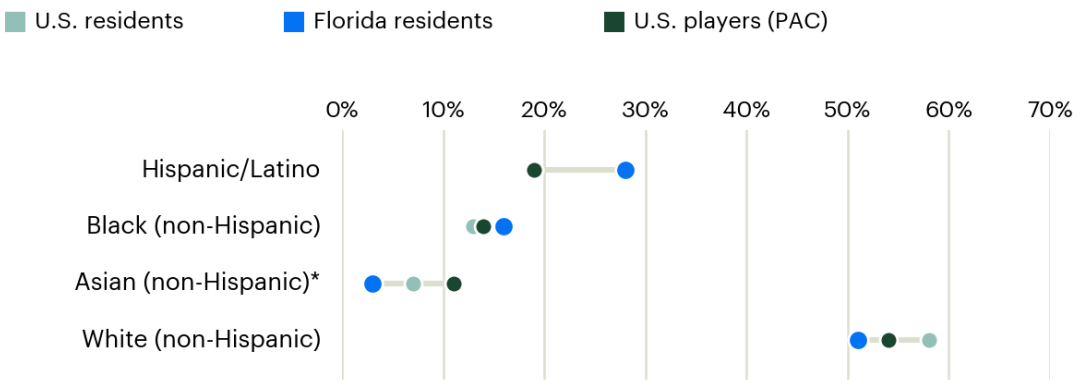
Nationally, tennis growth since 2020 has come disproportionately from communities of color. Between 2020 and 2025, Hispanic players nearly doubled, from 2.7 million to 5.1 million, and Black players rose from 2.1 million to 3.7 million. Asian/Pacific Islander players rose from 2.1 million to 3.0 million, while white players were nearly flat (14.5 million to 14.7 million). Black players were one of the four headline growth segments of 2025 (+14%, +454,000). Relative to their share of the population, Asian/Pacific Islander (index 181) and Hispanic (119) Americans are over-represented among players, Black Americans are at parity (101), and non-Hispanic white Americans are under-represented (89).

The catchments report the racial and ethnic makeup of each county's residents but not of its players, and the USTA report does not break players down by state. This section therefore reports Florida's resident makeup alongside the national player profile, and uses county comparisons to show how participation varies with a county's makeup. It does not estimate the race-ethnicity of Florida players.

FIGURE 1.8

## Florida is more Hispanic and more Black than the nation

Share of residents and of U.S. tennis players by race-ethnicity, %




Sources: AGS 2025 via Kinetica; USTA 2026 report. *Players: Asian/Pacific Islander

*Figure 1.8. Race-ethnicity of Florida and U.S. residents (AGS 2025, via Kinetica county catchments) and of U.S. tennis players (USTA 2026 report, Table 3). Florida-specific player data by race-ethnicity is not available. *U.S. player figure is Asian/Pacific Islander. Resident shares use the AGS population base and player shares come from the PAC Study, so the two bases differ; PAC's own index for Hispanic players is 119. Sources: AGS 2025 population, via Kinetica county catchment reports; USTA 2026 U.S. Tennis Participation Report (PAC Study).*

*Across Florida's counties, income, education, and access to courts and programs are the factors most closely tied to how many people play.*

## 1.3 Team play

Team play is where Florida tennis turns from a game into a habit. Team tennis brings a unique dimension to the sport, turning individual matches into a shared effort where every player contributes to the team's success. This section sizes that habit across adult leagues of every kind, USTA leagues and community, club, and flex leagues alike, and across youth team tennis programs.

**59,786**
USTA LEAGUE PARTICIPANTS, 2025 (+2%)

**2,287**
VOLUNTEER LEAGUE CAPTAINS, 2025

**+16%**
YOUTH TEAM TENNIS PLAYERS, SPRING 2026 VS SPRING 2025

**41,814**
COMMUNITY AND CLUB LEAGUE PARTICIPANTS

**How to read these numbers.** Every count in this section is a participant, not a unique player. One person on an 18 & Over team, a Mixed team, and a Combo team counts three times, and someone in both a USTA league and a community or club

> league is counted in both. Participants measure the volume of organized team play. A unique player count requires a de-duplicated player ID, which the current exports do not carry.

### TEAM PLAY AT A GLANCE

| Program | Period | Teams | Participants | Change |
|---|---|---|---|---|
| USTA adult leagues | 2025 league year | 4,683 | 59,786 | +2% vs 2024 |
| Youth team tennis | 2025 calendar year | 450 | 2,417 | +11% vs 2024 |
| Community and club leagues | 2025 to 2026 season | 2,437 | 41,814 | No prior baseline |
| **Total participants** | | **7,570** | **104,017** | |

*Sources: USTA Florida Dynamics 365 participation exports (adult league captains, youth team tennis captains and co-captains), pulled October 2026; USTA Florida community and club league collection, spring 2026; 2026 USTA National League Survey. Periods differ by program and are not summed into a single trend.*

## 1.3.1 ADULT LEAGUES

USTA Florida leagues held steady and grew a little between the 2024 and 2025 league years. Participants rose 2% to **59,786** across **4,683** team records, led by **2,287** volunteer captains. The more telling shift is underneath the total: the number of full-roster teams (three or more players) dipped slightly, from 4,191 to 4,165, while participants grew, so the average team carried slightly more players. Growth in team records came from individual and partner registrations in Flex, Social, and park-run Mixed formats, which rose from 427 to 518.

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Team records (all formats) | 4,618 | 4,683 | +1% |
| Full-roster teams (3+ players) | 4,191 | 4,165 | -1% |
| Individual or pair registrations | 427 | 518 | +21% |
| Participants | 58,695 | 59,786 | +2% |
| Unique captains | 2,253 | 2,287 | +2% |
| Host facilities | 390 | 389 | 0% |
| Counties hosting teams | 37 | 36 | -1 |

*League year follows the USTA championship year; the 2025 league year includes seasons starting August 2024. All records carry Completed status. 2026 is excluded because its league year is still in progress.*

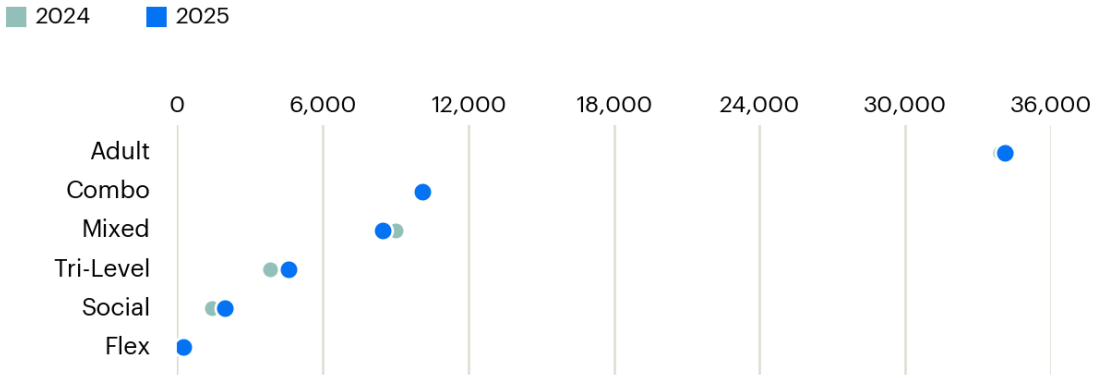
### FORMATS: TRI-LEVEL AND SOCIAL ARE THE GROWTH STORY

The traditional Adult format still carries well over half of all participants (57%), and it held flat. The momentum is in formats built for flexibility and fun. **Tri-Level** teams grew 15% and their participants grew 20%. **Social** league teams grew 27%, with participants up 38%. Mixed full-roster teams declined 5%, though some of that play shifted into partner-based Mixed registrations at county parks departments, which are counted separately. Flex leagues are individual registrations (one player per record) and fell from 316 to 262.

FIGURE 1.9

## Adult leagues hold most participants

USTA league participants by league type, 2024 and 2025 league years




Source: USTA Florida Dynamics 365 league records. Flex counts individual registrations

*Figure 1.9. Adult leagues hold most participants. Source: USTA Florida Dynamics 365 league records. Flex counts individual registrations*

*Adult, Combo, Mixed, Tri-Level, and Social show full-roster teams (3+ players). Flex shows individual registrations.*

### AGE AND GENDER

The 18 & Over division is where league play is adding teams, up 3% to 2,774 records. The 40 & Over division held its team count but added 726 participants (+5%). The senior divisions are softening: 55 & Over teams fell 5%, 65 & Over fell 4%, and 70 & Over dropped from 21 teams to 16. Women's teams account for **59%** of all participants (35,518), men's teams 24%, and mixed teams 16%. That is a sharp contrast with youth team tennis, where boys and girls are at parity (see 1.3.2).

| Age division | Teams 2024 | Teams 2025 | Team change | Participants 2025 | Share |
|---|---|---|---|---|---|
| 18 & Over | 2,685 | 2,774 | +3% | 33,308 | 56% |
| 40 & Over | 1,017 | 1,014 | <1% | 15,182 | 25% |
| 55 & Over | 516 | 489 | -5% | 6,165 | 10% |
| 50 & Over | 241 | 238 | -1% | 3,175 | 5% |
| 65 & Over | 138 | 133 | -4% | 1,513 | 3% |
| 70 & Over | 21 | 16 | -24% | 181 | <1% |
| Not recorded | 0 | 19 | n/a | 262 | <1% |

### WHERE LEAGUE PLAY HAPPENS

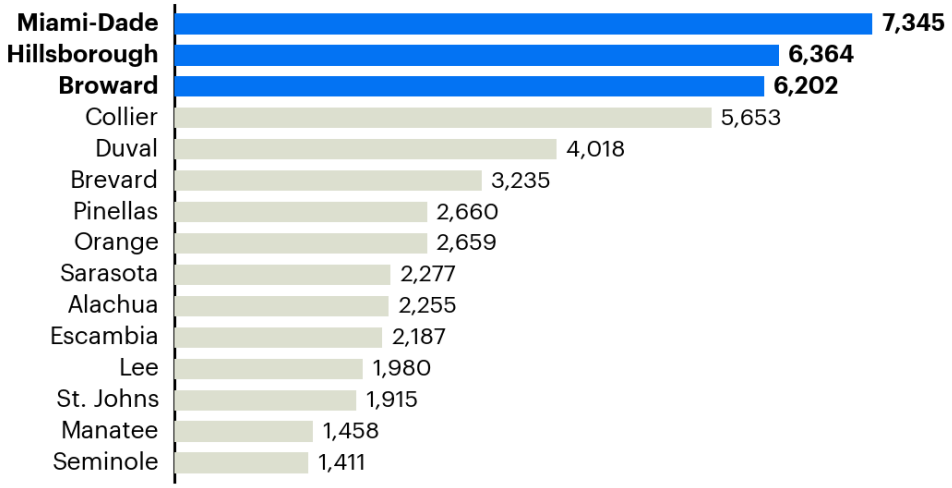
League play is concentrated. Four counties, **Miami-Dade, Hillsborough, Broward, and Collier**, hold 43% of all participants statewide. Adjusting for population changes the picture: statewide, there are about 25

league participants for every 10,000 residents, while **Collier County** runs at 135 per 10,000, more than five times the state rate. Alachua (77), Walton (77), Escambia (66), and St. Johns (57) also punch well above their size.

FIGURE 1.10

## Miami-Dade leads league play

USTA league participants by county of home facility, 2025, top 15 counties




Source: USTA Florida Dynamics 365 league records, 2025 league year

*Figure 1.10. Miami-Dade leads league play. Source: USTA Florida Dynamics 365 league records, 2025 league year*

*Participants by the county of the team's home facility. Population: Kinetica Catchment Reports (2025 estimates, September 2026 release).*

Among counties with at least 30 full-roster teams, the fastest growth from 2024 to 2025 came in **Walton** (+46%, 35 to 51 teams), **Charlotte** (+35%, 23 to 31), **Orange** (+14%), **Manatee** (+13%), **Brevard** (+8%), Sarasota and St. Johns (+7% each), and Miami-Dade and Broward (+6% and +5%). The steepest declines were in **Okaloosa** (-45%, 38 to 21 teams), **Clay** (-31%), **Leon** (-14%), **Marion** (-13%), Collier (-9%), Alachua (-8%), Duval (-7%), Polk (-7%), and Lee (-6%). Lee and Duval are worth reading alongside 1.3.1: both also have large community and club league systems that serve many of the same players and courts.

### THE COVERAGE GAP

In 2025, **31 of Florida's 67 counties had no USTA league team based in the county.** Those counties are home to about 1.64 million residents and an estimated 89,000 adults who played tennis in the past year. Most are small and rural, but the list also includes **Osceola County (474,816 residents in Kinetica's catchment** and an estimated 33,765 adult players), which had five team records in 2024 and none in 2025, plus Hernando (219,403 residents) and Highlands (110,405). Some of these players likely travel to leagues in

neighboring counties, Osceola into Orange in particular, but the gap lines up closely with the high-growth pressure counties in Section 2.2 and the underserved counties in Section 3.4.

### THE BUSIEST LEAGUE HUBS

A small set of facilities carries a large share of league play, and **seven of the ten busiest are public facilities**: Roger Scott, Forestmeadows, Fort King, Frank Veltri, Sanlando, Ron Ehmann, and McMullen. That is a direct link to the public court investment case in Section 4: when these sites lose court time or fall into disrepair, hundreds of teams feel it.

| Facility | County | Type | Full-roster teams 2025 | Participants |
|---|---|---|---|---|
| Roger Scott Tennis Center | Escambia | Public | 134 | 1,629 |
| HCC Tennis Complex | Hillsborough | Private | 105 | 1,624 |
| Midtown Athletic Club Weston | Broward | Private | 93 | 1,433 |
| Forestmeadows Park & Athletic Center | Leon | Public | 74 | 901 |
| Fort King Tennis Center | Marion | Public | 72 | 1,014 |
| Frank Veltri Tennis Center | Broward | Public | 67 | 1,020 |
| USTA National Campus | Orange | Private | 64 | 875 |
| Sanlando Park | Seminole | Public | 60 | 890 |
| Ron Ehmann Park | Miami-Dade | Public | 57 | 927 |
| Henry L. McMullen Tennis Complex | Pinellas | Public | 55 | 753 |

*Facility type from the USTA Florida Courts and Facilities list (October 2026). Brian Piccolo Tennis Center (Broward, public) and Eastern Florida State College (Brevard, private) also had 55 full-roster teams.*

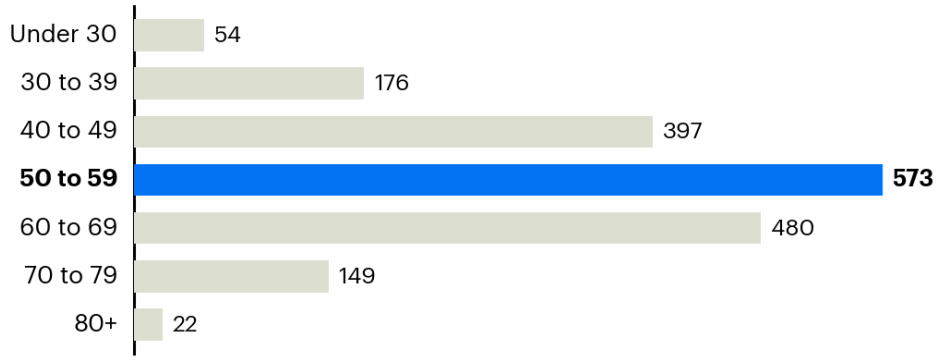
### CAPTAINS: THE VOLUNTEER ENGINE

Every league team runs on a captain, and Florida's captains carry a lot. In 2025, **2,287** unique captains led 4,683 team records. Nearly half (**1,092**, or 48%) led two or more teams, and **556** led three or more. Among the 1,851 captains with an age on record, the median is 55. Only 230 (12%) are under 40, while 651 (35%) are 60 or older. That age profile is a succession risk for the league system and a clear target for Big Bold Move 3, Volunteer System and Structure.

FIGURE 1.11

## Most league captains are 40 to 69

Unique USTA league captains by age, 2025




Source: USTA Florida Dynamics 365 league records

*Figure 1.11. Most league captains are 40 to 69. Source: USTA Florida Dynamics 365 league records*

*Unique captains by USTA number; age as recorded on the contact record at the time of export. 436 captains have no birthdate on file and are excluded.*

### WHAT LEAGUE PLAYERS TELL US: THE 2026 LEAGUE SURVEY

In February 2026, the USTA surveyed league players across the country about their 2025 season in its national league survey. 999 Florida players responded (860 completed the full survey), and the figures here are their responses. The survey adds what the participation records cannot: why people play leagues and how the experience feels. Respondents skew female (69%, compared with 59% of participants on women's teams) and older (median age 59), and results are not weighted, so read them as the voice of engaged league players rather than a precise statewide estimate.

**75%**
SATISFIED WITH THEIR 2025 LEAGUE EXPERIENCE

**+28**
NET PROMOTER SCORE (N=919)

**88%**
PLAN TO PLAY USTA LEAGUES IN 2026

**57%**
PLAY FOR EXERCISE AND HEALTH

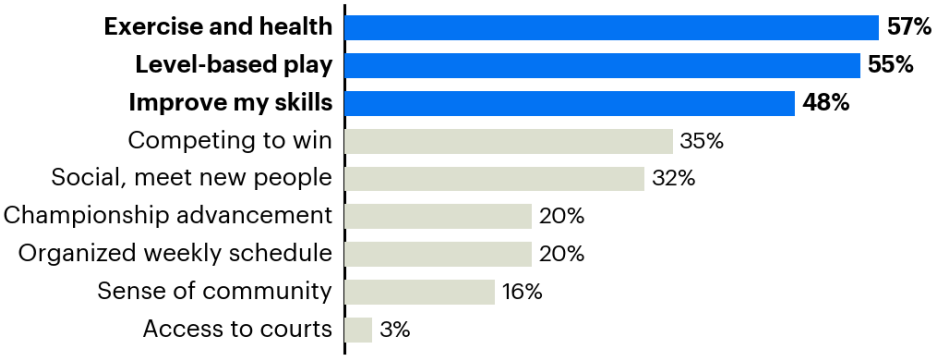
### WHY THEY PLAY

League tennis is a health habit first and a competition second. The top reasons are **exercise and health** (57%), **level-based play** with others at the same skill level (55%), and **improving their own skills** (48%). Competing to win (35%) and meeting new people (32%) follow. Championship advancement, the structure most league rules are built around, motivates only one player in five. Relationships are the glue: 92% play with people they met through tennis and 89% with friends.

FIGURE 1.12

# Fitness and fair matches keep players coming

Reasons for playing league tennis, % of respondents, select all that apply




Source: 2026 USTA National League Survey, Florida respondents, n=893

*Figure 1.12. Fitness and fair matches keep players coming. Source: 2026 USTA National League Survey, Florida respondents, n=893*

*2026 USTA National League Survey, question 16 (select all that apply), n=893.*

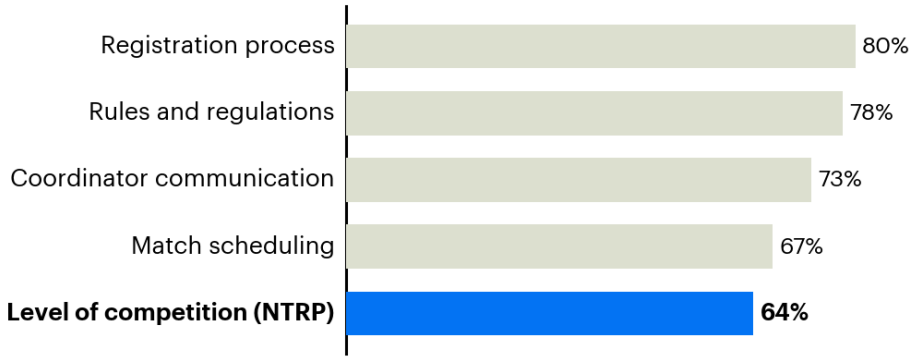
## HOW IT FEELS

Three in four respondents (**75%**) were satisfied with their 2025 league experience, a quarter extremely so, and 11% were dissatisfied. The **Net Promoter Score is +28** (49% promoters, 21% detractors), and **88%** plan to play USTA leagues again in 2026, with another 8% unsure. Registration and rules rate best. **Level of competition, meaning National Tennis Rating Program (NTRP) rating accuracy, rates lowest**: 64% satisfied and 17% dissatisfied.

FIGURE 1.13

## Level of competition rates lowest

Share of league players satisfied with each part of the experience, %, 2025 season




Source: 2026 USTA National League Survey, Florida respondents, n=902

*Figure 1.13. Level of competition rates lowest. Source: 2026 USTA National League Survey, Florida respondents, n=902*

*2026 USTA National League Survey, question 15, n=902.*

Rating accuracy is also the element that swings loyalty most. Players satisfied with the level of competition give leagues an NPS of **+52**; players dissatisfied with it give **-43**, a 95-point gap. The open-ended answers say the same thing in players' own words: ratings, sandbagging, or mismatched levels come up in about 37% of detractor comments but only 7% of promoter comments. Promoters talk most about friends, fun, and the social side (39% of their comments), while scheduling and summer heat show up in a quarter of detractor comments.

| Experience element | Satisfied | Dissatisfied | NPS if satisfied | NPS if dissatisfied |
|---|---|---|---|---|
| Level of competition (NTRP accuracy) | 64% | 17% | +52 | -43 |
| Match scheduling and timing | 67% | 14% | +52 | -33 |
| Rules and regulations | 78% | 8% | +46 | -48 |
| Coordinator communication | 73% | 7% | +48 | -51 |
| Registration process | 80% | 6% | +42 | -50 |

*Open-ended themes coded by keyword from 728 comments to question 14; treat percentages as directional.*

### WHAT WOULD MAKE IT BETTER

When asked what would improve the experience, players point to value and fairness more than process. The top asks are **better perks for league players** (35%), **electronic line calling** (33%), **lower fees** (30%), **more flexible match days and times** (29%), and **greater oversight of sportsmanship** (22%). Only 8% said their experience needs no improvement. Among the roughly 100 respondents not planning to return or unsure, the most common reasons were that they **will play in leagues outside the USTA** (37%), the

experience was not enjoyable (35%), negative conduct from players or teams (28%), and not having a captain or consistent team (21%). The base is small, but the first reason connects directly to the community or club league system in 1.3.1.

### WHERE LEAGUE PLAYERS PLAY

League players are club players first, but public courts matter to most of them. **82%** play on private club courts and 48% on private community or residential courts, yet **60%** also use public courts, paid (45%) or free (36%). Clay is the dominant surface (85%). The barriers that limited their play were mostly outside anyone's control (weather 32%, injury 28%), but 16% cited **limited leagues to play in**, 16% limited people to play with, and 13% **courts being busy** when they want to play.

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## COMMUNITY, CLUB, AND FLEX LEAGUES

This is the first time the State of Florida Tennis report has sized community, club, and flex league play. Club leagues, municipal leagues, regional associations, and flex leagues are a big part of how Floridians play, and in several markets they are the main way. The figures below are a first count, reported as collected.

### WHAT WE COUNTED

USTA Florida collected league records in spring 2026. This section uses every Florida record with a reported participant count: **2,467 records from 24 sources**, totaling **41,814 participants**. Three teams based in Georgia are excluded. UTR tournaments, collected at the same time, are held separately and are reported in Section 1.4 Competitive. Records come in three forms:

| Record type | Records | Participants | Share |
|---|---|---|---|
| Team records (20 sources) | 2,437 | 39,156 | 94% |
| League-level totals (TenniScores, Palm Tennis Leagues) | 19 | 2,340 | 6% |
| Flex league registrations (Tampa, Orlando) | 11 | 318 | 1% |
| **Total** | **2,467** | **41,814** | **100%** |

*Source: USTA Florida community and club league collection, Combined Leagues (Has Participation) sheet, spring 2026. Records without a reported participant count, and three Georgia-based teams, are not included. Shares do not sum to 100% due to rounding.*

### WHAT WE FOUND

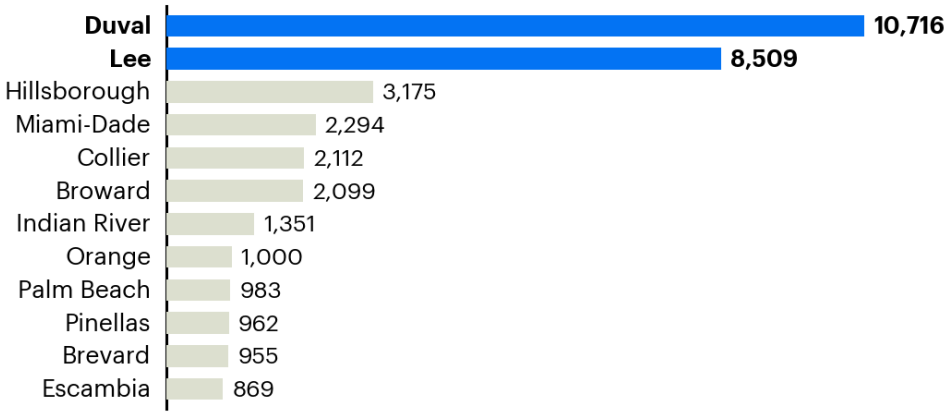
Community, club, and flex leagues recorded 41,814 participants, alongside 59,786 USTA league participants. Together, Florida's adult leagues recorded about 101,600 participants, about two in five of them in community and club leagues. That is a much fuller picture of organized league play than any prior USTA Florida report has captured.

Two markets lead. **Duval County** (10,716 participants, 449 teams) and **Lee County** (8,509 participants, 598 teams) together hold 46% of all community and club league participants. In both, community and club leagues are bigger than USTA leagues: Lee's community and club league participation is about **4 times** its USTA league participants (8,509 vs 1,980), and Duval's is about **3 times** (10,716 vs 4,018). Independent play is also larger than USTA league play in **Indian River** (1,351 vs 397), **Pasco** (229 vs 81), **Palm Beach** (983 vs 475), **Okaloosa** (462 vs 246), **Bay** (322 vs 216), **Martin** (597 vs 475), and **St. Lucie** (186 vs 26). In Miami-Dade, Broward, Collier, Hillsborough, and Pinellas the balance runs the other way, with community and club league play at roughly a third to a half of USTA league volume.

FIGURE 1.14

## Duval and Lee lead non-USTA league play

Non-USTA league participants by county, combined leagues, 2025 to 2026




Source: USTA Florida collection of non-USTA league records

*Figure 1.14. Duval and Lee lead non-USTA league play. Source: USTA Florida collection of non-USTA league records*

*Participants by county across team records, league-level totals, and flex registrations. Teams = team records only. 1,533 participants have no county recorded and are not mapped.*

That pattern matters for reading the league map. A county with modest USTA league numbers may have a strong community and club league scene. In Lee County, community and club leagues carry most of the county's league play, so the full picture of demand there includes both.

### 1.3.2 YOUTH TEAM TENNIS

Youth team tennis is the brightest growth line in Florida team play. Participants, counting both players who played and registered players who did not, rose 11% from 2024 to 2025, to 2,417, on 450 teams (+5%). Captains grew faster still, up 24% from 67 to 83. In 2026, youth team tennis runs one traditional season while USTA Florida pilots new formats in the fall. That single season was the biggest of the three years: **Spring 2026 drew 1,489 participants on 291 teams**, up 16% and 18% over Spring 2025. Because 2026 has no traditional fall season, its full-year total is not comparable to 2024 or 2025; the spring comparison is the like-for-like read.

| Measure | 2024 | 2025 | Change | Spring 2025 | Spring 2026 | Change |
|---|---|---|---|---|---|---|
| Teams | 428 | 450 | +5% | 247 | 291 | +18% |
| Players | 2,174 | 2,417 | +11% | 1,280 | 1,489 | +16% |
| Unique captains | 67 | 83 | +24% | 60 | 76 | +27% |
| Counties | 20 | 20 | 0 | 18 | 14 | -4 |

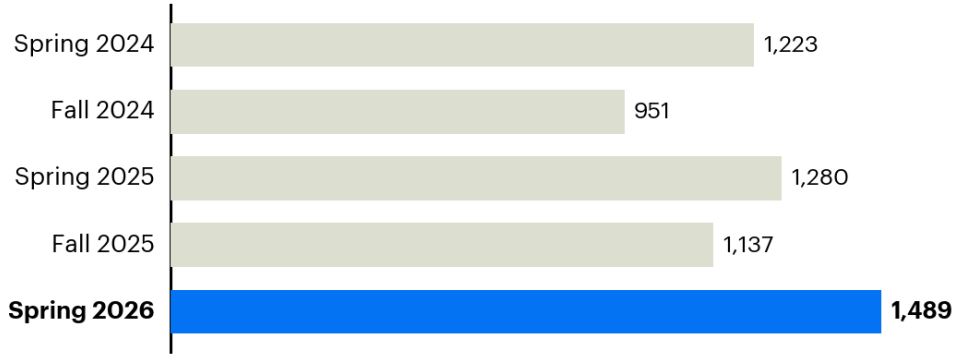
| Measure | 2024 | 2025 | Change | Spring 2025 | Spring 2026 | Change |
|---|---|---|---|---|---|---|
| Host facilities | 63 | 64 | +1 | 49 | 57 | +8 |

*Youth team tennis ran Spring and Fall seasons in 2024 and 2025; in 2026 the fall season is replaced by pilot formats not included in this export. Leagues titled Winter are filed under Spring.*

**FIGURE 1.15**

## Spring 2026 was the biggest season yet

Youth team tennis participants by season, including registered players who did not play




Source: USTA Florida Dynamics 365 youth team tennis records

*Figure 1.15. Spring 2026 was the biggest season yet. Source: USTA Florida Dynamics 365 youth team tennis records*

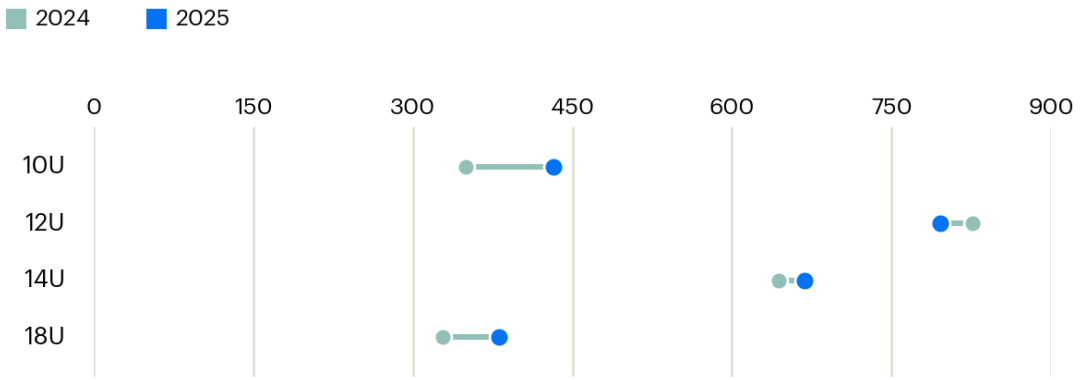
### BALANCED BY GENDER, WITH GROWTH ACROSS AGE GROUPS

Youth team tennis is one of the few corners of Florida tennis at true gender parity: youth team tennis counted 1,216 girls and 1,201 boys in 2025, totals that include players who played matches and registered players who did not play. By age group, 10U players rose from 350 to 432 and 18U from 328 to 381, while 12U dipped slightly (826 to 796) and 14U held steady (644 to 668). Age groups are assigned from flight names, and players in flights without an age label rose from 26 in 2024 to 140 in 2025, so treat these shifts as directional rather than exact.

FIGURE 1.16

## 10U and 18U grew the most

Youth team tennis participants by age group, full year 2024 and 2025




Source: USTA Florida Dynamics 365 youth team tennis records

*Figure 1.16. 10U and 18U grew the most. Source: USTA Florida Dynamics 365 youth team tennis records*

*Age groups assigned from flight names (for example, "12U Green", "14U Intermediate"). 140 players in 2025 played in flights without an age label and are excluded from this chart.*

### WHERE YOUTH TEAM TENNIS IS GROWING

In 2025, the largest youth team tennis programs by player count were **Hillsborough** (398), **Orange** (225), **St. Johns** (187), **Duval** (178), **Miami-Dade** (176), and **Broward** (172). The 2023 report named Palm Beach, Miami-Dade, Broward, Orange, and Pinellas as the leaders, so the center of gravity has moved toward Tampa Bay and Northeast Florida. Relative to the youth population, the Panhandle stands out: **Walton** has 118 youth team tennis players per 10,000 youth, compared with about 8 statewide, followed by Bay (43), St. Johns (36), and Santa Rosa (32).

| County | Teams 2024 | Teams 2025 | Players 2024 | Players 2025 | Spring 2026 players | Per 10k youth, 2025 |
|---|---|---|---|---|---|---|
| Hillsborough | 53 | 58 | 359 | 398 | 274 | 17 |
| Orange | 18 | 42 | 98 | 225 | 124 | 10 |
| St. Johns | 22 | 25 | 168 | 187 | 83 | 36 |
| Duval | 26 | 25 | 163 | 178 | 54 | 11 |
| Miami-Dade | 76 | 47 | 287 | 176 | 189 | 5 |
| Broward | 28 | 49 | 94 | 172 | 239 | 6 |
| Pinellas | 26 | 24 | 161 | 157 | 83 | 16 |
| Walton | 17 | 30 | 82 | 151 | 83 | 118 |
| Palm Beach | 35 | 37 | 121 | 135 | 70 | 7 |

| County | Teams 2024 | Teams 2025 | Players 2024 | Players 2025 | Spring 2026 players | Per 10k youth, 2025 |
|---|---|---|---|---|---|---|
| Bay | 15 | 27 | 73 | 124 | 61 | 43 |

*Youth = population ages 6 to 17, Kinetica Catchment Reports (2025 estimates). Spring 2026 is the only traditional 2026 season and is not comparable to full-year totals.*

The Spring 2026 jump is deep rather than wide. Hillsborough (161 to 274 spring players), Broward (114 to 239), Miami-Dade, and Palm Beach drove the gain, and **Broward has more than doubled its team count in two years** (28 teams in 2024, 49 in 2025, 67 in Spring 2026 alone). At the same time, the program reached fewer counties: 14 in Spring 2026, down from 18. Lee, Manatee, Martin, Alachua, and Okaloosa have no Spring 2026 teams in the export. Escambia also drops off the county list, but only because the combined Escambia and Santa Rosa league is coded to Santa Rosa facilities in 2026; that league did run.

## 1.3.3 HIGH SCHOOL TENNIS

### SCHOOLS WITH A TEAM, 2024-25 VS. 2025-26

High school tennis gives Florida teenagers a school-based path into team play alongside youth team tennis programs and play (Section 1.3.2). This section counts **schools with a high school tennis team**. A school counts once whether it fields a boys team, a girls team, or both. These are school counts, not player counts.

Two lists support it: the 2024-25 school list (503 schools) and the FHSAA 2025-26 assignments for boys and girls tennis (528 schools fielding 1,032 teams), prepared in the same nine-column layout so the two seasons line up school by school.

| At a glance | 2024-25 | 2025-26 |
|---|---|---|
| Schools with a team, classes 1A to 4A | 503 | 497 |
| Independent schools (no district) | n/a | 31 |
| All schools on the list | 503 | 528 |
| Boys teams / girls teams | n/a | 511 / 521 |
| Counties with a school (of 67) | 55 | 54 |

*Sources: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Boys Tennis and Girls Tennis (pulled October 15, 2026).*

#### SEASON COMPARISON

Florida had 497 schools with a team in classes 1A to 4A in 2025-26, down 6 schools (1.2%) from 503 in 2024-25, using the FHSAA Unique Schools list. The small net change hides more movement underneath. Of the 503 schools on the 2024-25 list, 485 appear in 2025-26 in a class, 3 moved to Independent, and 15 no longer appear (Table 1.12). The 497 schools in 2025-26 are those 485 continuing schools plus 12 new ones (Table 1.13).

| Schools, classes 1A to 4A | Schools |
|---|---|
| 2024-25 schools continuing in a class | 485 |
| 2024-25 schools moved to Independent | 3 |
| 2024-25 schools not on the 2025-26 list | 15 |
| 2024-25 total | 503 |
| 2025-26 continuing schools | 485 |
| 2025-26 new schools | 12 |

| Schools, classes 1A to 4A | Schools |
|---|---|
| 2025-26 total | 497 |

*Matched on school name and city. Twenty schools with a wrong county or city on the 2024-25 list were matched by name, and Babcock Ranch and Cambridge are treated as the same schools as Babcock and Cambridge Christian School.*

## TABLE 1.12 SCHOOLS ON THE 2024-25 LIST NOT ON THE 2025-26 LIST

| School | City | County | FHSAA region | 2024-25 class |
|---|---|---|---|---|
| Monroe | Quincy | Gadsden | 1 | 1A |
| Faith Christian | Orlando | Orange | 3 | 1A |
| Liberty | Kissimmee | Osceola | 3 | 2A |
| Calvary Chapel | West Melbourne | Brevard | 4 | 1A |
| Lake Region | Eagle Lake | Polk | 4 | 2A |
| Ridge Community | Davenport | Polk | 4 | 4A |
| Seffner Christian | Seffner | Hillsborough | 5 | 1A |
| Marco Island Academy | Marco Island | Collier | 6 | 1A |
| South Fort Myers | Fort Myers | Lee | 6 | 3A |
| South Plantation | Plantation | Broward | 7 | 4A |
| Homestead | Homestead | Miami-Dade | 8 | 4A |
| Mater Lakes | Hialeah | Miami-Dade | 8 | 2A |
| McArthur | Hollywood | Broward | 8 | 3A |
| Miami Springs | Miami Springs | Miami-Dade | 8 | 2A |
| SLAM | Miami | Miami-Dade | 8 | 2A |

*Fifteen schools. County and city as corrected for the 2024-25 list (see Appendix F). Source: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Unique Schools list.*

## TABLE 1.13 NEW SCHOOLS ASSIGNED TO CLASSES 1A TO 4A, 2025-26

| School | City | County | FHSAA region | 2025-26 class |
|---|---|---|---|---|
| Destin | Destin | Okaloosa | 1 | 1A |
| Northview | Century | Escambia | 1 | 1A |
| Harvest Community | Jacksonville | Duval | 2 | 1A |
| Roosevelt | Lake Wales | Polk | 3 | 1A |
| Morgan | Wimauma | Hillsborough | 5 | 3A |
| Mason Classical Academy | Naples | Collier | 6 | 1A |
| Pine View | Osprey | Sarasota | 6 | 1A |
| Atlantic Christian | West Palm Beach | Palm Beach | 7 | 1A |
| Greene School | West Palm Beach | Palm Beach | 7 | 1A |
| Dillard | Fort Lauderdale | Broward | 8 | 3A |
| Florida Christian | Miami | Miami-Dade | 8 | 1A |

| School | City | County | FHSAA region | 2025-26 class |
|---|---|---|---|---|
| Mater Bay Academy | Cutler Bay | Miami-Dade | 8 | 1A |

*Twelve schools. The 28 new Independent schools are listed under Independent schools below. Source: FHSAA Assignments of the Year 2025-26, Unique Schools list.*

1A and 3A grew while 2A lost six schools and 4A lost four. Ten of the 12 new schools are 1A, which drives the 1A gain. Classification is reset by FHSAA between seasons, so a change in a class reflects both schools joining or leaving and schools moving between classes.

**TABLE 1.14 SCHOOLS WITH A TEAM BY CLASSIFICATION**

| Class | 2024-25 | 2025-26 | Change | % change |
|---|---|---|---|---|
| 1A | 128 | 131 | +3 | 2.3% |
| 2A | 127 | 121 | -6 | -4.7% |
| 3A | 125 | 126 | +1 | 0.8% |
| 4A | 123 | 119 | -4 | -3.3% |
| **Total, 1A to 4A** | **503** | **497** | **-6** | **-1.2%** |

*Sources: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Unique Schools list.*

**FIGURE 1.17**

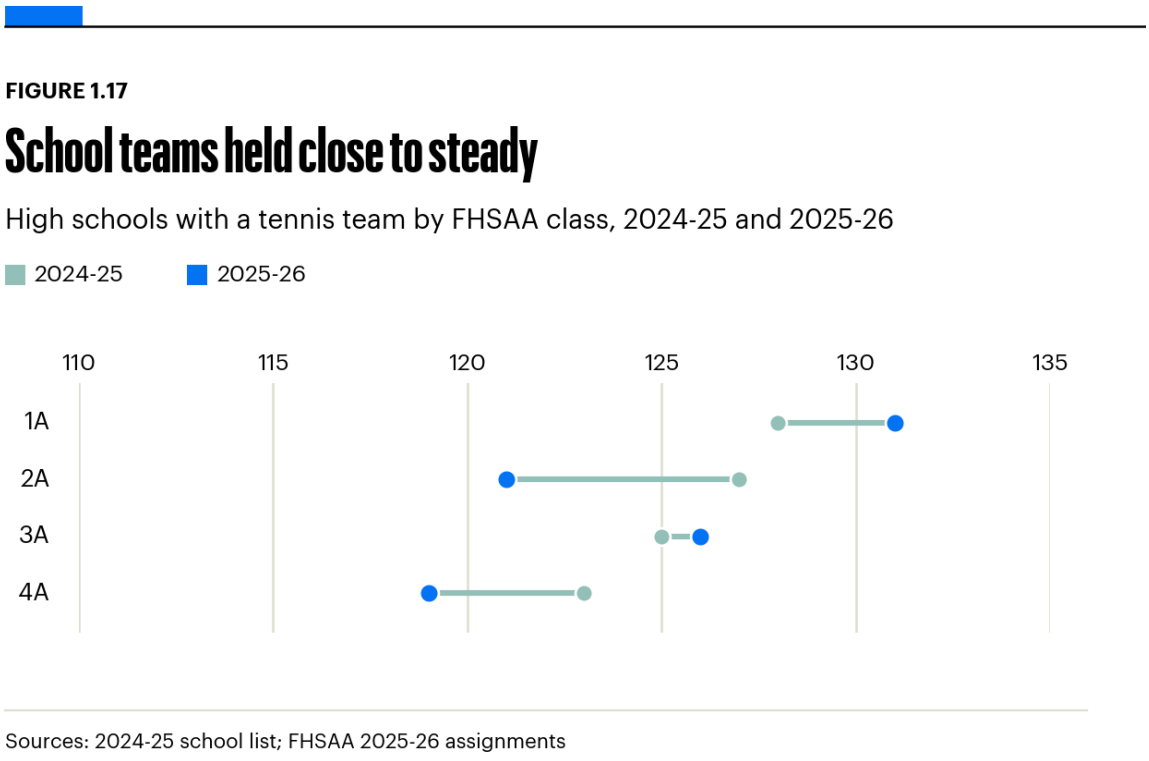



*Figure 1.17 Schools with a team by classification, 2024-25 vs. 2025-26. Sources: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Unique Schools list.*

## BY REGION

Across the eight FHSAA regions, counts moved by four schools or fewer. Region 4 lost four schools, Region 3 lost three, and Region 8 lost two, while Region 5 gained two, Region 1 gained one, and Regions 2, 6, and 7

were unchanged. FHSAA regions are the athletic association's own groupings and are not the same as USTA Florida's eight regions.

**TABLE 1.15 SCHOOLS WITH A TEAM BY FHSAA REGION**

| Region | 2024-25 | 2025-26 | Change | Both | Boys only | Girls only |
|---|---|---|---|---|---|---|
| Region 1 | 61 | 62 | +1 | 61 | 1 | 0 |
| Region 2 | 60 | 60 | 0 | 58 | 1 | 1 |
| Region 3 | 76 | 73 | -3 | 69 | 0 | 4 |
| Region 4 | 66 | 62 | -4 | 60 | 0 | 2 |
| Region 5 | 63 | 65 | +2 | 63 | 1 | 1 |
| Region 6 | 57 | 57 | 0 | 56 | 0 | 1 |
| Region 7 | 58 | 58 | 0 | 56 | 2 | 0 |
| Region 8 | 62 | 60 | -2 | 53 | 2 | 5 |
| Independent | n/a | 31 | n/a | 28 | 0 | 3 |
| **Total** | **503** | **528** | **-6** | **504** | **7** | **17** |

*Sources: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Unique Schools list.*

*Region counts use each season's assigned FHSAA region, which is not the same as a USTA Florida region. Change compares classes 1A to 4A; the 2025-26 total includes the 31 Independent schools. Teams offered is 2025-26 only.*

## COUNTY COVERAGE

In 2024-25, 55 of Florida's 67 counties had at least one school with a team. In 2025-26 that fell to 54, because Gadsden County's only school on the 2024-25 list (Monroe, Quincy) does not appear in the 2025-26 assignments. Thirteen counties now have no school with a team, all in the Panhandle and North Central Florida except Glades. These feed the geographic disparities analysis in Section 3.4.

The county picture is otherwise steady. Thirteen counties changed, all by one or two schools: Palm Beach gained two and Duval, Okaloosa, and Sarasota one each, while Miami-Dade and Orange each lost two and Brevard, Broward, Gadsden, Lee, Nassau, Osceola, and Polk lost one each. The full county table follows at the end of this section.

## INDEPENDENT SCHOOLS

FHSAA lists 31 schools as Independent in 2025-26, meaning they field a team but are not assigned to a district. They are reported separately because the 2024-25 list has no Independent category. Three were on the 2024-25 list with a class (East Hill Christian in Pensacola, Hilliard, and Oak Ridge in Orlando), and 28 were not on the 2024-25 list at all, most of them in Miami-Dade (10), Broward (4), and Polk (4): Archimedean, Atlantic (Delray Beach), Baldwin, Boyd Anderson, Coconut Creek, Greater Miami, Hallandale, Hialeah, Hialeah-Miami Lakes, Indian River Charter, International Studies, JLA, John I. Leonard, Mater Brickell, McLaughlin (Lake Wales), Miami Arts, Montverde Academy, Mulberry, Naples Classical, Parkridge Christian, Ribault, South Miami, Southwest Florida Christian, St. Francis (Gainesville), Tenoroc, Vanguard (Lake Wales), Washington (Miami), and Wildwood. Twenty-eight of the 31 offer both boys and girls teams.

## WHAT "INDEPENDENT" MEANS

An Independent school is an FHSAA member school that has chosen to sit outside the state series, the district, region, and state playoff path, for a given sport. It is a membership choice, not a size or skill category.

Why schools choose it: FHSAA bylaws allow Independent status for legitimate reasons, such as a newly opened school, an inability to compete in its assigned classification, geographic isolation, or educational or religious reasons. It is not meant as a way to protest FHSAA policies or run a separate postseason.

What it gives them: more control over their schedules. What it costs them: Independents generally have no FHSAA postseason, and any playoff after the regular season needs FHSAA Board approval. New in 2026, Independents can join an independent league that offers possible postseason play.

How it shows up: FHSAA lists show "Independent" in the class, region, and district columns instead of numbers. Status is set sport by sport. Episcopal (Jacksonville) and Innovation (Orlando), for example, are listed as Independent in football, which says nothing about their tennis status.

### BOYS, GIRLS, OR BOTH

Nearly every school offers both. Of the 528 schools in 2025-26, 504 offer boys and girls teams (95.5%), 17 offer girls only (3.2%), and 7 offer boys only (1.3%). In total, 511 schools offer a boys team and 521 offer a girls team, for 1,032 teams.

**TABLE 1.16 2025-26 SCHOOLS BY TEAMS OFFERED**

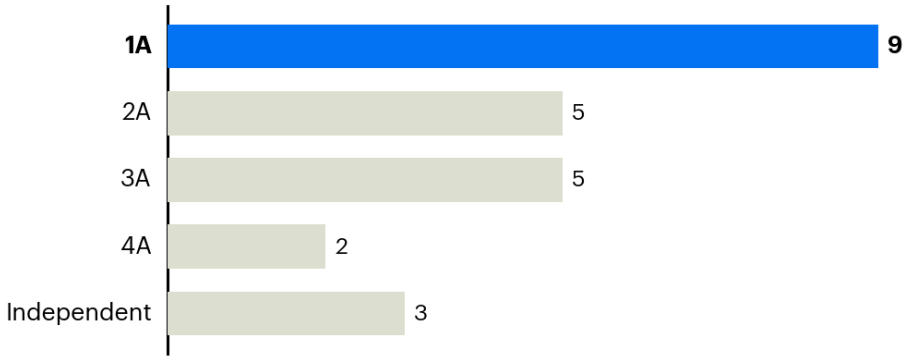
| Class | Both | Boys only | Girls only | Schools | Boys teams | Girls teams |
|---|---|---|---|---|---|---|
| 1A | 122 | 3 | 6 | 131 | 125 | 128 |
| 2A | 116 | 0 | 5 | 121 | 116 | 121 |
| 3A | 121 | 2 | 3 | 126 | 123 | 124 |
| 4A | 117 | 2 | 0 | 119 | 119 | 117 |
| Independent | 28 | 0 | 3 | 31 | 28 | 31 |
| **All schools** | **504** | **7** | **17** | **528** | **511** | **521** |

*Source: FHSAA Assignments of the Year 2025-26, boys and girls tennis.*

FIGURE 1.18

## Nearly every school fields both teams

2025-26 schools offering only a boys or only a girls team, by FHSAA class




Source: FHSAA Assignments of the Year 2025-26, boys and girls tennis

*Figure 1.18 Schools offering only a boys or only a girls team, by class, 2025-26. Source: FHSAA Assignments of the Year 2025-26, boys and girls tennis.*

Single-gender programs cluster in Miami-Dade County, which has 8 of the 24, and in Region 8, which has 7 of the 21 single-gender schools assigned to a class. Several of these are single-sex schools (for example Belen Jesuit and Columbus for boys, Carrollton and Lourdes for girls), so a one-gender roster there reflects enrollment rather than a missing program. Elsewhere, single-gender programs appear one or two per county, and most are at 1A and 2A schools.

**TABLE 1.17 SINGLE-GENDER PROGRAMS BY COUNTY, 2025-26**

| County | Schools | Schools (G = girls only, B = boys only; class) |
|---|---|---|
| Miami-Dade | 8 | Belen Jesuit (B, 3A); Columbus (B, 4A); Carrollton (G, 1A); Florida Christian (G, 1A); Lourdes (G, 3A); Miami Arts (G, Independent); Pinecrest Glades (G, 1A); St. Brendan (G, 2A) |
| Collier | 2 | Mason Classical Academy (G, 1A); Naples Classical (G, Independent) |
| Hillsborough | 2 | Jesuit (B, 3A); Holy Names (G, 2A) |
| Polk | 2 | Fort Meade (G, 1A); Kathleen (G, 3A) |
| Alachua | 1 | Newberry (G, 1A) |
| Broward | 1 | Coral Glades (B, 4A) |
| Duval | 1 | Harvest Community (B, 1A) |
| Highlands | 1 | Lake Placid (G, 2A) |
| Lake | 1 | Umatilla (G, 2A) |
| Leon | 1 | St. John Paul II (B, 1A) |
| Marion | 1 | North Marion (G, 2A) |
| Palm Beach | 1 | Atlantic Christian (B, 1A) |

| County | Schools | Schools (G = girls only, B = boys only; class) |
|---|---|---|
| Sumter | 1 | Wildwood (G, Independent) |
| Volusia | 1 | Mainland (G, 3A) |

*Source: FHSAA Assignments of the Year 2025-26, boys and girls tennis.*

Three schools have a different class for boys and girls (Baldwin, Mulberry, and Sheridan Hills Christian, each Independent for one gender). The Unique Schools list counts Baldwin and Mulberry as Independent and Sheridan Hills Christian as 1A, and this section follows it. The 2024-25 list does not show which teams a school has, so this boys, girls, and both view is 2025-26 only.

## CONNECTION TO YOUTH DEMAND

Section 1.1 reports 373,378 youth players age 6 to 17 statewide (Kinetica, 2025). The 13 counties with no high school team account for 2,932 of them, under 1% of the state total, led by Gadsden (707), Jackson (456), and Levy (389). These are modeled catchment figures for a wider age band than high school, so they are shown alongside the school counts as context and are never added to them.

**TABLE 1.18 COUNTIES WITH NO SCHOOL WITH A TEAM, 2025-26**

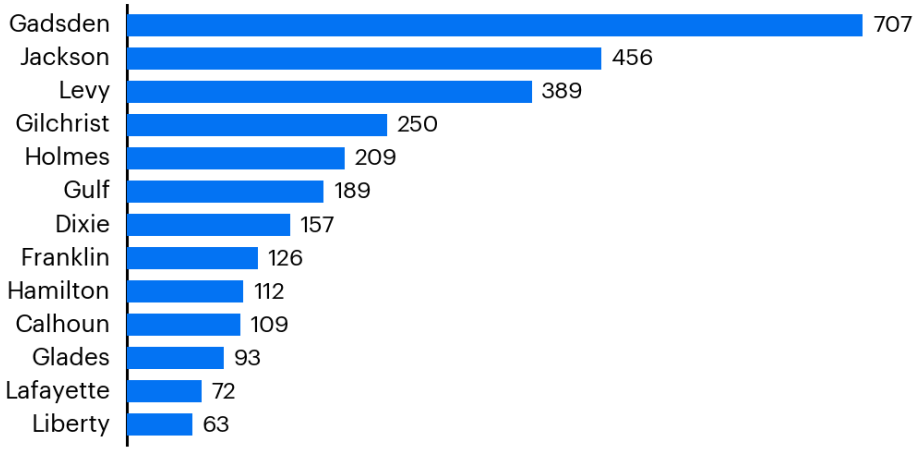
| County | Youth players 6 to 17 (2025) | Population (2025) |
|---|---|---|
| Gadsden | 707 | 44,395 |
| Jackson | 456 | 50,219 |
| Levy | 389 | 48,034 |
| Gilchrist | 250 | 20,344 |
| Holmes | 209 | 19,958 |
| Gulf | 189 | 15,935 |
| Dixie | 157 | 17,707 |
| Franklin | 126 | 13,047 |
| Hamilton | 112 | 14,404 |
| Calhoun | 109 | 13,347 |
| Glades | 93 | 13,193 |
| Lafayette | 72 | 8,682 |
| Liberty | 63 | 7,991 |
| **Total** | **2,932** | **287,256** |

*Sources: FHSAA Assignments of the Year 2025-26; Kinetica Sports & Recreation Localized Intelligence 2025.*

FIGURE 1.19

## About 2,900 young players with no school team

Youth players age 6 to 17 in the 13 counties with no high school tennis team, 2025-26




Sources: 2025-26 school list; Kinetica 2025

*Figure 1.19 Youth players in counties with no high school team. Source: Kinetica Sports & Recreation Localized Intelligence 2025 county catchment reports (Section 1.1).*

### WHAT THIS MEANS

- **Team play is growing, but the growth is in new shapes.** Tri-Level, Social, and youth team tennis are rising; traditional full-roster Adult and senior divisions are flat to down. Programming and marketing should follow the formats players are choosing.
- **Rating accuracy is the experience lever.** League players are largely happy (75% satisfied, NPS +28), but NTRP accuracy is the lowest-rated element and the biggest swing in loyalty, worth 95 NPS points between satisfied and dissatisfied players.
- **The captain pipeline is the constraint to watch.** Half of captains run multiple teams and only about one in eight is under 40. Recruiting and supporting younger captains protects the whole league system.
- **League play is bigger than any one organizer. Community and club leagues add 41,814 participants to 59,786 USTA league participants, and they carry most of the league play in Duval, Lee, and Indian River. Counting them together gives the full picture of adult league tennis in Florida.**
- **Thirty-one counties have no USTA league home**, including fast-growing Osceola. These are the same counties flagged for court access in Sections 2.2 and 3.4, and the clearest case for pairing new public courts with a league launch.

- **Youth team tennis is the on-ramp working as intended.** Double-digit growth, gender parity, and gains in the youngest age group. The next step is breadth: returning to the five counties absent from Spring 2026.

SECTION 1 | PARTICIPATION LANDSCAPE | COMPETITIVE PLAY

# 1.4 Tournaments

Tournaments are where Florida's competitive players test themselves, from a first Junior Circuit round robin to national championships. This section looks at three things: how much USTA sanctioned tournament play happened from January 2024 through September 2026, how players and families rated those tournaments, and the UTR-rated events that round out Florida's competitive calendar.

**1,206**
**USTA TOURNAMENTS IN 2025**
Unique tournament IDs, down 8% from 1,307 in 2024

**93,360**
**PARTICIPANTS IN 2025**
Down 1% from 2024, with larger fields (77 participants per tournament)

**84%**
**JUNIOR SHARE OF PARTICIPANTS**
78,649 junior participants in 2025; adult participants rose 3%

**34**
**COUNTIES HOSTING PLAY**
Jan. 2024 to Sept. 2026; the other 33, home to 1.9 million Floridians, had none

**4 in 5**
**REVIEWERS RATE IT 4 OR 5 STARS**
83% to 84% under FEEFO, 81% under Medallia

**+46**
**NET PROMOTER SCORE**
Medallia, Dec. 2025 to Sept. 2026; 90% call events welcoming

**How to read these numbers.** A participant is one player in one event, so a junior who plays singles and doubles at the same tournament counts twice, and a player who enters ten tournaments counts ten times. These are not unique players; the export has no player ID. Years are calendar years based on tournament start date. Because Florida tennis is seasonal and the 2026 data runs through September 26, every 2026 comparison uses January to September of each year.

## 1.4.1 SANCTIONED TOURNAMENTS

### WHAT WE COUNTED

The Dynamics 365 tournament export holds 9,255 event rows for tournaments starting January 3, 2024 through September 26, 2026. Each row is one event (for example, Level 6 girls' singles) inside a tournament. Following the counting rules for this report, tournaments are counted once per unique **Tournament ID**, and participation is the **total of the Participants field across all rows**.

Years are calendar years based on tournament start date.

### WHAT WE FOUND

Tournament play in Florida is **holding steady rather than growing**. Calendar 2025 had **1,206 tournaments** and **93,360 participants**, compared with 1,307 tournaments and 94,655 participants in 2024. There were fewer tournaments, but each one drew more players: the average field rose from 72 to 77 participants.

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Tournaments | 1,307 | 1,206 | -8% |

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Participants | 94,655 | 93,360 | -1% |
| Participants per tournament | 72 | 77 | +7% |
| Host venues | 142 | 143 | +1% |
| Host counties | 32 | 32 | |
| Tournaments with zero recorded participants | 34 | 34 | |

The 2026 picture is stronger. From January through September, Florida hosted 963 tournaments, up 5% on the same months of 2025, and participants rose 6% to 65,908, so fields held steady at 68 participants per tournament.

FIGURE 1.20

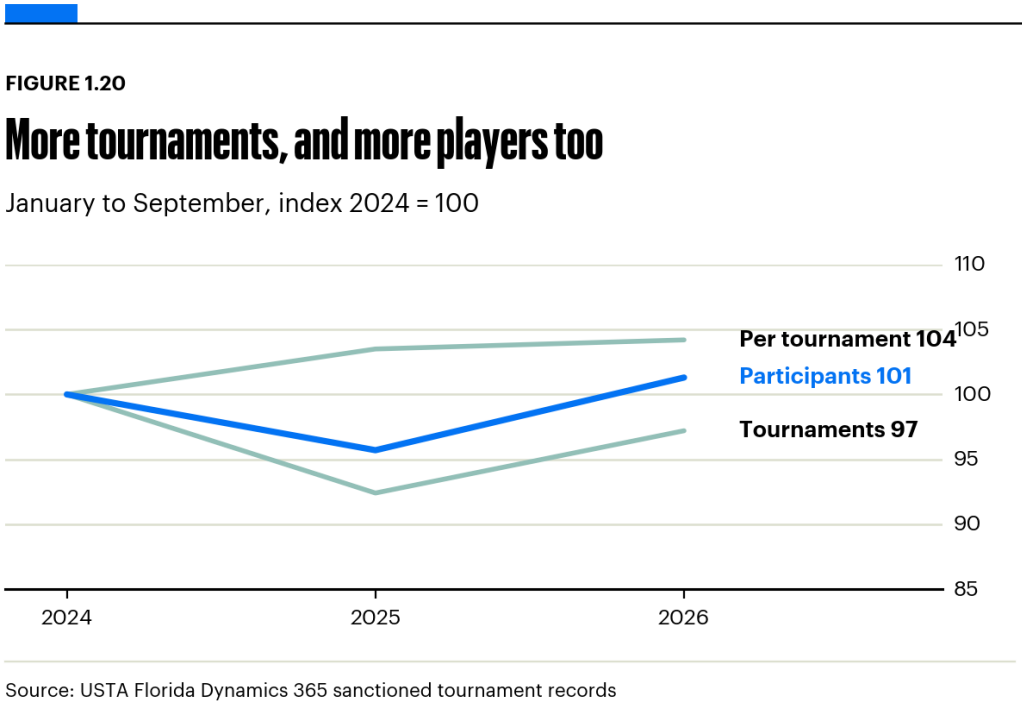



*Figure 1.20. More tournaments, and more players too. Source: USTA Florida Dynamics 365 sanctioned tournament records*

| January to September | 2024 | 2025 | 2026 | 2026 vs 2025 |
|---|---|---|---|---|
| Tournaments | 991 | 916 | 963 | +5% |
| Participants | 65,081 | 62,288 | 65,908 | +6% |
| Participants per tournament | 66 | 68 | 68 | +1% |

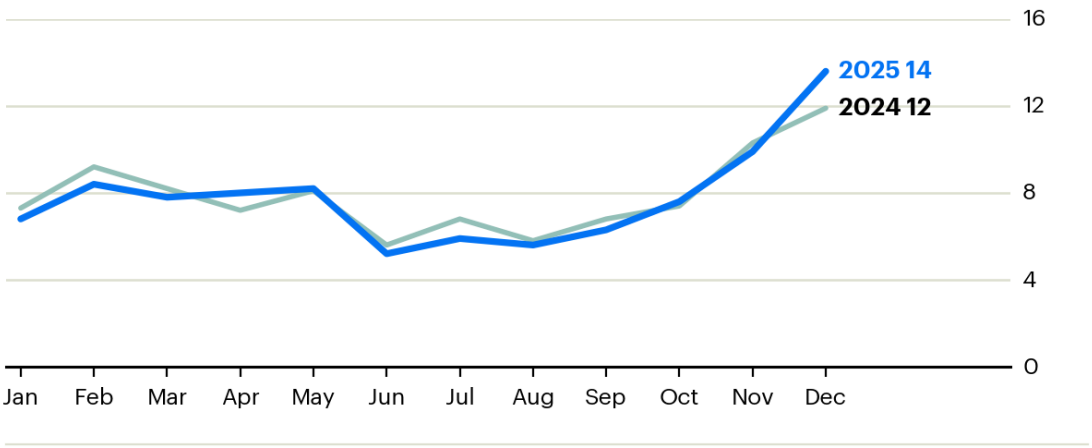
*Source: USTA Florida Dynamics 365 tournament participation export (export with corrected years and levels, Oct. 2026). Matched January to September periods.*

Seasonality matters more here than almost anywhere else in the report. October through December produced **31% of 2024 participants and 33% of 2025 participants**, driven by national and international junior events in late fall and December. December 2025 was the busiest month in the data at 13,609 participants. A January to September view will always understate the full year, so full-year 2026 figures should wait until the December events close.

FIGURE 1.21

## Tournament play peaks in late fall

Sanctioned tournament participants by month of start date, '000




Source: USTA Florida Dynamics 365 sanctioned tournament records

*Figure 1.21. Tournament play peaks in late fall. Source: USTA Florida Dynamics 365 sanctioned tournament records*

### WHO PLAYS

Florida tournament play is overwhelmingly junior. Juniors made up **84% of 2025 participants** (78,649), and that share has barely moved. Adult play grew in 2025, with participants up **3%**. In 2026, adult tournaments jumped from 134 to 162 for January to September, and adult participants rose 4%.

| Tournament type | Tournaments 2024 | Tournaments 2025 | Participants 2024 | Participants 2025 | Change | Jan. to Sept. 2026 vs 2025 |
|---|---|---|---|---|---|---|
| Junior | 1,048 | 1,003 | 79,233 | 78,649 | -1% | +5% |
| Adult | 179 | 176 | 13,164 | 13,615 | +3% | +4% |
| World Tennis Number (WTN) Play | 71 | 20 | 2,114 | 709 | -66% | +186% |
| Wheelchair | 9 | 5 | 144 | 119 | -17% | +67% |
| Family | 0 | 2 | 0 | 268 | | |
| **Total** | **1,307** | **1,206** | **94,655** | **93,360** | **-1%** | **+6%** |

*WTN Play, wheelchair, and family percentage changes are based on small counts.*

**WTN Play is the one format in real decline.** WTN Play tournaments fell from 71 in 2024 to 20 in 2025, and participants from 2,114 to 709, a confirmed drop in events offered rather than a change in how they are recorded. Early 2026 shows a small rebound (15 tournaments and 446 participants from January to September, up from 11 and 156), but the format remains a fraction of its 2024 size. It also accounts for much of the 21% decline in the "WTN, unsanctioned and other" level group below.

**Girls' share of junior play is inching up**, from 43% of gendered junior participants in 2024 to 44% in 2025. **Women's share of adult play is moving the other way.** Women held 35% of gendered adult participants in 2024 and 31% in 2025. From January to September 2026, women's adult participants fell 22% (3,284 to 2,547) while men's rose 16% (6,812 to 7,880), even though the number of tournaments with women's events grew from 103 to 108. The events are there; the participants are not.

## LEVELS AND FORMATS

Entry-level ranked events (Levels 6 and 7) are the backbone of the calendar, with **32,367 participants in 2025, or 35% of the total**. At the other end, national Level 1 and 2 events are few but enormous: **45 tournaments, under 4% of the calendar, drew 20,363 participants**, about 22% of all play. Events such as the national winter and clay court championships and the international junior championships in Bradenton and Miami pull players from across the country and the world.

FIGURE 1.22

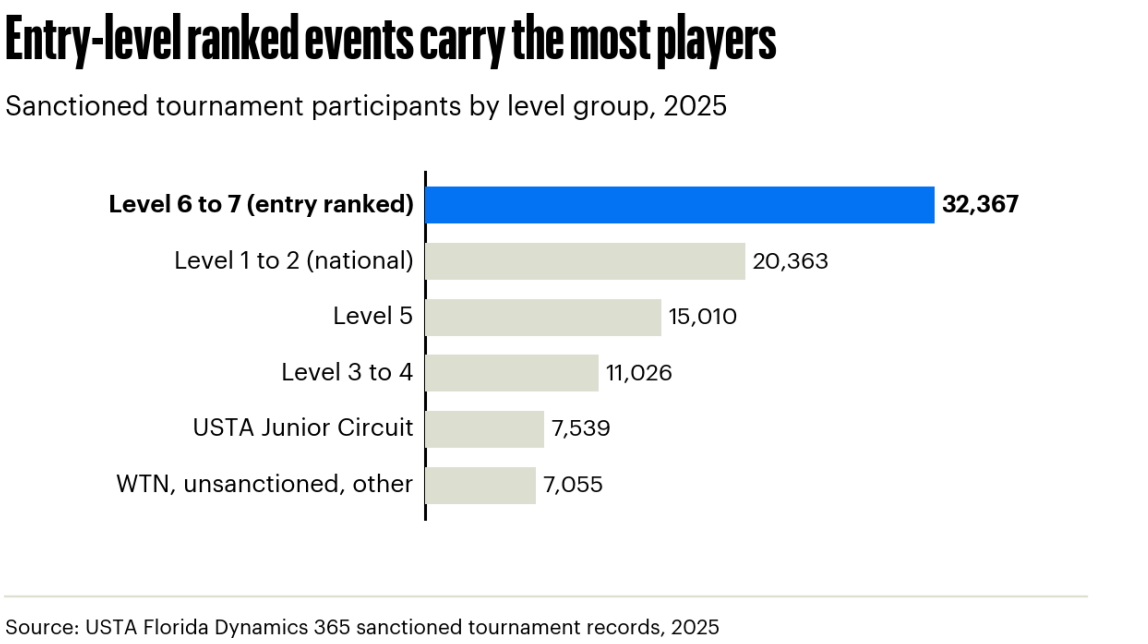



*Figure 1.22. Entry-level ranked events carry the most players. Source: USTA Florida Dynamics 365 sanctioned tournament records, 2025*

| Level group | Participants 2024 | Participants 2025 | Change | Jan. to Sept. 2025 | Jan. to Sept. 2026 | Change | Median fee 2025 |
|---|---|---|---|---|---|---|---|
| Level 6 to 7 | 32,045 | 32,367 | +1% | 23,505 | 26,807 | +14% | $65 |
| Level 1 to 2 (national) | 19,018 | 20,363 | +7% | 8,017 | 6,946 | -13% | $145 |
| Level 5 | 14,798 | 15,010 | +1% | 12,029 | 12,184 | +1% | $99 |
| Level 3 to 4 | 12,244 | 11,026 | -10% | 9,233 | 9,544 | +3% | $146 |
| USTA Junior Circuit | 7,669 | 7,539 | -2% | 5,774 | 6,236 | +8% | $49 |
| WTN, unsanctioned, other | 8,881 | 7,055 | -21% | 3,730 | 4,191 | +12% | $50 |

*Level groups combine junior and adult levels. "Other" includes ITA Summer Circuit and Tennis on Campus events. Median fee is the median per-event entry fee recorded on rows with a fee above zero.*

Level 3 and 4 events declined 10% for the full year, though they are up 3% from January to September 2026. As 1.4.2 shows, they are also the lowest-rated tier in both review systems. The national tier held its full-year gain in 2025 but is down 13% from January to September 2026; most national participants arrive in late fall and December, so that gap may close.

Singles accounts for **75% of participants**, doubles 21%, and team events 4%. Doubles participants are down 6% from January to September 2026, after a 12% drop in the same months of 2025.

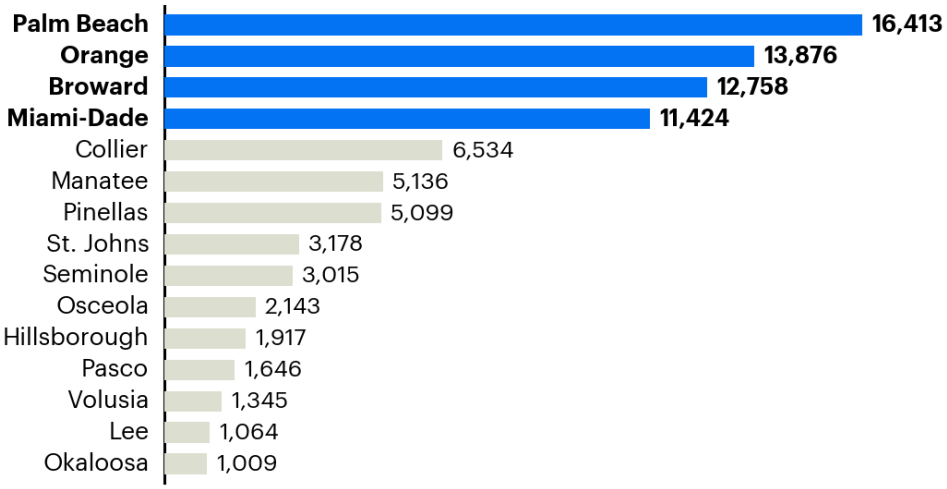
### WHERE TOURNAMENTS ARE PLAYED

Tournament play is highly concentrated. **Palm Beach, Orange, Broward, and Miami-Dade** hosted **58% of 2025 participants**, and the top 10 venues alone hosted 40%. The USTA National Campus in Orange County was the single largest host, with 8,896 participants (10% of the state).

FIGURE 1.23

## Four counties host over half of play

Sanctioned tournament participants by host county, 2025, top 15 counties




Source: USTA Florida Dynamics 365 sanctioned tournament records, 2025

*Figure 1.23. Four counties host over half of play. Source: USTA Florida Dynamics 365 sanctioned tournament records, 2025*

Statewide, Florida generates about **40 tournament participants per 10,000 residents**. Collier (156), Manatee (111), Palm Beach (103), St. Johns (94), and Orange (90) are well above that. Several of the state's largest counties are far below it: **Hillsborough (12), Lee (12), Brevard (4), Duval (4), and Polk (4)** all host very little tournament play for their size, and St. Lucie (about 393,000 residents) hosted none in 2025.

**33 of Florida's 67 counties hosted no USTA tournament at all** between January 2024 and September 2026. Together they are home to about **1.9 million people (8% of the state)**, including Lake County (447,000), one of the high-growth pressure counties in the report's population projections, and Santa Rosa (209,000). These counties are not without courts: the USTA Florida facility list shows 806 tennis courts at 288 facilities across them, 242 of them public, including 189 courts in Lake and 182 in Monroe. Counties are assigned by where the tournament was played, not where players live, so residents of these counties may be traveling to compete.

Court inventory tells the same story from another angle. Florida generated about **5 tournament participants per tennis court** in 2025. Lee County has the fourth-largest court inventory in the state (1,106 courts) but hosted about 1 participant per court, and Sarasota (805 courts), Duval (588), Brevard (528), and Polk (367) were all at about 1. Orange (16 per court) and Manatee (10) host far more play than their court counts alone would suggest, largely because of the USTA National Campus and IMG Academy.

| Region | Participants 2024 | Participants 2025 | Jan. to Sept. 2026 vs 2025 | Medallia rated 4 or 5 |
|---|---|---|---|---|
| Region 1 | 2,215 | 2,578 | 0% | 89% |
| Region 2 | 5,992 | 5,931 | +1% | 85% |
| Region 3 | 8,128 | 8,738 | +15% | 81% |
| Region 4 | 21,231 | 21,195 | +13% | 82% |
| Region 5 | 7,340 | 6,237 | +19% | 69% |
| Region 6 | 16,674 | 16,901 | -3% | 84% |
| Region 7 | 7,883 | 7,598 | +20% | 85% |
| Region 8 | 25,192 | 24,182 | -4% | 72% |

*Region is the USTA Florida region of the tournament location. Medallia ratings cover Dec. 2025 to Sept. 2026; Region 1 (128 ratings) and Region 5 (129 ratings) have small samples.*

## PUBLIC AND PRIVATE VENUES

**Public facilities host more than two in five tournament participants.** From January 2024 through September 2026, 57% of participants were at private venues and 42% at public ones. By facility subtype, **public parks hosted the most play (40% of participants)**, followed by athletic and commercial clubs (25%), country clubs (13%), schools and academies (11%), hotels and resorts (4%), and community and recreation centers (3%); the remaining 4% were at other or unmatched venues.

Tournaments use a small share of Florida's courts. In 2025, tournaments were played at 143 venues with 1,928 tennis courts, 11% of the 18,293 courts on the USTA Florida facility list. 55 of those venues are public, and their 797 courts make up 21% of Florida's 3,786 public tennis courts. This connects directly to the Case for Public Court Investment section: public parks are already the single largest host of tournament play, and public court capacity is one of the few levers that could bring tournaments to counties that have none.

*Facility type and court counts come from the USTA Florida Courts and Facilities list (updated Oct. 2026), matched to tournament venues by facility name; closed facilities are excluded. School courts are counted as not public. Six small venues (689 participants, under 1%) could not be matched.*

# 1.4.2 PLAYER EXPERIENCE: TOURNAMENT REVIEWS

### WHAT WE COUNTED

USTA Florida collects post-tournament feedback from players and families. The platform changed in December 2025, so this section combines two sources:

- **FEEFO**, January 2, 2024 to December 19, 2025: **9,105 reviews of 1,696 tournaments**. Each review is a single 1 to 5 star rating with an optional comment. Reviews dated 2023 fall outside this report and are not included.
- **Medallia**, December 16, 2025 to September 30, 2026: **3,734 responses** of 713 tournaments. Of these, **3,484** include an overall rating (3,195 on the tournament form and 289 on the shorter event form used for some junior and entry events). Medallia also asks about nine parts of the event, likelihood to recommend, and whether the event felt welcoming. Responses received after September 30, 2026 are not included.

The handover is clean: no tournament has reviews in both systems, and the two run back to back with a three-day overlap in December 2025.

> **Two different surveys, not one trend line.** The review format changed substantially in December 2025. FEEFO asked for a single star rating with an optional comment. Medallia is a longer survey that asks respondents to score nine parts of the event, rate their likelihood to recommend, and answer inclusion questions before or alongside the overall rating. Results from the two platforms are not directly comparable, so this section reports each on its own terms and does not treat 2024 to 2025 versus 2026 as a year-over-year change.

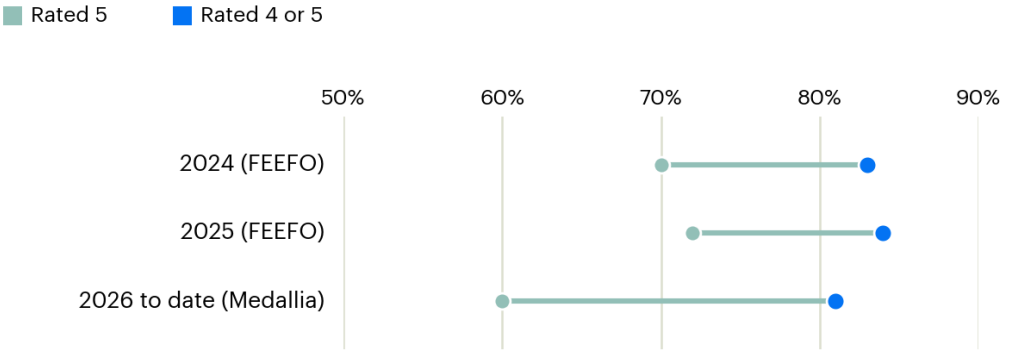
### WHAT WE FOUND

Satisfaction is **high on both platforms**. Under FEEFO, 83% of 2024 reviews and 84% of 2025 reviews gave 4 or 5 stars. Under Medallia, 81% of 2026 respondents rated their overall experience a 4 or 5. The share of 5-star ratings is lower under Medallia (60% versus 72%), which may reflect the new survey format rather than a drop in tournament quality: respondents who have just scored scheduling, value, and warm-up space are less likely to give an automatic 5. About 1 in 10 reviews is a 1 or 2.

FIGURE 1.24

## Four in five reviewers rate events highly

Share of tournament ratings at 5 stars and at 4 or 5 stars, %, by review year




Sources: FEEFO reviews, 2024 to 2025; Medallia surveys from December 2025

*Figure 1.24. Four in five reviewers rate events highly. Sources: FEEFO reviews, 2024 to 2025; Medallia surveys from December 2025*

| Review year | Source | Ratings | Tournaments reviewed | Rated 4 to 5 | Rated 5 | Rated 1 to 2 |
|---|---|---|---|---|---|---|
| 2024 | FEEFO | 5,086 | 890 | 83% | 70% | 10% |
| 2025 | FEEFO | 4,019 | 811 | 84% | 72% | 9% |
| Dec. 2025 | Medallia | 165 | 38 | 77% | 50% | 15% |
| 2026 (to Sept. 30) | Medallia | 3,319 | 664 | 81% | 60% | 11% |

*Review year is based on the review or response date. Medallia records without a response date use the date the respondent was added.*

Reviews reach most of the calendar. **Two-thirds or more of tournaments receive at least one review**: 67% in 2024, 70% in 2025, and 70% from January to September 2026.

### ADULTS RATE HIGHER THAN JUNIORS

Adult tournaments outscore junior tournaments on both platforms. In 2025, 88% of adult reviews and 82% of junior reviews gave 4 or 5 stars under FEEFO; under Medallia in 2026 the gap holds at 86% versus 78%, and adults give a Net Promoter Score of **+56** compared with **+38** for juniors.

**Level 3 and 4 events are the lowest-rated tier in both systems** (73% rated 4 or 5 under FEEFO and 77% under Medallia, with 15% to 17% of ratings at 1 or 2). Because the finding holds across two different instruments, it is one of the most reliable signals in this section. USTA Junior Circuit (88%) and national Level 1 to 2 events (87%) rate highest under FEEFO, with Level 6 to 7 close behind (85%).

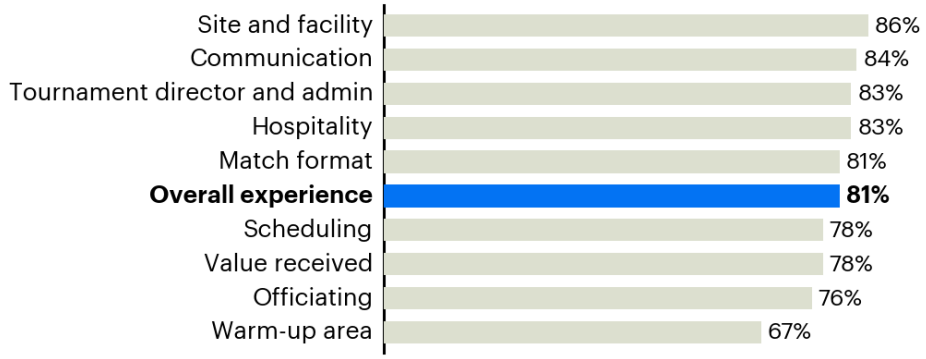
## WHAT DRIVES A GOOD TOURNAMENT

Medallia breaks the experience into parts. **Site and facility scores best** (86% rate it 4 or 5), followed by communication and the tournament director. **The warm-up area scores worst by a wide margin** (67%), with scheduling and value received also below the overall score.

FIGURE 1.25

### Facilities score best, warm-up space worst

Share rating each part of the event 4 or 5 out of 5, %, Dec. 2025 to Sept. 2026




Source: Medallia tournament surveys

*Figure 1.25. Facilities score best, warm-up space worst. Source: Medallia tournament surveys*

Scoring low is not the same as driving the overall rating. The parts most closely tied to a respondent's overall score are **value received** (correlation 0.84) and the **tournament director and administration** (0.83), followed by hospitality, scheduling, and communication. The warm-up area has the weakest link to overall satisfaction (0.50). In plain terms: fixing warm-up space would remove a common irritation, but director quality and a sense of value are what make or break the day.

| Medallia measure | Result | Responses |
|---|---|---|
| Net Promoter Score (likely to recommend, 0 to 10) | +46 (65% promoters, 19% detractors) | 2,622 |
| Likely to play a similar tournament in the next 12 months (4 or 5 of 5) | 85% | 2,906 |
| Tournament was welcoming and inclusive | 90% yes, 5% no, 5% not sure | 3,410 |
| Had fun (event form) | 93% yes | 289 |
| Rated overall experience 4 or 5, private venues | 82% | 2,204 |
| Rated overall experience 4 or 5, public venues | 80% | 1,276 |

Two results stand out for the rest of the report. **Nine in ten respondents found their tournament welcoming and inclusive**, a strong baseline for the demographic and inclusion findings later in Section 1.

And **public venues rate nearly as well as private ones** (80% versus 82% rated 4 or 5), which supports the Case for Public Court Investment section: public courts can host high-quality competitive play.

Regional ratings are close, with two exceptions. Region 5 (69% rated 4 or 5, with 20% at 1 or 2) and Region 8 (72%, with 17% at 1 or 2) trail the rest of the state, where 81% to 89% rate their event 4 or 5. Region 5 rests on 129 ratings, so it should be treated as a flag for follow-up rather than a finding.

### WHAT PLAYERS AND FAMILIES SAY

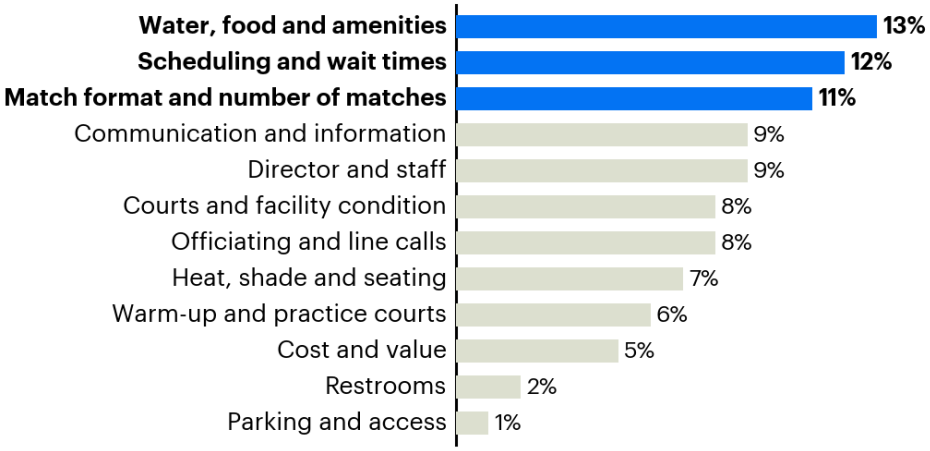
Most respondents left comments. Grouping them by keyword shows what people value and what they would change.

- **Favorite part** (3,118 comments): the competition itself (29%), the people, staff, and director (26%), and the facility (25%), followed by the social side of the event (15%).
- **What to improve** (Medallia, 2,909 comments): water, food, and on-site amenities (13%), scheduling and waiting between matches (12%), and match format or number of matches guaranteed (11%) lead the list.
- **Low ratings** (FEEFO reviews of 3 stars or fewer, 1,247 comments): these most often mention the director and staff (38%), courts and facility condition (29%), scheduling and delays (25%), and officiating or line calls (25%).

FIGURE 1.26

## Amenities top the wish list

Share of improvement comments mentioning each theme, %, n=2,822




Source: Medallia tournament surveys, keyword themes

*Figure 1.26. Amenities top the wish list. Source: Medallia tournament surveys, keyword themes*

*Themes are assigned by keyword matching, and one comment can fall into several themes. Treat percentages as a guide to relative frequency. Individual comments are not quoted because many name directors, officials, or players.*

# 1.4.3 UTR-RATED TOURNAMENTS

### WHAT WE COUNTED

Florida's tournament calendar also includes events rated through the UTR system, many offering prize money. USTA Florida collected UTR event listings at the same time as the community and club league data in Section 1.3.

The collection file holds **47 event listings with 506 registered participants** in 12 counties. One listing is a pickleball event and is excluded, leaving **46 tennis listings and 489 participants**. Three listings are wildcard or pre-qualifying events for USTA Pro Circuit tournaments, and one ("Little Mo" East Regionals) may overlap with USTA records, where the Little Mo Internationals appears as an unsanctioned event. Both are kept and flagged.

> **Check the period.** This dataset was provided as 2025, but the event names that carry dates point to April and May 2026, and it matches the spring 2026 collection described in Section 1.3. This section treats it as a spring 2026 snapshot.

### WHAT WE FOUND

UTR play in the snapshot is small and concentrated. **Broward County holds 48% of participants**, almost all from a single recurring matchplay series in Hollywood (14 listings, 233 players). Palm Beach has the most listings (12) but few registrations per listing. The median listing had **9 participants**, and 15 listings showed 5 or fewer, which suggests the counts are registrations captured at a point in time rather than final draws. 17 listings advertise prize money, ranging from small purses to a $40,000 guaranteed prize fund.

| County | Listings | Participants | Share |
|---|---|---|---|
| Broward | 14 | 233 | 48% |
| Orange | 2 | 63 | 13% |
| Hillsborough | 3 | 37 | 8% |
| Palm Beach | 12 | 36 | 7% |
| Miami-Dade | 4 | 33 | 7% |
| St. Johns | 3 | 26 | 5% |
| Indian River | 2 | 25 | 5% |
| Duval | 2 | 16 | 3% |
| Clay, Lee, Manatee, Pasco | 4 | 20 | 4% |
| **Total (tennis only)** | **46** | **489** | **100%** |

*Source: USTA Florida collection of UTR event listings (Florida UTR Tournaments). Pickleball listing (17 participants) excluded.*

For scale, USTA sanctioned tournaments recorded 15,373 participants across 243 tournaments in April and May 2026. The UTR snapshot equals about **3% of that volume**. Given how the UTR counts were captured, this is a floor, not an estimate. A complete picture of independent competitive play would need event results rather than registration snapshots, which should be scoped alongside the community and club league pilot in Section 1.3.

## WHAT THIS MEANS

- **Tournament play dipped and is recovering. Participants were down 1% in 2025 and up 6% from January to September 2026, as the calendar added tournaments.**
- **Watch field sizes at Level 5. Level 5 tournaments rose from 83 to 95 from January to September 2026 while participants rose only 1%, so fields there are getting thinner. Providers and schedulers should watch for calendar overlap.**
- **Geography is the biggest gap.** Four counties host 58% of play, 33 counties host none, and large, fast-growing counties such as Hillsborough, Lee, Polk, Duval, Brevard, and Lake host little or nothing. Several are the same high-growth counties the report flags for court supply pressure.
- **Fewer adult women are entering tournaments.** Women's adult participants fell 22% from January to September 2026 even as events offered to them increased. This is a specific, measurable target for Women in Tennis.
- **The experience is a strength to protect.** Four in five reviewers rate their tournament highly, 90% find it welcoming, and public venues rate nearly as well as private ones. The fixes that matter most are operational: director quality, value, scheduling, and amenities, with Level 3 and 4 events as the clearest place to start.

# 1.5 Community

Community tennis is where "Promote and Develop Tennis for All" is most literal. It is the network of local associations, youth development chapters, and inclusive programs that bring the game to people the league and tournament pathways in Sections 1.3 and 1.4 do not reach on their own: beginners, under-resourced neighborhoods, athletes with intellectual and developmental disabilities, and children and adults on the autism spectrum.

This section profiles seven program types that together form Florida's community tennis footprint. Two are organizational: Community Tennis Associations (CTAs) and National Junior Tennis & Learning (NJTL) chapters, local providers that deliver tennis in their communities. Five are inclusive and adaptive programs: Special Olympics Florida, ACEing Autism, Love Serving Autism®, Tennis For Fun, and wheelchair tennis, delivered through parks, clubs, and foundations. USTA Florida works with all of them. Most of these organizations are small and rely heavily on volunteers, which makes what they accomplish all the more notable. The section also covers USTA Florida's own funding support: grants to community programs and the equipment it provides directly to schools, after-school programs, and summer camps.

**How to read this section.** The seven source lists describe where programs exist, not how many people play in them. None includes participant or athlete counts. Figures here are therefore footprint measures (programs, sites, organizations, and counties reached), not participation.

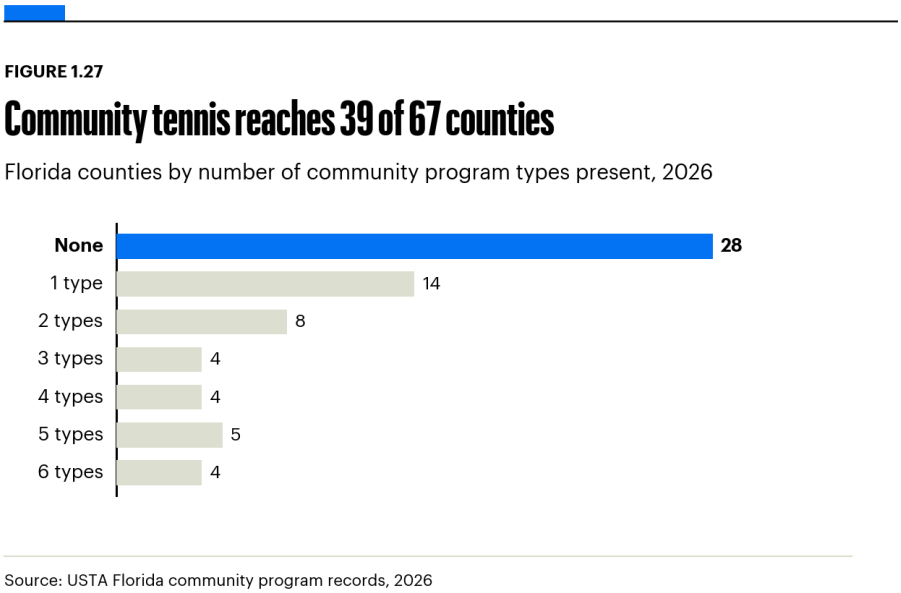
**KEY FIGURES**

| | | |
|---|---|---|
| **190**<br>community program, site, or organization records across seven lists | **39 of 67**<br>counties with at least one community program | **96%**<br>of Floridians live in a county with at least one program |

| 28 | 113 | 72 |
|---|---|---|
| counties with no community program (928,674 residents) | adaptive programs, sites, and sessions, in 34 counties | distinct CTA and NJTL organizations, in 25 counties |

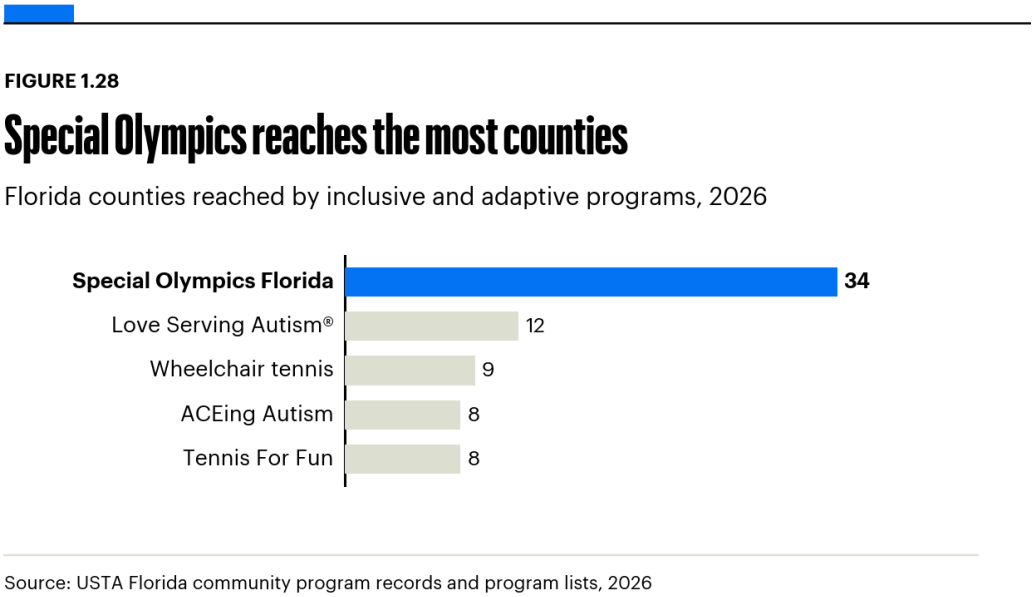
*Population share measures county presence, not drive-time access. A program on one side of a large county does not make tennis accessible across all of it.*

**FIGURE 1.27. Florida counties by number of community program types present, 2026**




*Source: USTA Florida community program records (Dynamics 365) and program lists, 2026.*

**FIGURE 1.28. Counties reached by inclusive and adaptive programs, 2026**




*Community Tennis Associations and NJTL chapters are classifications of organizations rather than programs, and some organizations shown here also hold those classifications (Love Serving Autism® is an NJTL chapter), so they are not compared in this*

*figure; their footprint is in Table 1.19 and Sections 1.5.2 and 1.5.3. Source: USTA Florida community program records (Dynamics 365) and program lists, 2026.*

**TABLE 1.19. Community programs and organization types at a glance**

| Program type | Unit counted | Records | Counties | Season |
|---|---|---|---|---|
| Special Olympics Florida | County program | 34 | 34 | Dec or Jan to May |
| ACEing Autism | Program site | 10 | 8 | Winter to Summer sessions |
| Love Serving Autism® | Program | 31 | 12 | Spring 2026 sessions |
| Tennis For Fun | Weekly session | 21 (19 venues) | 8 | Nov to Apr (most) |
| Wheelchair tennis | Program | 17 | 9 | Ongoing (no end date) |
| Community Tennis Associations | Organization | 61 | 25 | Year-round |
| NJTL chapters | Organization | 16 | 11 | Year-round |

*Sources: USTA Florida Dynamics 365 (CTA, NJTL, and active wheelchair program exports); Special Olympics Florida tennis locations list; ACEing Autism, Love Serving Autism®, and Tennis For Fun program lists, all as received October 2026.*

## 1.5.1 ADAPTIVE PROGRAMS

Adaptive tennis in this review comes from five providers: Special Olympics Florida, three autism and special-needs nonprofits, and a network of wheelchair tennis programs. Together they list 113 county programs, sites, sessions, and programs in 34 counties. Special Olympics accounts for 34 of them and reaches every county the other four providers do.

Special Olympics Florida

Special Olympics Florida (SOFL) runs the widest-reaching community tennis offering in the state. Tennis is offered in 34 counties across SOFL's five regions: Central and West Coast (10 counties each), Northeast (6), Northwest (5), and South (3). Ten SOFL area and county offices support the program. The tennis season runs January to May in most counties, starting in December in seven (Escambia, Santa Rosa, Okaloosa, Walton, Polk, Sumter, and Manatee).

Across all of its sports, Special Olympics Florida provides year-round training and competition for people with intellectual disabilities at no cost to athletes or their families. It reports more than 86,000 athletes and Unified partners statewide, supported by about 56,000 volunteers, and tennis is one of the sports it offers county by county.

SOFL matters to this report beyond its own numbers because it is often the only organized community option. In 9 of its 34 counties, Special Olympics is the only one of the seven program types present: Lake, Seminole, Polk, St. Lucie, Santa Rosa, Okaloosa, Walton, Citrus, and Hernando. Several of these are among Florida's fastest-growing counties (see 1.5.5).

Florida tennis athletes won six medals at the 2026 Special Olympics USA Games.

### ACEing Autism

ACEing Autism lists 10 Florida program sites in 8 counties: Boca Raton, Clearwater, Fort Myers, Miami Gardens, Miami Springs, Naples, Orlando (UCF), St. Petersburg, Stuart, and Weston. Seven have sessions scheduled in 2026; three are between sessions (Miami Gardens and Weston, plus Fort Myers, whose last session ended in Spring 2024). Programs run as four- to six-week weekend sessions for ages 5 to 18, usually split into younger and older groups. Host venues range from private clubs (Polo Club of Boca Raton, Vanderbilt Country Club) to university and municipal facilities.

ACEing Autism is a national, volunteer-driven nonprofit based in Los Angeles. It uses affordable tennis programming to help children with autism build social connection and fitness, tailors sessions to each child's needs, and reports more than 7,000 athletes served across the country. Florida is one of its expansion states.

### Love Serving Autism®

Love Serving Autism® lists 31 Florida programs in 12 counties, the largest autism-specific network in the state by site count. Fourteen of the 31 are in Palm Beach County and five in Broward. The mix is distinctive: 24 community programs, 6 school-based programs delivered with autism schools and physical education (PE) classes, and 1 early intervention program for ages 2 to 4. Host sites include the USTA National Campus in Lake Nona and Riverside Racquet Complex in Vero Beach, a USTA Florida managed facility.

Love Serving Autism® is a national nonprofit based in Palm Beach County that serves people with autism and other developmental differences from early childhood through adulthood. Its programs use therapeutic tennis, pickleball, and padel to build motor, communication, and social skills, and they stand out for placing certified therapists on court alongside coaches. It also trains coaches, teachers, therapists, and volunteers in adaptive and inclusive instruction, and its Rising Racquets program serves the youngest children.

Love Serving Autism® also works with the USTA Florida Section Foundation and appears on USTA Florida's NJTL roster (see 1.5.3). In August 2026 it joined Crandon Park for an adaptive tennis workshop with more than 30 coaches, volunteers, and young athletes.

### Tennis For Fun

Tennis For Fun runs free, volunteer-led clinics for athletes with special needs, focused on athletes with intellectual disabilities, especially Down syndrome, and open to anyone who qualifies for Special Olympics. Every service and piece of equipment is donated, and its instructors are certified by Special Olympics. Nathan Moore founded it in September 2000, as a Jesuit High School student, to give athletes in the greater Tampa area a fun, positive way to play. It received the USTA's 2024 National Adaptive Tennis Community Service Award. Its current Florida list has 21 weekly sessions at 19 venues in 8 counties, more than half of them (11) in Hillsborough County, with others in Pinellas, Sarasota, Manatee, Lee, Pasco, Sumter (The Villages), and Okeechobee. Most sessions run November to April, avoiding summer heat.

Several Tennis For Fun venues have received recent USTA Florida facility investment, including Apollo Beach Racquet & Fitness Club and St. Petersburg Tennis Center (2025 hurricane repair and resurfacing). This is a useful bridge to the facility investment story in Section 4.4.

### Wheelchair tennis

USTA Florida's Dynamics 365 records list 17 active wheelchair tennis programs at 17 venues in 9 counties. They cluster in two regions. Southeast Florida has eight (three each in Miami-Dade and Broward, two in Palm Beach) and Southwest Florida four (three in Lee, one in Collier). Hillsborough has two City of Tampa programs, and Orange, Osceola, and Flagler one each.

The most common format is a weekly weekday-evening clinic (7 of 17 programs), often at public tennis centers such as Frank Veltri in Plantation, George English in Fort Lauderdale, and Patch Reef Park in Boca Raton. Others are run by specialist providers, including the Sabrina Cohen Foundation at Flamingo Park in Miami Beach and Tropical Wheelchair Sports in Naples, which also hosts ITF and USTA wheelchair tournaments. Star Island Resort in Kissimmee offers instruction, camps, and tournaments. Real Life Christian Church in Orlando plays indoors on a gymnasium court.

The gap is the northern half of the state. Flagler is the northernmost county with a program; Duval, Pinellas, and the entire Panhandle have none.

### 1.5.2 COMMUNITY TENNIS ASSOCIATIONS

USTA Florida's Dynamics 365 records list 61 Community Tennis Associations across 25 counties. Southeast Florida holds the largest share: 14 of the 61 sit in Broward, Miami-Dade, and Monroe, and another 10 in Palm Beach, Martin, and Indian River. Palm Beach and Broward have seven each, Miami-Dade six.

The list is broader than the traditional volunteer-run CTA. It includes park-based tennis centers (Play Tennis Gainesville, a USTA Florida–managed program across four city parks; Winter Park Tennis Center; Henry L. McMullen Tennis Complex), youth foundations, school athletic associations, and service providers. That breadth is a strength, since it shows how many kinds of local organization anchor community play.

What CTAs do in their communities. CTAs are local, not-for-profit, mostly volunteer-run organizations that grow tennis close to home, and their public descriptions show how varied that work is. Several focus on young people in under-resourced neighborhoods and pair tennis with mentoring and school support. The Gainesville Area Community Tennis Association runs Aces in Motion, which combines weekly tennis with life-skills and academic support for middle and high school students in partnership with schools, city parks, and local police, and it sponsors a middle school tennis league. The Sloane Stephens Foundation in Fort Lauderdale brings structured tennis into elementary school recess, runs park-based and weekend programs, and offers free summer camps that mix tennis with tutoring, mentoring, and enrichment.

Others organize play for the whole community. The Tallahassee Tennis Association, founded in 1986, runs adult leagues and tournaments and works with city parks staff on community events, such as clinics for local schools and Special Olympics athletes during the week of the Tallahassee Challenger professional tournament. The Lee County Community Tennis Association promotes play across the county and supports free wheelchair tennis lessons, with loaner sport chairs, at Rutenberg Park and Three Oaks Park. Together, CTAs are the local network that leagues, coaches, and parks lean on to bring new players in.

The gaps are as telling as the concentrations. Hillsborough County, with 1.59 million residents, has two CTA records; Duval, with 1.06 million, has one. Polk, Osceola, Seminole, Lake, Brevard, and St. Lucie have none.

**TABLE 1.20. CTA records by USTA Florida region code**

| Region code | CTA records | Counties with a CTA record |
|---|---|---|
| 1 | 3 | Bay, Leon |
| 2 | 9 | Alachua, Clay, Columbia, Duval, Marion, St. Johns |
| 3 | 10 | Hillsborough, Pasco, Pinellas |
| 4 | 10 | Flagler, Orange, Volusia |
| 5 | 2 | Manatee, Sarasota |
| 6 | 10 | Indian River, Martin, Palm Beach |
| 7 | 3 | Charlotte, Collier, Lee |
| 8 | 14 | Broward, Miami-Dade, Monroe |

*Source: USTA Florida Dynamics 365 community tennis association records, 2026.*

*Region codes as stored in Dynamics 365.*

### 1.5.3 NATIONAL JUNIOR TENNIS & LEARNING (NJTL)

NJTL chapters pair tennis with education and life skills for under-resourced youth, a model founded by Arthur Ashe and colleagues in 1969. USTA Florida's records list 16 NJTL chapters in 11 counties. They range from long-running programs such as the MaliVai Washington Youth Foundation in Jacksonville and First

Serve Miami to newer organizations such as the Boys and Girls Clubs of Martin County. Orange and Palm Beach have three chapters each, and Manatee two. Five chapters also appear on the CTA list, so the combined CTA and NJTL network is 72 distinct organizations in 25 counties.

Coverage in Tampa Bay is thin. Life Academy in Apollo Beach is Hillsborough County's only listed chapter, at the same street address as Apollo Beach Racquet & Fitness Club, a Tennis For Fun venue that received USTA Florida hurricane-repair funding in 2025. Pinellas, with 971,000 residents, has no chapter.

### 1.5.4 FUNDING AND EQUIPMENT SUPPORT

USTA Florida supports community tennis with its own money in two ways: grants to the organizations that run programs, and equipment it buys and sends directly to schools and youth programs. The two are reported separately.

**Grants to community programs.** Between March 2024 and September 2026, USTA Florida disbursed $473,887 through 114 non-facility grants to 52 organizations. Program grants made up most of it ($328,874, 69 percent), followed by equipment grants ($75,044, 16 percent) and wheelchair tennis grants ($69,969, 15 percent). Disbursements rose from $184,960 in 2024 to $205,717 in 2025, an increase of 11 percent.

**Grant cycles changed in 2026.** USTA Florida moved to two grant cycles in 2026, spring and fall, and now awards program grants only. 2025 was the last full year under the earlier structure, so 2026 totals are not directly comparable.

**TABLE 1.21. USTA Florida non-facility grants disbursed, by grant type**

| Grant type | 2024 | 2025 | Jan to Sep 2026 | Total |
|---|---|---|---|---|
| Program | $108,470 | $140,294 | $80,110 | $328,874 |
| Equipment | $26,461 | $45,483 | $3,100 | $75,044 |
| Wheelchair | $50,029 | $19,940 | $0 | $69,969 |
| Total | $184,960 | $205,717 | $83,210 | $473,887 |
| Awards with a disbursement | 43 | 53 | 18 | 114 |

*Source: USTA Florida Dynamics 365, non-facility grant awards, as exported October 2026. Disbursed amounts, by award date. Excludes four awards with nothing disbursed yet ($20,700 awarded).*

On a matched January to September basis, 2026 disbursements of $83,210 trail 2025 ($115,310) and 2024 ($132,582). The gap is in equipment and wheelchair grants: program grants are slightly ahead of 2025 for the same months ($80,110 against $75,235), while only one equipment grant ($3,100) and no wheelchair grants have been made so far in 2026. Grant cycles also continue after September; in 2025, $90,407 across 24 awards was granted in October and November.

Grant dollars reached 19 counties. Orange County received the most ($109,136, 23 percent), and the top five counties (Orange, Broward, Hillsborough, Duval, and Pinellas) received 62 percent. Seven awards ($23,310) went to organizations headquartered outside Florida that run programs here, so no Florida county is recorded for them. NJTL chapters received $130,885 (28 percent) across eight organizations.

**Equipment purchased by USTA Florida.** Alongside its grants, USTA Florida equips schools and youth programs directly from its supplies ledger. In 2025 the ledger records $21,283 in tennis equipment for schools, after-school programs, summer camps, and community programs, across 42 purchases for 18 recipients. Orders ranged from foam and red felt balls for elementary PE classes to racquets, nets, and full kits for multi-school after-school programs.

After-school programming received the largest share. The All Stars after-school program accounted for $8,470, 40 percent of the year's total, to equip 17 schools. Broward County schools received $3,914 across 13 orders, including North Lauderdale Elementary, New River Middle, and North Fork Elementary. Two Boys & Girls Club sites in Clay County, in Orange Park and at Keystone Heights Elementary, received $1,544 for summer camp and after-school programs. A school visit tied to the Tallahassee Challenger professional tournament received $1,840 in racquets and balls. Smaller orders supported PE classes at individual schools, including Pine Island and Picolata elementaries in St. Johns County.

**TABLE 1.22. USTA Florida equipment purchases by setting, 2025**

| Setting | Purchases | Amount | Share |
|---|---|---|---|
| After-school programs | 8 | $10,402 | 49% |
| Schools and PE classes | 25 | $8,462 | 40% |
| Summer camps | 4 | $976 | 5% |
| Community programs | 4 | $875 | 4% |
| After-school and summer camp (combined order) | 1 | $568 | 3% |
| Total | 42 | $21,283 | 100% |

*Source: USTA Florida general ledger, January to December 2025. Net of credits. Shares do not sum to 100% due to rounding.*

Most of this spending, $18,410 or 86 percent, fell between January and September, which makes January to September 2025 the baseline for a matched comparison with 2026. Equipment support is reported separately from the program counts above, because the ledger names a county for only 38 percent of the spending.

From January to September 2026, the ledger records $13,744 in program equipment across 25 purchases for 20 recipients, 25 percent less than the $18,410 recorded in the same months of 2025. Schools and PE classes received most of it ($9,611, 70 percent).

**TABLE 1.23. USTA Florida equipment purchases by setting, January to September 2026**

| Setting | Purchases | Amount | Share |
|---|---|---|---|
| Schools and PE classes | 21 | $9,611 | 70% |
| After-school programs | 1 | $2,263 | 16% |
| Community programs | 3 | $1,871 | 14% |
| Total | 25 | $13,744 | 100% |

*Source: USTA Florida general ledger, January to September 2026. Net of credits. Amounts may not sum to the total due to rounding.*

The same account shows $1,319 in October and November 2024 for after-school and community programs, and no equipment purchases earlier in 2024. 2024 is therefore not used as a comparison year for equipment.

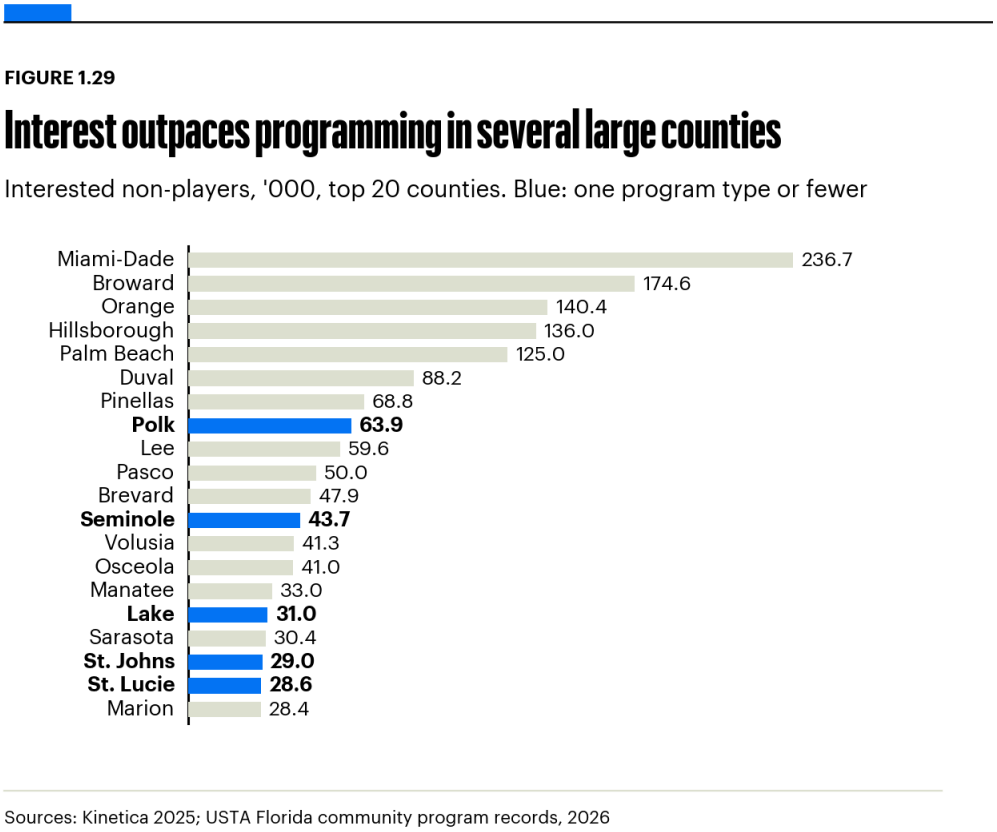
**How the two streams relate.** Equipment grants pay organizations to buy their own equipment, while the ledger records equipment USTA Florida buys and sends, so the two are counted separately.

### 1.5.5 COMMUNITY COVERAGE AND GAPS

**Coverage tracks population, but rural Florida is largely unserved.** The 28 counties with no community program are all small or rural, home to 928,674 residents (about 4 percent of Florida) and 59,148 people Kinetica reports as interested in tennis but not yet playing. They are also lower-income, with a median average household income of about $81,000 against $112,000 in covered counties.

**The bigger opportunity is mid-size, fast-growing counties.** Polk County has 854,000 residents and 63,897 people Kinetica reports as interested in playing, more latent demand than Lee or Pasco, yet Special Olympics is its only community program type. Seminole, Lake, and St. Lucie follow the same pattern, and St. Johns has CTAs but nothing else. Osceola adds only a wheelchair program at Star Island Resort. Three fast-growing counties (Polk, Lake, Walton) rely on Special Olympics alone, and Osceola nearly so.

**FIGURE 1.29. Interested non-players and community program coverage, top 20 counties**




*Sources: Kinetica Sports & Recreation Localized Intelligence 2025; USTA Florida community program records, 2026.*

**TABLE 1.24. Large counties with one community program type or fewer**

| County | 2025 population | Interested, not playing | Program types present |
|---|---|---|---|
| Polk | 853,666 | 63,897 | Special Olympics only |
| Seminole | 497,439 | 43,701 | Special Olympics only |
| Lake | 446,754 | 30,977 | Special Olympics only |
| St. Lucie | 392,918 | 28,595 | Special Olympics only |
| St. Johns | 336,848 | 29,003 | CTAs only (3) |

*Sources: Kinetica Sports & Recreation Localized Intelligence 2025; USTA Florida community program records, 2026.*

*Population and latent demand: Kinetica 2025 county catchment reports. Interested, not playing = adults plus youth with interest in playing tennis.*

**Concentration.** Palm Beach County alone holds 28 of the 190 records (15 percent), and much of Florida's autism programming depends on a single organization in a single county. In Hillsborough, 11 of its 14 adaptive offerings are Tennis For Fun, which is volunteer-run. These programs are strengths.

**What this points to. The pattern suggests four opportunities, which connect to the top-line recommendations in the Executive Summary:** extending autism and adaptive programming into counties where Special Olympics already operates (the local infrastructure exists); seeding CTA and NJTL coverage in Polk, Osceola, Seminole, Lake, and St. Lucie, linked to the Community Coach Program and the population growth story in Section 2.2; extending wheelchair tennis into North Florida and the Panhandle; and treating this seven-list dataset as the 2026 baseline, so future reports can measure change on a matched January to September basis.

# 1.6 Latent demand

Sections 1.1 through 1.5 describe who plays tennis in Florida today. This section turns to who does not play yet but could. It sizes two overlapping groups from the 2025 Kinetica data: residents who are interested in playing but are not playing, and former players who have lapsed. It closes with what this means for Section 2 (Growth Trends) and Section 4 (the case for public court investment).

### Key findings

- **About 1.83 million Floridians age 6 and up are interested in tennis but not playing, close to the 1.99 million who play.**
- **Youth latent demand is larger than the current youth game. Florida has 390,924 interested youth against 373,378 youth players. Florida youth interest (12.59%) is 2.7 points above the national rate.**
- **Interest runs highest relative to play in rural North Florida and the Heartland (Highlands, DeSoto, Hardee, Glades, Hendry, and Okeechobee counties, the rural area north and west of Lake Okeechobee), where participation rates are lowest.**
- **The five largest metro counties hold 44.5% of all interested non-players** (812,657 people), so most of the absolute opportunity is still in South and Central Florida metros.

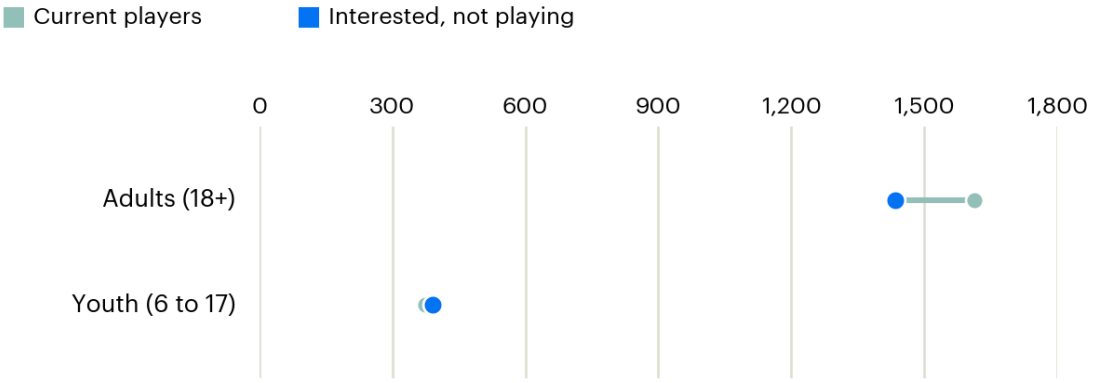
## 1.6.1 INTERESTED BUT NOT YET PLAYING: ADULTS AND YOUTH

Kinetica's "interest to play" measure counts residents who say they would like to play tennis. In 2025, 1,826,073 Floridians age 6 and up fall into this group, or 8.27% of the age 6+ population, close to the 1,987,130 people who played in the past 12 months.

FIGURE 1.30

## Youth interest outnumbers youth players

Current players and interested non-players, Florida, 2025, '000




Source: Kinetica Sports & Recreation Localized Intelligence 2025

*Figure 1.30. Current past-12-month players and interested non-players by age group, Florida, 2025. Source: Kinetica Sports & Recreation Localized Intelligence 2025, county catchment reports.*

| Segment | Current players | Interested, not yet playing | Interest rate (FL) | Interest rate (U.S.) |
|---|---|---|---|---|
| Adults (18+) | 1,613,752 | 1,435,149 | 7.56% | 7.74% |
| Youth (6 to 17) | 373,378 | 390,924 | 12.59% | 9.86% |
| **Total (6+)** | **1,987,130** | **1,826,073** | **8.27%** | **8.08%** |

*Table 1.25. Interest to play by age group, Florida and U.S., 2025. Interest rate = interested non-players as a share of the age group population. Source: Kinetica, 2025 catchment releases (Florida and U.S. benchmark columns).*

**Florida's latent demand leans young. Florida adults are slightly less likely than U.S. adults to be interested but not playing (7.56% against 7.74%), partly because Florida adults already play at a higher rate (8.50% against 7.94%). Florida youth are well above the national rate (12.59% against 9.86%), and there are more Florida youth who want to play than youth who currently play.**

**Adults are still the bigger pool in raw numbers.** Interested adults (1,435,149) outnumber interested youth nearly four to one. Programs aimed at adult beginners and returners therefore reach the most people, while youth programming addresses the deepest gap relative to current play.

### Lapsed players: the return pool

Kinetica also reports the share of residents who used to play and have stopped. Kinetica's Florida lapsed rate is 5.57% of residents age 6 and up: 5.83% of adults and 3.68% of youth. Kinetica reports lapsed players as a rate only, so no count is shown. Florida's lapsed rate is below the U.S. rate (6.06%), which fits with Florida's higher current participation. Lapsed players already know the game and can be an easier group to bring back. Some of them are also counted in the interested group, so the two pools should not be added together.

| Latent pool | Florida count | Share of base | U.S. share | How derived |
|---|---|---|---|---|
| Interested, not yet playing (age 6+) | 1,826,073 | 8.27% of age 6+ | 8.08% | Reported count |
| Lapsed players (age 6+) | Rate only | 5.57% of age 6+ | 6.06% | Reported rate |

*Table 1.26. The two latent pools, Florida, 2025. These groups overlap and must not be summed. Kinetica reports the lapsed pool as a rate only, so it is shown without a count. Source: Kinetica, 2025 catchment releases.*

### 1.6.2 WHO COULD PLAY: THE HAND-OFF TO SECTIONS 2 AND 4

Taken together, the latent demand data describe a large group of Floridians who could play if courts and programs were available to them: about 1.8 million interested non-players, plus a lapsed pool equal to 5.57% of residents age 6 and up. The two groups overlap, so they should not be combined, and the interested group alone is nearly the size of the current playing population.

# 2. Growth trends

## 2.1 Participation growth

This section looks at how Florida tennis participation is changing. It uses the PAC Study, published each year in the USTA U.S. Tennis Participation Report, because PAC measures every year the same way. Kinetica's localized data is designed to show the current picture rather than change over time, so it is used in Section 1.1 for where Floridians play today and is not compared across releases here.

### KEY FINDINGS

- **Florida's participation rate rose from 6.1% in 2019 to 9.1% in 2025.** That is the highest Florida rate in PAC figures published for those years.
- **In the latest year, it rose 1.1 points.** It went from 8.0% in 2024 to 9.1% in 2025, tied for the third-largest gain among the 16 USTA sections that PAC reports. Single-year section changes carry sampling error, so the longer trend is the stronger signal.
- **Florida moved back above the national rate.** The U.S. rate rose half a point, from 8.3% to 8.8%, so Florida went from just below the nation to above it.
- **About 1.95 million Floridians played in 2025.** PAC estimates 1,949,000 Florida players, up from about 1.7 million in 2024. Nationally, players rose 6% to a record 27.3 million.
- **Tennis grew faster than the population.** Florida's population grew 2% (BEBR) while its participation rate rose 1.1 points, so the gain came from more Floridians playing, not only from more Floridians.

### 2.1.1 FLORIDA'S PARTICIPATION TREND, 2019 TO 2025

Florida's rate climbed quickly from 2019 to 2021, held near 8% through 2024, and then rose to 9.1% in 2025. Florida was above the national rate in every year from 2019 through 2023. In 2024 the national rate rose while Florida's dipped slightly (8.0% against 8.3%), and in 2025 Florida moved back above it.

**TABLE 2.1. Tennis participation, Florida section and United States, 2019 to 2025 (PAC)**

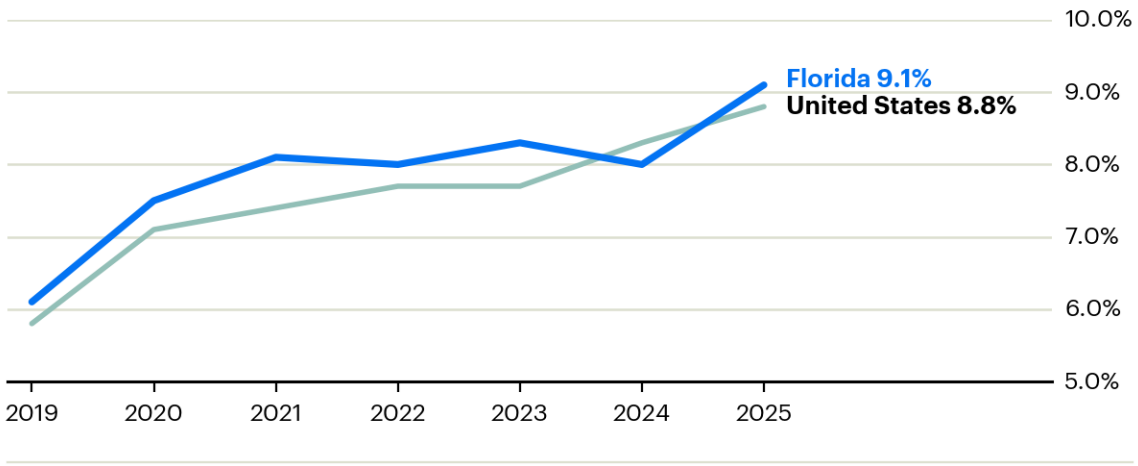
| Year | Florida rate | U.S. rate | Florida players | U.S. players |
|---|---|---|---|---|
| 2019 | 6.1% | 5.8% | 1.2M | 17.7M |
| 2020 | 7.5% | 7.1% | 1.5M | 21.6M |
| 2021 | 8.1% | 7.4% | 1.6M | 22.5M |
| 2022 | 8.0% | 7.7% | 1.7M | 23.6M |
| 2023 | 8.3% | 7.7% | 1.7M | 23.8M |
| 2024 | 8.0% | 8.3% | 1.7M | 25.7M |
| 2025 | 9.1% | 8.8% | 1,949,000 | 27.3M |

*Players age 6+ who played at least once in the year. Section player counts are published rounded to 0.1 million, except Florida in 2025. Source: PAC Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data).*

FIGURE 2.1

## Florida moved back above the nation

Tennis participation rate, age 6+, %, 2019 to 2025




Source: PAC Study, USTA U.S. Tennis Participation Reports, 2025 and 2026

*FIGURE 2.1. Tennis participation rate, Florida section vs. U.S., 2019 to 2025 (PAC). Source: PAC Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data).*

### 2.1.2 FLORIDA AND THE NATION, 2024 TO 2025

Florida's rate rose more than twice as much as the nation's (1.1 points against 0.5). Florida is the sixth-largest USTA section by number of players and has the seventh-highest participation rate, and it accounts for 7.1% of all U.S. players.

**TABLE 2.2. Florida and U.S. participation, 2024 and 2025 (PAC)**

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Florida participation rate | 8.0% | 9.1% | +1.1 pts |
| Florida players (6+) | 1.7M | 1,949,000 | n/a |
| U.S. participation rate | 8.3% | 8.8% | +0.5 pts |
| U.S. players (6+) | 25.7M | 27.3M | +1.6M (+6%) |

*2024 Florida players are published rounded to 0.1 million, so the change is not calculated. Source: PAC Study, as published in the USTA 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data).*

### 2.1.3 FLORIDA POPULATION GROWTH FOR CONTEXT

BEBR's April 1 estimates show Florida adding 364,710 residents between 2024 and 2025, growth of 2%. Because the participation rate also rose, the number of players grew faster than the population.

**TABLE 2.3. Florida population, April 1 estimates (BEBR)**

| Measure | 2024 | 2025 | Change |
|---|---|---|---|
| Florida population (all ages) | 23,014,551 | 23,379,261 | +364,710 (+2%) |

*Source: BEBR, Florida Estimates of Population 2024 and 2025.*

### 2.1.4 WHERE FLORIDA PLAYS TODAY

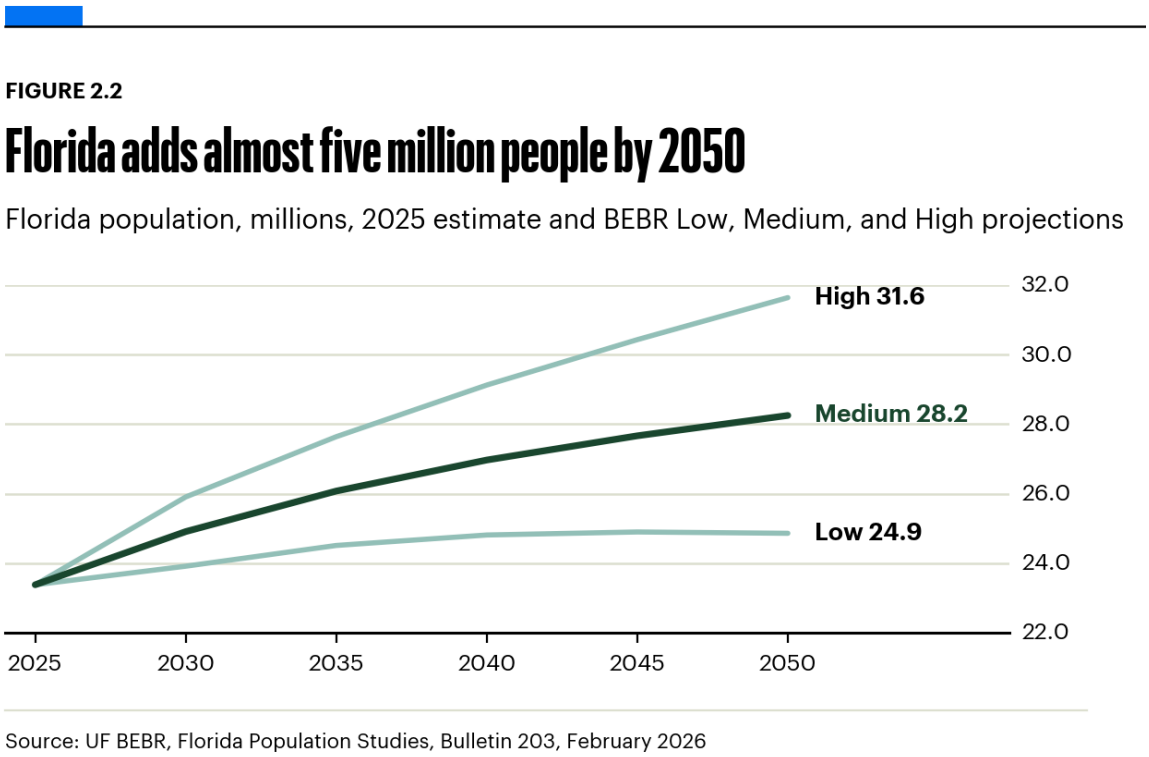
PAC does not publish county figures. The county view of participation comes from the 2025 Kinetica release in Section 1.1, and Section 2.2 sets those figures against county population growth and court supply.

## 2.2 Population growth and pressure counties

Florida added about 1.84 million residents between the 2020 Census (21,538,187) and April 2025 (23,379,261), an increase of 8.5%. BEBR's Medium projection adds another 2.70 million by 2035 (26.07 million, +12%) and 4.87 million by 2050 (28.25 million, +21%). Under BEBR's High projection the state reaches 27.64 million by 2035 and 31.64 million by 2050 (+35%).

Growth is not spread evenly, and neither are courts. This section sets county population projections against today's players, recent player growth and court inventory to identify where demand is likely to outrun supply. It replaces the 2023 report's qualitative call-out with a ranked, sourced measure.

**FIGURE 2.2. Florida population, April 1 2025 estimate and 2030 to 2050 projections, Medium with Low to High range**



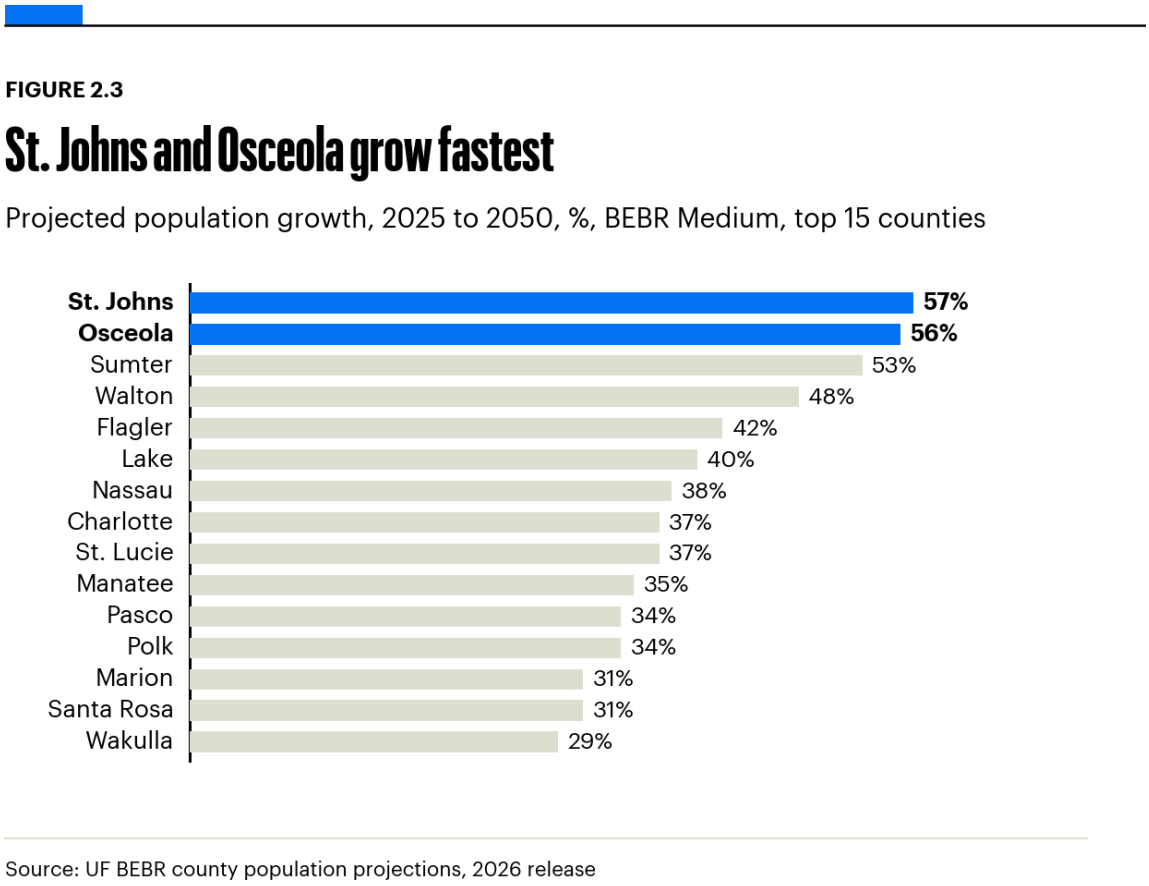

*Source: UF BEBR.*

### 2.2.1 WHERE GROWTH IS CONCENTRATED

Measured by rate, the fastest growth is in the northeast and central corridors. St. Johns (+57%), Osceola (+56%), Sumter (+53%), Walton (+48%) and Flagler (+42%) lead the Medium projection to 2050. The same five led actual growth from 2020 to 2025, so the projections extend a pattern already under way.

Measured by people, the picture shifts to the large metros. Orange (+363,555), Hillsborough (+326,463), Miami-Dade (+325,773), Polk (+292,004) and Osceola (+269,985) add the most residents by 2050. Osceola is the only county in the top five on both measures.

FIGURE 2.3. Fastest-growing counties by projected percent growth, 2025 to 2050




*Bars show BEBR Medium. Source: UF BEBR.*

### 2.2.2 TODAY'S PLAYERS AND COURTS

In 2025, Kinetica reports 1.99 million Floridians played tennis in the past 12 months: 1.61 million adults (8.50%) and 373,378 youth aged 6 to 17 (12.02%). USTA Florida's inventory records 18,293 courts at 5,849 facilities, of which 3,786 courts (21%) are public. Statewide that is about 1,278 residents and 109 players per court.

One county, Liberty, has no courts on record. The full court inventory breakdown is in Section 3.1.

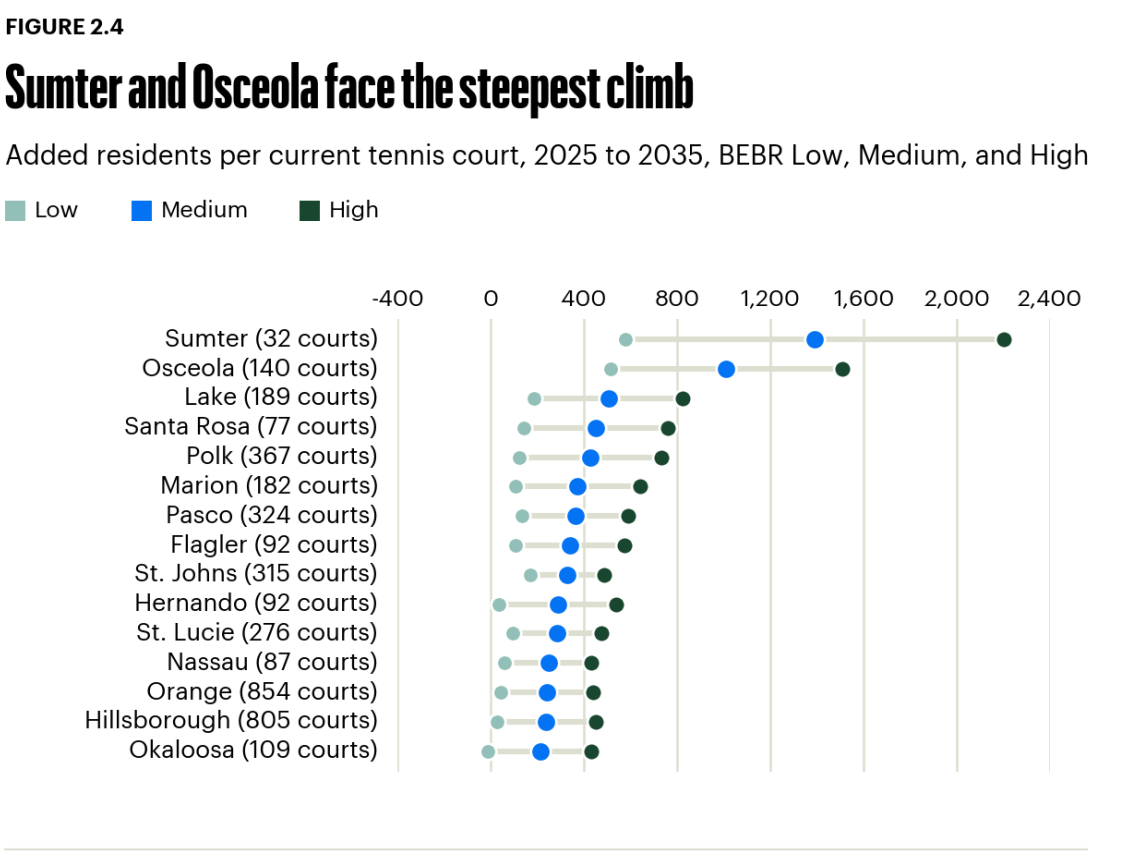
*Population sources differ by purpose. Growth figures use BEBR estimates and projections throughout. Player counts and rates are Kinetica's, which use Kinetica's own 2025 population base; the two are not mixed in any single calculation.*

### 2.2.3 PRESSURE VIEW

**Method.** Pressure is the number of residents a county is projected to add between 2025 and 2035 for every court it has today. It uses BEBR Medium as the headline, with High shown alongside, and holds courts at current levels to show the size of the gap rather than to forecast construction. No future player counts are modeled. The ranking covers the 37 counties projected to add at least 10,000 residents by 2035; smaller and rural counties are addressed in Section 3.4.

Statewide, Florida is projected to add 147 residents per existing court by 2035 under the BEBR Medium series (62 under Low and 233 under High). Half of all projected Medium growth to 2035 falls in the 15 counties below.

**FIGURE 2.4. Projected added residents per current court, 2025 to 2035, top 15 counties**




*Bars show BEBR Medium. Sources: UF BEBR projections; USTA Florida court inventory (Dynamics 365, October 2026).*

**TABLE 2.4. Pressure ranking, top 15 of 37 ranked counties**

| Rank | County | Courts | Public courts | Residents per court, 2025 | Kinetica players per court | Added residents 2025–35 (Medium) | Added per court (Medium) | Added per court (High) |
|---|---|---|---|---|---|---|---|---|
| 1 | Sumter | 32 | 2 | 5,078 | 255 | 44,507 | 1,391 | 2,203 |
| 2 | Osceola | 140 | 34 | 3,464 | 312 | 141,485 | 1,011 | 1,508 |
| 3 | Lake | 189 | 60 | 2,359 | 175 | 95,819 | 507 | 825 |
| 4 | Santa Rosa | 77 | 28 | 2,746 | 237 | 34,655 | 450 | 759 |
| 5 | Polk | 367 | 107 | 2,308 | 176 | 156,904 | 428 | 732 |
| 6 | Marion | 182 | 59 | 2,383 | 154 | 68,035 | 374 | 640 |
| 7 | Pasco | 324 | 37 | 2,001 | 167 | 117,531 | 363 | 592 |
| 8 | Flagler | 92 | 30 | 1,530 | 101 | 31,286 | 340 | 575 |
| 9 | St. Johns | 315 | 36 | 1,106 | 115 | 103,664 | 329 | 489 |
| 10 | Hernando | 92 | 16 | 2,314 | 155 | 26,551 | 289 | 540 |
| 11 | St. Lucie | 276 | 29 | 1,428 | 108 | 78,426 | 284 | 475 |
| 12 | Nassau | 87 | 6 | 1,230 | 90 | 21,547 | 248 | 433 |
| 13 | Orange | 854 | 179 | 1,799 | 180 | 205,855 | 241 | 438 |
| 14 | Hillsborough | 805 | 177 | 1,957 | 184 | 191,763 | 238 | 451 |
| 15 | Okaloosa | 109 | 22 | 2,075 | 182 | 23,107 | 212 | 433 |

*Sources: UF BEBR, Bulletin 203 (2026); USTA Florida Courts and Facilities records, October 2026; Kinetica Sports & Recreation Localized Intelligence 2025.*

*Population: UF BEBR. Courts: USTA Florida inventory, October 2026. Players: Kinetica 2025.*

### What the ranking shows.

- **Osceola is the clearest pressure county. It is projected to add 1,011 residents per court by 2035, nearly seven times the statewide rate, and has 34 public courts serving about 485,000 residents today.**
- **A second tier sits at roughly three times the state rate. Lake adds about 510 residents per court, Santa Rosa and Polk about 430 to 450 each, and Marion about 370. Polk adds the most people of any county in this group (156,904 by 2035).**
- **This report calls the seven counties with the fastest projected growth to 2050 under BEBR Medium the high-growth counties: St. Johns, Osceola, Sumter, Walton, Flagler, Lake, and Nassau. Fast growth does not always mean high pressure. St. Johns and Walton are among the fastest-growing counties but rank 9th and 21st, because their existing inventories (315 and 139 courts) absorb more of the growth. Most of their courts are private: 36 of 315 in St. Johns and 9 of 139 in Walton are public.**
- **The large metros carry volume, not intensity. Orange and Hillsborough each add close to 200,000 residents by 2035, but at 241 and 238 per court they sit 13th and 14th. Lee, Sarasota, Collier and Palm Beach fall in the bottom third of the 37 (27th to 35th) because of their large club and community inventories.**
- **The High series does not change the story.** Sumter and Osceola remain first and second, and no county in the top 15 moves more than three places; Nassau shifts the most, from 12th to 15th.

> **Sumter County.** Sumter ranks first on this measure (1,391 residents per court) but should be read differently from the counties below it. It has only 2 public courts, and most of its courts and much of its growth are concentrated in The Villages, an age-restricted community that provides courts to residents privately. Its high ranking comes from the small number of courts on record (32) set against fast growth.

> The Villages likely has more courts than USTA Florida's records show, so Sumter's figure may overstate the pressure until those courts are verified.

# 3. Court and facility infrastructure

## 3.1 Inventory

Courts are where every part of this report happens. Leagues, tournaments, school teams, community programs, and the casual hit after work all need one. This section counts what Florida has: how many courts and facilities are on record, what kinds of places host them, what they are made of, and where they are. Every court count in Section 3 is a tennis court. Pickleball courts are not counted, including at sites that have both.

| 18,293 | 5,849 | 66 of 67 | 36% |
|---|---|---|---|
| TENNIS COURTS | TENNIS FACILITIES | COUNTIES WITH TENNIS COURTS | OF TENNIS COURTS ARE CLAY |

*Source: USTA Florida Courts and Facilities records (Dynamics 365), export of October 20, 2026. Tennis courts only.*

USTA Florida's records list 18,293 full-size tennis courts at 5,849 facilities in 66 of Florida's 67 counties. Liberty County has no courts on record. The typical facility is small: the median has 2 courts and the average is 3.

> **About these counts.** Court and facility records are maintained on an ongoing basis, so totals move as facilities are added, verified, or updated. These figures reflect the most recent export and may differ slightly from the March 2026 white paper, The Case for Public Tennis Court Investment in Florida. See "How this compares with earlier counts" below.

### WHAT KINDS OF PLACES HAVE TENNIS COURTS

**Public parks hold more courts than any other facility type: 3,425 courts at 1,050 parks, or 19% of the statewide total. Apartments and condominiums are the most numerous facilities (1,810, nearly a third of all facilities) but average just 2 courts each, so they account for 17% of courts. Athletic and commercial clubs are the opposite: 398 clubs averaging 7 courts hold 2,651 courts.**

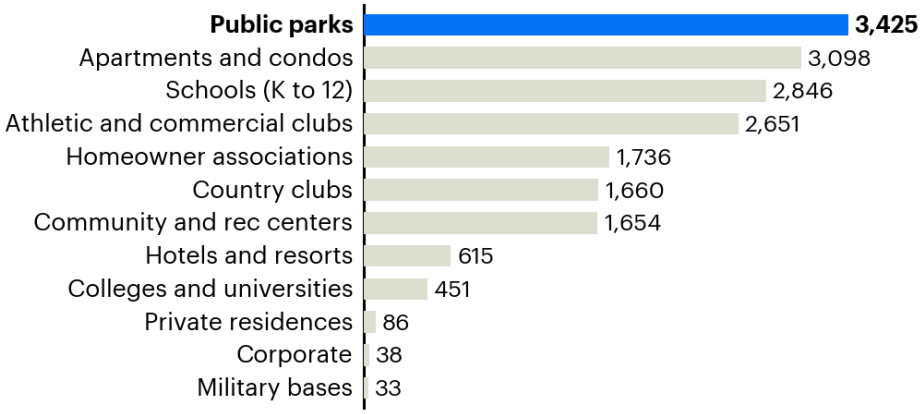
Two groups stand out for what they mean elsewhere in this report. Schools hold 2,846 courts at 610 sites, the court base behind the high school play in Section 1.3.3. Colleges and universities hold 451 courts at 79 campuses, the crossover stock discussed in Section 8. Where people live is also a big part of the picture: apartments, condominiums, homeowner associations, and private residences together account for 4,920 courts (27%). Who can use these courts is covered in Section 3.2.

## FIGURE 3.1. TENNIS COURTS AND FACILITIES BY FACILITY TYPE

FIGURE 3.1

# Public parks hold the most courts

Tennis courts by facility type, Florida, October 2026




Source: USTA Florida Courts and Facilities records (Dynamics 365), October 2026

*Source: USTA Florida Courts and Facilities records, October 2026. Facility type is the Facility Subtype field in Dynamics 365.*

## TABLE 3.1. TENNIS FACILITIES AND COURTS BY FACILITY TYPE

| Facility type | Facilities | Tennis courts | Share of courts | Avg. courts per facility |
|---|---|---|---|---|
| Public parks | 1,050 | 3,425 | 19% | 3 |
| Apartments and condominiums | 1,810 | 3,098 | 17% | 2 |
| Athletic and commercial clubs | 398 | 2,651 | 14% | 7 |
| Schools (K to 12) | 610 | 2,846 | 16% | 5 |
| Homeowner associations | 703 | 1,736 | 9% | 2 |
| Community and recreation centers | 638 | 1,654 | 9% | 3 |
| Country clubs | 274 | 1,660 | 9% | 6 |
| Hotels and resorts | 205 | 615 | 3% | 3 |
| Colleges and universities | 79 | 451 | 2% | 6 |
| Private residences | 53 | 86 | 0% | 2 |
| Corporate | 20 | 38 | 0% | 2 |
| Military bases | 9 | 33 | 0% | 4 |
| **Total** | **5,849** | **18,293** | **100%** | **3** |

*Source: USTA Florida Courts and Facilities records (Dynamics 365), October 2026.*

*Shares may not sum to 100% due to rounding.*

## FACILITY SIZE

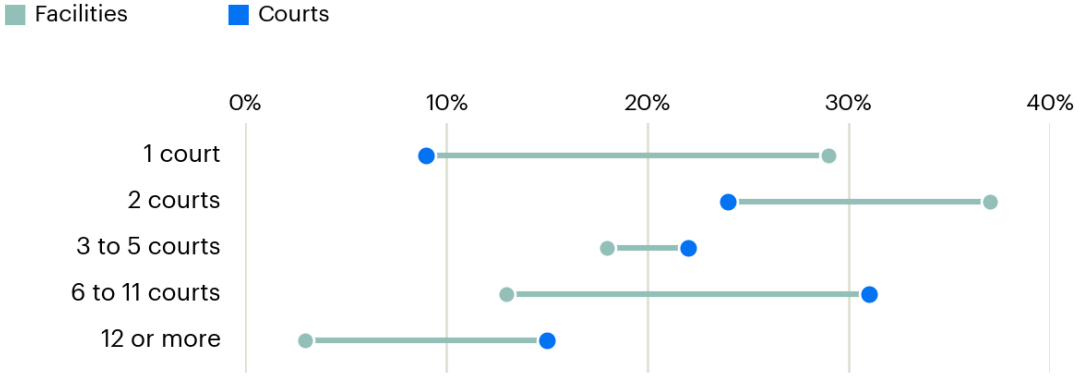
Most of Florida's tennis facilities are small, but most of its courts sit at larger ones. 66% of facilities have one or two courts, yet together they hold 33% of courts. At the other end, 162 facilities with 12 or more courts hold 2,681 courts (15%). These larger venues are the ones able to host tournaments, team matches, and multi-court programming.

### FIGURE 3.2. SHARE OF TENNIS FACILITIES AND COURTS BY FACILITY SIZE

FIGURE 3.2

**Most sites are small, but courts cluster at bigger ones**

Share of facilities and share of courts by facility size, %, October 2026




Source: USTA Florida Courts and Facilities records (Dynamics 365), October 2026

*Source: USTA Florida Courts and Facilities records, October 2026.*

### TABLE 3.2. TEN LARGEST FACILITIES BY TENNIS COURT COUNT

| Facility | County | Facility type | Tennis courts |
|---|---|---|---|
| USTA National Campus | Orange | Athletic or commercial club | 82 |
| IMG Academy - Bollettieri Tennis Program | Manatee | School | 59 |
| Emilio Sanchez Academy Florida | Collier | School | 38 |
| Frank Veltri Tennis Center | Broward | Public park | 28 |
| Roger Scott Tennis Center | Escambia | Public park | 28 |
| Boca West Country Club | Palm Beach | Country club | 27 |
| Crandon Park Tennis Center | Miami-Dade | Public park | 27 |
| Saddlebrook Resort | Pasco | Country club | 27 |
| Wellington Tennis Center | Palm Beach | Public park | 27 |
| Indian Spring Country Club | Palm Beach | Country club | 26 |

*Source: USTA Florida Courts and Facilities records, October 2026. Court counts as recorded.*

## TENNIS COURT SURFACES AND INDOOR COURTS

**Clay is a defining feature of Florida tennis. 6,546 courts, 36% of the total, are clay, found at 1,413 facilities. Hard courts make up most of the rest at 11,734 courts (64%). Clay is most common in Region 7 (54% of courts), Region 6 (49%), and Region 5 (44%), and Palm Beach County alone has 1,359 clay courts, more than half of its inventory.**

Florida's climate means almost all tennis is played outdoors. Only 34 indoor courts at 7 facilities are on record, less than 1% of the total. That small indoor base matters most for players who need protection from summer heat and storms, a constraint noted for wheelchair tennis in Section 1.5.

### TABLE 3.3. TENNIS COURTS BY SURFACE AND SETTING

| Surface or court type | Outdoor | Indoor | Total | Share |
|---|---|---|---|---|
| Hard | 11,700 | 34 | 11,734 | 64% |
| Clay | 6,546 | 0 | 6,546 | 36% |
| Grass | 13 | 0 | 13 | 0% |
| **Total** | **18,259** | **34** | **18,293** | **100%** |

*Source: USTA Florida Courts and Facilities records, October 2026. Grass courts are at 6 facilities. Shares may not sum to 100% due to rounding.*

## WHERE THE TENNIS COURTS ARE

Florida's courts are heavily concentrated in the southeast and southwest. Five counties (Palm Beach, Broward, Miami-Dade, Lee, and Collier) hold 7,871 courts, 43% of the state's total, and each has more than 1,000. Palm Beach alone has 2,618 courts (14%), more than any other county by over 900. The top ten counties hold 64%.

At the other end, 18 counties have fewer than 10 courts, including Liberty with none on record. Fifteen of them are in North Florida, the Panhandle, and the Big Bend; the other three (DeSoto, Glades, and Hardee) are in South Central Florida. Section 3.4 looks at these gaps alongside population and growth.

### TABLE 3.4. TENNIS FACILITIES AND COURTS BY USTA FLORIDA REGION

| Region | Counties with courts | Facilities | Tennis courts | Share of courts | Clay share |
|---|---|---|---|---|---|
| Region 1 | 20 | 280 | 962 | 5% | 25% |
| Region 2 | 16 | 572 | 1,767 | 10% | 31% |
| Region 3 | 4 | 704 | 2,035 | 11% | 29% |
| Region 4 | 8 | 1,037 | 2,952 | 16% | 22% |
| Region 5 | 5 | 440 | 1,371 | 8% | 44% |
| Region 6 | 5 | 985 | 3,536 | 19% | 49% |
| Region 7 | 5 | 779 | 2,361 | 13% | 54% |
| Region 8 | 3 | 1,052 | 3,309 | 18% | 27% |
| **Total** | **66** | **5,849** | **18,293** | **100%** | **36%** |

*Source: USTA Florida Courts and Facilities records (Dynamics 365), October 2026.*

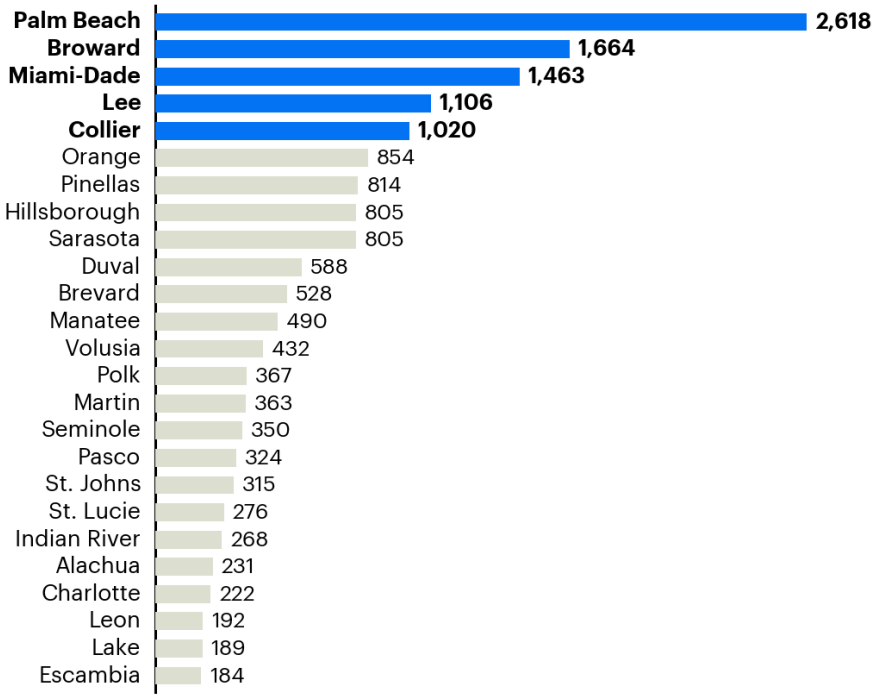
*Region is the USTA Florida region code stored on each facility record. Liberty has no courts on record and is not counted. Shares may not sum to 100% due to rounding.*

FIGURE 3.3. TENNIS COURTS BY COUNTY, TOP 25 (ALL 67 IN TABLE F.2)

FIGURE 3.3

## Five counties hold 43% of Florida courts

Tennis courts by county, October 2026, top 25 counties




Source: USTA Florida Courts and Facilities records (Dynamics 365), October 2026

*Source: USTA Florida Courts and Facilities records, October 2026. The five counties with more than 1,000 courts are shown in USTA Blue. Liberty has no courts on record. All 67 counties are in Table F.2.*

### HOW THIS COMPARES WITH EARLIER COUNTS

Three statewide counts now exist. They are best read as snapshots of an inventory that keeps improving, not as a trend line.

| Source | Facilities | Tennis courts | Counties with courts |
|---|---|---|---|
| 2023 State of Tennis Report | about 1,600 | about 11,000 | n/a |
| White paper (March 2026) | 5,601 | 17,770 | 65 |
| This report (October 2026 export) | 5,849 | 18,293 | 66 |

*White paper: The Case for Public Tennis Court Investment in Florida, USTA Florida, March 2026.*

The current count is about 3% above the white paper (523 more courts and 248 more facilities). The difference reflects routine record maintenance since March: facilities newly identified, including schools, parks, and clubs found while matching Placer.ai site-visit data, and duplicate records removed. The current

count has courts in 66 of 67 counties; the white paper had 65. The gap to the 2023 report is much larger, and it reflects how the list was built rather than growth in courts. In 2023, USTA Florida's list of facilities and courts came mainly from its own programs, such as leagues. In 2024 and 2025, USTA Florida worked to record more play, which identified more facilities and courts, and drew on the USTA national list of facilities and courts. Together, these efforts took the list from about 1,600 identified facilities to more than 5,800.

# 3.2 Public vs. private

Most of Florida's tennis courts sit behind a gate. Four in five are at clubs, condominiums, homeowner associations, hotels, schools, and other places where play is limited to members, residents, guests, or students. The other fifth are public, mostly at city and county parks. This section measures that public share, sets it against Florida's population today and in the BEBR projections, and then shows where organized play and measured site visits actually happen. The short version: public courts are a small part of the supply and a much larger part of the play.

**21%**
OF TENNIS COURTS ARE PUBLIC

**6,175**
RESIDENTS PER PUBLIC TENNIS COURT

**43%**
OF 2025 TOURNAMENT PARTICIPANTS AT PUBLIC FACILITIES

**2x**
VISITS PER TENNIS COURT AT PUBLIC VS. PRIVATE

**About these figures.** "Public" means a facility open to public use, as recorded in the Facility Type field of USTA Florida's facility records. "Private" covers everything else, including clubs, residential communities, hotels, colleges, and schools. Many school courts are publicly owned, but the property and courts are not open to the public, so they are counted here as not public. Some schools may allow public use; that is not recorded today. Pickleball courts are excluded throughout.

## HOW MUCH OF THE SUPPLY IS PUBLIC

USTA Florida's records list 3,786 public tennis courts at 1,125 facilities, 21% of the 18,293 courts and 19% of the 5,849 facilities statewide. Nearly all public courts are at parks: 3,425 courts at 1,050 public parks, plus 361 courts at 75 public recreation centers.

**Table 3.5. Tennis courts and facilities by public and private access**

| Access | Facilities | Tennis courts | Share of courts | Clay share | Indoor courts |
|---|---|---|---|---|---|
| Public | 1,125 | 3,786 | 21% | 25% | 0 |
| Private | 4,724 | 14,507 | 79% | 38% | 34 |
| **Total** | **5,849** | **18,293** | **100%** | **36%** | **34** |

*Source: USTA Florida Courts and Facilities records, October 2026 export. Clay share is outdoor clay courts as a share of each group's courts.*

The private side is large and varied. Apartments, condominiums, homeowner associations, and private residences together hold 4,920 courts, more than every public facility in the state combined. Athletic and commercial clubs hold 2,651, schools 2,846, and country clubs 1,660. Section 3.1 has the full facility type breakdown.

Public facilities are built a little differently from private ones. They are slightly less likely to be one or two court sites (66% of public facilities, against 67% of private), and 50 public facilities with 12 or more courts hold 22% of public courts. Clay is less common on public courts, 25% against 38%, and all 34 of Florida's indoor courts are private.

## PUBLIC TENNIS COURTS PER RESIDENT

Florida has one public tennis court for every 6,175 people, using BEBR's April 2025 population estimate. Public courts are the measure that matters here, because most residents cannot use most private courts.

Florida keeps growing, so the ratio falls unless public courts are added. Under BEBR's Medium projection, the current public court count works out to one public court for every 6,579 residents in 2030 and 7,462 in 2050. Holding today's ratio would take about 248 more public courts by 2030 and 789 by 2050 (409 and 1,338 under the High projection).

**Table 3.6. Public tennis courts per resident, 2025 and BEBR projections**

| Year and series | Florida population | Residents per public court | Added public courts to keep 2025 ratio |
|---|---|---|---|
| 2025 estimate | 23,379,261 | 6,175 | n/a |
| 2030 Medium | 24,909,000 | 6,579 | 248 |
| 2030 High | 25,905,400 | 6,842 | 409 |
| 2050 Medium | 28,250,100 | 7,462 | 789 |
| 2050 High | 31,640,100 | 8,357 | 1,338 |

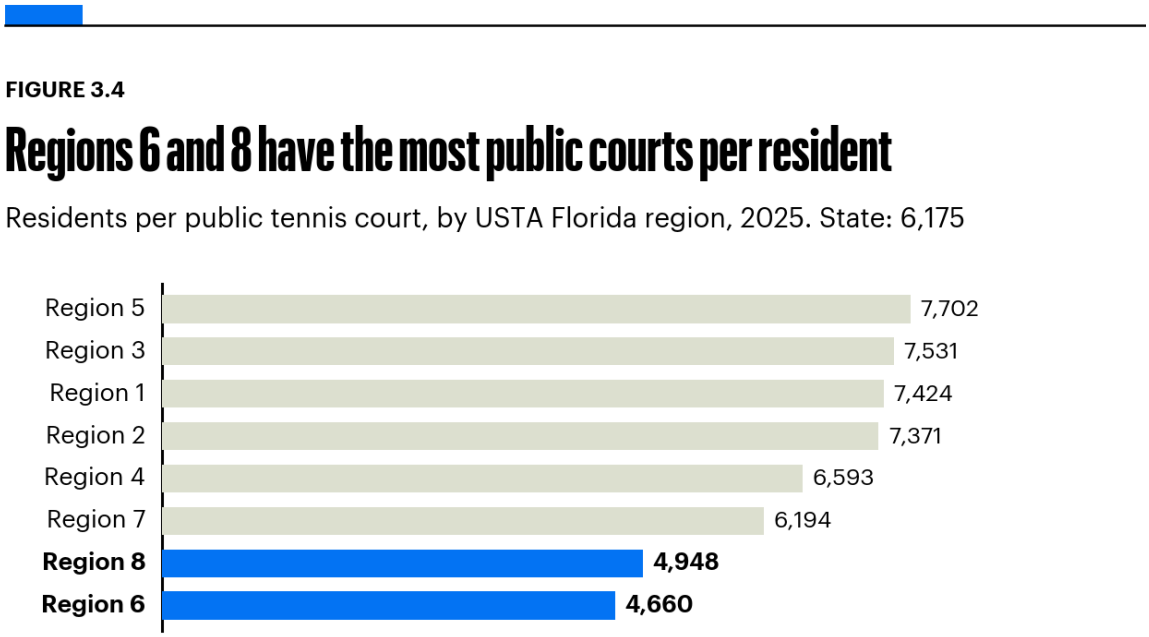
*Sources: USTA Florida Courts and Facilities records, October 2026; BEBR Florida population estimate (April 1, 2025) and projections for Florida. Projection rows hold the current public court count constant. Medium is the headline series; High is shown alongside.*

### BY REGION

The regions split into two groups. Regions 5, 6, and 7 in central and southwest Florida have far more courts per resident than anywhere else, but 86% to 89% of those courts are private. Region 6 has the most public courts per resident, one for every 4,660 residents, and Region 8 is next at one for every 4,948. Regions 1, 2, 3, and 5 have one public court for every 7,371 to 7,702 residents, against 6,175 statewide.

**Figure 3.4. Residents per public tennis court by region**

FIGURE 3.4




Sources: USTA Florida records, October 2026; BEBR 2025 estimates

*Sources: USTA Florida Courts and Facilities records, October 2026; BEBR county estimates, April 1, 2025. Statewide: one public court for every 6,175 residents.*

**Table 3.7. Public tennis courts per resident by region**

| Region | Population 2025 | Public courts | Private courts | Public share | Residents per public court |
|---|---|---|---|---|---|
| Region 1 | 1,729,814 | 233 | 729 | 24% | 7,424 |
| Region 2 | 3,140,100 | 426 | 1,341 | 24% | 7,371 |
| Region 3 | 3,403,788 | 452 | 1,583 | 22% | 7,531 |
| Region 4 | 5,221,990 | 792 | 2,160 | 27% | 6,593 |
| Region 5 | 1,124,450 | 146 | 1,225 | 11% | 7,702 |
| Region 6 | 2,329,843 | 500 | 3,036 | 14% | 4,660 |
| Region 7 | 1,536,107 | 248 | 2,113 | 11% | 6,194 |
| Region 8 | 4,893,169 | 989 | 2,320 | 30% | 4,948 |
| **Florida** | **23,379,261** | **3,786** | **14,507** | **21%** | **6,175** |

*Sources: as Figure 3.4. Region populations are sums of county estimates. Liberty County (Region 1) has no courts on record; its population is included in Region 1.*

## BY COUNTY

**40 of Florida's 67 counties fall below the statewide rate, and they are home to 49% of residents. Three counties have courts but no public courts at all: Baker, Dixie, and Madison. With Liberty, which has no courts on record, 73,355 Floridians live in a county without a public tennis court.**

Among the 37 counties with at least 100,000 residents, the gap is widest in Sumter, where most courts are at The Villages and are recorded as private. Sumter has 2 public courts, one for every 81,246 residents. Nassau follows (one public court per 17,842 residents), then Pasco (17,523), Osceola, and Manatee. The best supplied large counties are Alachua and Palm Beach (one public court for every 3,980 residents), Broward (4,179), Martin (4,264), and Pinellas (4,356). Six of the seven high-growth counties defined in Section 2.2 have fewer public courts per resident than the state: Lake (one for every 7,431 residents), St. Johns (9,676), Walton (10,061), Osceola (14,262), Nassau (17,842), and Sumter (81,246); Flagler is better supplied than the state, at one for every 4,690. Section 3.4 takes up the geographic gaps in more detail.

**Table 3.8. Counties of 100,000 or more residents with the fewest public tennis courts per resident**

| County | Region | Population 2025 | Public courts | All courts | Residents per public court |
|---|---|---|---|---|---|
| Sumter | 2 | 162,493 | 2 | 32 | 81,246 |
| Nassau | 2 | 107,053 | 6 | 87 | 17,842 |
| Pasco | 3 | 648,369 | 37 | 324 | 17,523 |
| Osceola | 4 | 484,915 | 34 | 140 | 14,262 |
| Manatee | 5 | 466,845 | 34 | 490 | 13,731 |
| St. Lucie | 6 | 394,074 | 29 | 276 | 13,589 |
| Highlands | 5 | 107,976 | 8 | 65 | 13,497 |
| Hernando | 3 | 212,849 | 16 | 92 | 13,303 |
| Bay | 1 | 199,950 | 19 | 154 | 10,524 |
| Okaloosa | 1 | 226,193 | 22 | 109 | 10,282 |

*Sources: USTA Florida Courts and Facilities records, October 2026; BEBR county estimates, April 1, 2025. All 67 counties are in Table F.3.*

## WHERE KNOWN PLAY HAPPENS

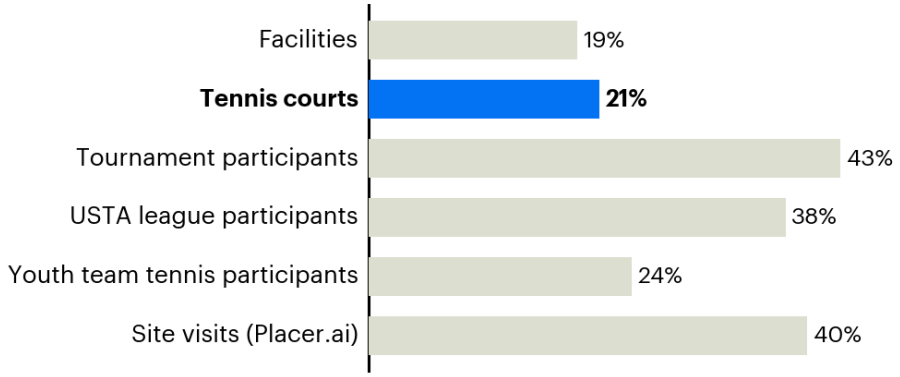
Court counts show what exists. Program records show where people actually play. Each tournament, USTA league team, and youth team tennis team in USTA Florida's records lists a location, and almost all of those locations match a facility record. Public facilities host more than their share of play in every program, and about twice their share of courts for tournaments and leagues.

**Figure 3.5. Public and private shares of tennis courts and known play**

FIGURE 3.5

### Public courts host far more than their share

Public share of each measure, %, Florida, 2025




Sources: USTA Florida records and program data; Placer.ai

*Sources: USTA Florida Courts and Facilities records, October 2026; USTA Florida tournament, league, and youth team tennis records (Dynamics 365). Tournament participants are calendar year 2025 by start date; league participants are the 2025 league year; youth team tennis is the Spring and Fall 2025 seasons. *Measured site visits are 2025 Placer.ai site visits at measured locations, as reported in Section 3.3. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

**Table 3.9. Known play by public and private access**

| Measure | Period | Total | Public | Private | Not matched |
|---|---|---|---|---|---|
| Tennis courts (for comparison) | Oct 2026 | 18,293 | 21% | 79% | n/a |
| Tournaments | 2025 | 1,206 | 43% | 57% | Under 1% |
| Tournament participants | 2025 | 93,360 | 43% | 57% | None |
| USTA league teams | 2025 league year | 4,683 | 38% | 55% | 7% |
| USTA league participants | 2025 league year | 59,786 | 38% | 60% | 2% |
| Youth team tennis teams | 2025 | 450 | 24% | 53% | 23% |
| Youth team tennis participants | 2025 | 2,417 | 24% | 58% | 18% |

*Sources: as Figure 3.5. Totals match Sections 1.3 and 1.4. Participants and participants count participation, not unique players. "Not matched" locations are not on USTA Florida's facility list. Teams and participants with no home location are not counted as public.*

## TOURNAMENTS

Public facilities hosted 517 of 1,206 sanctioned tournaments in 2025 (43%) and 43% of participants, at 55 public venues against 87 private ones. That works out to about 11 participants for every public court in the

state, against 4 for every private court. The busiest public hosts were Palm Beach Gardens Tennis Center, Lake Cane Tennis Center, Coral Gables Kerdyk Biltmore Tennis Center, Frank Veltri Tennis Center, and the Tennis Center of Coral Springs. On the private side, the USTA National Campus alone hosted 10% of all 2025 participants.

The public share is similar for junior tournaments at Levels 1 to 3 (40%) and Levels 4 to 7 (42%), and lower for adult tournaments (36%). In the matched January to September window, the public share of participants was 42% in 2025 and 40% in 2026.

### USTA ADULT LEAGUES

Public facilities were home to 38% of USTA league teams and 38% of participants in the 2025 league year (22,806 of 59,786), across 96 public locations and 280 private ones. Another 7% of team records, mostly individual Flex and Mixed registrations through county parks and recreation departments, had no home location and are not counted as public. Public teams draw from fewer, busier sites: public league locations averaged about twice as many teams each as private ones. The public share of participants is highest in Mixed (43%) and Adult division play (36%), and lowest in Flex (30%), where most registrations have no home location. It was 39% in the 2024 league year.

### YOUTH TEAM TENNIS

Youth team tennis leans on public courts too. In 2025, 24% of participants and 24% of teams played at public facilities, and another 23% of teams had no home location, which is not counted as public. The public share has grown: comparing spring seasons, it rose from 28% of participants in Spring 2025 to 39% in Spring 2026, and public teams grew from 74 to 123.

### INDEPENDENT LEAGUES

Community and club leagues (Section 1.3.1) cannot yet be placed. About 42% of their 41,814 participants are recorded with a city or a league-wide total rather than a facility, and another 23% list a site that is not on USTA Florida's facility list. The named sites have been set aside so they can be added to the facility records.

## PUBLIC TENNIS COURTS CARRY MORE USE PER COURT

Placer.ai site-visit data, covered in Section 3.3, gives a second view of the same pattern. Among measured locations matched to USTA Florida's facility records, public facilities hold 24% of measured tennis courts but drew 40% of 2025 site visits. That is 1,484 site visits per public court, about twice the 694 per private court. Counted against all 2025 site visits, including those at locations not yet matched, public facilities drew 40% (Section 3.3).

Keep in mind that site-visit estimates show that someone was at a location, not why they were there or whether they used the courts. A visit can be a tennis player, but it can also be a spectator or someone passing through, and this is true whether a location’s boundary covers the whole property or only the courts. With that in mind, USTA Florida tested the comparison: leaving out event venues, campus recreation centers, and fitness clubs gives 2.2 times as many site visits per public court as per private court, leaving out colleges and hotels as well gives 2.4 times, and limiting it to sites with no pickleball courts gives 2.0 times. Against athletic and country clubs alone, public courts still draw 1.6 times the site visits per court.

The gap is not driven by one region or one kind of site. Public courts recorded more site visits per court than private courts in all eight regions, and at every facility size. It is widest at the smallest sites: one or two court public facilities averaged 1,327 site visits per court, against 406 at private facilities of the same size, many of them at apartments, condominiums, and homeowner associations. Colleges and universities show the highest site visits per court of any facility type (Figure 3.6).

**Table 3.10. Site visits per tennis court at measured locations, 2025**

| Access | Measured facilities | Tennis courts | Share of courts | Share of site visits | Site visits per court |
|---|---|---|---|---|---|
| Public | 895 | 3,073 | 24% | 40% | 1,484 |
| Private | 3,422 | 9,768 | 76% | 60% | 694 |

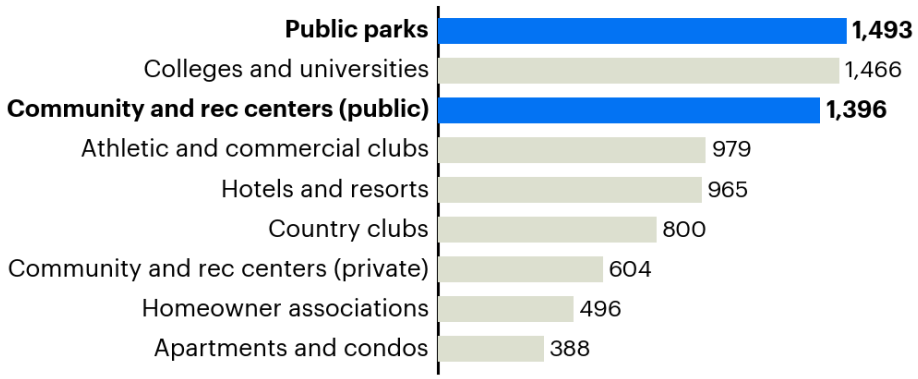
*Sources: Placer.ai site visits, 2025, as used in Section 3.3; USTA Florida Courts and Facilities records. Locations matched to the facility list by USTA location ID, or by facility name where the ID did not match. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

**Figure 3.6. Site visits per tennis court by facility type, 2025**

FIGURE 3.6

## Public parks rank near the top for site visits

Placer.ai site visits per court by facility type, 2025




Sources: Placer.ai; USTA Florida records, October 2026

*Sources: as Table 3.10. Facility types with at least 100 measured courts. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

### WHAT THIS MEANS

- **Public courts are the working core of Florida tennis.** They are about a fifth of the supply but host roughly two fifths of tournament participants, league participants, and measured site visits.
- **Private supply does not close the access gap.** The regions with the most courts per resident are overwhelmingly private, and residential courts, the largest private group, see the lightest use per court.
- **Growth widens the gap without new public courts. Keeping today's ratio means adding about 248 public courts by 2030 under the BEBR Medium projection, with the sharpest shortfalls in fast-growing counties such as Pasco and Osceola. Section 4 builds the case for public court investment on these findings.**

# 3.3 Facility utilization



Court counts tell us what Florida has. Utilization tells us how hard those courts are working. For the first time, this report uses anonymized foot traffic data from Placer.ai to measure site visits at about 4,400 tennis locations across all eight USTA Florida regions, from January 2024 through September 2026.

**11.4M**
site visits to Florida tennis locations in 2025

**86 min**
average stay per visit in 2025

**64%**
of all site visits went to the busiest 10% of locations

**WHAT THIS DATA COVERS** Placer's data does not include every property in USTA Florida's facility database. Of the 5,849 tennis facilities on record, 4,317 (74%) are matched to Placer locations, holding 70% of Florida's tennis courts (81% of public courts and 67% of private). Placer does not report site visits for some locations because its data there is partial, missing, or limited. Common reasons include sites in dense areas with many nearby locations, indoor venues and multi-story buildings where GPS accuracy is reduced, physical setups that make site visits hard to attribute to one site, too few observed site visits to produce a reliable count, and locations Placer has not yet reviewed. School courts are almost entirely absent from Placer's data. Figures in this section describe the facilities Placer measures, not every court in Florida.

## STEADY PLAY ACROSS THE STATE

Florida's tennis locations recorded 11.4 million site visits in 2025, essentially level with 11.5 million in 2024 (down 1%). The number of locations showing activity held steady at about 4,400, so the comparison reflects play on the courts, not a change in which courts were counted. Through September, 2026 has already logged 8.2 million site visits, 71% of the 2025 full-year total. Region 7 is furthest along at 75% of its 2025 total, and Region 2 has the furthest to go at 68%.

Three regions grew in 2025: Region 6 (up 3%), Region 7 (up 1%), and Region 8 (up 1%). Regions 3 and 5 held flat. Region 1 saw the largest decline (down 8%), followed by Regions 2 and 4 (each down 5%).

## A FEW COURTS CARRY MOST OF THE LOAD

Play is highly concentrated. In 2025, the busiest 10% of locations (about 440 sites) accounted for 64% of all site visits, and the busiest 1% (44 sites) accounted for 18%. The quieter half of all locations combined for just 3%. About one in five locations logged fewer than 100 site visits for the entire year.

This pattern held almost exactly in 2024 and again in 2026 to date, which makes it a lasting feature of Florida tennis rather than a one-year blip. It points in two directions. High-traffic hubs are where capacity, maintenance, and lighting investments reach the most players. And hundreds of lightly used courts are an opening for programming, promotion, or renovation to bring them into regular play. Section 4 picks up both threads.

Regions differ in how hard their courts work. Region 8 holds 19% of the state's tennis locations but drew 29% of 2025 site visits, averaging 3,871 site visits per location. Region 5 holds 8% of locations and 4% of site visits, averaging 1,341. Region 7 holds 15% of locations and 9% of site visits.

| REGION | SITES | 2025 VISITS | CHANGE VS. 2024 | SHARE OF VISITS | VISITS PER LOCATION | AVG. STAY (MIN) | PEAK TIME |
|---|---|---|---|---|---|---|---|
| Region 1 | 180 | 578,536 | -8% | 5% | 3,214 | 84 | Evening |
| Region 2 | 404 | 998,514 | -5% | 9% | 2,472 | 88 | Evening |
| Region 3 | 429 | 1,277,846 | 0% | 11% | 2,979 | 86 | Evening |
| Region 4 | 780 | 1,994,998 | -5% | 17% | 2,558 | 90 | Morning |
| Region 5 | 334 | 447,877 | 0% | 4% | 1,341 | 83 | Morning |
| Region 6 | 788 | 1,809,991 | +3% | 16% | 2,297 | 86 | Morning |
| Region 7 | 642 | 1,041,136 | +1% | 9% | 1,622 | 84 | Morning |
| Region 8 | 849 | 3,286,447 | +1% | 29% | 3,871 | 86 | Evening |
| Statewide | 4,406 | 11,435,345 | -1% | 100% | 2,595 | 86 | Twin peaks |

*Full-year 2025 vs. full-year 2024. Peak time compares the mid-morning and early-evening peaks in 2025 hourly site visits.*

## PUBLIC TENNIS COURTS WORK HARDEST

Matching Placer locations to USTA Florida's facility database shows how differently public and private courts are used. Public facilities make up 21% of the matched locations with 2025 activity, yet they drew 40% of all site visits. Private facilities, including clubs, condominiums, homeowner associations, and resorts, make up 79% of those locations and drew 59% of site visits. The remaining 0.9% of site visits are at locations not yet matched to the database (0.5%) or with no tennis courts (0.4%).

The typical public facility logged 2,003 site visits in 2025, about six times the 348 site visits at the typical private facility. Public parks alone accounted for 36% of all site visits statewide. Many private courts, especially at condominiums and homeowner associations, see light use, while public courts carry a large share of Florida's everyday play. Section 4 builds on this finding.

## LONG SITE VISITS, AND GETTING LONGER

The average visit lasted 86 minutes in 2025, up from 85 in 2024, and 87 minutes so far in 2026. That is enough time for a full match, or a lesson with a warm-up. Region 4 posts the longest stays (90 minutes in 2025 and 91 in 2026). From 2024 to 2026, average stays rose by two minutes or more in Regions 3, 4, 6, and 8 and changed by about a minute or less elsewhere. These are modeled changes of a minute or two, too small to read as a shift in how long people play.

## MORNING MARKETS AND EVENING MARKETS

Statewide, court traffic has two daily peaks, mid-morning (9 to 10 a.m.) and early evening (6 to 7 p.m.), with a clear lull in the early afternoon. That statewide shape blends two different regional patterns.

- **Morning markets:** Regions 4, 5, 6, and 7, where the mid-morning peak leads, by a wide margin in Regions 5, 6, and 7.
- **Evening markets:** Regions 1, 2, 3, and 8, where the after-work peak matches or tops the morning one. In Region 8, the state's busiest region, 7 p.m. is the busiest hour of the day.

Evening markets lean on lit courts and after-work programming. Morning markets lean on daytime leagues, lessons, and players with flexible schedules. Both matter when deciding where lighting, staffing, and program times will do the most good.

Play is spread evenly across the week. Weekdays draw about as many site visits as Saturday, and Sunday is the quietest day in every region and every year.

March is the busiest month statewide in every year measured. Site visits ease through summer, bottom out in August and September, and rebuild in the fall. Regional seasons differ: Region 1 peaks in March and April and holds up well through summer, while Regions 5, 6, and 7 drop off sharply after spring.

## FLORIDA'S BUSIEST TENNIS FACILITIES

The same names lead the list year after year. Sixteen facilities ranked in the statewide top 25 in all three periods measured (2024, 2025, and January to September 2026), not counting Hard Rock Stadium.

| # | FACILITY | CITY | REGION |
|---|---|---|---|
| 1 | USTA National Campus | Orlando | 4 |
| 2 | Coral Gables / Salvadore Park | Coral Gables | 8 |
| 3 | University of Florida Southwest Recreation Center | Gainesville | 2 |
| 4 | The Boca Raton Resort and Club | Boca Raton | 6 |
| 5 | Midtown Athletic Club, Weston | Weston | 8 |
| 6 | Miami Beach Tennis Center | Miami Beach | 8 |
| 7 | Palm Beach Gardens Tennis Center* | Palm Beach Gardens | 6 |
| 8 | University of Central Florida | Orlando | 4 |
| 9 | Sanlando Park | Altamonte Springs | 4 |
| 10 | Red Bug Lake Park | Casselberry | 4 |

*Ranked by 2025 site visits at each Placer.ai location. Site-visit counts for individual locations are not shown. Some venues host major events or share space with other recreation, which raises their counts. Hard Rock Stadium is excluded: its courts are temporary, set up for a professional event at a football stadium that also hosts races. *Palm Beach Gardens Tennis Center appears under two Placer locations; the larger is shown.*

### BUSIEST FACILITIES BY REGION, 2025

| REGION | TOP THREE FACILITIES BY VISITS |
|---|---|
| Region 1 | Winthrop Park (Tallahassee); Sandestin Tennis Center (Miramar Beach); Scott Speicher Memorial Tennis Center at Florida State University (Tallahassee) |
| Region 2 | UF Southwest Recreation Center (Gainesville); UNF Tennis Complex (Jacksonville); Fort King Tennis Center (Ocala) |
| Region 3 | JBL Riverfront Park (Tampa); Racquet Club St. Petersburg; LifeTime Fitness (Tampa) |
| Region 4 | USTA National Campus (Orlando); University of Central Florida (Orlando); Sanlando Park (Altamonte Springs) |
| Region 5 | Lakewood Ranch Tennis Center; TPC Prestancia Sports Club (Siesta Key); Sarasota Tennis Center |
| Region 6 | The Boca Raton Resort and Club; Palm Beach Gardens Tennis Center; Woodfield Country Club (Boca Raton) |
| Region 7 | Angler's Cove Condominiums (Marco Island); Arthur Allen Tennis Center at Cambier Park (Naples); Naples Grande Beach Resort |

| REGION | TOP THREE FACILITIES BY VISITS |
|---|---|
| Region 8 | Coral Gables / Salvadore Park; Midtown Athletic Club (Weston); Miami Beach Tennis Center |

### RENOVATION SPOTLIGHT

**Jimmy Evert Tennis Center, Fort Lauderdale.** The City of Fort Lauderdale closed the Jimmy Evert Tennis Center at Holiday Park for a nearly yearlong, $9.5 million renovation, completed in partnership with the Orange Bowl Committee and USTA. Site visits fell sharply while the center was closed in 2025 and have recovered since it reopened; at the usual seasonal pace, 2026 is on track to come close to its 2024 level.

**ABOUT THIS DATA** Site-visit counts, dwell time, and timing patterns are modeled from anonymized, aggregated mobile location data at about 4,400 tennis court locations, grouped into USTA Florida's eight regions. Figures describe site visits to locations, not unique players; Placer does not provide how often individual players return. Placer measures site visits to a site, not to a specific court. About 1,150 measured sites also have pickleball courts, and together they account for about a third of 2025 site visits, so totals at those sites include some pickleball play. Court counts in this section are tennis courts only. Facility type and county come from USTA Florida's facility database.

**Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.**

# 3.4 Geographic disparities

Florida has 18,293 tennis courts on record, but where you live shapes how many are within reach. Courts cluster in a handful of large coastal counties, while much of North and North Central Florida has only a few courts per county, and one county has none at all. This section looks at that spread: how concentrated the inventory is, which counties are underserved, and how rural Florida compares with the rest of the state.

**43%**
of all tennis courts are in five counties, home to 33% of residents

**18**
counties have fewer than 10 tennis courts; all are rural, and 17 have below-median income

**1**
county has no tennis courts on record: Liberty

**9,194 vs 6,051**
residents per public tennis court, rural vs non-rural

## TOP-COUNTY CONCENTRATION

Palm Beach, Broward, and Miami-Dade alone hold 31% of Florida's courts with 27% of its residents. Adding Lee and Collier brings the top five to 43% of courts and 33% of residents, and seven counties together hold more than half of the state's inventory. The top 10 hold 64% of courts, compared with 57% of residents.

Concentration is not only a big-county story. Several smaller coastal counties, including Collier, Martin, and Monroe, have far more courts than their population share would suggest, and much of that supply is private: apartments, condominiums, homeowners associations (HOAs), and country clubs (Section 3.2). Public courts follow population more closely. The 10 counties with the most courts hold 63% of public courts, close to their 57% share of residents.

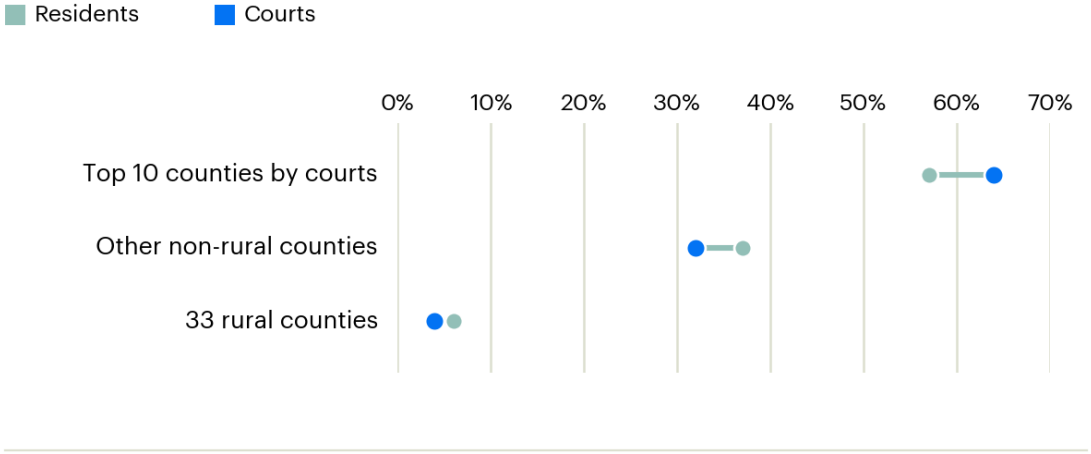
At the other end, the 33 counties with the fewest courts, half of Florida's counties, share 3% of the state's courts and 7% of its residents.

**Figure 3.7 Share of residents, tennis courts, and public tennis courts by county group**

FIGURE 3.7

## Courts follow population, unevenly

Share of Florida's residents and tennis courts by county group, %




Sources: USTA Florida records, October 2026; BEBR 2025 estimates; Florida DOH

*Sources: USTA Florida courts and facilities records (Dynamics 365, October 2026); BEBR April 1, 2025 population estimates; rural designation per Florida Department of Health (2020 Census). Top 10 ranked by total courts.*

**Table 3.11 Top 10 counties by tennis courts**

| County | Region | Residents (2025) | Tennis courts | Public courts | Residents per public court |
|---|---|---|---|---|---|
| Palm Beach | 6 | 1,556,161 | 2,618 | 391 | 3,980 |
| Broward | 8 | 1,993,535 | 1,664 | 477 | 4,179 |
| Miami-Dade | 8 | 2,814,927 | 1,463 | 480 | 5,864 |
| Lee | 7 | 839,223 | 1,106 | 119 | 7,052 |
| Collier | 7 | 413,314 | 1,020 | 73 | 5,662 |
| Orange | 4 | 1,536,045 | 854 | 179 | 8,581 |
| Pinellas | 3 | 966,933 | 814 | 222 | 4,356 |
| Hillsborough | 3 | 1,575,637 | 805 | 177 | 8,902 |
| Sarasota | 5 | 487,640 | 805 | 96 | 5,080 |
| Duval | 2 | 1,079,044 | 588 | 167 | 6,461 |

*Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

*Population: BEBR April 1, 2025 estimates. Public means open to the public; school courts are counted as not public.*

### UNDERSERVED COUNTIES

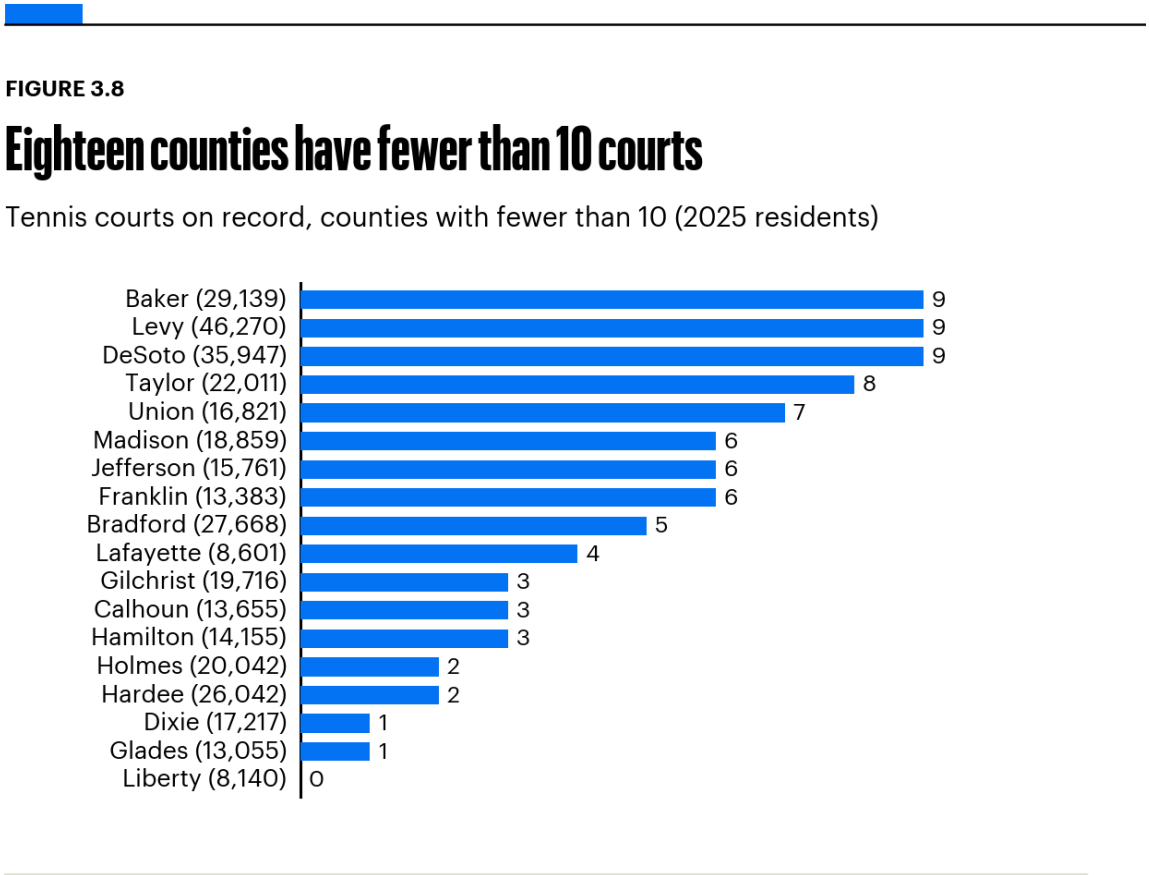
Eighteen counties have fewer than 10 tennis courts on record. Together they are home to 366,482 residents, 2% of the state, and hold 84 courts, under 1% of the inventory. Every one of them is a rural county. Liberty

has no courts on record at all. The 2026 white paper counted 17 counties under 10 courts; the count here reflects the current inventory, which USTA Florida maintains on an ongoing basis.

Public courts carry more of the load in these counties. 36 of their 84 courts (43%) are public, compared with 21% statewide, so in many small counties a single park is the whole local court supply. Glades, Hamilton, Hardee, and Holmes have only public courts. Four counties have no public courts at all: Baker, Dixie, Liberty, and Madison, home to 73,355 residents combined. Sumter is close behind: The Villages accounts for most of its 32 courts, and only 2 are public.

**Figure 3.8 Counties with fewer than 10 tennis courts (2025 residents in parentheses)**

FIGURE 3.8




*Source: USTA Florida courts and facilities records (Dynamics 365, October 2026); BEBR April 1, 2025 population estimates.*

**Table 3.12 Counties with fewer than 10 tennis courts**

| County | Region | Residents (2025) | Tennis courts | Public courts | Growth 2025-35 |
|---|---|---|---|---|---|
| Liberty | 1 | 8,140 | 0 | 0 | 2% |
| Glades | 7 | 13,055 | 1 | 1 | 5% |
| Dixie | 2 | 17,217 | 1 | 0 | 3% |
| Holmes | 1 | 20,042 | 2 | 2 | 2% |
| Hardee | 5 | 26,042 | 2 | 2 | 1% |
| Calhoun | 1 | 13,655 | 3 | 1 | 1% |
| Hamilton | 1 | 14,155 | 3 | 3 | 2% |
| Gilchrist | 2 | 19,716 | 3 | 1 | 11% |

| County | Region | Residents (2025) | Tennis courts | Public courts | Growth 2025-35 |
|---|---|---|---|---|---|
| Lafayette | 1 | 8,601 | 4 | 2 | 7% |
| Bradford | 2 | 27,668 | 5 | 1 | 4% |
| Franklin | 1 | 13,383 | 6 | 4 | 11% |
| Jefferson | 1 | 15,761 | 6 | 4 | 5% |
| Madison | 1 | 18,859 | 6 | 0 | 1% |
| Union | 2 | 16,821 | 7 | 4 | 8% |
| Taylor | 1 | 22,011 | 8 | 2 | 4% |
| Baker | 2 | 29,139 | 9 | 0 | 8% |
| DeSoto | 5 | 35,947 | 9 | 6 | 5% |
| Levy | 2 | 46,270 | 9 | 3 | 8% |

*Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

*Growth: BEBR Medium projection, April 2025 to April 2035. Gulf, Washington, and Jackson have exactly 10 courts each and Okeechobee has 11, so they sit just outside this list.*

## RURAL FLORIDA

Florida defines a rural county by population: 75,000 residents or fewer, or 125,000 or fewer when it borders a county of 75,000 or fewer (section 288.0656, Florida Statutes). Applied to the 2020 Census, the Florida Department of Health lists 33 rural counties. The list is used as published; it includes Sumter and Monroe, which now exceed the population thresholds. By 2025 they are home to 1.38 million people, 6% of Florida's residents, and hold 4% of its courts and 4% of its public courts.

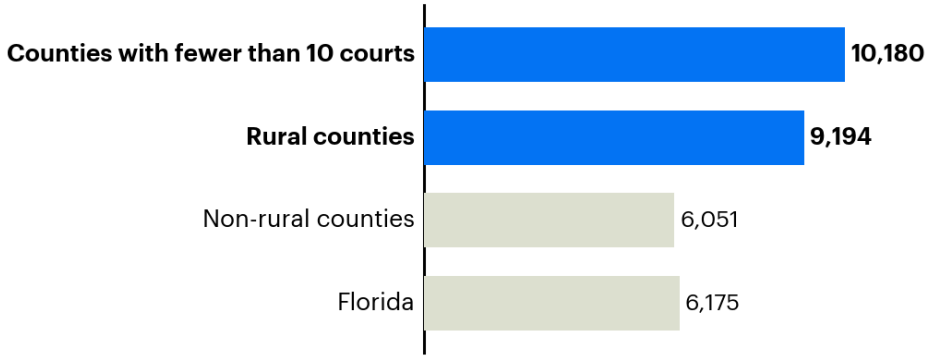
The gap shows up in per-person terms. Rural counties have one public court for every 9,194 residents, compared with one for every 6,051 in the rest of the state. In the 18 counties with fewer than 10 courts, there is roughly one court for every 4,400 residents.

**Figure 3.9 Residents per public tennis court by county group**

FIGURE 3.9

## Rural Florida has far fewer public courts per person

Residents per public tennis court by county group, 2025




Sources: USTA Florida records, October 2026; BEBR 2025 estimates

*Sources: USTA Florida courts and facilities records (Dynamics 365, October 2026); BEBR April 1, 2025 population estimates; Florida Department of Health, Florida's Rural Counties: 2020 Census.*

### WHERE IT IS CONCENTRATED

Region 1 carries most of the rural picture. Sixteen of its 21 counties are rural and 9 have fewer than 10 courts. Region 2 adds 10 rural counties, six of them under 10 courts. Regions 3 and 4 have no rural counties.

### RURAL COUNTIES THAT ARE GROWING

Most rural counties are projected to grow slowly, but a few are growing fast. Under the BEBR Medium projection, rural counties add about 146,000 residents by 2035. Sumter, Walton, and Nassau account for 61% of that growth. Sumter has one public court for every 81,246 residents (2 courts in all), Nassau one for every 17,842, and Walton one for every 10,061. Wakulla, with 13 courts, is projected to grow 15%.

**Table 3.13 Rural counties with 10 or more tennis courts, by projected growth**

| County | Region | Residents (2025) | Tennis courts | Public | Residents per public court | Added by 2035 | Growth (Med.) | Growth (High) |
|---|---|---|---|---|---|---|---|---|
| Sumter | 2 | 162,493 | 32 | 2 | 81,246 | 44,507 | 27% | 43% |
| Walton | 1 | 90,547 | 139 | 9 | 10,061 | 22,953 | 25% | 41% |
| Nassau | 2 | 107,053 | 87 | 6 | 17,842 | 21,547 | 20% | 35% |
| Wakulla | 1 | 38,189 | 13 | 5 | 7,638 | 5,811 | 15% | 28% |
| Hendry | 7 | 47,085 | 12 | 11 | 4,280 | 6,015 | 13% | 25% |
| Gulf | 1 | 16,621 | 10 | 3 | 5,540 | 1,679 | 10% | 24% |
| Washington | 1 | 26,876 | 10 | 3 | 8,959 | 1,824 | 7% | 19% |
| Suwannee | 1 | 47,274 | 13 | 8 | 5,909 | 3,426 | 7% | n/a |

| County | Region | Residents (2025) | Tennis courts | Public | Residents per public court | Added by 2035 | Growth (Med.) | Growth (High) |
|---|---|---|---|---|---|---|---|---|
| Highlands | 5 | 107,976 | 65 | 8 | 13,497 | 6,824 | 6% | 17% |
| Columbia | 2 | 72,388 | 23 | 5 | 14,478 | 3,912 | 5% | 16% |
| Monroe | 8 | 84,707 | 182 | 32 | 2,647 | 4,193 | 5% | 15% |
| Jackson | 1 | 49,728 | 10 | 5 | 9,946 | 1,272 | 3% | 11% |
| Putnam | 2 | 76,600 | 28 | 6 | 12,767 | 1,900 | 2% | 11% |
| Okeechobee | 6 | 40,314 | 11 | 8 | 5,039 | 986 | 2% | n/a |
| Gadsden | 1 | 44,790 | 13 | 3 | 14,930 | 310 | 1% | 9% |

*Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

*Growth: BEBR projections, April 2025 to April 2035, Medium headline with High alongside. Counties with fewer than 10 courts are in Table 3.12.*

Most of the high-pressure counties in Section 2.2 (Osceola, Lake, Santa Rosa, Marion, Polk) are not rural; Sumter and Nassau are the exceptions. For most rural counties the disparities are a separate problem: low supply where demand is small and spread out, rather than supply falling behind fast growth.

## DEMOGRAPHIC CONTEXT

The counties with the fewest courts are also, for the most part, the counties with the least income. Of the 18 counties with fewer than 10 courts, 17 have a median household income below the Florida median of $74,568, and 16 have a poverty rate above the state rate of 13%. Baker is the only one above the state median, and its margin of error (about ±$10,200) is wide enough that it may not be. Glades, which has a single court, has the lowest median household income in Florida at $45,870.

The pattern holds across rural Florida. In 27 of the 33 rural counties, median household income is below the state median, and in 25 the poverty rate is above the state rate. Among the 34 non-rural counties, those numbers are 18 and 11.

Age is not what sets these counties apart. In the counties with fewer than 10 courts, about 20% of residents are under 18 and 21% are 65 or older, about the same as the state as a whole. Rural Florida overall skews older (26% are 65 or older, compared with 21% elsewhere), but that comes mainly from Sumter and Highlands. The low-court counties have as many young and older residents, as a share of their population, as the rest of Florida, with far fewer places to play.

Getting to a court is a smaller part of the story than having one. Five percent of households in rural counties have no vehicle, compared with 6% statewide. A few underserved counties are exceptions: Jefferson (11%), Liberty (9%), and Franklin, Taylor, and DeSoto (8% each), where a court in the next town over may be out of reach without a car.

**Table 3.14 Counties with fewer than 10 tennis courts: income, poverty, age, and vehicle access**

| County | Median household income | Below poverty | Under 18 | 65 and over | No vehicle |
|---|---|---|---|---|---|
| Glades | $45,870 | 17% | 13% | 26% | 2% |
| Madison | $48,485 | 21% | 18% | 23% | 7% |
| Taylor | $49,073 | 17% | 20% | 21% | 8% |
| Holmes | $49,343 | 14% | 21% | 21% | 3% |
| Dixie | $50,110 | 21% | 18% | 24% | 3% |

| County | Median household income | Below poverty | Under 18 | 65 and over | No vehicle |
|---|---|---|---|---|---|
| Hamilton | $50,144 | 20% | 21% | 20% | 4% |
| Calhoun | $50,517 | 21% | 20% | 19% | 6% |
| DeSoto | $54,417 | 24% | 18% | 24% | 8% |
| Levy | $56,750 | 17% | 19% | 25% | 5% |
| Liberty | $58,671 | 18% | 20% | 14% | 9% |
| Hardee | $60,489 | 25% | 24% | 16% | 6% |
| Jefferson | $61,212 | 21% | 17% | 25% | 11% |
| Lafayette | $62,757 | 18% | 17% | 21% | 5% |
| Bradford | $63,050 | 17% | 21% | 18% | 6% |
| Gilchrist | $63,523 | 12% | 21% | 20% | 7% |
| Franklin | $64,105 | 17% | 15% | 27% | 8% |
| Union | $64,146 | 20% | 22% | 17% | 2% |
| Baker | $79,836 | 12% | 24% | 15% | 5% |
| **Florida** | **$74,568** | **13%** | **20%** | **21%** | **6%** |

*Source: U.S. Census Bureau, American Community Survey 2020-2024 5-year estimates (DP03, DP04, DP05). Florida row is the published state estimate; rural and non-rural percentages in the text combine published county counts. Small-county estimates carry wide margins of error (for example, about ±$8,200 on Liberty's median income), so county-by-county differences of a few points should not be read as precise.*

## SCHOOL TENNIS IN THE SAME COUNTIES

High school teams are another way young players get on court, and they are scarcest where courts are scarcest. Thirteen counties had no school with a tennis team in 2025-26 (Section 1.3.3), and all 13 are rural. Ten of them also have fewer than 10 courts: Calhoun, Dixie, Franklin, Gilchrist, Glades, Hamilton, Holmes, Lafayette, Levy, and Liberty. Together these 10 counties are home to 174,234 residents. The other 8 counties with fewer than 10 courts each have exactly one school with a team.

*Source: FHSAA 2025-26 boys and girls tennis assignments (528 schools, including Independent), as prepared for Section 1.3.3; USTA Florida courts and facilities records; BEBR April 1, 2025 estimates.*

# 3.5 Economic impact

Tennis moves money in Florida, and it does more than that. This section opens with USTA Florida's tournament economic impact study, then adds two measures that are new this cycle: what Florida players spend on tennis each year, and the wellbeing dividend, a dollar value placed on the higher life satisfaction associated with playing among adults.

**$145.9M**
Total economic impact of sanctioned tournaments and events (2023)

**$583.0M**
estimated spent by Florida tennis players

**$2.26B**
Wellbeing dividend of adult tennis participation in Florida (2025)

## 3.5.1 TOURNAMENTS AND EVENTS

USTA Florida commissioned Tourism Economics, part of Oxford Economics, to measure the economic impact of sanctioned amateur, youth, and adult tennis tournaments and events in Florida. The study, released in December 2024, found that sanctioned tournaments and events generated **$145.9 million in total economic impact** in Florida in 2023. The study centers on event participants and spectators, how far they traveled to attend, and what visitors spent while in the host community.

*Source: Tourism Economics (Oxford Economics), Economic Impact of Amateur, Youth, and Adult Tennis Tournaments and Events in Florida, released December 2024 (2023 data), p. 5. Total economic impact is total business sales, including direct, indirect, and induced effects.*

## 3.5.2 WHAT FLORIDA PLAYERS SPEND

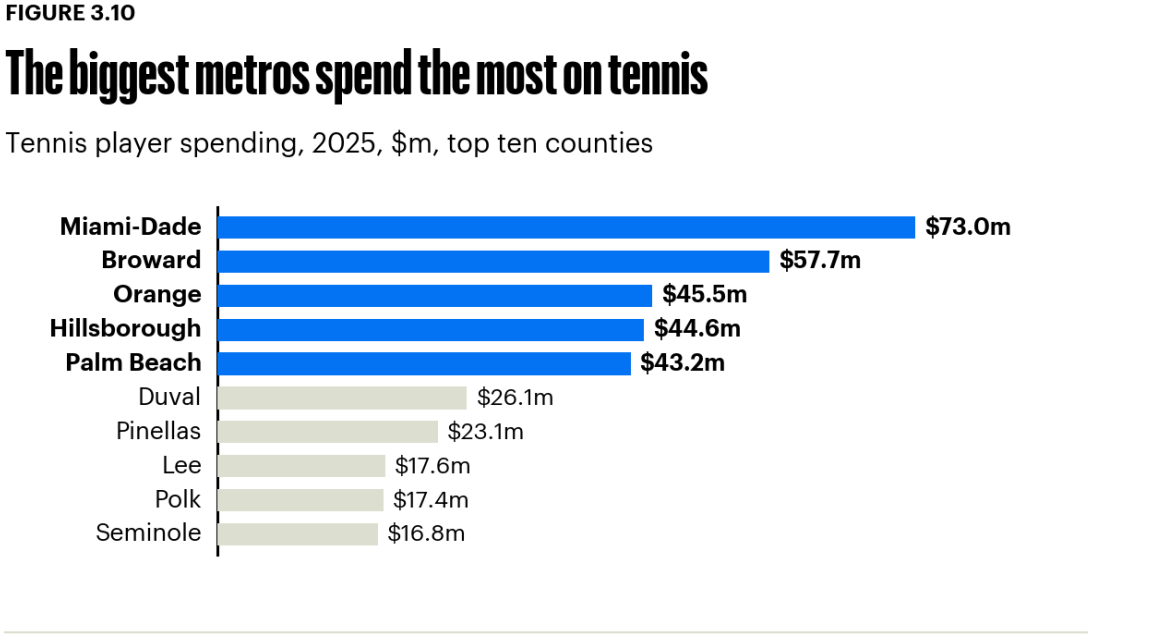
Kinetica's 2025 catchment reports include, for the first time, an estimate of what tennis players spend on tennis each year. Across Florida's 67 counties, the **1,987,130 people who played tennis in the past 12 months spent $583.0M** on the game in 2025, an average of **$293 per player**. The U.S. average is $334. Florida is home to 7% of U.S. tennis players and accounts for 6% of U.S. tennis spending.

Spending follows the player base. The five largest counties by spending, Miami-Dade, Broward, Orange, Hillsborough, and Palm Beach, account for 45% of statewide spending and 45% of players. The top ten account for 63%. By USTA Florida region, Region 4 and Region 8 each account for 23% of statewide spending.

Spending per player varies more than the totals suggest. It is highest in Nassau ($387), St. Johns ($382), Clay ($340), Seminole ($336), and Walton ($329), and lowest in Madison ($127), Glades ($157), Jackson ($174), Franklin ($178), and Washington ($178). Twenty-four counties are at or above the statewide average; 43 are below it.

Figure 3.10 Top ten counties by tennis player spending, 2025

FIGURE 3.10




*Source: Kinetica Sports & Recreation Localized Intelligence 2025, county catchment reports.*

Table 3.15 Player spending and wellbeing dividend by USTA Florida region, 2025

| Region | Counties | Players | Player spending | Share | Avg. per player | Wellbeing dividend | Share |
|---|---|---|---|---|---|---|---|
| Region 1 | 21 | 139,411 | $39.0M | 7% | $279 | $163.6M | 7% |
| Region 2 | 16 | 249,935 | $72.6M | 12% | $291 | $279.5M | 12% |
| Region 3 | 4 | 293,324 | $88.3M | 15% | $301 | $332.2M | 15% |
| Region 4 | 8 | 450,236 | $134.0M | 23% | $298 | $495.6M | 22% |
| Region 5 | 5 | 82,139 | $25.1M | 4% | $306 | $91.4M | 4% |
| Region 6 | 5 | 197,049 | $59.4M | 10% | $302 | $227.1M | 10% |
| Region 7 | 5 | 113,530 | $31.9M | 5% | $281 | $127.9M | 6% |
| Region 8 | 3 | 461,506 | $132.6M | 23% | $287 | $542.4M | 24% |
| **Florida** | **67** | **1,987,130** | **$583.0M** | **100%** | **$293** | **$2,259.7M** | **100%** |

*Source: Kinetica Sports & Recreation Localized Intelligence 2025; regions from the USTA Florida courts and facilities records. Average per player for Florida is as reported by Kinetica; regional averages are spending divided by players. Region 1 includes Liberty County, which has no facility records.*

## READING THE SPENDING FIGURE

- **This is a current snapshot. Kinetica's localized data is designed to describe the current market rather than change over time, so spending is reported for 2025 only.**
- **Players are counted where they live.** A county's spending reflects its residents, wherever they play. Liberty County has no tennis courts, yet 449 residents played in the past year.

- **What it includes.** Kinetica's estimate covers what players spend on tennis, from fees and coaching to equipment and events.
- **Tennis only. The estimate covers spending on tennis.**

### 3.5.3 THE WELLBEING DIVIDEND

Tennis is good for people, and that benefit has value even when no money changes hands. The wellbeing dividend puts a dollar figure on it. It follows a method developed for UK government appraisal, which values improvements in how satisfied people are with their lives, and applies it to Florida's adult tennis players (18 and older) through Kinetica's 2025 catchment data.

In 2025, the **wellbeing dividend of tennis participation in Florida was $2.26 billion**. Because the dividend covers adults only, that works out to about $1,400 per adult player each year, close to the U.S. figure of about $1,453. Florida accounts for 7% of the U.S. wellbeing dividend of tennis ($31.0 billion).

Like spending, the wellbeing dividend follows the player base: the same five counties account for 46% of it. The value per adult player is a different story. It is highest in some of Florida's smallest counties, Union ($1,585), Liberty ($1,559), Lafayette ($1,533), Hamilton ($1,523), and Taylor ($1,516), and lowest in St. Johns ($1,238), Sumter ($1,269), Osceola ($1,271), Pasco ($1,294), and Flagler ($1,304). St. Johns, second in the state for spending per player, is last on wellbeing value per adult player. The value of playing does not track the size of the wallet, which strengthens the case for access in places where players spend the least.

#### HOW THE WELLBEING DIVIDEND IS VALUED

**How it is estimated.** Kinetica compares the life satisfaction of adults who play tennis with those who do not and values the difference using a published UK government method. It covers adults only and reflects an association between playing and higher wellbeing, not a measured causal effect.

**The governing UK framework.** The method is set out in HM Treasury's **Wellbeing Guidance for Appraisal: Supplementary Green Book Guidance** (July 2021). It measures wellbeing as life satisfaction on a 0 to 10 scale and defines one WELLBY (wellbeing-adjusted life year (WELLBY)) as a one-point change in life satisfaction for one person for one year. HM Treasury values one WELLBY at **£13,000**, with a range of £10,000 to £16,000, in 2019 prices (p. 30; derivation in Annex 2, p. 54).

**How UK sport applies it.** Sport England uses the HM Treasury WELLBY in its social value model for community sport and physical activity, developed with State of Life and Manchester Metropolitan University. That model valued the wellbeing benefit of participating and volunteering at £96.7 billion in England in 2022/23, and the primary wellbeing value at £106.9 billion in 2023/24. It found being active is worth about £2,500 per adult a year in wellbeing value, and being fairly active about £1,200. Earlier research for the UK Department for Culture, Media and Sport (Fujiwara, Kudrna and Dolan, 2014) valued the wellbeing gain from sport participation at £1,127 per person a year.

**A sense check.** The Green Book guidance recommends comparing monetised wellbeing values with findings from elsewhere (p. 24). Florida's figure of about $1,400 per adult player is the same order of magnitude as the UK sport values above. No currency conversion is applied here.

#### WHAT THE FIGURE IS, AND IS NOT

- **It is** an annual, non-market value of the life-satisfaction benefit associated with playing tennis, for adults (18 and older) who played in the past 12 months.
- **It is not** cash, revenue, or part of Florida's economy. It cannot be added to player spending, and it should not be described as economic impact.

- **It rests on UK evidence.** The WELLBY value and the life-satisfaction research behind it come from UK studies. The Green Book guidance asks analysts to consider whether a study's context and population fit the case at hand (p. 24). Applying UK values to Florida players is an adaptation, and the report says so.
- **It avoids double counting** only if it is used alone. The guidance warns against counting the same benefit twice (p. 37), for example adding the wellbeing dividend to separately monetised health savings.

## SOURCES


- Tourism Economics (Oxford Economics). Economic Impact of Amateur, Youth, and Adult Tennis Tournaments and Events in Florida. Prepared for USTA Florida, released December 2024 (2023 data).
- Kinetica. Sports & Recreation Localized Intelligence 2025, county catchment reports for all 67 Florida counties (report date September 2026).
- HM Treasury. Wellbeing Guidance for Appraisal: Supplementary Green Book Guidance. July 2021.
- Sport England. The social value of sport and physical activity in England (2022/23 data, published October 2024) and 2023/24 update (published 2025).
- Fujiwara, D., Kudrna, L. and Dolan, P. Quantifying and Valuing the Wellbeing Impacts of Culture and Sport. Department for Culture, Media and Sport, April 2014.
- USTA Florida. State of Tennis courts and facilities records (Dynamics 365 export), October 2026, for county to region assignment.

# 4. The case for public court investment

This section carries forward the case USTA Florida made in its March 2026 white paper, The Case for Public Tennis Court Investment in Florida, with the figures brought up to date. The argument hasn't changed. More Floridians are playing and more want to, the state keeps growing, and only about one in five of Florida's courts is open to the public. What has changed is the detail: USTA Florida's court records have been maintained since March, the 2025 Kinetica catchments replace the 2024 release, and BEBR's 2026 projections set the population outlook. Box 4.1 at the end of the section compares the updated figures with the white paper's.

Public courts sit at the center of USTA Florida's first Big Bold Move, Best in Class Facilities and Providers. They are where many players start, and where the mission, to promote and develop tennis for all, is most directly tested.

***The white paper's key ask stands: at least 800 new or fully rehabilitated public courts over the next decade, funded by state capital grants, federal pass-through funding, and local public-private partnerships.***

## 4.1 Demand outpacing supply

### 4.1.1 MORE PEOPLE ARE PLAYING, AND FLORIDA IS GROWING FASTER THAN THE NATION

Tennis keeps growing across the country. The USTA's 2026 U.S. Tennis Participation Report counted a record 27.3 million players in 2025, up 6 percent from 2024 and the sixth straight year of growth. About one in 11 Americans played, participation is up 54 percent from 17.7 million in 2019, and a record 4.9 million people picked up a racquet for the first time.

Florida is growing faster than the nation. The same report puts Florida's participation rate at 9.1 percent in 2025, up from 6.1 percent in 2019, with about 1.95 million players. In the latest year Florida's rate rose 1.1 points while the national rate rose 0.5 points, moving Florida back above the national rate. Section 2.1 covers this trend in detail.

Current players are only part of the demand. Another 1.44 million Florida adults and 391,000 youth told Kinetica they are interested in playing, 1.83 million people in all (Section 1.6). That is close to the number who already play.

***1.99 million Floridians played tennis in the past year. Another 1.83 million want to.***

### 4.1.2 PUBLIC COURT SUPPLY IS NOT KEEPING PACE

USTA Florida's records show 18,293 tennis courts at 5,849 facilities in 66 counties. Of those, 3,786 courts at 1,125 facilities are public: 3,425 at public parks and 361 at public community and recreation centers. That is 21% of the state's courts, or one public court for every 6,175 people. The other 79% sit at clubs, homeowner associations, apartments and condominiums, hotels, colleges, and schools. School courts (2,846 at 610 schools) are classified as private: they are almost always behind locked fences and not open for public use, and there is currently no way to identify school courts the public can use (Section 3.2).

USTA Florida rebuilt its court records between 2023 and 2025 as it recorded more play and added the USTA national facility list (Section 3.1). That means the change in public court stock over time can't be measured yet, so this section measures supply against population instead.

BEBR projects Florida will grow from 23.38 million residents in 2025 to 24.91 million by 2030 and 28.25 million by 2050 under its medium series, 4.87 million more people (21%). If public court stock stays where it is, each public court serves more people: one for every 6,175 residents today, 6,579 by 2030, and 7,462 by 2050 (Figure 4.1). Under BEBR's high series it reaches 8,357 by 2050.

FIGURE 4.1

**Without new courts, each public court serves more people**

Residents per public tennis court at today's court count




Sources: USTA Florida records, October 2026; UF BEBR projections

**FIGURE 4.1. RESIDENTS PER PUBLIC COURT IF PUBLIC COURT STOCK STAYS AT TODAY'S LEVEL**

*Source: USTA Florida court and facility records (Dynamics 365, October 2026 export); BEBR Florida Population Studies, Bulletin 203, April 1, 2025 estimate and 2030 to 2050 projections.*

Two yardsticks show the size of the gap (Table 4.1, Figure 4.2).

- **Holding today's ratio.** Keeping one public court for every 6,175 residents takes 248 more public courts by 2030 and 789 by 2050 under BEBR Medium, or 409 and 1,338 under High. This is arithmetic on BEBR's projections, not an estimate of demand.
- **The white paper's standard.** The white paper recommends that counties adopt a minimum of one public court per 4,000 residents. Florida would need 5,845 public courts to meet it today, 2,059 more

than it has, and only five counties meet it now: Alachua, Franklin, Jefferson, Monroe, and Palm Beach. By 2050 the requirement rises to 7,063 under BEBR Medium (7,910 under High).

- **How Florida compares.** The one per 4,000 standard comes from the white paper. The National Recreation and Park Association's 2026 Agency Performance Review reports a median of 7,278 residents per dedicated outdoor tennis court among park and recreation agencies (13,714 for jurisdictions of 500,000 or more), and describes its medians as current conditions, not standards. Florida's 6,175 residents per public court compares well with that median, so one per 4,000 is best read as a goal for growing communities rather than a national norm.
- **The white paper's ask.** The white paper asked for 800 new or rehabilitated public courts over the next decade. Holding today's ratio through 2035 takes about 436 new public courts under BEBR Medium, so 800 covers that growth with room to rehabilitate existing courts. Reaching one per 4,000 would take far more: 2,059 new courts today.
- **What it would cost.** Excluding land and operations, at $40,000 to $130,000 for a hard court (Table 4.4 ranges from $25,000 to $135,000 by surface and lighting), holding today's ratio would cost about $10 million to $32 million by 2030 and $32 million to $103 million by 2050. Reaching one public court per 4,000 residents would cost about $82 million to $268 million.

### TABLE 4.1. PUBLIC COURT SUPPLY AGAINST PROJECTED POPULATION (BEBR MEDIUM)

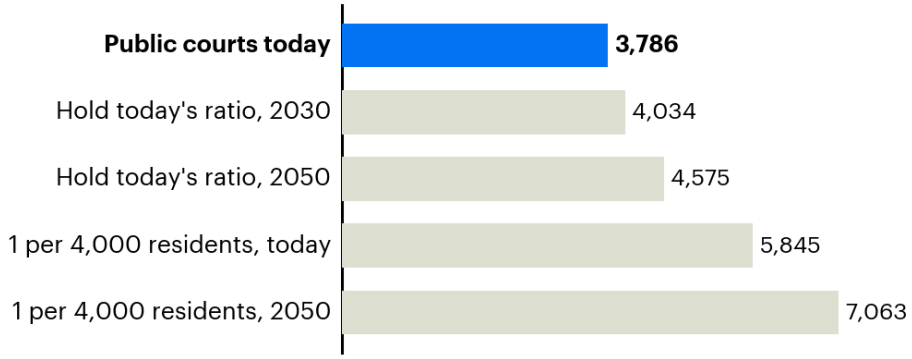
| Year | Population | Residents per public court at today's stock | Added courts to hold today's ratio | Courts for 1 per 4,000 | Added courts for 1 per 4,000 |
|---|---|---|---|---|---|
| 2025 (estimate) | 23,379,261 | 6,175 | 0 | 5,845 | 2,059 |
| 2030 | 24,909,000 | 6,579 | 248 | 6,227 | 2,441 |
| 2035 | 26,074,600 | 6,887 | 436 | 6,519 | 2,733 |
| 2040 | 26,967,900 | 7,123 | 581 | 6,742 | 2,956 |
| 2045 | 27,664,900 | 7,307 | 694 | 6,916 | 3,130 |
| 2050 | 28,250,100 | 7,462 | 789 | 7,063 | 3,277 |

*Source: USTA Florida court and facility records (3,786 public courts); BEBR Bulletin 203. Population is the April 1, 2025 estimate and the April 1 medium projection for each later year. High-series figures are in the companion workbook.*

FIGURE 4.2

## Meeting the standard takes about 2,000 more courts

Public tennis courts today and needed under each yardstick, BEBR Medium




Sources: USTA Florida records; UF BEBR; USTA Florida white paper, 2026

**FIGURE 4.2. PUBLIC COURTS TODAY AND COURTS NEEDED UNDER EACH YARDSTICK (BEBR MEDIUM)**

*Source: USTA Florida court and facility records; BEBR Bulletin 203. The 1 per 4,000 standard is the white paper's county-level recommendation.*

### 4.1.3 ORGANIZED PLAY LEANS ON PUBLIC COURTS

USTA Florida's own program records show how much organized play depends on public courts. In 2025, players filled 59,786 participants on 4,683 USTA adult league teams and counted 93,360 participants in 1,206 sanctioned tournaments, while youth team tennis counted 2,417 participants, including registered players who did not play, on 450 teams (Table 4.2). Community and club leagues added 41,814 participants, and 17 wheelchair tennis programs were active as of October 2026.

Public facilities carry far more than their share of that play. They hold 21% of courts but hosted 43 percent of tournament participants, 38 percent of league participants, and 24 percent of youth team tennis participants in 2025 (Section 3.2). When public courts are crowded or out of service, organized play is squeezed first.

Placer.ai site-visit data for 2025 points the same way. Public facilities drew 40% of site visits to matched tennis locations in Florida while holding 24% of the matched courts. That works out to 1,484 site visits per public court against 694 per private court, about twice as many (Section 3.2 describes checks on the measure). Nationally, nearly 40% of tennis players use public parks as their primary place to play (USTA, 2026 U.S. Tennis Participation Report).

### TABLE 4.2. ORGANIZED PLAY IN FLORIDA, 2025

| Program | 2025 volume | Hosted at public facilities |
|---|---|---|
| USTA adult leagues | 4,683 teams, 59,786 participants | 38% of participants |
| USTA sanctioned tournaments | 1,206 tournaments, 93,360 participants | 43% of participants |
| Youth team tennis | 450 teams, 2,417 participants | 24% of participants |
| Community and club leagues | 41,814 participants | Not reported (too few named facilities) |
| Wheelchair tennis programs | 17 active programs (October 2026) | Not calculated |

*Source: USTA Florida Dynamics 365 league, tournament, youth team tennis, and wheelchair program exports (October 2026); community and club league participants from Section 1.3.1; public shares from Section 3.2. Tournaments counted by calendar year of start date. Visit figures: Placer.ai, January 1 to December 31, 2025, Placer locations matched to USTA Florida court records by location ID, or by facility name where the ID did not match. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

# 4.2 Equity and access

## 4.2.1 INCOME-BASED BARRIERS

Most of Florida's courts come with a gate. Playing at a club, homeowner association, condominium, or hotel usually takes a membership, a residency, or a room key. With 79% of courts in that position, the barrier is structural, not just cultural. Public courts are the free or low-cost way in, and for many households the only one.

Florida's household incomes show how many people that affects. In the 2025 catchments, 11% of Florida households earn under $20,000 a year, 22% under $35,000, and 32% under $50,000 (Table 4.3). Nearly half (49%) earn under $75,000. At each of these levels Florida has a slightly larger share of households than the nation, and its average household income ($116,162) is below the national average ($122,077).

### TABLE 4.3. HOUSEHOLDS BY INCOME, FLORIDA AND UNITED STATES, 2025

| Household income | Florida households | Florida share | U.S. share |
|---|---|---|---|
| Under $20,000 | 1,054,068 | 11% | 11% |
| Under $35,000 | 2,031,540 | 22% | 21% |
| Under $50,000 | 3,030,401 | 32% | 31% |
| Under $75,000 | 4,568,031 | 49% | 46% |
| Average household income | $116,162 | | $122,077 |

*Source: Kinetica 2025 catchment reports (AGS 2025 household income), Florida and United States columns. Shares are cumulative and use 9,414,661 Florida households. Kinetica reports an average household income, not a median.*

Section 3.4 found the same pattern county by county: the counties with the fewest courts also tend to have below-median incomes and above-average poverty. Where public courts are scarce, tennis is hard to reach whatever a family's interest.

## 4.2.2 YOUTH AND SENIORS

Two groups stand to gain the most from better public access. Florida has 3.11 million children aged 6 to 17. In 2025, 373,000 of them played tennis (12%) and another 391,000 (13%) were interested in playing. Schools are a natural entry point: Florida has 4,312 public and 1,733 private schools, and 528 schools fielded a high school tennis team in 2025-26 (Section 1.3.3). But the 2,846 courts USTA Florida has recorded at 610 schools are classified as private because they are almost always locked and not open for public use, and many are not

kept to a standard that invites recreational play. Joint-use agreements with school districts, which the white paper recommends, would open that capacity to families on evenings, weekends, and summers.

At the other end of the age range, 5.13 million Floridians are 65 or older, 22% of residents against 18% nationally. For older adults, staying active is a health priority, and Florida has room to improve: about one in five Florida adults (21%) get no exercise in their free time, compared with 19% nationally, and 27% are obese and 8% have diabetes (CDC, 2023, as reported by Kinetica).

Tennis is one of the strongest options available. The Copenhagen City Heart Study, which followed 8,577 adults for up to 25 years, associated tennis with up to 9.7 more years of life expectancy than a sedentary lifestyle, the largest gain of any sport it studied. It is an observational study and can't prove cause, but the association is strong and consistent. A smaller survey of 151 long-term players aged 45 and older (Spring, Holmes, and Smith, 2020) found better self-reported health and lower rates of obesity and heart disease. Section 3.5 puts a wellbeing value on Florida's tennis participation.

*Sources: Kinetica 2025 catchments (youth population, players and interest, age profile, NCES school counts); Kinetica 2024 catchments (CDC health measures, the most recent release with these fields); FHSAA 2025-26 assignments (Section 1.3.3); Schnohr et al., 2018, Mayo Clinic Proceedings; Spring, Holmes, and Smith, 2020, International Journal of Exercise Science 13(7).*

### 4.2.3 RACIAL AND ETHNIC ACCESS

Florida's population is diverse. In the 2025 catchments, 28% of Floridians are Hispanic, 16% are non-Hispanic Black, and 3% are non-Hispanic Asian.

Neither the catchments nor the USTA's participation report show Florida players by race or ethnicity, so this report doesn't estimate a Florida player mix (Section 1.2). What the data does show is that public courts are the lowest-cost way into the sport for every community. Expanding them where Floridians of every background live is both an equity step and a growth strategy.

*Source: Kinetica 2025 catchments (AGS 2025 race and Hispanic origin), Florida column.*

## 4.3 The cost of inaction

### 4.3.1 DEFERRED MAINTENANCE COMPOUNDS

Courts wear out on a schedule. Hard courts typically need resurfacing every 4 to 8 years, at $6,000 to $20,000 a court in the Florida market, and clay courts need similar periodic work. Put it off long enough and the surface fails, and the fix becomes a full reconstruction at $40,000 to $130,000 a court, depending on surface type and whether lighting is included (Table 4.4). The difference between a $12,000 resurfacing and a $100,000 rebuild is the hidden cost of waiting.

Outside funding doesn't close that difference. The USTA's 2026 Tennis Venue Services grants cover up to $8,000 a court for resurfacing and $35,000 a court for reconstruction, never more than half the project (Section 4.4.2). A delayed project brings a much bigger bill, and grants cover a smaller share of it.

**TABLE 4.4. ESTIMATED CONSTRUCTION COST PER COURT, FLORIDA MARKET, 2026**

| Court type | Without lights | With lights |
|---|---:|---:|
| Asphalt hard court | $40,000 to $100,000 | $45,000 to $115,000 |
| Concrete hard court | $60,000 to $115,000 | $65,000 to $130,000 |
| Post-tensioned concrete | $60,000 to $120,000 | $65,000 to $135,000 |
| Clay court | $25,000 to $60,000 | $31,000 to $75,000 |
| Resurfacing (any type) | $6,000 to $20,000 | Not applicable |

*Source: USTA Florida court construction cost analysis, 2026, as published in the March 2026 white paper. LED lighting for an existing court runs $5,000 to $15,000.*

### 4.3.2 STORMS ADD TO THE BILL

Florida's courts also take hurricane damage. After the 2024 storms, USTA Florida committed $845,289 in hurricane relief to six tennis facilities in the Tampa Bay area, in Treasure Island, St. Petersburg, Clearwater, Tampa, Apollo Beach, and Plant City (Table 4.8). Courts already behind on maintenance are the hardest and costliest to bring back after a storm.

### 4.3.3 LOST PROGRAMMING CAPACITY

A court out of service costs more than court time. Courts in poor repair can't host sanctioned tournaments, league matches, or lessons. Each tournament that goes elsewhere takes hotel stays, restaurant spending, and local tax revenue with it (Section 3.5 covers the economic impact of tennis events). Each youth program that can't run means youth who don't pick up a lifelong habit. Each league season squeezed for courts means adults who play less or stop. Because public facilities host about two in five of Florida's tournament participants and league participants on one in five courts (Section 4.1.3), losing public court capacity hits organized play hardest.

Lighting matters as much as surface. Placer.ai site-visit data for 2025 shows Florida's court site visits peak twice a day, mid-morning and again in the early evening after work and school. Courts without lights can't serve that evening demand, which is why the white paper recommends LED lighting on all new public courts (lighting costs are in Table 4.4).

*Source: Placer.ai, hourly site visits to Florida tennis courts, January 1 to December 31, 2025. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

### 4.3.4 WIDENING EQUITY GAPS

Without new public investment, the public share of Florida's courts will keep shrinking. The 4.87 million more residents BEBR expects by 2050 will mostly live in new development. Public courts that aren't expanded will each serve more people: at today's stock, residents per public court rise from 6,175 to 7,462 by 2050 under BEBR Medium (8,357 under High). The residents who depend on public access, including the lower-income households, young players, and fast-growing communities described in Section 4.2, feel it first.

## 4.4 Funding landscape

No single source can close the gap. Public court projects in Florida typically stack state grants, federal pass-through money, USTA and USTA Florida grants, and local or private funds.

### 4.4.1 STATE AND FEDERAL MECHANISMS

Florida's main state program for courts is the FRDAP. The two federal programs most relevant to courts, the Land and Water Conservation Fund (LWCF) and its competitive ORLP, reach Florida projects through the state as well. Two sources the white paper listed are no longer open to new projects: American Rescue Plan Act (ARPA) recovery funds had to be committed by December 31, 2024, and the Economic Development Administration's ARPA Travel, Tourism, and Outdoor Recreation grants were a one-time program. Table 4.5 summarizes the status of each as of October 2026.

### TABLE 4.5. STATE AND FEDERAL FUNDING MECHANISMS FOR PUBLIC COURTS, STATUS AS OF OCTOBER 2026

| Program | Administered by | What it funds | Terms and status |
|---|---|---|---|
| FRDAP | Florida Department of Environmental Protection (DEP), Land and Recreation Grants | Acquisition and development of public outdoor recreation, including courts, for local governments | Up to $200,000 per application, two applications per cycle. State share 100% on projects up to $50,000, 75% to $150,000, 50% above. Awards depend on annual legislative appropriation. The FY2027-28 window ran September 15 to October 15, 2026; rural match waivers available |
| Florida Communities Trust (FCT) and Florida Forever | Florida DEP | Land acquisition for parks and open space | Helps secure sites for future courts rather than build them |
| LWCF, state and local assistance | National Park Service through Florida DEP | Matching grants for outdoor recreation acquisition and development, including courts, lighting, and fencing | Permanently funded since the Great American Outdoors Act of 2020 |
| ORLP | National Park Service, through Florida DEP as state lead agency | New or renovated outdoor recreation in urban areas of 25,000 or more people | $300,000 to $15 million per project, 50% match, site must stay public recreation in perpetuity. A recurring 2026 to 2030 notice runs one round a year |
| Recreational Trails Program (RTP) | Florida DEP, Office of Greenways and Trails | Trails and access paths that can connect to tennis facilities | Does not fund courts directly |
| ARPA State and Local Fiscal Recovery Funds | U.S. Treasury | Was eligible for park and recreation improvements | Closed to new projects. Funds had to be obligated by December 31, 2024 and spent by December 31, 2026 |
| EDA Travel, Tourism, and Outdoor Recreation | U.S. Economic Development Administration | Was eligible for outdoor recreation infrastructure | One-time ARPA program, no longer accepting applications |

*Sources: Florida DEP FY2027-2028 FRDAP Application Information; National Park Service ORLP Notice of Funding Opportunity (2026 to 2030 recurring notice); U.S. Treasury SLFRF guidance (September 2026); March 2026 white paper. Grants.gov remains the main portal for federal competitive grants.*

## 4.4.2 USTA GRANTS

The USTA's TVS program is the largest national source of facility funding. Since 2005 it has awarded more than $34 million, including more than $16 million in 2025, when the USTA expanded the program to meet rising demand. The 2025 grants supported nearly 300 projects touching more than 2,500 courts. The white paper cited $19 million since 2005, before that expansion.

TVS funds facilities that are open to the public. Eligibility depends on the project's scope and complexity and the number of courts, and the largest projects (Category 3) must pass a technical review. Grants cover up to 50 percent of the total project cost, are paid as a reimbursement after the project is finished and reviewed, and each site can receive funding once in any 12-month period. Applications are reviewed on a rolling basis at usta.com/facilities, and every grantee also gets TVS technical, business, and advocacy support (Table 4.6).

### TABLE 4.6. USTA TENNIS VENUE SERVICES FUNDING LEVELS, 2026

| Category | Project types | Maximum funding |
|---|---|---|
| Category 1 (low complexity) | Amenities such as windscreens, backboards, and blended 36-foot and 60-foot lines; tennis court technology; inclusive access | Amenities $5,000; court technology $10,000; inclusive access $10,000 |
| Category 2 (mid complexity), up to $60,000 | Lighting, fencing, resurfacing | Lighting up to $15,000 a court; fencing up to $12,000 a court; resurfacing up to $8,000 a court |
| Category 3 (high complexity), up to $150,000 (the 2025 guide capped this category at $200,000, and individual awards can exceed published caps) | New construction and reconstruction of 78-foot courts; indoor structures | Construction up to $35,000 a court; indoor structures up to $50,000 a court |

*Source: USTA, 2026 Guide to Tennis Venue Services. No project may receive more than 50% of its total cost.*

USTA Florida's records list 17 TVS grants to Florida facilities awarded between February 2024 and September 2026, totaling $1,079,130 across 10 counties (Table 4.7). Most fund resurfacing and reconstruction, and two fund new construction (Pelican Bay Community Park in Collier County and Rollins College in Orange County). Six of the 17 went to college and university courts, including Florida Gulf Coast University, one of USTA Florida's Collegiate Community Hub sites (Section 8.2).

### TABLE 4.7. USTA TENNIS VENUE SERVICES GRANTS TO FLORIDA FACILITIES, AS RECORDED BY USTA FLORIDA, 2024 TO 2026

| Award date | Facility | County | Type | Award |
|---|---|---|---|---|
| 09/03/2026 | UCF Recreation & Wellness Center | Orange | Resurfacing | $37,500 |
| 06/25/2026 | Embry-Riddle Aeronautical University | Volusia | Reconstruction | $200,000 |
| 06/25/2026 | Florida Southern College | Polk | Reconstruction | $31,000 |
| 04/07/2026 | Olympia Park | Palm Beach | Reconstruction | $47,250 |
| 02/09/2026 | Racquet Club of Cocoa Beach | Brevard | Reconstruction | $70,000 |
| 01/06/2026 | Pensacola State College | Escambia | Reconstruction | $23,000 |
| 12/01/2025 | Coral Reef Park, Palmetto Bay | Miami-Dade | Reconstruction | $40,000 |
| 11/18/2025 | Trailside Tennis Club | Volusia | Reconstruction | $40,000 |
| 10/30/2025 | Florida Gulf Coast University | Lee | Reconstruction | $47,600 |
| 09/10/2025 | Pelican Bay Community Park | Collier | New Construction | $170,000 |
| 08/11/2025 | Winter Park Tennis Center | Orange | Reconstruction | $140,000 |
| 04/23/2025 | Beerman Family Tennis Complex, Lakeland | Polk | Reconstruction | $62,000 |
| 03/12/2025 | Palm Beach Gardens Tennis Center | Palm Beach | Reconstruction | $24,000 |
| 01/13/2025 | Kraft Tennis Club | Nassau | Reconstruction | $22,000 |
| 01/06/2025 | Miccosukee Golf and Country Club | Miami-Dade | Reconstruction | $25,000 |
| 12/18/2024 | Rollins College | Orange | New Construction | $40,000 |
| 02/01/2024 | Pompey Park, Delray Beach | Palm Beach | Reconstruction | $59,780 |
| **Total** | | | | **$1,079,130** |

*Source: USTA Florida Dynamics 365, facility grant awards (October 2026 export), excluding hurricane relief awards. Award amounts; TVS pays by reimbursement, so these records show no disbursement. Facility names from the grant record. By award year: $99,780 in 2024 (2 grants), $570,600 in 2025 (9), and $408,750 so far in 2026 (6).*

### 4.4.3 USTA FLORIDA GRANTS

USTA Florida also puts its own money into tennis infrastructure. Since 2022 it has committed $2,989,969 to 13 facility projects, from hurricane repairs and resurfacing to five new clay courts in Palm Coast and a $1.1 million rebuild at the Racquet Club of Cocoa Beach (Table 4.8). The 2024 hurricane relief awards make up $845,289 of that total, and $762,085 of it is recorded as disbursed.

**TABLE 4.8. USTA FLORIDA FACILITY INVESTMENT, 2022 TO 2026**

| Year | Location | Description | Amount |
|---|---|---|---|
| 2022 | Lee County Community Tennis Association | Hurricane damage: court resurfacing, equipment replacement | $70,000 |
| 2022 | Treasure Bay Golf and Tennis Facility | Hurricane damage: court resurfacing, equipment replacement | $41,000 |
| 2022 | New Smyrna Beach Tennis Center | Hurricane damage: court resurfacing, light post and windscreens | $93,300 |
| 2024 to 2025 | Southern Recreation Center, Palm Coast | Addition of 5 new clay courts | $695,000 |
| 2025 | Riverside Racquet Complex, Vero Beach | Court resurfacing for 2 courts and crack repairs | $25,380 |
| 2025 to 2026 | Fort Walton Beach Tennis Center | 7 courts resurfaced and 3 hitting walls | $120,000 |
| 2025 to 2026 | Racquet Club of Cocoa Beach | Rebuild of 6 hard courts, new lighting and electrical for 12 courts | $1,100,000 |
| 2025 | City of Plant City Tennis Facility | 2024 hurricane relief | $57,080 |
| 2025 | Apollo Beach Racquet and Fitness Club | 2024 hurricane relief | $223,700 |
| 2025 | HCC Tennis Complex, Tampa | 2024 hurricane relief | $167,878 |
| 2025 | McMullen Tennis Complex, Clearwater | 2024 hurricane relief | $46,508 |
| 2025 | St. Petersburg Tennis Center | 2024 hurricane relief | $68,473 |
| 2025 | Treasure Bay Golf and Tennis, Treasure Island | 2024 hurricane relief | $281,650 |
| | **Total** | | **$2,989,969** |

*Sources: 2022 projects and USTA Florida capital investments from USTA Florida records as published in the March 2026 white paper; 2024 hurricane relief from USTA Florida Dynamics 365 facility grant awards (October 2026 export), award amounts by award year. Recorded disbursements for the hurricane relief awards total $762,085.*

Beyond facilities, USTA Florida funds the programs that fill courts. Between March 2024 and September 2026 it disbursed $473,887 through 114 non-facility grants to 52 organizations for programs, equipment, and wheelchair tennis (Section 1.5.4).

### 4.4.4 PUBLIC-PRIVATE PARTNERSHIPS

Several partnership models can stretch public dollars further:

- **Naming rights.** Agreements with local businesses can offset construction costs.
- **Management concessions.** Private or nonprofit operators run programs at public facilities in exchange for maintenance obligations. USTA Florida itself manages five publicly owned facilities, including the Racquet Club of Cocoa Beach and Riverside Racquet Complex, under management or licensing agreements with their local governments.
- **Joint-use agreements.** School districts can open the 2,846 school courts in USTA Florida's records to the community outside school hours.

- **Developer impact fees.** Counties and cities can require or encourage court construction in new residential development, so court supply grows with the population.

## BOX 4.1. HOW THESE FIGURES COMPARE WITH THE WHITE PAPER

The white paper won't be reissued, so the differences are explained here. Most come from ongoing maintenance of USTA Florida's court and facility records and from newer source releases. Court and facility counts are maintained continuously and will keep shifting slightly between publications.

| Measure | White paper (March 2026) | This report | Why it changed |
|---|---|---|---|
| Courts and facilities | 17,770 courts, 5,601 facilities | 18,293 courts, 5,849 facilities | Ongoing maintenance and correction of facility records |
| Public courts | 3,497 (19.7%) | 3,786 (21%) | Facility type corrections, including facilities reclassified as public |
| Residents per public court | 6,686 | 6,175 | More public courts on the same BEBR 2025 population |
| Added courts for 1 per 4,000 | 2,128 (5,625 needed) | 2,059 (5,845 needed) | The white paper's 5,625 matches the Kinetica 2024 catchment population (22.5 million); this report uses BEBR's 23.38 million throughout |
| Florida players | 1.33 million adults, 332,000 youth (as published) | 1.61 million adults, 373,000 youth | 2025 Kinetica release |
| Interested in playing | 1.13 million adults, 335,000 youth (as published) | 1.44 million adults, 391,000 youth | 2025 Kinetica release |
| Active league teams | 7,295 | 4,683 (2025) | The white paper's figure was a Kinetica total that counts age divisions twice; Dynamics 365 is the source of truth |
| Tournaments | 4,914 tournaments, 303,000+ participant appearances (all years on file) | 1,206 tournaments, 93,360 participants (2025) | This report uses a single calendar year |
| Wheelchair programs | 21 | 17 | Active programs in the October 2026 export |
| USTA TVS grants nationally | More than $19 million since 2005 | More than $34 million since 2005 | USTA update (April 2026) after the 2025 expansion |
| USTA Florida facility investment | $2,949,366 across 14 projects | $2,989,969 across 13 projects | Treasure Bay 2024 hurricane relief now recorded at $281,650 (white paper $241,047); the white paper's own table lists 13 projects |
| League and youth team tennis captains | 4,851 league captains; 150 Junior Team Tennis captains | 2,287 adult league captains; 83 youth team tennis captains | This report counts unique people who captained in 2025, so a captain of several teams is counted once |

*Population projections are unchanged: both use BEBR Bulletin 203 (medium series, 28.25 million by 2050).*

## SOURCES FOR SECTION 4

- USTA Florida court and facility records, Dynamics 365 export, October 2026 (facilities with at least one tennis court).
- USTA Florida Dynamics 365 exports, October 2026: USTA leagues 2024 to 2026, sanctioned tournaments 2024 to 2026, youth team tennis 2024 to 2026, active wheelchair tennis programs, and facility grant awards.

- Kinetica catchment reports for Florida's 67 counties, Florida and United States columns: US Aura Survey 2024 and Sports & Recreation Localized Intelligence 2025 (demographics from AGS 2025; schools from NCES; health measures from CDC in the 2024 release).
- University of Florida BEBR, Florida Population Studies, Volume 59, Bulletin 203, February 2026.
- USTA, 2026 U.S. Tennis Participation Report, with the Physical Activity Council and the PLAY Study.
- USTA Florida, The Case for Public Tennis Court Investment in Florida, white paper, March 2026 (including the USTA Florida court construction cost analysis, 2026).
- USTA, 2026 Guide to Tennis Venue Services; USTA, City of Artesia Receives $32K TVS Grant, April 13, 2026.
- Florida Department of Environmental Protection, FY2027-2028 Application Information for the Florida Recreation Development Assistance Program.
- National Park Service, Outdoor Recreation Legacy Partnership Program Notice of Funding Opportunity, 2026 to 2030 recurring notice.
- U.S. Department of the Treasury, State and Local Fiscal Recovery Funds newsletter, September 2026.
- Placer.ai, Florida tennis court site visits, January 1 to December 31, 2025 (statewide and Region 1 to 8 reports; ranked locations). Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.
- Schnohr, P., et al. (2018), Mayo Clinic Proceedings (Copenhagen City Heart Study); Spring, K.E., Holmes, M.E., and Smith, J.W. (2020), International Journal of Exercise Science, 13(7), 1251 to 1261.

# 5. Coaching

Coaches are how players find the game and stay in it. This section looks at two separate coaching programs USTA Florida can see in its own records: coaches enrolled in USTA Coaching, the USTA's national coach program, and people trained through the USTA Florida Community Coach Program, which partners with parks and community organizations to train new and diverse coaches. Both come from Dynamics 365. They are separate programs with different purposes, so they are reported separately and are not combined. The section also reports certification counts provided by the Racquet Sports Professionals Association (RSPA). No single source counts every coach in Florida. Coaches who are not enrolled in USTA Coaching, have not attended a Community Coach training, and are not RSPA certified, such as some club, academy, and parks staff, are not captured, so each part describes its own group.

## KEY TAKEAWAYS

- **1,551 people enrolled in USTA Coaching between its August 2025 launch and September 2026 have a Florida record, a roughly 14-month enrollment snapshot rather than a count of all Florida coaches.**
- **The entry level is the base of the program.** 79% of enrollees hold a Baseline membership, and 19% hold an RSPA or Professional Tennis Registry (PTR) professional certification.
- **Certification is concentrated among full-time professionals.** 46% of full-time professional coaches hold RSPA or PTR certification, compared with 3% of school coaches.
- **Women make up 36% of Florida enrollees with gender recorded, compared with 34% of the USTA Coaching community nationally, and men 64%. The share of women ranges from 48% of school coaches to 25% of full-time professionals. Coaches under 30 are 20% of Florida enrollees (24% nationally).**
- **The RSPA, which provided its own counts for this report, has 1,377 certified tennis professionals in Florida, 1,259 of them at the Professional or Elite level.**
- **1,097 people have trained as community coaches since 2022**, across 111 training sessions in 25 counties. Youth formats lead: 55% have red ball, orange and green ball, summer camp, or after-school training on record.
- **Community coach training peaked in 2024.** In matched January to September periods, people trained went from 390 in 2024 to 296 in 2025 and 94 in 2026 (down 68% from 2025), and completed sessions fell from 20 in 2025 to 8 in 2026.
- **19 counties have no coach record of either kind**, mostly rural counties in North Florida, the Panhandle, and the interior.

# 5.1 USTA Coaching enrollees

This section covers only coaches enrolled in USTA Coaching, the USTA's national coach membership program. It uses the full roster of Florida contacts enrolled in USTA Coaching, with membership level, coach type, professional certification, age, gender, and county on each record. Order dates on the records run from August 2025, when USTA Coaching launched, to September 2026, so the 1,551 enrollees are a roughly 14-month enrollment snapshot, not a count of Florida's coaches. Enrollment is voluntary, and many people who coach in Florida are not enrolled. RSPA-certified professionals are covered in 5.2, community coaches in 5.3, and where coaches are in 5.4. Professional certification here means RSPA (formerly USPTA) or PTR (Professional Tennis Registry), as recorded in Dynamics 365.

### 5.1.1 ENROLLMENT AND MEMBERSHIP LEVEL

Florida has 1,551 USTA Coaching enrollees on record, with order dates from August 11, 2025 to September 30, 2026.

**TABLE 5.1. USTA COACHING ENROLLEES BY MEMBERSHIP LEVEL**

| Membership level | Enrollees | Share |
|---|---|---|
| Baseline | 1,218 | 79% |
| Rally | 140 | 9% |
| Pro | 117 | 8% |
| Pro Plus | 76 | 5% |
| **Total** | **1,551** | **100%** |

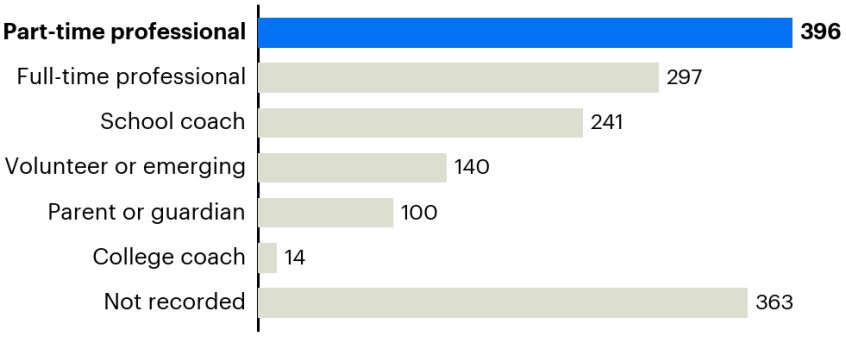
Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026. Shares are rounded and may not sum to 100%.

Part-time professionals are the largest group, followed by full-time professionals and school coaches. Almost a quarter of records (363) have no coach type, so the shares below describe the people who answered and the "not recorded" group together.

FIGURE 5.1

## Part-time pros are the largest group

USTA Coaching enrollees by coach type, Florida, October 2026 (n=1,551)




Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026

*Figure 5.1. Part-time pros are the largest group. Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026*

### 5.1.2 PROFESSIONAL CERTIFICATION

Of the 1,551 enrollees, 184 (12%) are RSPA certified and 142 (9%) are PTR certified. Thirty-eight hold both, so 288 people (19%) hold at least one professional certification. Forty-nine records have neither field filled in. USTA Coaching verifies the RSPA and PTR certifications that enrollees report.

Certification tracks closely with coaching as a career. Nearly half of full-time professional coaches hold RSPA or PTR certification, about a quarter of part-time professionals do, and very few school, volunteer, or parent coaches do. That pattern fits a program built to bring new and occasional coaches in at the entry level.

**TABLE 5.2. PROFESSIONAL CERTIFICATION BY COACH TYPE**

| Coach type | Enrollees | RSPA or PTR certified | Share certified |
|---|---|---|---|
| Full-time professional (30+ hours) | 297 | 136 | 46% |
| Part-time professional (under 30 hours) | 396 | 101 | 26% |
| School coach | 241 | 7 | 3% |
| Volunteer or emerging coach | 140 | 5 | 4% |
| Parent or guardian coach | 100 | 4 | 4% |
| College coach | 14 | 3 | 21% |
| Not recorded | 363 | 32 | 9% |
| **All enrollees** | **1,551** | **288** | **19%** |

Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026.

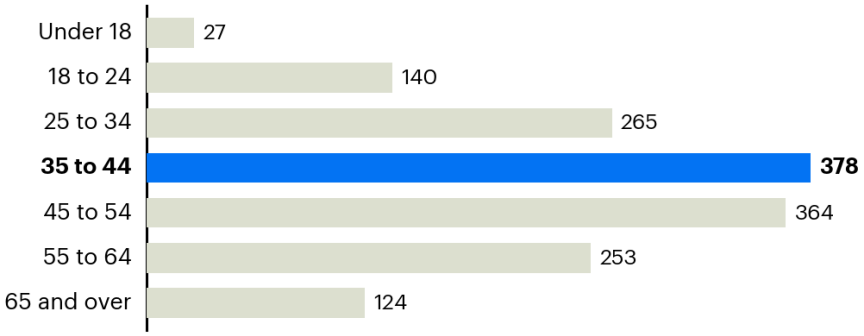
### 5.1.3 WHO ENROLLEES ARE

The median enrollee is 44 years old. Nearly half (48%) are 35 to 54, 11% are under 25, and 24% are 55 or older. Coaches under 30 make up 20% of Florida enrollees, including 27 ages 13 to 17; nationally, USTA Coaching reports 24% under 30.

FIGURE 5.2

## Most coaches are 25 to 64

USTA Coaching enrollees by age, Florida, October 2026 (n=1,551)




Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026

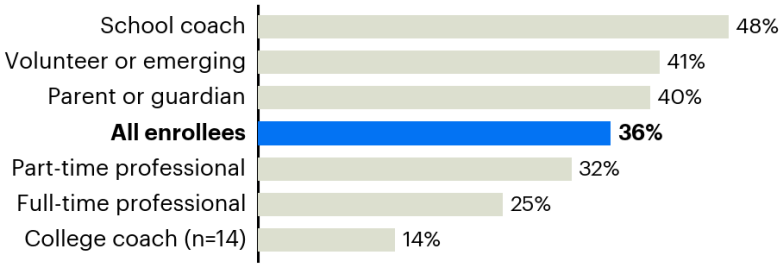
*Figure 5.2. Most coaches are 25 to 64. Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026*

Women make up 36% of Florida enrollees with gender recorded, compared with 34% of the USTA Coaching community nationally; men are 64%. The share of women is highest among school coaches (48%) and lowest among full-time professionals (25%) and college coaches (2 of 14). Women are less likely to hold a professional certification (14% compared with 25% of men), so they are 24% of certified coaches. Gender is missing for 183 records (12%).

FIGURE 5.3

## Women are scarcest among full-time pros

Women as % of USTA Coaching enrollees with gender recorded, October 2026 (n=1,368)




Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026

*Figure 5.3. Women are scarcest among full-time pros. Source: USTA Florida Dynamics 365, USTA Coach Enrollees export, October 29, 2026*

Race and ethnicity are not reported in this section. Race is missing for 60% of USTA Coaching enrollees, and the Community Coach export records no gender, so the diversity of Florida's coaching workforce, including the Community Coach Program's aim of training new and diverse coaches, cannot currently be measured.

## 5.2 RSPA-certified tennis professionals

The Racquet Sports Professionals Association (RSPA) provided counts of its Florida-certified professionals for this report. Formerly the United States Professional Tennis Association (USPTA), the RSPA has certified teaching professionals since 1927 and is headquartered in Orlando. It reports more than 12,000 certified professionals across 17 U.S. divisions and offers a Director of Racquet Sports certification through the University of Florida. Keeping certification current requires active membership, ongoing professional development, and adherence to the RSPA Code of Ethics.

Florida has 1,377 RSPA-certified tennis professionals, and another 153 members are working toward tennis certification. Most hold Professional (649) or Elite Professional (610) certification. Another 99 are certified Instructors, and 19 are Master Professionals, the association's top designation.

RSPA certification and USTA Coaching enrollment are separate programs run by separate organizations. A coach can be in both, so the two counts overlap and cannot be added together or compared.

**TABLE 5.3. RSPA-CERTIFIED TENNIS PROFESSIONALS IN FLORIDA BY CERTIFICATION LEVEL**

| Certification level | Professionals | Share of certified |
|---|---|---|
| Master Professional | 19 | 1% |
| Elite Professional | 610 | 44% |
| Professional (Level 2) | 649 | 47% |

| Certification level | Professionals | Share of certified |
|---|---|---|
| Instructor (Level 1) | 99 | 7% |
| **Total certified** | **1,377** | **100%** |
| Applicants (working toward certification) | 153 | |

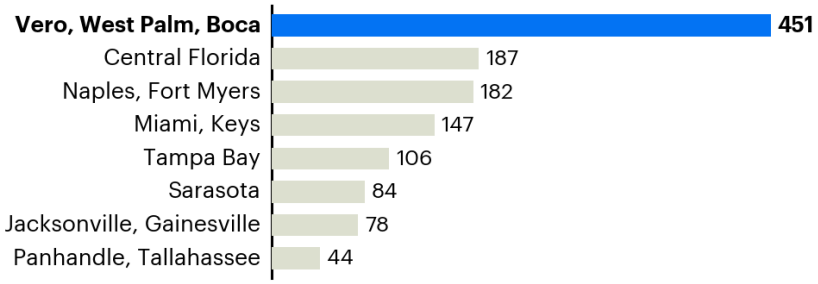
Source: Racquet Sports Professionals Association (RSPA), 2026 certified professional counts for Florida, provided to USTA Florida. Applicants are current members working toward certification and are not included in the certified total. Shares are rounded.

By RSPA region, Southeast Florida (Vero Beach, West Palm Beach, and Boca Raton) has 451 certified tennis professionals, about a third of those with a region on record. Central Florida (187), Naples and Fort Myers (182), and Miami and the Keys (147) follow, and the Panhandle and Tallahassee region has 44. Not every professional has a region on record, so the regional counts sum to 1,279. RSPA regions are the association's own and are named here by place to avoid confusion with USTA Florida's numbered regions.

FIGURE 5.4

## Southeast Florida holds a third of RSPA tennis pros

RSPA-certified tennis professionals by RSPA region, Florida, 2026 (n=1,279)




Source: Racquet Sports Professionals Association (RSPA), data provided to USTA Florida, 2026

*Figure 5.4. Southeast Florida holds a third of RSPA tennis pros. Source: Racquet Sports Professionals Association (RSPA), data provided to USTA Florida, 2026*

## 5.3 Community Coach Program

The Community Coach Program partners with public parks and community organizations to train and employ new and diverse coaches. In this report, a community coach is anyone who attended at least one Community Coach training, usually a single day. The records show training only, not whether a person went on to coach or be employed. Trainings typically run one day and focus on formats that parks and other facilities can run or already do: red ball for young youth, summer camps, after-school programs, adult beginners through Love to Learn, Play, Roll, and adaptive and wheelchair tennis.

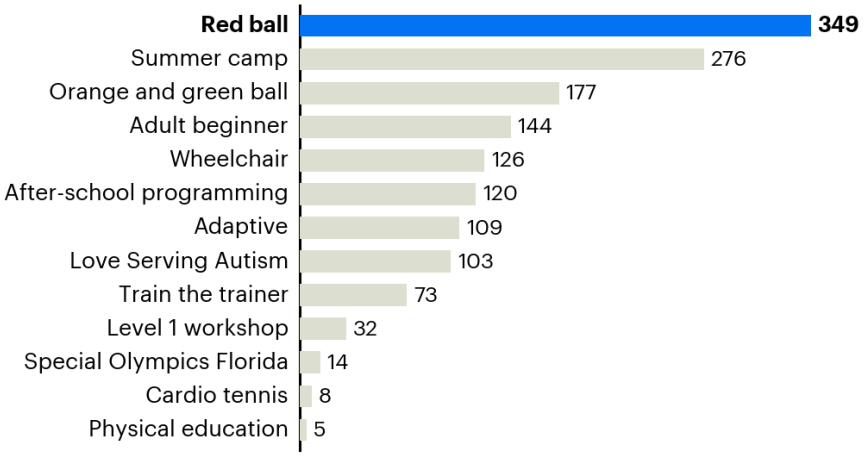
### 5.3.1 PROGRAM REACH, 2022 TO 2026

From 2022 through September 2026, 1,097 people took part in 111 community coach training sessions held in 25 counties. Many sessions cover more than one format, so those 1,371 session attendances produced 1,845 training records. Most people trained once, but 185 (17%) came back for two or more sessions, and a few attended as many as nine. Together, community coaches have logged 6,986 training hours. Gender is not recorded in the Community Coach Program export.

FIGURE 5.5

**Red ball training leads**

People with each Community Coach training recorded, 2022 to 2026 (n=1,107)




Source: USTA Florida Dynamics 365, Community Coach Participants export

*Figure 5.5. Red ball training leads. Source: USTA Florida Dynamics 365, Community Coach Participants export*

Red ball training is the most common, held by 349 people (32%), followed by summer camp (25%) and orange and green ball (16%). In all, 609 people (55%) hold at least one youth format training, and 212 (19%) hold at least one adaptive training (wheelchair, adaptive, Love Serving Autism®, or Special Olympics Florida). Almost a third (29%) hold two or more trainings, while 357 records (32%) have no specific training marked.

Few community coaches hold a professional certification: 131 (12%) are RSPA or PTR certified. By home county, community coaches reach 38 counties, led by Miami-Dade (112), Orange (81), Broward (67), Pinellas (66), Palm Beach (65), Alachua (56), and Escambia (52).

### 5.3.2 TRAINING BY YEAR

Training grew each year from 2022 to a peak in 2024, when 444 people trained across 43 sessions in 21 counties. Activity then eased: 345 people in 2025 and 94 through September 2026. First-time trainees follow the same path, from 375 in 2024 to 270 in 2025 and 76 in 2026.

FIGURE 5.6

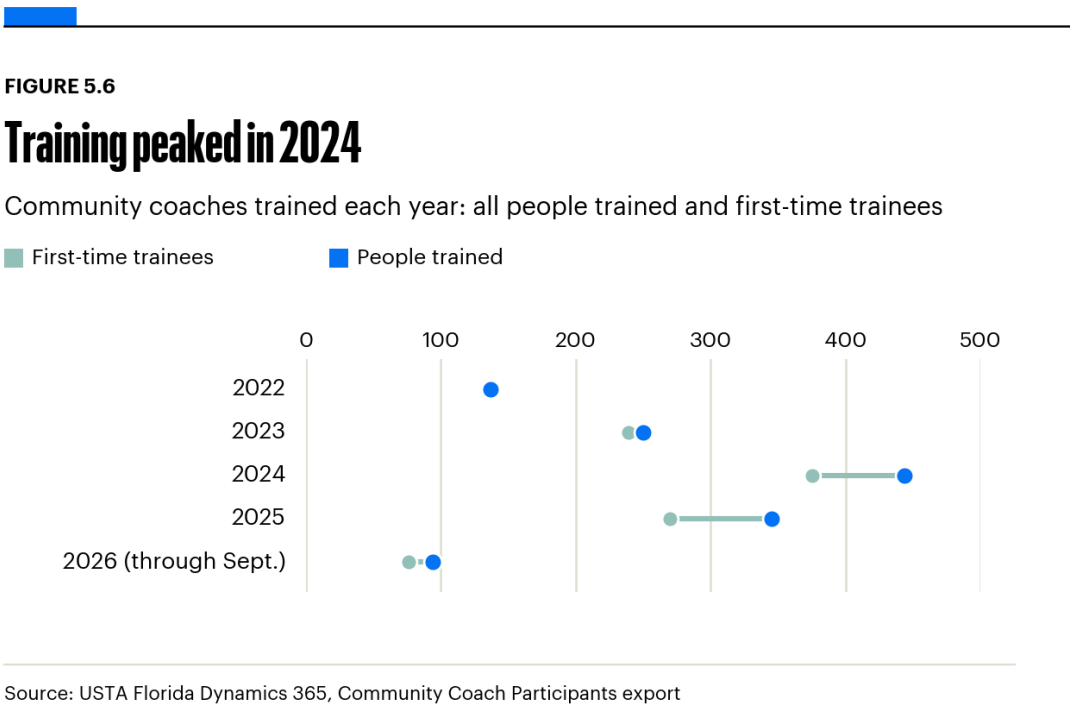



*Figure 5.6. Training peaked in 2024. Source: USTA Florida Dynamics 365, Community Coach Participants export*

**TABLE 5.4. COMMUNITY COACH TRAINING BY YEAR**

| Year | Sessions | Counties | Session attendances | People trained | First-time trainees |
|---|---|---|---|---|---|
| 2022 | 15 | 9 | 142 | 137 | 137 |
| 2023 | 22 | 15 | 262 | 250 | 239 |
| 2024 | 43 | 21 | 484 | 444 | 375 |
| 2025 | 23 | 14 | 379 | 345 | 270 |
| 2026 (through Sep) | 8 | 5 | 104 | 94 | 76 |

Source: USTA Florida Dynamics 365, Community Coach Participations export. People are matched by name. A person who trains in two years counts in both years but is a first-time trainee only once, so first-time trainees sum to 1,097. Sessions counts sessions with attendance records; one completed 2025 session, a partner chapter clinic in January, has no attendance recorded, so the training sessions table in 5.3.3 shows 24 completed sessions in 2025.

Why these counts differ from earlier USTA Florida figures. Earlier USTA Florida communications reported 270 coaches trained in 2023, more than 500 across 2022 and 2023, 518 in 2024, and more than 1,400 since launch. Those figures most likely counted session attendances, where a person who attends several

trainings counts more than once (1,371 attendances from 2022 through September 2026, Table 5.4). This section counts unique people, matched by name: 250 in 2023, 387 across 2022 and 2023, 444 in 2024, and 1,097 in all. The program did not shrink; the counting method changed.

Matched periods tell the same story. From January to September, people trained went from 110 in 2022 to 172 in 2023, 390 in 2024, 296 in 2025, and 94 in 2026.

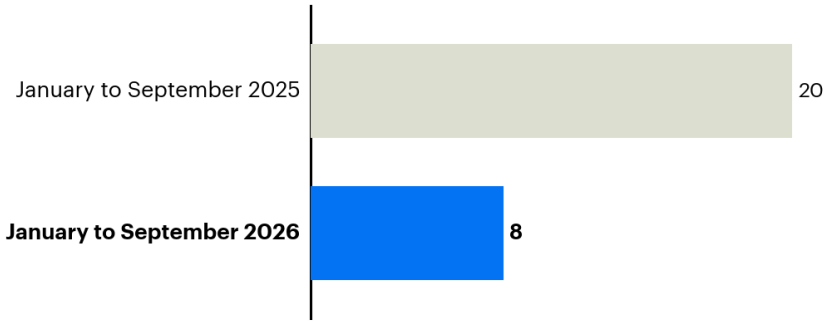
### 5.3.3 TRAINING SESSIONS, 2025 AND 2026

USTA Florida held 32 community coach training sessions from January 2025 through September 2026, with 2 more scheduled for later in 2026 (Lake City on October 16 and Gainesville on November 21). Completed sessions took place at 25 sites in 16 counties.

FIGURE 5.7

**Fewer training sessions ran in 2026**

Completed community coach training sessions, January to September




Source: USTA Florida Dynamics 365, Community Coach Sessions export

*Figure 5.7. Fewer training sessions ran in 2026. Source: USTA Florida Dynamics 365, Community Coach Sessions export*

Comparing matched periods, completed sessions fell from 20 in January to September 2025 to 8 in January to September 2026, and session attendances fell from 309 to 104. Summer staff trainings account for half of the drop in sessions, from 8 in January to September 2025 to 2 in the same months of 2026. The first Intro to Coaching workshop in South Florida ran at Crandon Park in August 2026, with 20 participants.

**TABLE 5.5. TRAINING SESSIONS BY TYPE AND STATUS**

| Session type | 2025 completed (full year) | 2025 completed (Jan to Sep) | 2026 completed (Jan to Sep) |
|---|---|---|---|
| Summer camp and summer program staff | 8 | 8 | 2 |
| Wheelchair and adaptive | 3 | 3 | 1 |
| USTA Coaching workshops | 2 | 1 | 1 |
| Women in Tennis | 2 | 0 | 1 |

| Session type | 2025 completed (full year) | 2025 completed (Jan to Sep) | 2026 completed (Jan to Sep) |
|---|---|---|---|
| High school coaches | 2 | 2 | 1 |
| Love Serving Autism® | 1 | 1 | 1 |
| Adult beginner (Love to Learn, Play, Roll) | 1 | 0 | 1 |
| Red, orange, and green ball | 2 | 2 | 0 |
| Train the trainer | 1 | 1 | 0 |
| Partner clinic or youth organization | 2 | 2 | 0 |
| **Total** | **24** | **20** | **8** |

Source: USTA Florida Dynamics 365, Community Coach Sessions export. Compare the two January to September columns; full-year 2025 is shown for reference. Two sessions scheduled after September 2026 are not shown. Session type is assigned from the session title.

## 5.4 Where coaches are

This part brings the USTA Coaching and Community Coach records together by county.

USTA Coaching enrollees live in 46 of Florida's 67 counties. Four counties, Orange (287), Miami-Dade (186), Broward (133), and Palm Beach (123), hold 47% of enrollees with a Florida county. Orange County is also home to the USTA National Campus.

48 counties have at least one USTA Coaching enrollee or community coach on record. The 19 without one are Baker, Calhoun, Dixie, Franklin, Gadsden, Gilchrist, Glades, Gulf, Hamilton, Hardee, Hendry, Holmes, Jackson, Jefferson, Lafayette, Levy, Liberty, Taylor, and Union. These counties connect to the geographic disparities in Section 3.4.

**TABLE 5.6. THE 15 COUNTIES WITH THE MOST COACH RECORDS**

| County | USTA Coaching enrollees | Community coaches |
|---|---|---|
| Orange | 287 | 81 |
| Miami-Dade | 186 | 112 |
| Broward | 133 | 67 |
| Palm Beach | 123 | 65 |
| Pinellas | 61 | 66 |
| Hillsborough | 83 | 42 |
| Duval | 86 | 28 |
| Alachua | 31 | 56 |
| Pasco | 54 | 33 |
| Polk | 34 | 47 |
| Volusia | 32 | 38 |
| Seminole | 36 | 29 |
| Escambia | 9 | 52 |
| Osceola | 41 | 10 |
| St. Johns | 36 | 13 |

Source: USTA Florida Dynamics 365, USTA Coach Enrollees export (October 29, 2026) and Community Coach Participants export. County is the recorded county, or a city lookup where the county was blank. 184 community coaches have no Florida county, so community counts by county are a floor.

The mix differs by county. Community coaches make up most of the coach records in Escambia, Alachua, Polk, Volusia, and Pinellas, while USTA Coaching enrollees make up most in Orange, Duval, Broward, and Palm Beach. Each coach is counted at the county on their record, which may not be where they coach.

# 6. Tennis academies

Tennis academies are one of the ways Florida players get coaching beyond a weekly lesson. In this report, an academy is an organization that USTA Florida's Dynamics 365 records identify as a tennis academy: a program offering structured, ongoing tennis training, such as junior development or high-performance training, rather than individual lessons alone. Each academy is linked to the facilities where it runs its programs. USTA Florida records 128 academies operating at 146 facilities in 28 counties.

The list includes academies known to USTA Florida and is not a complete census. Some well-known programs, including IMG Academy in Bradenton and the Saddlebrook academy in Wesley Chapel, are not on record, while others, such as Evert Tennis Academy in Boca Raton and Emilio Sanchez Academy in Naples, are. Counts by county are therefore floors, and a county with few academies on record may have more than the records show. This section maps where recorded academies are, where they play, and where few or none are on record.

**128**
TENNIS ACADEMIES ON RECORD

**146**
FACILITIES WHERE ACADEMIES OPERATE

**28**
COUNTIES WITH AT LEAST ONE ACADEMY

**40%**
OF ACADEMY SITES ARE PUBLIC FACILITIES

## 6.1 Where academies are

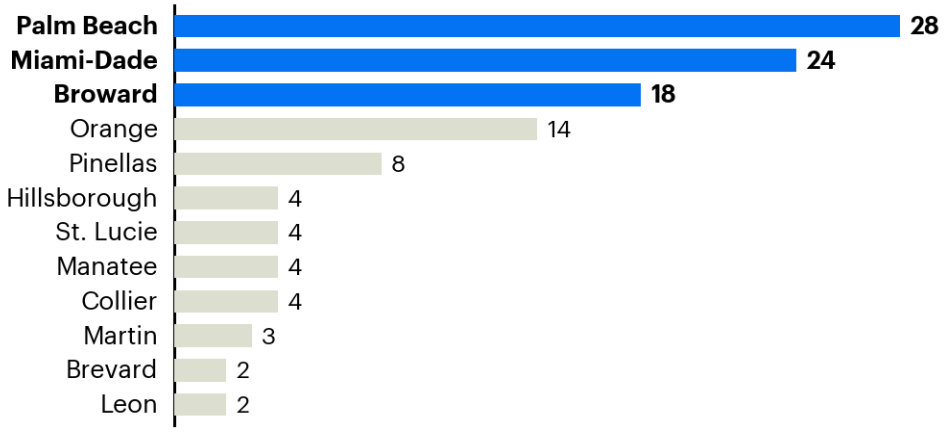
Academies are concentrated in South Florida. Palm Beach (28), Miami-Dade (24), and Broward (18) lead, followed by Orange (14) and Pinellas (8). Because 8 academies operate in more than one county, county counts add up to 136 county listings for the 128 unique academies. The three South Florida counties have 70 listings, representing 68 unique academies (53% of the total). By USTA Florida region, Region 8 (undefined) and Region 6 (undefined) together have 75 unique academies, while Regions 1, 5, and 7 have undefined, undefined, and undefined each.

The pattern follows Florida’s market tiers (Section 7), but more steeply. The 12 Large counties have 100 academies, about 78% of the total, while holding 68% of the state’s youth players. The 25 Mid counties have 27 (21%) with 29% of youth players, and the 30 Small counties have 2. These tier counts total 129 because one academy operates in counties in two tiers.

FIGURE 6.1

## Academies cluster in South Florida

Tennis academies by county where they operate, top 12 counties




Source: USTA Florida tennis academy records (Dynamics 365), October 2026

*Figure 6.1 Tennis academies by county where they operate, top 12 counties. Source: USTA Florida tennis academy records (Dynamics 365, exported October 29, 2026) matched to the USTA Florida Courts and Facilities records.*

### Table 6.1 Counties with the most tennis academies

| County | Academies | Youth players (6 to 17) | Market tier | Youth players per academy |
|---|---|---|---|---|
| Palm Beach | 28 | 25,934 | Large | 926 |
| Miami-Dade | 24 | 49,182 | Large | 2,049 |
| Broward | 18 | 36,741 | Large | 2,041 |
| Orange | 14 | 30,515 | Large | 2,180 |
| Pinellas | 8 | 11,888 | Large | 1,486 |
| Hillsborough | 4 | 28,564 | Large | 7,141 |
| Collier | 4 | 6,063 | Mid | 1,516 |
| Manatee | 4 | 6,898 | Mid | 1,724 |
| St. Lucie | 4 | 5,579 | Mid | 1,395 |
| Martin | 3 | 2,203 | Mid | 734 |

*Academies are counted in the county of each facility where they operate, so an academy with sites in two counties is listed in each; county listings total 136 for 128 unique academies. Youth players: Kinetica Sports & Recreation Localized Intelligence 2025. Source: USTA Florida tennis academy records (Dynamics 365, exported October 29, 2026) matched to the USTA Florida Courts and Facilities records.*

## 6.2 Where academies play

Of the 146 facilities where academies operate, 59 (40%) are public, 79 are private, and 8 do not yet have an access type on record. Public parks are the single most common host type, with 48 academy sites. 53 of the 128 academies (41%) run at least one program at a public facility, and 42 operate only at public facilities.

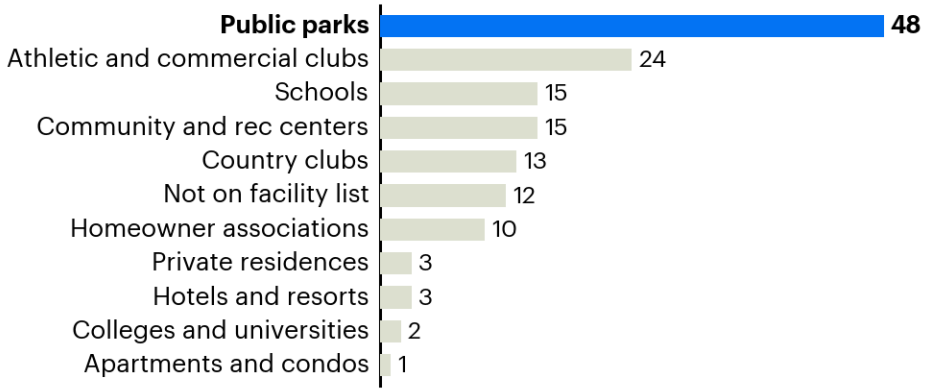
The public facilities that host academies hold at least 493 tennis courts, about 13% of Florida's 3,786 public courts. The figure is a floor: 12 academy sites are not yet in the Courts and Facilities records, 8 have no access type, and 6 have no court count.

Some facilities are hubs. 18 facilities host two or more academies, led by Indian Spring Country Club in Palm Beach County (6); the rest host two each. Public hubs include Frank Veltri Tennis Center, Palm Beach Gardens Tennis Center, Lake Cane Tennis Center, Coral Gables Kerdyk Biltmore Tennis Center, Ives Estates Tennis Center, and Rose G. Price Park.

**FIGURE 6.2**

### Public parks host the most academy sites

Facilities where tennis academies operate, by facility type, October 2026




Source: USTA Florida academy and facility records, October 2026

*Figure 6.2 Facilities where tennis academies operate, by facility type. "Not on facility list" marks sites named in academy records that are not yet in the Courts and Facilities records. Source: USTA Florida tennis academy records (Dynamics 365, exported October 29, 2026) matched to the USTA Florida Courts and Facilities records.*

## 6.3 Academy networks

Most academies run from a single site: 102 of the 128 operate at one facility. 26 academies run programs at two or more facilities, and nine operate at three or more.

### Table 6.2 Academies operating at three or more facilities

| Academy | Facilities | Home county |
|---|---|---|
| Canas Tennis | 5 | Miami-Dade |
| David Ensignia Tennis Academy | 4 | Miami-Dade |
| Tennis Master Academies | 4 | Miami-Dade |
| Play Tennis Academy | 4 | Palm Beach |
| Ale Tennis Academy | 3 | Miami-Dade |
| Cancelado Tennis Academy | 3 | Broward |
| Miami Beach Tennis Academy | 3 | Miami-Dade |
| SM Swiss Tennis Academy | 3 | Seminole |
| Treasure Coast Tennis Foundation | 3 | Martin |

*Academy names lightly standardized (capitalization and legal suffixes). Home county is the county on the academy record. Source: USTA Florida tennis academy records (Dynamics 365, exported October 29, 2026) matched to the USTA Florida Courts and Facilities records.*

## 6.4 Where few academies are on record

39 of Florida's 67 counties have no academy on record. They are home to 3,293,962 residents (14% of the state) and 40,107 youth players (11% of Florida's youth players).

Several growing counties with large youth player bases have few or no academies on record. Because the list is not a complete census, some of these gaps may reflect missing records rather than missing academies; IMG Academy and Saddlebrook, for example, are not on record in Manatee and Pasco. Lake, Alachua, and Escambia each have about 5,000 or more youth players and no academy. Duval and Polk, two Large-market counties, each have one academy for more than 13,000 youth players, and Hillsborough has four academies for 28,564 youth players, about 7,100 per academy against fewer than 1,000 in Palm Beach.

### Table 6.3 Counties with 4,000 or more youth players and two or fewer academies

| County | Academies | Youth players (6 to 17) | Residents (2025) | Market tier |
|---|---|---|---|---|
| Lake | 0 | 6,137 | 445,881 | Mid |
| Alachua | 0 | 5,623 | 298,485 | Mid |
| Escambia | 0 | 4,963 | 337,728 | Mid |
| Duval | 1 | 17,493 | 1,079,044 | Large |
| Polk | 1 | 13,092 | 846,896 | Large |
| St. Johns | 1 | 8,603 | 348,336 | Mid |
| Volusia | 1 | 7,995 | 604,533 | Large |
| Marion | 1 | 5,313 | 433,765 | Mid |
| Clay | 1 | 4,200 | 238,605 | Mid |
| Okaloosa | 1 | 4,073 | 226,193 | Mid |
| Pasco | 2 | 11,310 | 648,369 | Large |
| Lee | 2 | 11,199 | 839,223 | Large |

*Youth players: Kinetica Sports & Recreation Localized Intelligence 2025. Residents: BEBR April 1, 2025 estimates. Source: USTA Florida tennis academy records (Dynamics 365, exported October 29, 2026) matched to the USTA Florida Courts and Facilities records.*

## 6.5 Key findings

- **128 academies on record.** They operate at 146 facilities in 28 counties; 39 counties have none on record.
- **South Florida concentration.** Palm Beach, Miami-Dade, and Broward account for 68 of the 128 unique academies (53%).
- **Public and private sites.** 59 of 146 academy sites (40%) are public and 79 are private; 42 academies operate only at public facilities.
- **Most run from one site.** 102 academies operate at a single facility, and 26 at two or more.
- **Records are incomplete.** The list is not a complete census, so county counts are floors.

USTA FLORIDA

# 7. Market highlights

Florida's 67 counties range from more than 2.8 million residents to just over 8,000, and tennis looks different at each end of that range. This section sizes the state as three markets, Large, Mid, and Small, using the same population thresholds as USTA Florida's county market tiers. Each tier is measured on the same scale and told as its own story.

| Market tier | Population threshold | Counties | Population 2025 | Share of Florida |
|---|---|---|---|---|
| Large | 500,000 or more | 12 | 15,129,203 | 65% |
| Mid | 100,000 to 499,999 | 25 | 7,248,457 | 31% |
| Small | Under 100,000 | 30 | 1,001,601 | 4% |
| **Florida** | | **67** | **23,379,261** | **100%** |

*Table 7.1. Market tiers. Counties are placed by their April 1, 2025 population estimate in the BEBR 2026 population projections. Tier placement is based on population only; growth, participation, and courts are layered on separately and do not change a county's tier. The full county list for each tier is in Tables 7.5 to 7.7. Source: UF BEBR April 1, 2025 county population estimates (Bulletin 203, 2026).*

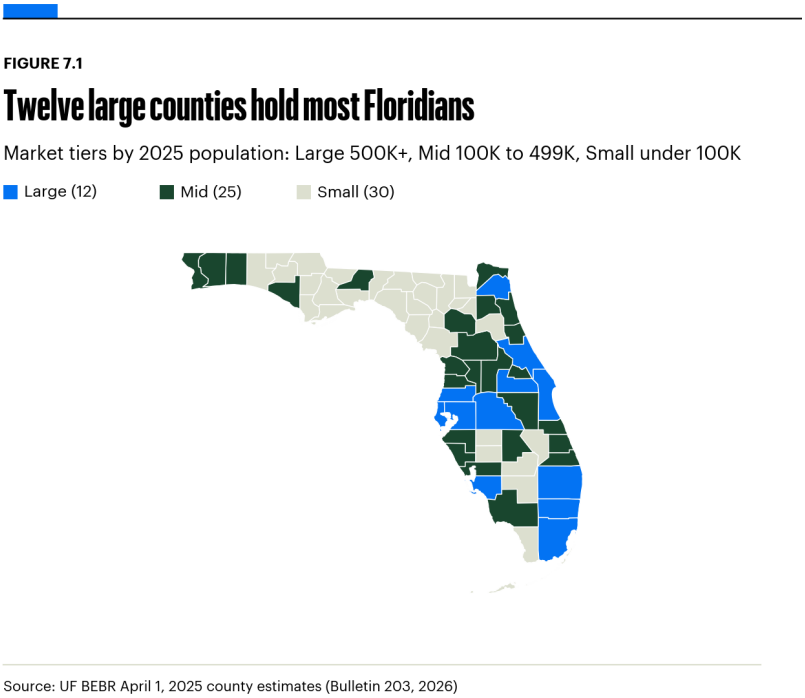



*Figure 7.1. Florida counties by market tier. Tiers are based on April 1, 2025 county population estimates in the BEBR 2026 population projections (Bulletin 203, February 2026). Large counties are labeled. Source: UF BEBR April 1, 2025 county population estimates (Bulletin 203, 2026).*

### HOW THE NUMBERS IN THIS SECTION WERE BUILT

Population and growth come from the BEBR 2026 population projections (Florida Population Studies, Bulletin 203, February 2026): the April 1, 2025 county estimates as the base, and the Medium projection series as the headline, with the High series noted alongside. Players, participation rates, and interest to play come from the 2025 Kinetica county catchment reports. Court and facility counts come from the USTA Florida courts and facilities records (October 2026).

Court site visits come from Placer.ai for January to December 2025. Tier figures are sums of their counties; rates are recalculated from the summed counts.

# 7.1 Market size analysis and themes

## THE THREE MARKETS AT A GLANCE

The 12 Large counties carry the state's volume: 65% of residents, 68% of players, and 63% of courts. The 25 Mid counties are where growth runs fastest, projected to grow 29% by 2050 against 21% statewide. The 30 Small counties together hold 4% of Florida's residents and 3% of its courts, and they post the lowest participation rates of the three tiers.

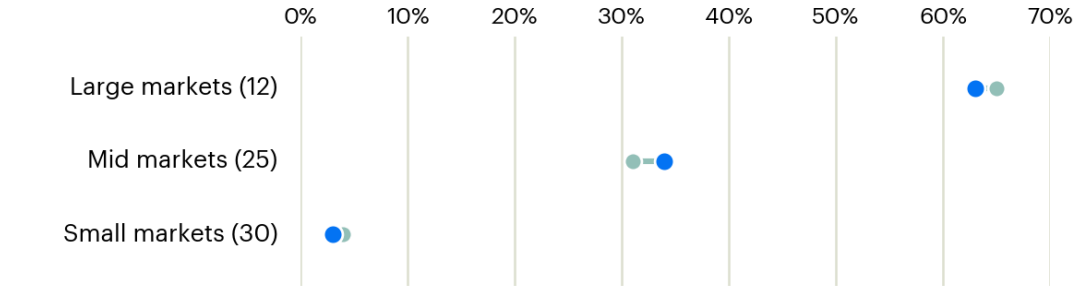
| Market tier | Population 2025 | Growth to 2050 | Players 2025 | Play rate | Courts | Public share |
|---|---|---|---|---|---|---|
| Large (12) | 15,129,203 (65%) | +17% | 1,347,820 (68%) | 9.39% | 11,563 (63%) | 23% |
| Mid (25) | 7,248,457 (31%) | +29% | 578,101 (29%) | 8.51% | 6,182 (34%) | 17% |
| Small (30) | 1,001,601 (4%) | +13% | 61,209 (3%) | 6.50% | 548 (3%) | 24% |
| **Florida (67)** | **23,379,261** | **+21%** | **1,987,130** | **9.00%** | **18,293** | **21%** |

*Table 7.2. Market size by tier. Shares of the Florida total in parentheses. Population and growth: BEBR 2026 population projections (2025 estimates and Medium series). Players and play rate (participation rate for adults and youth combined, players as a share of residents age 6 and up): Kinetica 2025 catchments; the Florida rate is as reported. Courts: USTA Florida records. Sources: UF BEBR, Bulletin 203 (2026); Kinetica Sports & Recreation Localized Intelligence 2025; USTA Florida Courts and Facilities records, October 2026.*

FIGURE 7.2

### Large markets hold most residents and courts

Share of Florida's residents and tennis courts by market tier, %




Sources: USTA Florida records, October 2026; BEBR 2025 estimates

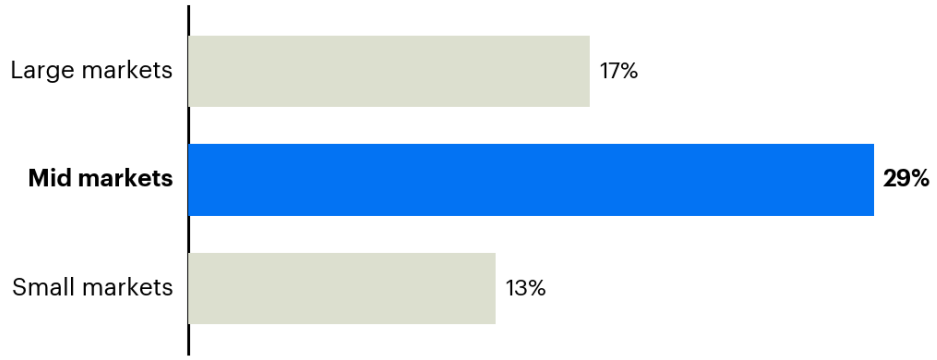
*Figure 7.2. Each market tier's share of Florida's population, tennis players, and tennis courts. Sources: BEBR 2026 population projections (2025 estimates); Kinetica 2025 catchments; USTA Florida courts and facilities records.*

Large markets hold a bigger share of Florida's players (68%) than of its residents (65%). Mid markets are the reverse on players (29% of players, 31% of residents) but hold more than their share of courts (34%). Small markets hold 4% of residents and 3% of players.

FIGURE 7.3

## Mid markets grow fastest

Projected population growth, 2025 to 2050, %, BEBR Medium




Source: UF BEBR county population projections, 2026 release

*Figure 7.3. Projected added residents, April 1, 2025 to April 1, 2050, Medium series, with percentage growth. Source: BEBR 2026 population projections (Bulletin 203, February 2026).*

Florida is projected to add 4,870,839 residents by 2050 under the Medium series (+21%), or about 8.3 million under the High series (+35%). Large markets add the most people (2,643,497, 54% of the state's growth), but Mid markets grow fastest: +29% under the Medium series and +55% under the High series. Tier growth under the High series sums BEBR's county High projections, which add up to more than the state High total (+35%), so tier High figures are not directly comparable to the state figure. Together the 25 Mid counties are projected to add 2,092,943 residents, 43% of the state's growth, on a base half the size of the Large tier.

FIGURE 7.4

## Small markets lean most on public courts

Public share of tennis courts by market tier, %, 2025




Source: USTA Florida records, October 2026

*Figure 7.4. Public share of tennis courts by market tier. Sources: USTA Florida courts and facilities records (October 2026); BEBR 2026 population projections (2025 estimates).*

### HOW HARD THE COURTS WORK

Court counts show supply. Foot traffic shows use. Placer.ai site-visit data for January to December 2025, matched to USTA Florida court records, adds a third view of each market: how many site visits each court receives in a year.

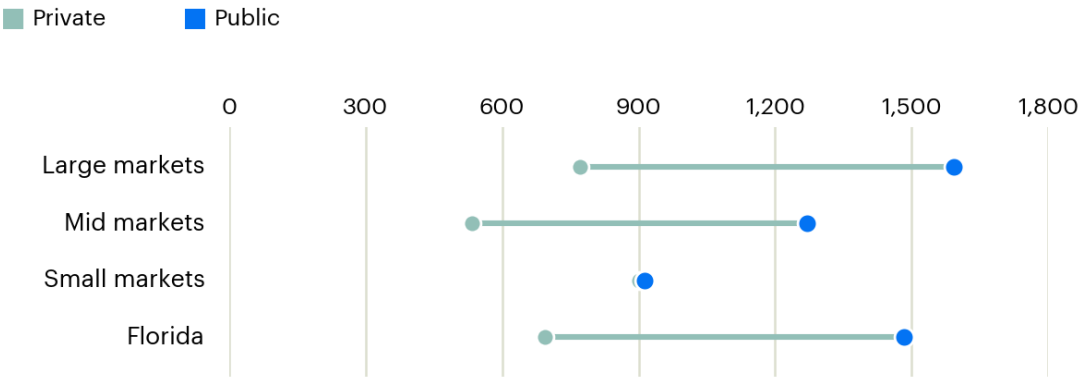
| Market tier | Facilities matched | Courts matched | Site visits 2025 | Site visits per court | Public courts | Private courts |
|---|---|---|---|---|---|---|
| Large | 2,771 | 8,428 | 8,267,243 | 981 | 1,592 | 771 |
| Mid | 1,425 | 4,091 | 2,776,085 | 679 | 1,271 | 533 |
| Small | 121 | 322 | 291,337 | 905 | 913 | 901 |
| **Florida** | **4,317** | **12,841** | **11,334,665** | **883** | **1,484** | **694** |

*Table 7.3. Site visits per tennis court by market tier, January to December 2025. Public and private columns are site visits per court at facilities recorded as public or private. Each facility is counted once. Placer.ai locations were matched to USTA Florida court records by location ID, then by facility name, then by reviewer confirmation. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

FIGURE 7.5

## Public courts work twice as hard

Placer.ai site visits per court, 2025, private and public courts




Sources: Placer.ai; USTA Florida records, October 2026

*Figure 7.5. Site visits per tennis court by market tier, all, public, and private courts, January to December 2025. Sources: Placer.ai; USTA Florida courts and facilities records. Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

Public courts do the heavy lifting. Across Florida, a public court received 1,484 site visits in 2025, more than twice the 694 at a private court. The gap is widest in Mid markets, where public courts averaged 1,271 site visits against 533 at private courts. Mid-market courts overall were the least used of the three tiers (679 site visits per court), and that lighter use is concentrated at private courts. Small-market courts were used almost as heavily as Large-market courts (905 against 981 site visits per court), with public and private courts at similar levels.

### A DISTINCT THEME FOR EACH MARKET

Each market tier has its own story, and each connects to USTA Florida's mission, To Promote and Develop Tennis for All, and to its Big Bold Moves. Together they show one mission at work, from the biggest metro to the smallest county.

| Market tier | Market theme | Strategic tie |
|---|---|---|
| Large | Where the volume lives | Big Bold Move 1: Best-in-Class Facilities and Providers |
| Mid | Where growth meets opportunity | Big Bold Moves 1 and 2: Best-in-Class Facilities and Providers; Business Insights and Analytics |
| Small | Tennis for all, 30 communities at a time | The mission, carried by Big Bold Move 3: Volunteer System and Structure |

*Table 7.4. Market themes and their ties to USTA Florida strategy. Source: USTA Florida, based on the market tiers in this section and the USTA Florida strategic plan.*

### 7.1.1 LARGE MARKETS: WHERE THE VOLUME LIVES

**BIG BOLD MOVE 1: BEST-IN-CLASS FACILITIES AND PROVIDERS**

**1,347,820**
players in 2025, 68% of Florida

**11,563**
tennis courts, 63% of Florida

**+2,643,497**
residents by 2050, 54% of Florida's growth

**117**
players per court, most of the three tiers

Florida's 12 Large counties, each with 500,000 or more residents, are where the state's tennis volume lives. Together they hold 15,129,203 residents (65% of Florida), 1,347,820 players (68%), and 11,563 tennis courts (63%). Their combined adult participation rate is 9% and youth rate 12%. Six of the 12 sit above the statewide adult rate of 8.50%, led by Orange (10.16%), Hillsborough (9.53%), and Miami-Dade (9.47%).

The theme here is how hard existing courts work. Large markets average 117 players per court, the most of the three tiers, and the spread inside the tier is wide. Hillsborough (184), Miami-Dade (182), Orange (180), and Polk (176) carry the heaviest loads, while Palm Beach, with 2,618 courts, the most of any Florida county, has 54. Growth adds pressure: the Large tier is projected to add 2,643,497 residents by 2050 (+17%, or +38% under the High series), led by Orange (363,555), Hillsborough (326,463), Miami-Dade (325,773), and Polk (292,004). Public courts make up 23% of the tier's supply, ranging from 11% in Lee and Pasco to 33% in Miami-Dade, yet they carry an outsized share of play: in 2025 a Large-market public court averaged 1,592 site visits, about twice the 771 at a private court (Placer.ai).

| County | Population 2025 | Growth to 2050 | Courts | Public courts |
|---|---|---|---|---|
| Miami-Dade | 2,814,927 | +12% | 1,463 | 480 |
| Broward | 1,993,535 | +10% | 1,664 | 477 |
| Hillsborough | 1,575,637 | +21% | 805 | 177 |
| Palm Beach | 1,556,161 | +14% | 2,618 | 391 |
| Orange | 1,536,045 | +24% | 854 | 179 |
| Duval | 1,079,044 | +18% | 588 | 167 |
| Pinellas | 966,933 | +3% | 814 | 222 |
| Polk | 846,896 | +34% | 367 | 107 |
| Lee | 839,223 | +28% | 1,106 | 119 |
| Brevard | 667,900 | +21% | 528 | 151 |
| Pasco | 648,369 | +34% | 324 | 37 |
| Volusia | 604,533 | +19% | 432 | 121 |
| **Large markets (12)** | **15,129,203** | **+17%** | **11,563** | **2,628** |

*Table 7.5. Large markets by county, largest to smallest population. Population and growth: BEBR 2026 population projections (2025 estimates and Medium series to 2050). Courts: USTA Florida records. Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

### 7.1.2 MID MARKETS: WHERE GROWTH MEETS OPPORTUNITY

**BIG BOLD MOVES 1 AND 2**

**+29%**
projected growth to 2050, fastest of the three tiers

**43%**
of Florida's projected growth

**6,182**
tennis courts, 34% of Florida's

**17%**
public share of courts, lowest of the three tiers

The 25 Mid counties, each with 100,000 to 499,999 residents, are where Florida is headed. They hold 31% of the state's residents today but are projected to absorb 43% of its growth, adding 2,092,943 residents by 2050 (+29%, or +55% under the High series). St. Johns (+57%), Osceola (+56%), Sumter (+53%), Flagler (+42%), and Lake (+40%) are the fastest-growing Mid counties. Osceola alone adds 269,985 residents.

Mid markets hold 578,101 players (29% of Florida), with an adult rate of 8% and a youth rate of 12%. The tier includes the state's highest-participating county: St. Johns posts the highest adult rate (10.42%) and youth rate (16.64%) of all 67 counties. Supply is uneven and mostly private, and several of the fastest-growing Mid counties, including Sumter, Osceola, and Santa Rosa, have among the fewest courts for their population. Only 17% of Mid-market courts are public, the lowest share of the three tiers, falling to 6% in Sumter and 7% in Collier, Nassau, and Manatee. Foot traffic confirms the pattern: Mid-market courts averaged 679 site visits each in 2025, the lowest of the three tiers, but public courts averaged 1,271 site visits, more than twice the 533 at private courts (Placer.ai).

| County | Population 2025 | Growth to 2050 | Courts | Public courts |
|---|---|---|---|---|
| Seminole | 495,106 | +14% | 350 | 110 |
| Sarasota | 487,640 | +25% | 805 | 96 |
| Osceola | 484,915 | +56% | 140 | 34 |
| Manatee | 466,845 | +35% | 490 | 34 |
| Lake | 445,881 | +40% | 189 | 60 |
| Marion | 433,765 | +31% | 182 | 59 |
| Collier | 413,314 | +23% | 1,020 | 73 |
| St. Lucie | 394,074 | +37% | 276 | 29 |
| St. Johns | 348,336 | +57% | 315 | 36 |
| Escambia | 337,728 | +10% | 184 | 50 |
| Leon | 305,866 | +10% | 192 | 60 |
| Alachua | 298,485 | +16% | 231 | 75 |
| Clay | 238,605 | +21% | 148 | 34 |
| Okaloosa | 226,193 | +18% | 109 | 22 |
| Charlotte | 223,430 | +37% | 222 | 44 |
| Hernando | 212,849 | +21% | 92 | 16 |
| Santa Rosa | 211,445 | +31% | 77 | 28 |
| Bay | 199,950 | +21% | 154 | 19 |
| Indian River | 173,013 | +20% | 268 | 33 |
| Citrus | 166,500 | +17% | 99 | 27 |
| Martin | 166,281 | +13% | 363 | 39 |
| Sumter | 162,493 | +53% | 32 | 2 |
| Flagler | 140,714 | +42% | 92 | 30 |
| Highlands | 107,976 | +12% | 65 | 8 |
| Nassau | 107,053 | +38% | 87 | 6 |
| **Mid markets (25)** | **7,248,457** | **+29%** | **6,182** | **1,024** |

*Table 7.6. Mid markets by county, largest to smallest population. Population and growth: BEBR 2026 population projections (2025 estimates and Medium series to 2050). Courts: USTA Florida records. Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

### 7.1.3 SMALL MARKETS: TENNIS FOR ALL, 30 COMMUNITIES AT A TIME

#### THE MISSION, CARRIED BY BIG BOLD MOVE 3

**30**
counties, 4% of Florida's residents

**6%**
adult participation rate, against 8.50% statewide

**18**
of 30 counties with fewer than 10 tennis courts

**65,039**
residents interested in playing, more than currently play

Florida's 30 Small counties, each with fewer than 100,000 residents, are where "tennis for all" is tested most directly. Together they hold 1,001,601 residents (4% of Florida), 61,209 players (3%), and 548 tennis courts (3%). Their adult participation rate is 6% and youth rate 8%, the lowest of the three tiers, and none of the 30 sits above the statewide adult rate of 8.50%.

The interest is there. Small markets are the only tier where more residents say they want to play (65,039) than currently play (61,209). Access is the gap. Eighteen of the 30 counties have fewer than 10 tennis courts on record, Liberty has none, and Baker, Dixie, and Madison have courts but no public ones. Where courts do exist, they lean public: 24% of Small-market courts are public, the highest share of the three tiers, and in four Small counties every court on record is public. Reaching 30 separate communities depends on local people as much as on facilities, which is why this tier connects most directly to the volunteer network. Growth is modest overall (+13% to 2050), with Walton (+48%), Wakulla (+29%), and Hendry (+25%) the exceptions. The courts that do exist are well used: Small-market courts averaged 905 site visits each in 2025, close to the 981 in Large markets (Placer.ai).

| County | Population 2025 | Growth to 2050 | Courts | Public courts |
|---|---|---|---|---|
| Walton | 90,547 | +48% | 139 | 9 |
| Monroe | 84,707 | +8% | 182 | 32 |
| Putnam | 76,600 | +4% | 28 | 6 |
| Columbia | 72,388 | +10% | 23 | 5 |
| Jackson | 49,728 | +5% | 10 | 5 |
| Suwannee | 47,274 | +13% | 13 | 8 |
| Hendry | 47,085 | +25% | 12 | 11 |
| Levy | 46,270 | +15% | 9 | 3 |
| Gadsden | 44,790 | +1% | 13 | 3 |
| Okeechobee | 40,314 | +4% | 11 | 8 |
| Wakulla | 38,189 | +29% | 13 | 5 |
| DeSoto | 35,947 | +8% | 9 | 6 |
| Baker | 29,139 | +15% | 9 | 0 |
| Bradford | 27,668 | +7% | 5 | 1 |
| Washington | 26,876 | +13% | 10 | 3 |
| Hardee | 26,042 | +1% | 2 | 2 |
| Taylor | 22,011 | +6% | 8 | 2 |
| Holmes | 20,042 | +3% | 2 | 2 |
| Gilchrist | 19,716 | +19% | 3 | 1 |
| Madison | 18,859 | +1% | 6 | 0 |
| Dixie | 17,217 | +6% | 1 | 0 |

| County | Population 2025 | Growth to 2050 | Courts | Public courts |
|---|---|---|---|---|
| Union | 16,821 | +14% | 7 | 4 |
| Gulf | 16,621 | +17% | 10 | 3 |
| Jefferson | 15,761 | +10% | 6 | 4 |
| Hamilton | 14,155 | +5% | 3 | 3 |
| Calhoun | 13,655 | +2% | 3 | 1 |
| Franklin | 13,383 | +19% | 6 | 4 |
| Glades | 13,055 | +9% | 1 | 1 |
| Lafayette | 8,601 | +12% | 4 | 2 |
| Liberty | 8,140 | +3% | 0 | 0 |
| **Small markets (30)** | **1,001,601** | **+13%** | **548** | **134** |

*Table 7.7. Small markets by county, largest to smallest population. Population and growth: BEBR 2026 population projections (2025 estimates and Medium series to 2050). Courts: USTA Florida records. Sources: USTA Florida Courts and Facilities records (Dynamics 365), October 2026; UF BEBR April 1, 2025 estimates and county projections (Bulletin 203, 2026).*

# 8. College tennis in Florida

Florida has 60 college tennis programs at 34 institutions, from NCAA Division I through the NJCAA, and a large international player base. This section gives a short overview of the college game here and how it connects to the rest of the tennis system covered in this report.

## 8.1 Overview of Florida college tennis

In the 2025-26 season, Florida had **60 active college tennis programs** (26 men's and 34 women's) at **34 institutions** across National Collegiate Athletic Association (NCAA) Division I, NCAA Division II, the National Association of Intercollegiate Athletics (NAIA), and the National Junior College Athletic Association (NJCAA). Official athletics rosters list **607 student-athletes**.

**Table 8.1 Florida college tennis programs and rosters, 2025-26**

| DIVISION | PROGRAMS (M / W) | ATHLETES | INTERNATIONAL | DOMESTIC | INTERNATIONAL SHARE |
|---|---|---|---|---|---|
| NCAA Division I | 21 (9 / 12) | 184 | 136 | 48 | 74% |
| NCAA Division II | 23 (10 / 13) | 264 | 191 | 73 | 72% |
| NAIA | 12 (6 / 6) | 127 | 90 | 37 | 71% |
| NJCAA | 4 (1 / 3) | 32 | 9 | 7 | 56% |
| **Total** | **60 (26 / 34)** | **607** | **426** | **165** | **72%** |

*Source: USTA Florida analysis of official athletics roster pages, 2025-26. Eastern Florida State College (16 athletes) could not be classified, so its athletes count toward the total but not toward international or domestic. International shares use classified athletes only: 9 of 16 in the NJCAA and 426 of 591 statewide.*

**Seven in ten Florida college tennis players whose status could be classified are international (426 of 591, 72%).** By gender, among classified athletes, men's rosters are 79% international (219 of 277) and women's rosters are 66% (207 of 314). Men's rosters average about 11 players and women's about 9. The share is about the same at every four-year level, from 71% in the NAIA to 74% in Division I.

**College tennis has contracted nationally: more than 125 college tennis programs have been eliminated across the country since 2016, including 22 NCAA programs in 2025-26 alone. In Florida, seven team-level programs are no longer active: Webber International (men and women, no activity since 2020-21), Warner (men and women, dropped after 2024-25), State College of Florida (women), the University of Tampa (men; the women's team is active), and Broward College (women, 2019-20). Three were added: New College of Florida's men's and women's teams in 2021-22 and Keiser's women's team in 2023-24, a net loss of four programs. The University of West Florida moves from Division II to Division I (ASUN) beginning fall 2026.**

**HBCU tennis.** Three of Florida's four historically Black colleges and universities (HBCUs) field tennis: Florida A&M and Bethune-Cookman (Division I, SWAC) and Edward Waters (Division II, SIAC). All three are

women's programs, with 22 athletes combined. Florida Memorial does not offer tennis. USTA Florida awarded HBCU Tennis Program Grants to all three between October 2024 and February 2025.

## 8.2 Why college tennis matters to Florida tennis

### PLAYER PATHWAY

College tennis is the next level of competition after the junior play covered earlier in this report: youth team tennis, high school tennis, and tournaments (Section 1). It is also a route to the pro game: a record 35 players with college tennis ties were in the 2025 Wimbledon singles main draws, and UF's Ben Shelton is the best-known recent example. Of Florida's 607 rostered college players, 165 (27%) are domestic and 16 could not be classified. Domestic means from the United States, not necessarily from Florida, and roster data do not show whether these players came through Florida's junior system.

### FACILITY AND COMMUNITY CROSSOVER

College courts can be community courts too. Florida's college and university campuses have 451 tennis courts at 79 facilities (Section 3.1). Through the USTA Collegiate Community Hub program, colleges open campus courts and programs to the public; nationally, more than 75 colleges and universities have launched hubs since 2021, making more than 600 courts available to the public. Florida Collegiate Community Hub recipients, in order, are St. Thomas University (2021), the University of West Florida (2021), Saint Leo University (2021), Stetson University (2022), Edward Waters University (2023), Florida A&M University (2024), and Florida Gulf Coast University (2025).

Others are building toward the model. USF opened 12 lighted on-campus courts, FIU built 6 lighted courts, Rollins completed a new facility, and New College is planning 6 new courts. FGCU and Rollins both won 2026 USTA Outstanding Facility Awards. USTA Tennis Venue Services grants recorded by USTA Florida (Section 4) have gone to Rollins College (December 2024), Florida Gulf Coast University (October 2025), Pensacola State College (January 2026), Embry-Riddle Aeronautical University (June 2026, $200,000), Florida Southern College (June 2026), and UCF (September 2026). These sites tie college tennis directly to court supply (Section 3) and the case for public court investment (Section 4).

# About USTA Florida

USTA Florida is the official governing body of tennis in Florida. Founded in 1949, it is a not-for-profit section of the United States Tennis Association, one of 17 USTA sections, and it serves all 67 Florida counties, from Pensacola to the Keys, from its executive office in Lake Nona, Orlando. Professional staff and a statewide network of volunteers carry the work into communities.

## To Promote and Develop Tennis for All.

USTA Florida's work is organized around three Big Bold Moves:

- **Best in Class Facilities and Providers (Especially Public Parks).** Investing in public tennis infrastructure and the people who run it, because public courts are where many players begin.
- **Business Insights and Analytics.** Using local data to make informed decisions, show progress, and find what drives growth. This report is a product of this Big Bold Move.
- **Volunteer System and Structure.** A structured, sustainable system that lets volunteers lead and advocate for tennis in their communities.

USTA Florida also operates five publicly owned tennis facilities under agreement with their cities or counties: Crandon Park Tennis Center (Key Biscayne), the Racquet Club of Cocoa Beach, Fort Walton Beach Tennis Center, Play Tennis Gainesville (four city parks), and Riverside Racquet Complex (Vero Beach).

### ABOUT THIS REPORT

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**Publication date:** October 2026

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# Appendix

## A. Court and facility count of record

Every court and facility figure in this report comes from one export of USTA Florida's Courts and Facilities records (Dynamics 365), updated through October 25, 2026. Records are maintained continuously as facilities are added, verified, or corrected, so later exports will differ slightly. During this report, facilities found while matching Placer.ai site-visit data were added and duplicate records were removed.

| Measure | October 2026 count |
|---|---|
| Full-size tennis courts | 18,293 |
| Tennis facilities | 5,849 |
| Counties with tennis courts | 66 of 67 (none on record in Liberty) |
| Public courts | 3,786 at 1,125 facilities (21% of courts) |
| Public parks | 3,425 courts at 1,050 facilities |
| Public community and recreation centers | 361 courts at 75 facilities |
| Private courts | 14,507 at 4,724 facilities (79%) |
| Residents per public court | 6,175 (BEBR April 1, 2025) |
| Hard courts | 11,734 (64%), including 34 indoor courts at 7 facilities |
| Clay courts | 6,546 (36%) at 1,413 facilities |
| School courts (counted as private) | 2,846 at 610 schools |
| Counties with fewer than 10 courts | 18 |
| Counties with no public court | 4: Baker, Dixie, Liberty, and Madison |
| Largest facility | USTA National Campus, Orange County, 82 full-size courts (38 clay, 44 hard) |

| Source | Facilities | Tennis courts | Public courts |
|---|---|---|---|
| 2023 State of Tennis Report | about 1,600 | about 11,000 | n/a |
| White paper (March 2026) | 5,601 | 17,770 | 3,497 (19.7%) |
| This report (October 2026) | 5,849 | 18,293 | 3,786 (20.7%) |

*The 2023 list was built mainly from USTA Florida programs such as leagues. In 2024 and 2025 USTA Florida recorded more play, which surfaced more facilities, and added the USTA National facilities and courts list. The difference from the white paper comes from ongoing maintenance and correction of the records (Section 3.1 and Box 4.1). Pickleball courts and closed facilities are excluded. Courts with no surface recorded are not counted.*

## B. Source citations

### USTA Florida records

- USTA Florida, State of Tennis Courts and Facilities records, Dynamics 365 export, October 2026 (updated through October 25, 2026).

- USTA Florida, tennis academy records (Dynamics 365), exported October 25, 2026.
- USTA Florida, Dynamics 365 exports, October 2026: USTA leagues 2024 to 2026; sanctioned tournaments 2024 to 2026; youth team tennis 2024 to 2026; active wheelchair tennis programs; community program lists; facility and non-facility grant awards; USTA Coach Enrollees; Community Coach sessions and participations.
- USTA Florida general ledger, account 65100 Supplies (equipment support for schools, after-school programs, and summer camps).
- FEEFO tournament reviews, 2024 to December 2025; Medallia tournament surveys, December 2025 to September 2026.
- Public descriptions of selected community tennis associations (Gainesville Area Community Tennis Association, Sloane Stephens Foundation, Tallahassee Tennis Association, and Lee County Community Tennis Association), from their websites, public nonprofit profiles, and USTA Florida news articles, accessed October 2026.
- RSPA, 2026 certified professional counts for Florida (tennis, by certification level and RSPA region), provided to USTA Florida; organization description from rspa.net, accessed October 2026.
- Organization websites, accessed October 2026: Special Olympics Florida (specialolympicsflorida.org), ACEing Autism (aceingautism.org), Love Serving Autism (loveservingautism.org), and Tennis For Fun (tennisforfun.org).
- USTA Florida collection of community, club, and flex league records (including Tennis Record FL, TenniScores, Palm Tennis Leagues, and flex league registrations) and UTR event listings, 2025 to 2026.
- 2024-25 high school tennis school list; Florida High School Athletic Association, 2025-26 assignments for boys and girls tennis.

### Participation, population, and demographics

- Kinetica county catchment reports for all 67 Florida counties: Kinetica Sports & Recreation Localized Intelligence 2025 (report date September 2026). Demographics from AGS 2025. The earlier Kinetica US Aura Survey 2024 release is referenced only in Box 4.1 to explain differences from the white paper.
- USTA, 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data), with the Physical Activity Council and the PLAY Study. usta.com/content/dam/usta/2025-pdfs/2025-usta-tennis-participation-report.pdf
- University of Florida Bureau of Economic and Business Research, Florida Population Studies, Volume 59, Bulletin 203, Projections of Florida Population by County, 2030 to 2050, with Estimates for 2025, February 2026; Florida Estimates of Population 2024 and 2025.
- U.S. Census Bureau, American Community Survey 2020 to 2024 5-year estimates; Florida Department of Health, Florida's Rural Counties: 2020 Census.

### Facility use, economic impact, and wellbeing

- Placer.ai, site visits to Florida tennis locations, 2024, 2025, and 2026 to date (statewide and Region 1 to 8 reports; ranked locations). Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.
- Tourism Economics (Oxford Economics), Economic Impact of Amateur, Youth, and Adult Tennis Tournaments and Events in Florida, prepared for USTA Florida, released December 2024 (2023 data).

- HM Treasury, Wellbeing Guidance for Appraisal: Supplementary Green Book Guidance, July 2021; Sport England, The social value of sport and physical activity in England (2022/23 data, October 2024) and 2023/24 update (2025); Fujiwara, D., Kudrna, L., and Dolan, P., Quantifying and Valuing the Wellbeing Impacts of Culture and Sport, Department for Culture, Media and Sport, April 2014.
- Schnohr, P., et al. (2018), Mayo Clinic Proceedings (Copenhagen City Heart Study); Spring, K.E., Holmes, M.E., and Smith, J.W. (2020), International Journal of Exercise Science, 13(7), 1251 to 1261.

### Funding and policy

- USTA Florida, The Case for Public Tennis Court Investment in Florida, white paper, March 2026, including the USTA Florida court construction cost analysis (2026).
- USTA, 2026 Guide to Tennis Venue Services.
- Florida Department of Environmental Protection, FY2027-2028 Application Information for the Florida Recreation Development Assistance Program; National Park Service, Outdoor Recreation Legacy Partnership Program notice, 2026 to 2030; U.S. Department of the Treasury, State and Local Fiscal Recovery Funds newsletter, September 2026.

### College tennis

- USTA Florida analysis of official athletics roster pages, 2025-26, building on USTA Florida, The State of College Tennis in Florida (May 2026).
- USTA Collegiate Community Hub program figures (more than 75 colleges and universities since 2021; more than 600 courts opened to the public): USTA, as reported by WKU Athletics, September 3, 2026; USTA Collegiate Community Hub Grant page, usta.com.
- USTA Coaching, "USTA Coaching Tops 17,000 Community Members in First Year," press release (PR Newswire), August 27, 2026, for national USTA Coaching gender and age shares.

## C. Placer.ai data governance

Placer.ai data is licensed to USTA Florida, not owned by it. USTA Florida has confirmed permission from Placer.ai for the use of Placer.ai data in this report and its planned public distribution (October 2026). Placer.ai figures appear as supporting evidence in the Executive Summary and Sections 3.2, 3.3, 4.1.3, 4.3, and 7, and every use carries this attribution: Facilities may be named, but site-visit counts for individual facilities are not published.

*Data provided by Placer.ai. Placer.ai is the provider of data only and is not involved in any analysis, conclusion, or recommendation.*

Site visits per court use Placer.ai locations matched to USTA Florida facility records by USTA location ID, then by facility name (checked against city or ZIP code), then by matches confirmed by USTA Florida reviewers: 4,317 facilities with 12,841 tennis courts in 2025. Locations listed twice, in Placer.ai or in USTA Florida records, are counted once, with site visits combined and courts counted once. About 0.5% of 2025 site visits remain unmatched, and Eagle Scout Park in Dunedin, converted to pickleball in 2024, is excluded (0.4%), so 0.9% of site visits fall outside the matched facilities. Placer.ai data was not used to train any AI model.

## D. Open items before publication

*Editor's list. Remove this subsection before publication.*

- **Tournament location record.** Ivanhoe Park Lager House (Orange County) is listed as the location of one 2025 tournament with no recorded participants. Confirm the correct venue so the 143 tournament venues reconcile fully (Sections 1.4 and 3.2).

## E. Data gaps carried forward

- High school player counts: FHSAA participation figures for boys and girls tennis, statewide and by county.
- Court condition ratings for public courts.
- Court-size detail: 36-foot and 60-foot courts, which USTA Florida plans to add to its records.
- School courts open to public use, which the records cannot yet identify.
- Sites named in community and club league records that are not yet on the facility list.
- Visit frequency (how often individual players return), which Placer.ai does not provide.
- Drive-time access to courts, which needs drive-time data USTA Florida does not have.
- Non-certified coaches, for whom no central record exists.
- Age division on tournament events, which is not yet recorded and makes separate divisions of the same gender look like duplicate rows.

## F. Methods and data notes

Methods, data notes, and caveats for each section of the report are collected here so the sections themselves read cleanly.

### 1. PARTICIPATION LANDSCAPE

#### METHODOLOGY NOTE

- **Kinetica.** County figures come from the Kinetica Sports & Recreation Localized Intelligence 2025 county catchment reports. County player and population counts sum exactly to the Florida totals.
- **Trends.** Kinetica designs its localized data to give the most current local view of participation and demand rather than to track change over time. Year-over-year change in this report comes from the PAC Study, which uses the same method every year.
- **PAC.** PAC figures are taken as published and are not adjusted or applied to counties.

#### METHODOLOGY AND DATA NOTES

> **Notes on these figures**
>
> - What the catchments provide: county resident demographics (age, income, race-ethnicity, education; AGS 2025) and modeled tennis participation for adults (18+), youth (6 to 17) and total, plus player segments, frequency, commitment and spend. They do not cross-tabulate players by age band, income or race-ethnicity.
> - County findings are associations between places, not between individuals. A higher rate in more diverse counties does not mean any group plays more.
> - Kinetica's county participation figures are modeled small-area estimates. Education and age mix alone explain about 90% of the county variation in adult rates, which suggests the model leans on these

demographics as inputs. The correlations here are therefore consistent with national survey patterns, but they are not independent proof of them.

- No estimates are used. Every figure is reported by Kinetica, AGS (via Kinetica) or USTA, or calculated directly from reported figures (sums, shares, pooled rates, medians and weighted averages). Correlations and regression results describe patterns across the 67 counties.
- Demographics are AGS 2025, so the catchments describe the current demographic picture and cannot show change over time.
- USTA member demographics in the catchments are excluded, consistent with 1.1.

## DATA SOURCES AND GAPS

| | |
|---|---|
| **Age distribution** | Catchments: resident age bands (AGS 2025), adult vs. youth participation. USTA/PAC: national player age shares, indexes and trend (2026 report, Table 3 and Chart 5). |
| **Income** | Catchments: households by income band, average household income, per-player spend. Supplemented with USTA/PAC national player income profile. |
| **Race-ethnicity** | Catchments: resident race and Hispanic origin (AGS 2025). USTA/PAC: national player shares, indexes and player counts by race-ethnicity. Florida players by race-ethnicity are not available from either source. |
| **Participation segments** | Catchments: Kinetica USTA player segments (2025 release only). |
| **Not available** | Florida-specific players by age, income and race-ethnicity. |

## LIMITS OF THIS COUNT

- **Period.** The collection is a current-season snapshot (2025 to 2026), not a full 2024 and 2025 series. Most sources do not date their records, so no year-over-year comparison is possible yet.
- **Players in more than one league.** Many players belong to several community and club leagues, or to a community or club league and a USTA league. Participants here are participants, additive to USTA league activity but not to unique players.
- **Coverage.** Only records with a reported participant count are included, so leagues that do not publish rosters are undercounted.
- **Recommendation for 2027:** request season-dated roster exports directly from the ten largest community and club leagues, starting with Duval and Lee, so the next report can show a true trend.

## NOTES ON THE DATA

- Like-for-like comparison uses classes 1A to 4A only, since the 2024-25 list has no Independent category.
- Nineteen schools on the 2024-25 list carried a county that did not match their city (for example Coral Gables listed in Columbia County and Jupiter in St. Lucie), plus "Highland" for Highlands. County counts here use the corrected county. Statewide coverage of 55 counties is the same either way.
- Babcock Ranch and Cambridge (2024-25) are treated as the same schools as Babcock and Cambridge Christian School (2025-26): same city and class.
- Lake Howell and Trinity Preparatory are listed in Orange County on the 2025-26 list. Lake Howell is a Seminole County public school and Trinity Prep's campus spans the Orange and Seminole line. If both move to Seminole, Orange has 29 schools and Seminole 13.
- FHSAA does not publish county; it was added by city lookup. FHSAA lists Southwest Miami under Region 4, District 16, used here as published.

**TABLE F.1 SCHOOLS WITH A TEAM BY COUNTY**

| County | 2024-25 | 2025-26 | Change | Indep. | All 2025-26 | Both | Boys only | Girls only |
|---|---|---|---|---|---|---|---|---|
| Alachua | 7 | 7 | 0 | 1 | 8 | 7 | 0 | 1 |
| Baker | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Bay | 5 | 5 | 0 | 0 | 5 | 5 | 0 | 0 |
| Bradford | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Brevard | 21 | 20 | -1 | 0 | 20 | 20 | 0 | 0 |
| Broward | 35 | 34 | -1 | 4 | 38 | 37 | 1 | 0 |
| Calhoun | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Charlotte | 4 | 4 | 0 | 0 | 4 | 4 | 0 | 0 |
| Citrus | 4 | 4 | 0 | 0 | 4 | 4 | 0 | 0 |
| Clay | 8 | 8 | 0 | 0 | 8 | 8 | 0 | 0 |
| Collier | 14 | 14 | 0 | 1 | 15 | 13 | 0 | 2 |
| Columbia | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| DeSoto | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Dixie | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Duval | 22 | 23 | +1 | 2 | 25 | 24 | 1 | 0 |
| Escambia | 7 | 7 | 0 | 1 | 8 | 8 | 0 | 0 |
| Flagler | 2 | 2 | 0 | 0 | 2 | 2 | 0 | 0 |
| Franklin | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Gadsden | 1 | 0 | -1 | 0 | 0 | 0 | 0 | 0 |
| Gilchrist | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Glades | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Gulf | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Hamilton | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Hardee | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Hendry | 2 | 2 | 0 | 0 | 2 | 2 | 0 | 0 |
| Hernando | 5 | 5 | 0 | 0 | 5 | 5 | 0 | 0 |
| Highlands | 3 | 3 | 0 | 0 | 3 | 2 | 0 | 1 |
| Hillsborough | 36 | 36 | 0 | 0 | 36 | 34 | 1 | 1 |
| Holmes | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Indian River | 4 | 4 | 0 | 1 | 5 | 5 | 0 | 0 |
| Jackson | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Jefferson | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Lafayette | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Lake | 10 | 10 | 0 | 1 | 11 | 10 | 0 | 1 |
| Lee | 20 | 19 | -1 | 1 | 20 | 20 | 0 | 0 |
| Leon | 9 | 9 | 0 | 0 | 9 | 8 | 1 | 0 |
| Levy | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Liberty | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Madison | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Manatee | 9 | 9 | 0 | 0 | 9 | 9 | 0 | 0 |
| Marion | 9 | 9 | 0 | 0 | 9 | 8 | 0 | 1 |
| Martin | 4 | 4 | 0 | 0 | 4 | 4 | 0 | 0 |
| Miami-Dade | 50 | 48 | -2 | 10 | 58 | 50 | 2 | 6 |

| County | 2024-25 | 2025-26 | Change | Indep. | All 2025-26 | Both | Boys only | Girls only |
|---|---|---|---|---|---|---|---|---|
| Monroe | 3 | 3 | 0 | 0 | 3 | 3 | 0 | 0 |
| Nassau | 4 | 3 | -1 | 1 | 4 | 4 | 0 | 0 |
| Okaloosa | 5 | 6 | +1 | 0 | 6 | 6 | 0 | 0 |
| Okeechobee | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Orange | 32 | 30 | -2 | 1 | 31 | 31 | 0 | 0 |
| Osceola | 8 | 7 | -1 | 0 | 7 | 7 | 0 | 0 |
| Palm Beach | 34 | 36 | +2 | 2 | 38 | 37 | 1 | 0 |
| Pasco | 16 | 16 | 0 | 0 | 16 | 16 | 0 | 0 |
| Pinellas | 25 | 25 | 0 | 0 | 25 | 25 | 0 | 0 |
| Polk | 18 | 17 | -1 | 4 | 21 | 19 | 0 | 2 |
| Putnam | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Santa Rosa | 5 | 5 | 0 | 0 | 5 | 5 | 0 | 0 |
| Sarasota | 8 | 9 | +1 | 0 | 9 | 9 | 0 | 0 |
| Seminole | 11 | 11 | 0 | 0 | 11 | 11 | 0 | 0 |
| St. Johns | 9 | 9 | 0 | 0 | 9 | 9 | 0 | 0 |
| St. Lucie | 7 | 7 | 0 | 0 | 7 | 7 | 0 | 0 |
| Sumter | 1 | 1 | 0 | 1 | 2 | 1 | 0 | 1 |
| Suwannee | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Taylor | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Union | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Volusia | 9 | 9 | 0 | 0 | 9 | 8 | 0 | 1 |
| Wakulla | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| Walton | 3 | 3 | 0 | 0 | 3 | 3 | 0 | 0 |
| Washington | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 0 |
| **Total** | **503** | **497** | **-6** | **31** | **528** | **504** | **7** | **17** |

*Sources: 2024-25 high school tennis school list; FHSAA Assignments of the Year 2025-26, Unique Schools list.*

*2024-25 and 2025-26 columns are classes 1A to 4A. Indep. = Independent schools, 2025-26. Teams offered columns cover all 2025-26 schools. 2024-25 counties corrected as described in Notes on the data.*

## DATA NOTES

- **Participants, not players.** No player ID is available, so participants cannot be de-duplicated to unique players.
- **Rows kept as provided.** Per the counting rule, all rows are summed. 388 rows (5,398 participants) look identical to another row because they are separate age divisions of the same gender, which the export does not record; they are counted. 773 rows have zero recorded participants, and 34 tournaments in each of 2024 and 2025 (27 so far in 2026) have no participants at all. They are included in tournament counts.
- **Data runs through September 26, 2026.** October to December 2026 tournaments are not in the export, so full-year 2026 figures are not available yet.
- **White paper figures do not match.** The March 2026 white paper cites 4,914 distinct sanctioned tournaments and more than 303,000 participant-appearances. This export holds 3,476 tournaments and 253,923 participants for January 2024 to September 2026, so the white paper likely uses a different

period or scope. The 2023 figure of 1,029+ junior tournaments in USTA Florida materials lines up with the 1,048 junior tournaments counted here for 2024.

- **Facility type and courts are matched by name.** Tournament venues are matched to the USTA Florida Courts and Facilities list by facility name, covering more than 99% of participants. Four venues were matched to a differently worded facility record (for example, Seminole Lake Country Club to Seminole Lake Family Tennis), and six small venues are not on the list.
- **Empty survey questions.** Medallia questions on respondent role (Q18), how people heard about the event (Q28), travel distance (Q33), and tournaments played in the past year (Q34) are blank in the export. Travel distance in particular would strengthen the economic impact figures in the Court and Facility Infrastructure section.
- **Privacy.** The tournament export includes tournament director contact details, and review comments often name individuals. Neither is used or reproduced here.

## METHOD AND CAVEATS

- Unit of analysis varies by list: Special Olympics rows are county programs, ACEing Autism and Love Serving Autism® rows are sites, Tennis For Fun rows are weekly sessions, wheelchair rows are programs, and CTA and NJTL rows are organizations. Totals across lists are records, not participants.
- Counties were assigned from the source county field (CTA, NJTL, Special Olympics) or from street address (partner program lists and wheelchair programs). Two Love Serving Autism® city labels differ from their addresses and were mapped by address.
- Population, participation, and interest figures come from the Kinetica 2025 county catchment reports in the project files. Kinetica data is not used for court or facility counts, and no Placer.ai data is used in this section.
- No 2025 versions of these lists were available, so no year-over-year comparison is made. The lists are snapshotted in the data model as the 2026 baseline.
- Equipment support comes from USTA Florida's general ledger (account 65100 Supplies, subaccount 21200, October 2024 to September 2026). Amounts are actual spending, net of credits; county is recorded only where the ledger description names it. Grants come from the Dynamics 365 non-facility grant export and use the disbursed amount, not the award amount.
- Contact names, phone numbers, and emails in the source files are excluded from the data model.

## METHODOLOGY AND DATA NOTES

- **Source.** All figures come from the Kinetica county catchment reports (Sports & Recreation Localized Intelligence 2025) for all 67 Florida counties. County totals for players, interested non-players, and population sum exactly to the statewide figures reported in every catchment. No Placer.ai data is used in this section.
- **Interested, not yet playing.** Kinetica's measure of residents who would like to play tennis but have not played in the past 12 months.
- **Lapsed players.** Kinetica reports lapsed participation as a percentage only, so this section reports lapsed players as rates (5.57% total, 5.83% adults, 3.68% youth) and does not convert them into counts.
- **Overlap.** The interested and lapsed pools can include the same people. They are reported side by side and are never added together.

## 2. GROWTH TRENDS

### METHODOLOGY AND DATA NOTES

- **USTA/PAC.** USTA, 2026 U.S. Tennis Participation Report (2025 data) and 2025 U.S. Tennis Participation Report (2024 data), based on the PAC Study and the PLAY Study. Florida section figures are shown as published.
- **Trend source.** Kinetica advised that its localized dataset is designed to provide the most up-to-date local view of participation and demand rather than to track trends over time, and recommended the PAC Study for year-on-year trends. This section follows that advice.
- **BEBR population.** April 1 state estimates from BEBR's Florida Estimates of Population 2024 and 2025.
- **Sampling error.** PAC section estimates come from a national survey sample, so a single-year change for one section carries sampling error. A peer reviewer estimated about plus or minus 1.1 points for a one-year change in Florida; the National Golf Foundation, which weights the study, could confirm the actual margin.
- **No estimates or CAGR.** All figures are as reported by their sources; changes are simple differences.

### DATA NOTES

- Population estimates and projections: University of Florida, BEBR. Projections of Florida Population by County, 2030–2050, with Estimates for 2025, Florida Population Studies, Volume 59, Bulletin 203, February 2026. BEBR's county High projections sum to more than its state High projection; statewide figures use the state row.
- Courts and facilities: USTA Florida court inventory (Dynamics 365), October 2026. The inventory is refined continuously as facilities are added or newly identified and records are corrected, so totals differ from the 2026 whitepaper (17,770 courts at 5,601 facilities). Kinetica data is not used for courts.
- Players and participation rates: Kinetica Sports & Recreation Localized Intelligence 2025, county catchment reports, as published. Kinetica figures describe 2025 and are not compared across releases.
- Pressure ranking cut-off (10,000 added residents, 2025 to 2035, Medium) is set by USTA Florida.

## 3. COURT AND FACILITY INFRASTRUCTURE

### DATA NOTES

- **Tennis only.** Every court and facility figure in Section 3 counts tennis courts only. Pickleball courts are not counted, including at sites that have both, and a facility is counted only if it has at least one tennis court.
- **Full-size courts.** Court counts in this report are full-size (78-foot) tennis courts with a recorded surface: hard, clay, or grass. The records have no separate fields for 36-foot and 60-foot short courts, and USTA Florida plans to add court-size detail in the coming months. The USTA National Campus counts 82 full-size courts (38 clay and 44 hard); its pickleball and padel courts are not counted.
- **Facility type.** Facility type is the Facility Subtype field on each record. Public tennis centers such as Crandon Park and the Racquet Club of Cocoa Beach are recorded as public parks.
- **County.** County is the County List field on the facility record. Sumter County's 32 courts are as recorded.

## TABLE F.2. TENNIS COURTS AND FACILITIES BY COUNTY (ALL 67 COUNTIES)

| County | Region | Facilities | Tennis courts | Hard | Clay | Share |
|---|---|---|---|---|---|---|
| Palm Beach | 6 | 692 | 2,618 | 1,255 | 1,359 | 14% |
| Broward | 8 | 544 | 1,664 | 1,207 | 455 | 9% |
| Miami-Dade | 8 | 445 | 1,463 | 1,075 | 384 | 8% |
| Lee | 7 | 380 | 1,106 | 581 | 525 | 6% |
| Collier | 7 | 315 | 1,020 | 364 | 656 | 6% |
| Orange | 4 | 289 | 854 | 697 | 156 | 5% |
| Pinellas | 3 | 292 | 814 | 559 | 255 | 4% |
| Sarasota | 5 | 273 | 805 | 417 | 388 | 4% |
| Hillsborough | 3 | 272 | 805 | 550 | 255 | 4% |
| Duval | 2 | 192 | 588 | 402 | 186 | 3% |
| Brevard | 4 | 212 | 528 | 432 | 96 | 3% |
| Manatee | 5 | 136 | 490 | 287 | 203 | 3% |
| Volusia | 4 | 146 | 432 | 286 | 146 | 2% |
| Polk | 4 | 140 | 367 | 292 | 75 | 2% |
| Martin | 6 | 120 | 363 | 192 | 171 | 2% |
| Seminole | 4 | 116 | 350 | 276 | 74 | 2% |
| Pasco | 3 | 108 | 324 | 259 | 63 | 2% |
| St. Johns | 2 | 89 | 315 | 188 | 127 | 2% |
| St. Lucie | 6 | 83 | 276 | 202 | 74 | 2% |
| Indian River | 6 | 87 | 268 | 124 | 144 | 1% |
| Alachua | 2 | 90 | 231 | 183 | 48 | 1% |
| Charlotte | 7 | 79 | 222 | 133 | 89 | 1% |
| Leon | 1 | 58 | 192 | 165 | 27 | 1% |
| Lake | 4 | 62 | 189 | 148 | 41 | 1% |
| Escambia | 1 | 46 | 184 | 137 | 47 | 1% |
| Marion | 2 | 62 | 182 | 135 | 47 | 1% |
| Monroe | 8 | 63 | 182 | 119 | 63 | 1% |
| Bay | 1 | 49 | 154 | 133 | 21 | 1% |
| Clay | 2 | 41 | 148 | 96 | 52 | 1% |
| Osceola | 4 | 46 | 140 | 116 | 24 | 1% |
| Walton | 1 | 34 | 139 | 49 | 90 | 1% |
| Okaloosa | 1 | 24 | 109 | 83 | 26 | 1% |
| Citrus | 2 | 37 | 99 | 78 | 21 | 1% |
| Hernando | 3 | 32 | 92 | 79 | 13 | 1% |
| Flagler | 4 | 26 | 92 | 54 | 38 | 1% |
| Nassau | 2 | 19 | 87 | 34 | 53 | 0% |
| Santa Rosa | 1 | 23 | 77 | 59 | 18 | 0% |
| Highlands | 5 | 24 | 65 | 59 | 6 | 0% |
| Sumter | 2 | 10 | 32 | 26 | 6 | 0% |
| Putnam | 2 | 10 | 28 | 27 | 1 | 0% |
| Columbia | 2 | 8 | 23 | 23 | 0 | 0% |
| Wakulla | 1 | 5 | 13 | 13 | 0 | 0% |
| Suwannee | 1 | 4 | 13 | 9 | 4 | 0% |
| Gadsden | 1 | 6 | 13 | 12 | 1 | 0% |

| County | Region | Facilities | Tennis courts | Hard | Clay | Share |
|---|---|---|---|---|---|---|
| Hendry | 7 | 4 | 12 | 12 | 0 | 0% |
| Okeechobee | 6 | 3 | 11 | 10 | 1 | 0% |
| Gulf | 1 | 6 | 10 | 9 | 1 | 0% |
| Washington | 1 | 4 | 10 | 8 | 2 | 0% |
| Jackson | 1 | 4 | 10 | 8 | 2 | 0% |
| Baker | 2 | 2 | 9 | 9 | 0 | 0% |
| DeSoto | 5 | 5 | 9 | 4 | 5 | 0% |
| Levy | 2 | 4 | 9 | 8 | 1 | 0% |
| Taylor | 1 | 2 | 8 | 8 | 0 | 0% |
| Union | 2 | 3 | 7 | 4 | 3 | 0% |
| Jefferson | 1 | 2 | 6 | 6 | 0 | 0% |
| Madison | 1 | 1 | 6 | 6 | 0 | 0% |
| Franklin | 1 | 5 | 6 | 5 | 1 | 0% |
| Bradford | 2 | 2 | 5 | 5 | 0 | 0% |
| Lafayette | 1 | 2 | 4 | 4 | 0 | 0% |
| Gilchrist | 2 | 2 | 3 | 3 | 0 | 0% |
| Hamilton | 1 | 2 | 3 | 2 | 1 | 0% |
| Calhoun | 1 | 2 | 3 | 3 | 0 | 0% |
| Holmes | 1 | 1 | 2 | 2 | 0 | 0% |
| Hardee | 5 | 2 | 2 | 1 | 1 | 0% |
| Dixie | 2 | 1 | 1 | 1 | 0 | 0% |
| Glades | 7 | 1 | 1 | 1 | 0 | 0% |
| Liberty | 1 | 0 | 0 | 0 | 0 | 0% |
| **Florida** | | **5,849** | **18,293** | **11,734** | **6,546** | **100%** |

*Source: USTA Florida Courts and Facilities records, October 2026. Hard includes indoor hard courts. Hard and clay do not sum to Courts where grass, Other (36-foot and 60-foot), or unrecorded surfaces exist. Shares are rounded to whole numbers, so counties with very small shares show as 0%.*

## DATA NOTES

- **Access type.** Public and private come from the Facility Type field in the October 2026 export used for this report (Dynamics 365, updated through October 25, 2026), which includes USTA Florida's updates to Coral Gables Kerdyk Biltmore Tennis Center and the Tennis Center of Coral Springs (both public), both Heron Bay records (private), and Kenny Dixon Sport Complex in Sumter (public). Duplicate facility records were cleared before the export. Records with no tennis courts are excluded.
- **Matching play to facilities.** Program locations are matched to facility records by name. Teams and participants with no home location are not counted as public. Locations not on the facility list are shown as not matched. Tennis play at Jimmy Moore Park, a public park that has since converted to pickleball, is counted as public.
- **Periods.** Tournaments use calendar year by start date, leagues use the league year, and youth team tennis uses the Spring and Fall seasons. There is no traditional Fall 2026 youth team tennis season, so 2026 comparisons use spring only. Shares are not compared across different periods.
- **Population.** Per-resident figures use BEBR estimates and projections. BEBR's county projections do not add up exactly to its state projection, so statewide projection figures use the Florida row.
- **Placer.ai.** Visit figures are site-level, cover locations Placer measures and that match the facility records, and use access types from the same facility export.

### Table F.3. Public and private tennis courts and public courts per resident, all 67 counties

| County | Region | Population 2025 | Public courts | Private courts | Public share | Residents per public court |
|---|---|---|---|---|---|---|
| Alachua | 2 | 298,485 | 75 | 156 | 32% | 3,980 |
| Baker | 2 | 29,139 | 0 | 9 | 0% | n/a |
| Bay | 1 | 199,950 | 19 | 135 | 12% | 10,524 |
| Bradford | 2 | 27,668 | 1 | 4 | 20% | 27,668 |
| Brevard | 4 | 667,900 | 151 | 377 | 29% | 4,423 |
| Broward | 8 | 1,993,535 | 477 | 1187 | 29% | 4,179 |
| Calhoun | 1 | 13,655 | 1 | 2 | 33% | 13,655 |
| Charlotte | 7 | 223,430 | 44 | 178 | 20% | 5,078 |
| Citrus | 2 | 166,500 | 27 | 72 | 27% | 6,167 |
| Clay | 2 | 238,605 | 34 | 114 | 23% | 7,018 |
| Collier | 7 | 413,314 | 73 | 947 | 7% | 5,662 |
| Columbia | 2 | 72,388 | 5 | 18 | 22% | 14,478 |
| DeSoto | 5 | 35,947 | 6 | 3 | 67% | 5,991 |
| Dixie | 2 | 17,217 | 0 | 1 | 0% | n/a |
| Duval | 2 | 1,079,044 | 167 | 421 | 28% | 6,461 |
| Escambia | 1 | 337,728 | 50 | 134 | 27% | 6,755 |
| Flagler | 4 | 140,714 | 30 | 62 | 33% | 4,690 |
| Franklin | 1 | 13,383 | 4 | 2 | 67% | 3,346 |
| Gadsden | 1 | 44,790 | 3 | 10 | 23% | 14,930 |
| Gilchrist | 2 | 19,716 | 1 | 2 | 33% | 19,716 |
| Glades | 7 | 13,055 | 1 | 0 | 100% | 13,055 |
| Gulf | 1 | 16,621 | 3 | 7 | 30% | 5,540 |
| Hamilton | 1 | 14,155 | 3 | 0 | 100% | 4,718 |
| Hardee | 5 | 26,042 | 2 | 0 | 100% | 13,021 |
| Hendry | 7 | 47,085 | 11 | 1 | 92% | 4,280 |
| Hernando | 3 | 212,849 | 16 | 76 | 17% | 13,303 |
| Highlands | 5 | 107,976 | 8 | 57 | 12% | 13,497 |
| Hillsborough | 3 | 1,575,637 | 177 | 628 | 22% | 8,902 |
| Holmes | 1 | 20,042 | 2 | 0 | 100% | 10,021 |
| Indian River | 6 | 173,013 | 33 | 235 | 12% | 5,243 |
| Jackson | 1 | 49,728 | 5 | 5 | 50% | 9,946 |
| Jefferson | 1 | 15,761 | 4 | 2 | 67% | 3,940 |
| Lafayette | 1 | 8,601 | 2 | 2 | 50% | 4,300 |
| Lake | 4 | 445,881 | 60 | 129 | 32% | 7,431 |
| Lee | 7 | 839,223 | 119 | 987 | 11% | 7,052 |
| Leon | 1 | 305,866 | 60 | 132 | 31% | 5,098 |
| Levy | 2 | 46,270 | 3 | 6 | 33% | 15,423 |
| Liberty | 1 | 8,140 | 0 | 0 | n/a | n/a |
| Madison | 1 | 18,859 | 0 | 6 | 0% | n/a |
| Manatee | 5 | 466,845 | 34 | 456 | 7% | 13,731 |
| Marion | 2 | 433,765 | 59 | 123 | 32% | 7,352 |
| Martin | 6 | 166,281 | 39 | 324 | 11% | 4,264 |

| County | Region | Population 2025 | Public courts | Private courts | Public share | Residents per public court |
|---|---|---|---|---|---|---|
| Miami-Dade | 8 | 2,814,927 | 480 | 983 | 33% | 5,864 |
| Monroe | 8 | 84,707 | 32 | 150 | 18% | 2,647 |
| Nassau | 2 | 107,053 | 6 | 81 | 7% | 17,842 |
| Okaloosa | 1 | 226,193 | 22 | 87 | 20% | 10,282 |
| Okeechobee | 6 | 40,314 | 8 | 3 | 73% | 5,039 |
| Orange | 4 | 1,536,045 | 179 | 675 | 21% | 8,581 |
| Osceola | 4 | 484,915 | 34 | 106 | 24% | 14,262 |
| Palm Beach | 6 | 1,556,161 | 391 | 2227 | 15% | 3,980 |
| Pasco | 3 | 648,369 | 37 | 287 | 11% | 17,523 |
| Pinellas | 3 | 966,933 | 222 | 592 | 27% | 4,356 |
| Polk | 4 | 846,896 | 107 | 260 | 29% | 7,915 |
| Putnam | 2 | 76,600 | 6 | 22 | 21% | 12,767 |
| Santa Rosa | 1 | 211,445 | 28 | 49 | 36% | 7,552 |
| Sarasota | 5 | 487,640 | 96 | 709 | 12% | 5,080 |
| Seminole | 4 | 495,106 | 110 | 240 | 31% | 4,501 |
| St. Johns | 2 | 348,336 | 36 | 279 | 11% | 9,676 |
| St. Lucie | 6 | 394,074 | 29 | 247 | 11% | 13,589 |
| Sumter | 2 | 162,493 | 2 | 30 | 6% | 81,246 |
| Suwannee | 1 | 47,274 | 8 | 5 | 62% | 5,909 |
| Taylor | 1 | 22,011 | 2 | 6 | 25% | 11,006 |
| Union | 2 | 16,821 | 4 | 3 | 57% | 4,205 |
| Volusia | 4 | 604,533 | 121 | 311 | 28% | 4,996 |
| Wakulla | 1 | 38,189 | 5 | 8 | 38% | 7,638 |
| Walton | 1 | 90,547 | 9 | 130 | 6% | 10,061 |
| Washington | 1 | 26,876 | 3 | 7 | 30% | 8,959 |
| **Florida** | | **23,379,261** | **3,786** | **14,507** | **21%** | **6,175** |

*Sources: USTA Florida Courts and Facilities records, October 2026; BEBR county estimates, April 1, 2025. n/a: no courts, or no public courts, on record.*

### NOTES ON THE DATA

- Courts and facilities come from the USTA Florida Dynamics 365 export of October 2026 (updated through October 25, 2026), after duplicate records were removed. Court counts are tennis courts only; pickleball courts are excluded. County figures follow the county on each facility record.
- Public means open to the public. School courts are publicly owned but generally not open to the public, so they are counted as not public.
- Population for all per-capita court figures is the BEBR April 1, 2025 estimate. Demographic shares use the ACS 2020-2024 5-year estimates; the two population bases are never mixed in one ratio. Rural status is the official state list based on the 2020 Census; it is not recalculated with 2025 figures.
- Liberty County has no facility records and is shown in Region 1.
- "Fewer than 10 courts" means 9 or fewer. Gulf, Washington, and Jackson have exactly 10, and Okeechobee has 11.
- BEBR High projections are shown county by county only, since county ranges do not add up to the state range.
- Rural status uses the Florida Department of Health list as published.

## 5. COACHING

### DATA NOTES

- **Sources.** All data in this section comes from USTA Florida Dynamics 365: the USTA Coach Enrollees export (1,551 records, October 29, 2026), the Community Coach Participants export (1,107 contact records with training hours and training types), the Community Coach Participations export (1,845 training records, 2022 to September 2026), and the Community Coach Sessions export (61 records, January 2025 to November 2026).
- **Excluded by direction.** Safe Play fields were dropped from every export before analysis. Participant fees noted in some session descriptions are not reported, consistent with the no participant cost rule used elsewhere in the report.
- **Matching.** Community coaches are counted from the participants export. The participations export carries the contact name only, so people are matched by name there. The 1,097 names match the participants export exactly.
- **Units.** A training record is one format within a session. A session attendance is one person at one session. People trained counts each person once per year.
- **Hours.** Training hours (6,986) come from the hours total on each contact. The participations export sums to 6,279 hours because some format rows have no hours; 131 contacts have more hours on the contact than in their participation rows.
- **County.** For coach records, the recorded county is used where present, and a city lookup where it was blank (325 enrollees and 23 community coaches). Three enrollees and 184 community coaches remain without a Florida county. Session counties come from the session record or the site name; the two 2024 Whispering Pines Park sessions have no county on their records and are assigned to St. Lucie from the site name (Port St. Lucie).
- **Sessions.** One completed 2025 session, the Zeta Phi Epsilon chapter clinic, has no participation records.
- **Order date.** Enrollee order dates are not used to show change over time.

## 6. TENNIS ACADEMIES

### DATA NOTES

- **Source.** USTA Florida Dynamics 365 tennis academy connections, exported October 29, 2026. Each record links an academy to a facility where it operates; 168 distinct academy and facility links are counted after duplicates are removed.
- **Coverage.** 8 host sites have no access type recorded and 6 have no court count, and 12 named sites are not yet in the Courts and Facilities records.
- **County.** Academies are placed in the county of the facility where they operate, from the Courts and Facilities records where the facility is matched, and otherwise from the academy record.

# The state of the game, county by county.

Florida's tennis base has grown by more than half since 2019, and nearly as many Floridians again want to play. This report brings together 16 data sources to show who plays, where they play, and who is ready to start, in all 67 counties.

**1.95M**

**Floridians played tennis in 2025**

**1.83M**

**More want to play but aren't playing yet**

**21%**

**Of courts are public, yet they host 43% of tournament participants**

**To Promote and Develop Tennis for All.**

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**SCAN TO READ THE DIGITAL REPORT**

