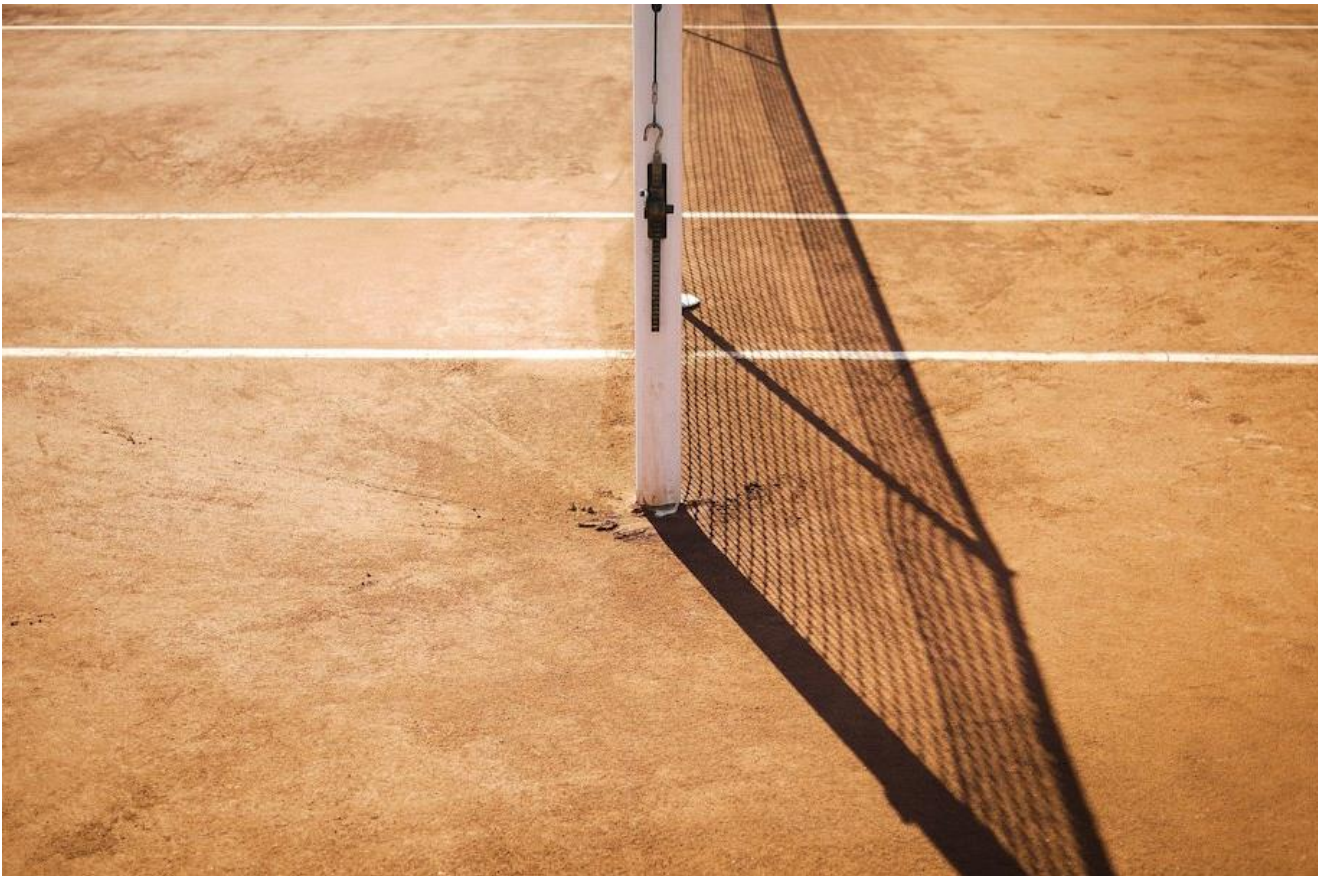




U.S. Tennis Participation Report 2024

An overview of findings on tennis participation in the United States,
based on 2023 data



Passion Driven. Data Led.

Promoting the growth of tennis and the economic vitality of the
tennis industry

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About this Report

Methodology

Since 2007, the Tennis Industry Association (TIA) and the United States Tennis Association (USTA) have collaborated to survey tennis participation in the U.S. through the Physical Activity Council (PAC) Study on Sports and Physical Activity, a partnership that currently includes eight of the major governing bodies and trade associations in the U.S. Sports and Leisure industry. These include the International Health, Racquet and Sportsclub Association (IHRSA), National Golf Foundation (NGF), Outdoor Industry Association (OIA & OF), People for Bikes (PFB), Sports and Fitness Industry Association (SFIA), Snowsports Industries America (SIA) and USA Football (USAF). This annual study, administered by Sports Marketing Surveys USA, starts with a nationally representative panel of over 1 million Americans and features responses from 18,000 people ages 6 and older. The study currently includes 122 separate sports, fitness and recreational activities. Strict quotas associated with gender, age, income, region, and ethnicity are followed to ensure a balanced sample.

In 2021, the TIA launched a separate participation and engagement study (PES) in collaboration with the National Golf Foundation. Consistent with the PAC survey, this study uses a sample of 18,000 individuals ages 6 and older. The combined sample (PAC and PES) provides a higher degree of statistical accuracy and enables more granular analyses across demographic cohorts, regions and time periods.

Key Definitions

A **tennis player** is defined as someone age 6 or older who played tennis one or more times in the past 12 months.

Participation rate is defined as the percentage of those ages 6+ in the Section who played tennis at least once in the past 12 months.

Key Insights

1 Growth slowed, but didn't stop, in 2023

Following an extraordinary and anomalous jump in players in 2020, U.S. tennis participation experienced subsequent years of additional 4% and 5% gains, erasing doubts that the surge in engagement was simply a fleeting, Covid-fueled craze. In 2023, the growth curve flattened but didn't change course, with a gain of approximately 250,000 players (+1%) that marks a fourth consecutive year of net increases. Especially in what's become an increasingly competitive sports and recreation environment, even holding steady should be viewed as a success.

2 More is happening below the surface

A 1% increase in U.S. tennis participation may give the appearance that nothing really changed in 2023. But a deeper look reveals some noteworthy shifts – among them, continued racial and ethnic diversification, and another year of “give-back” in the youth ranks (ages 6-17), marking a net decline of approximately one million under-age-18 players (-14%) since 2021 (from 6.9 million to 5.9 million). As much as anything else, this decline speaks to the return of organized team sports following an extended period of facility closures and league shutdowns in 2020 and 2021. The U.S. tennis population still maintains a strong skew towards younger people (more than half of players are ages 6 to 34, compared to 40% of the U.S. 6+ year-old population), and the decline in youth “Core” participants over that same time is much less (-8%).

3 1 player, 1 “very interested” prospect

There were just over 25 million Americans in 2023 who didn't play tennis but suggested they are “very interested” in doing so now, which makes a better than 1-to-1 ratio of current players to prospects, and points to significant upside for the industry. The challenge is that only a small fraction of these hopeful participants will self-activate – the rest will let their interest lie, and therefore require innovative approaches that attract them, engage them, and convert them to committed players.

Participation Numbers

An overview of key statistics reflecting the state of tennis participation in the United States, based on 2023 data

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Key 2023 Numbers

Total U.S. Tennis Players in 2023

23.8MM

Number of Americans, ages 6 and older, who played tennis at least once in 2023, representing 7.7% of the U.S. population

+1%

vs. 2022

+ 34% vs. 2019

Core U.S. Tennis Players in 2023

11.8MM

Those who played tennis 10 or more times in the past year; Core players typically account for 90% of all play occasions

-2%

vs. 2022

+ 28% vs. 2019

Beginning Tennis Players in 2023

4.8MM

Americans, ages 6 and older, who played tennis for the very first time in 2023, representing 20% of all tennis players

+14%

vs. 2022

+133% vs. 2019

"Very Interested" Prospects in 2023

25.1MM

Americans, ages 6 and older, who didn't play tennis in 2023 but are "very interested" in doing so now

-1%

vs. 2022

NEW IN 2021

Total U.S. Tennis Play Occasions in 2023

527MM

Number of times the 23.8 million U.S. tennis participants played in 2023, equaling 22 occasions per player, on average

+7%

vs. 2022

+ 36% vs. 2019

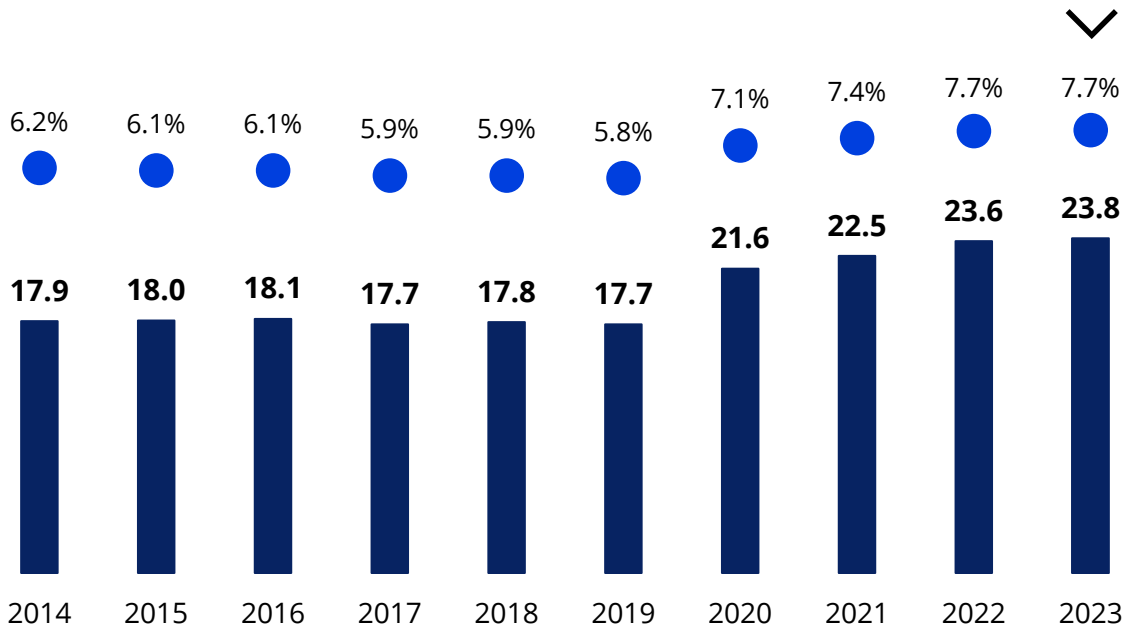
Overall U.S. Tennis Participation

Following an extraordinary and anomalous jump in players in 2020, U.S. tennis participation experienced subsequent years of additional 4% and 5% gains, erasing doubts that the surge in engagement was simply a fleeting, Covid-fueled craze. In 2023, the growth curve flattened but didn't change course, with a gain of approximately 250,000 players (+1%) that marks a fourth consecutive year of net increases. Especially in what's become an increasingly competitive sports and recreation environment, even holding steady should be viewed as a success.

Chart 1. Percentage and number of Americans, ages 6 and older, who played tennis 1+ times in the calendar year

- Percentage of Americans (ages 6+) who played tennis at least once
- Millions of Americans (ages 6+) who played tennis at least once

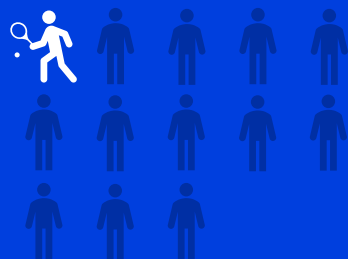
Additional 250K (+1%) U.S. tennis players in 2023



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)
 The margin of error in estimating tennis participation through the combined sample approach is 0.2% at the 95 percent confidence level. Thus, based on a population of 308.5 million U.S. individuals ages 6 and older, the estimated number of tennis participants in 2023, accounting for margin of error, is 23.8 million +/- 600K.

1 in every 13

Americans (age 6+) played tennis in 2023, matching the proportion who played in 2022 and outmatching the 10-year pre-pandemic average of 1 in 16 Americans.



Tennis Participation by USTA Section

There were six million more U.S. tennis players in 2023 than in 2019. Almost half (48%) of that growth has come from four sections alone – and not just the four biggest, as the Pacific Northwest has swelled by 80% since 2019 (+573K).

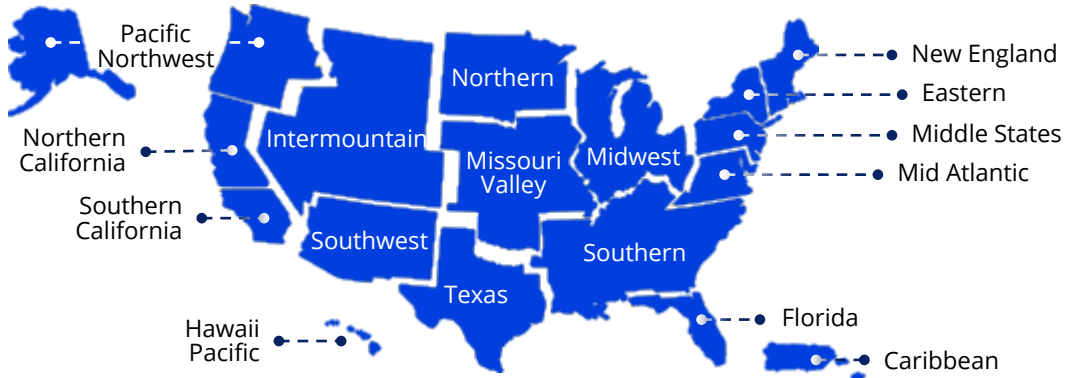


Table 1. Tennis participation by USTA section

	2023 Population (Age 6+)	2023 Tennis Players	2023 Tennis Part. Rate	Above Total U.S. Part. Rate	Avg. Annual Growth %
Total USA	308,549,000	23,835,000	7.7%		7.8%
Eastern	22,359,000	2,107,000	9.4%	✓	5.6%
Florida	20,841,000	1,721,000	8.3%	✓	9.3%
Hawaii Pacific	1,316,000	95,000	7.2%		*
Intermountain	13,582,000	998,000	7.4%		8.6%
Mid-Atlantic	15,124,000	1,273,000	8.4%	✓	3.0%
Middle States	16,121,000	1,103,000	6.8%		11.0%
Midwest	43,451,000	2,786,000	6.4%		0.4%
Missouri Valley	16,704,000	1,242,000	7.4%		12.5%
New England	13,861,000	1,048,000	7.6%		8.9%
Northern	7,350,000	465,000	6.3%		1.5%
Northern California	14,472,000	1,409,000	9.7%	✓	10.4%
Pacific Northwest	16,490,000	1,285,000	7.8%	✓	15.9%
Southern	49,200,000	3,265,000	6.6%		8.3%
Southern California	21,578,000	2,182,000	10.1%	✓	9.6%
Southwest	9,613,000	601,000	6.3%		3.7%
Texas	26,488,000	2,255,000	8.5%	✓	12.0%

Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Due to small sample size, estimate is unavailable for the Caribbean section

*Estimate of Hawaii Pacific tennis players unavailable for 2019

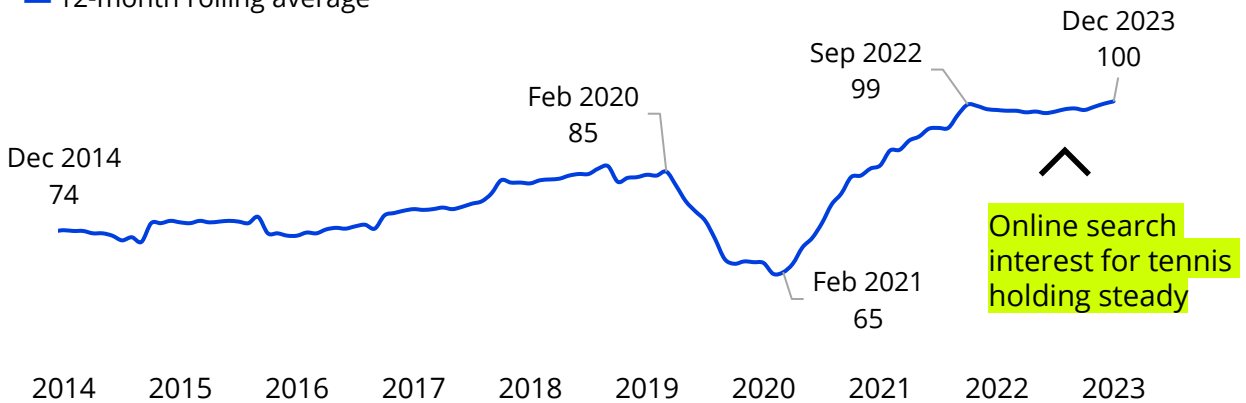
Annual growth % represents the compound annual growth rate, by section, from 2019 to 2023

Online Search Insights

Though most of the information in this report is based on robust survey-based research, online search data serves as another useful measure of interest, engagement and consumption. And so it's encouraging tennis' search popularity in the U.S. has also been holding steady for the past 12-15 months (up about a percent), with certain markets (Washington DC and San Francisco especially) showing significant momentum not only in the past year, but since 2019 as well.

Chart 2. Online search popularity for 'tennis' in the U.S.

— 12-month rolling average



Source(s): Google Trends

*Results include searches containing the word "tennis"; Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A value of 0 means there was not enough data for this term. The analysis above uses a 12-month rolling average and is re-indexed so that the peak point has a value of 100.

Table 2. MSA rankings for 'tennis' online search popularity

	2023 rank	2022 rank	2019 rank
Palm Springs CA	1	1	1
West Palm Beach-Ft. Pierce FL	2	2	2
Ft. Myers-Naples FL	3	3	3
Charleston SC	4 ▲	5	5
New York NY	5 ▲	6 ▼	4
Washington DC	6 ▲	9 ▲	15
Miami-Ft. Lauderdale FL	7 ▼	4 ▲	10
San Fran-Oakland-San Jose CA	8 ▲	10 ▲	12
Savannah GA	9 ▼	7 ▲	8
Atlanta GA	10 ▼	8 ▼	7
San Diego CA	11	11 ▲	13
Raleigh-Durham NC	12 ▲	19 ▼	14

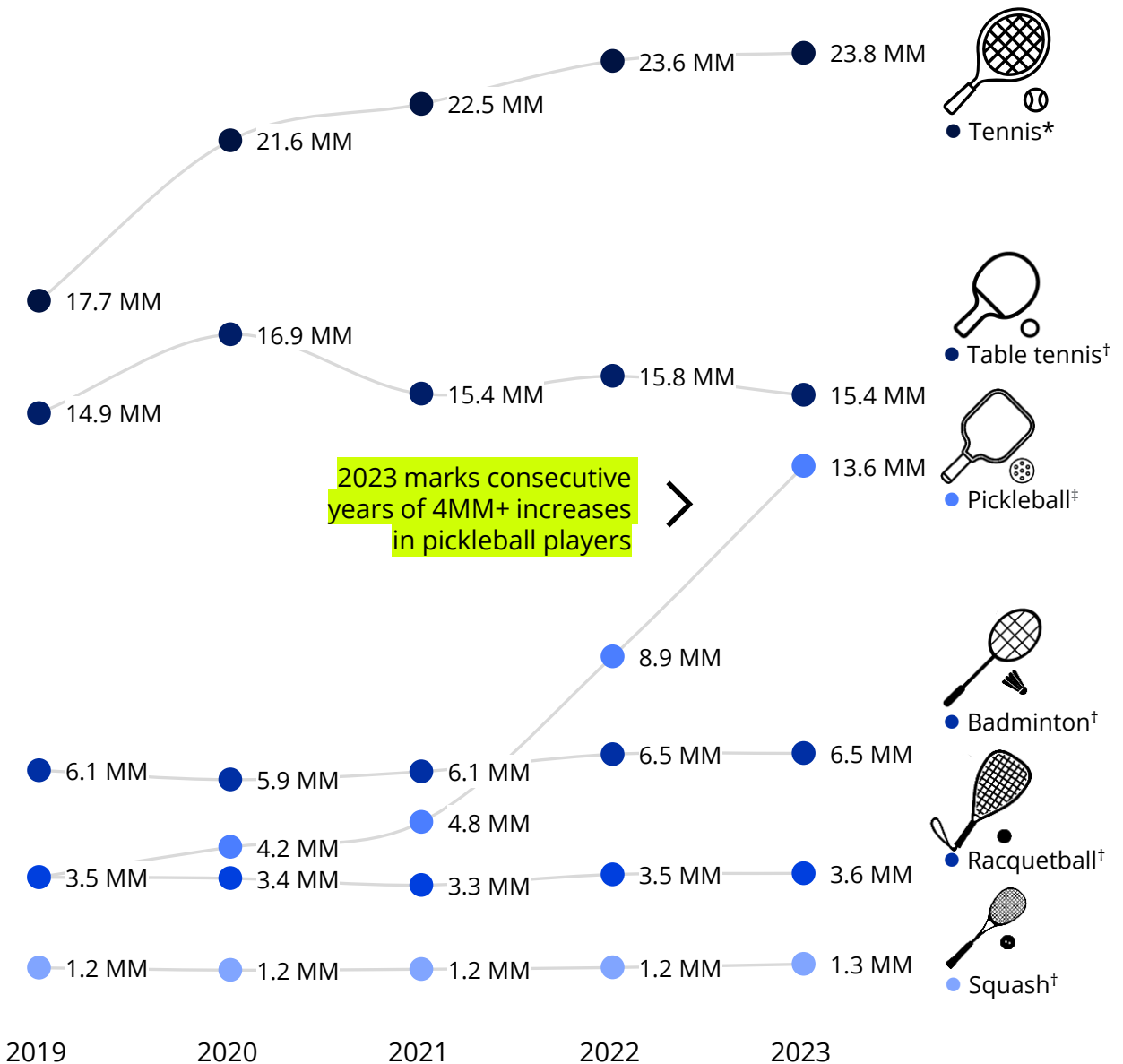
Source(s): Google Trends

Rankings are based on the popularity of tennis searches across metropolitan statistical areas (MSA) and considers searches with the term 'tennis' as a fraction of total searches in each market for the given year.

Racquet Sports Participation

Since 2019, U.S. tennis participation has grown by more than six million players (34%), while pickleball has experienced even larger gains – now with 10 million more players than it had in 2019 (+289%). The pickleball growth curve is unmatched, and yet tennis still remains the racquet sport of choice for the greatest number of Americans.

Chart 3. Number of Americans (ages 6+) who played each of the following racquet sports 1+ times in the calendar year



*Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

† Source(s): Sports & Fitness Industry Association (SFIA)

‡ Source(s): TIA, USTA and SFIA

The margin of error in estimating tennis participation through the combined sample approach is 0.2% at the 95 percent confidence level. Thus, based on a population of 308.5 million U.S. individuals ages 6 and older, the estimated number of tennis participants in 2023, accounting for margin of error, is 23.8 million +/- 600K.

2023 Tennis Player Demographics

Relative to the U.S. population overall, the U.S. tennis population leans significantly younger and affluent, and has a considerable skew towards Asian Americans and Pacific Islanders – the fastest-growing racial-ethnic cohort in the U.S. over the past 20+ years.⁽¹⁾

Table 3. Profile of 2023 U.S. tennis players, compared 2022 and the U.S. population overall

	Proportion of 2023 U.S. Tennis Players	Proportion of 2022 U.S. Tennis Players	2023 Index vs. U.S. Population (=100)*
Male	57%	55%	116
Female	43%	45%	85
6-12 years old	13%	15%	143
13-17 years old	11%	13%	169
18-24 years old	13%	12%	128
25-34 years old	18%	18%	123
35-44 years old	15%	15%	112
45-54 years old	13%	12%	96
55-64 years old	9%	9%	61
65+ years old	7%	6%	41
Black/African-American	11%	10%	80
Asian/Pacific Islander	11%	10%	183
White, non-Hispanic	60%	62%	96
Hispanic/Latino	17%	16%	110
Other race-ethnicity	3%	2%	70
Under \$25,000 income	10%	9%	47
\$25,000-\$49,999 income	13%	14%	68
\$50,000-\$74,999 income	15%	16%	84
\$75,000-\$99,999 income	16%	15%	122
\$100,000+ income	47%	46%	155
Play primarily at public park	42%	45%	-
Play primarily at school/college	16%	15%	-
Play primarily at private tennis club	12%	12%	-
Play primarily at recreation center	12%	11%	-
Play primarily at private residence	6%	5%	-
Play primarily at country club	5%	5%	-
Play primarily at apartment/condo	4%	3%	-
Play primarily at other venue	3%	3%	-

Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

*Indices are comparing each demographic characteristic of the U.S. tennis population to the broader U.S. population. An index value of 100 indicates the section matches the other population exactly on a given characteristic, while an index of 200 would indicate the section is twice as high, and an index of 50 would indicate the section is half as high.

(1) <https://www.pewresearch.org/short-reads/2021/04/09/asian-americans-are-the-fastest-growing-racial-or-ethnic-group-in-the-u-s/>

Participation Trends

A longer look at the movements in key U.S. participation variables over time

12 Trend by Age

13 Trend by Race-Ethnicity

14 Trend in Players by USTA Section

15 Trend in Participation Rate by USTA Section

16 Trend in Total Play Occasions

17 Trend in Beginners

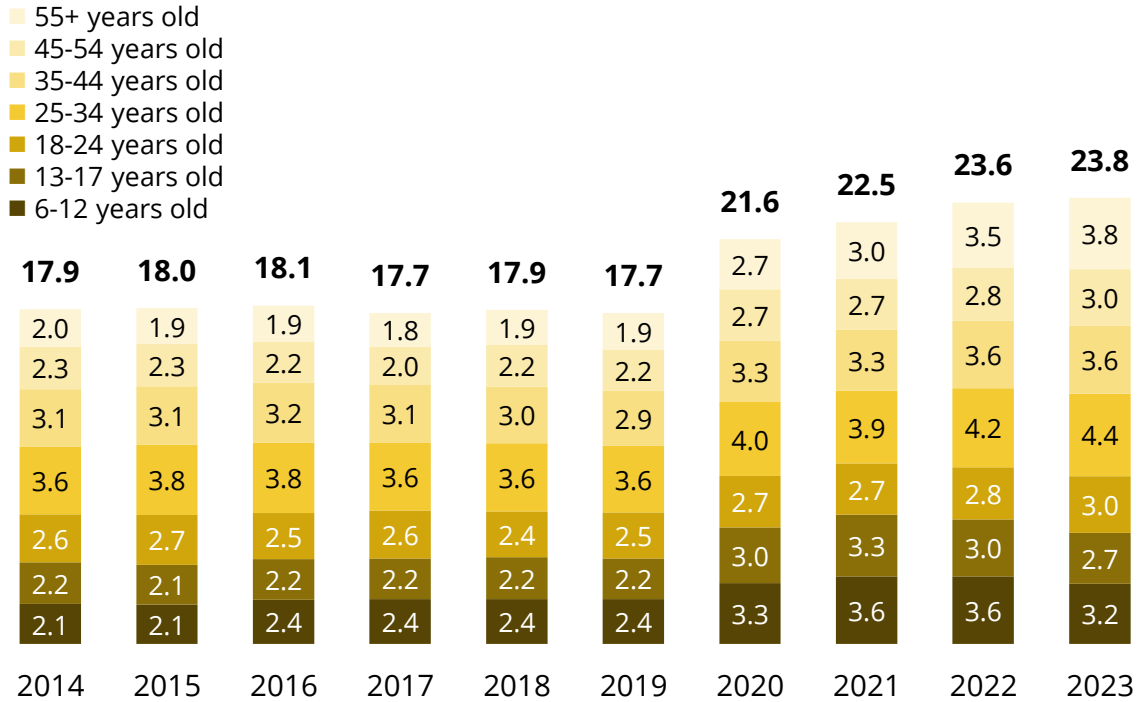
18 Trend in Core Players

19 Trend in Latent Demand for Tennis

Trend by Age

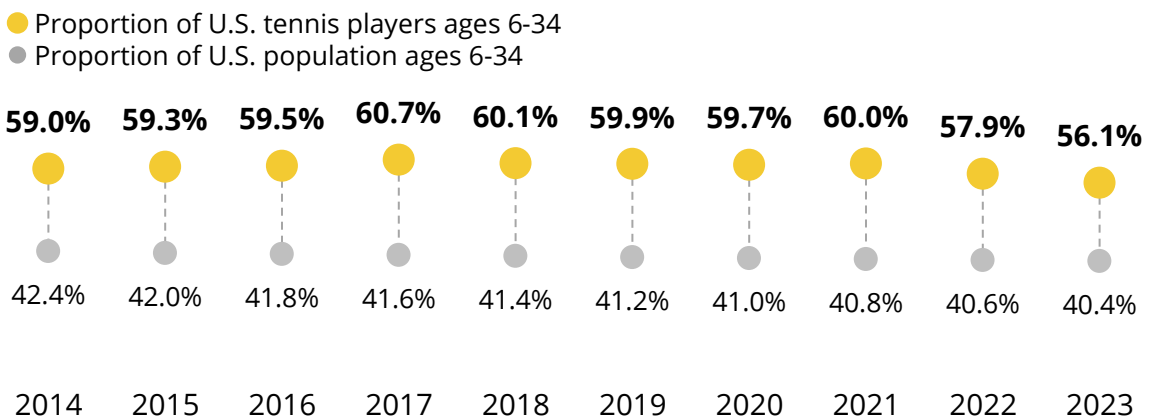
Although the number of tennis players in every defined age cohort is up at least 20% in the “pandemic era,” there has been some “give-back” in the youth ranks (ages 6-17) in each of the past two years – from roughly 6.9 million players in 2021 to 5.9 million by the end of 2023 (-14%). And yet, tennis participation in the U.S. maintains a strong skew towards younger people, with more than half of players (56%) being between the ages of 6 and 34, compared to 40% of the overall U.S. 6+ year-old population.

Chart 4. Millions of Americans, by age, who played tennis 1+ times in the calendar year



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Chart 5. Proportion of Americans and U.S. tennis players who are ages 6-34

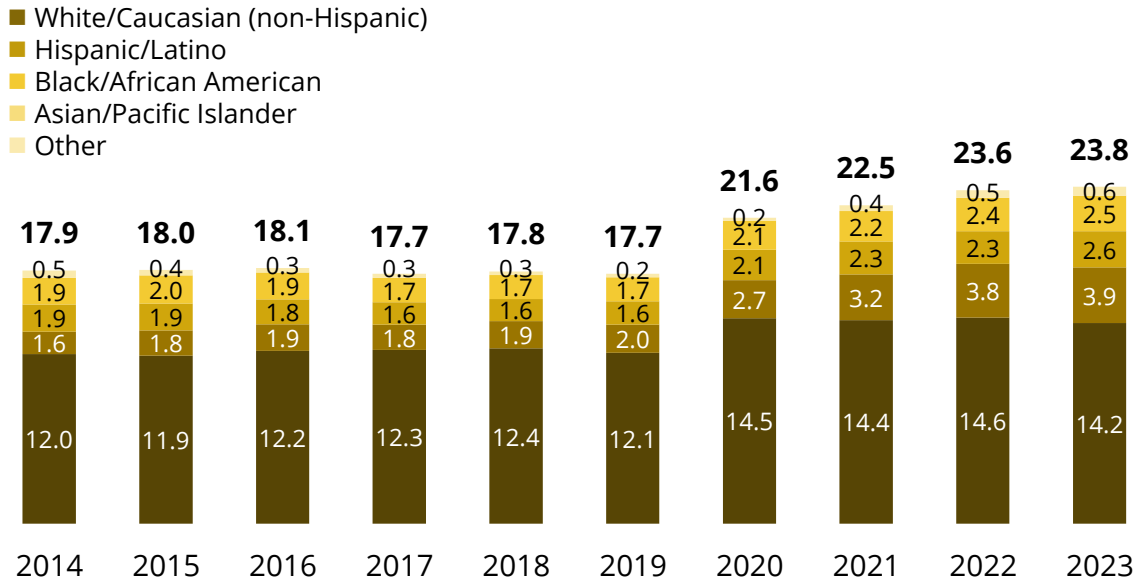


Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Trend by Race-Ethnicity

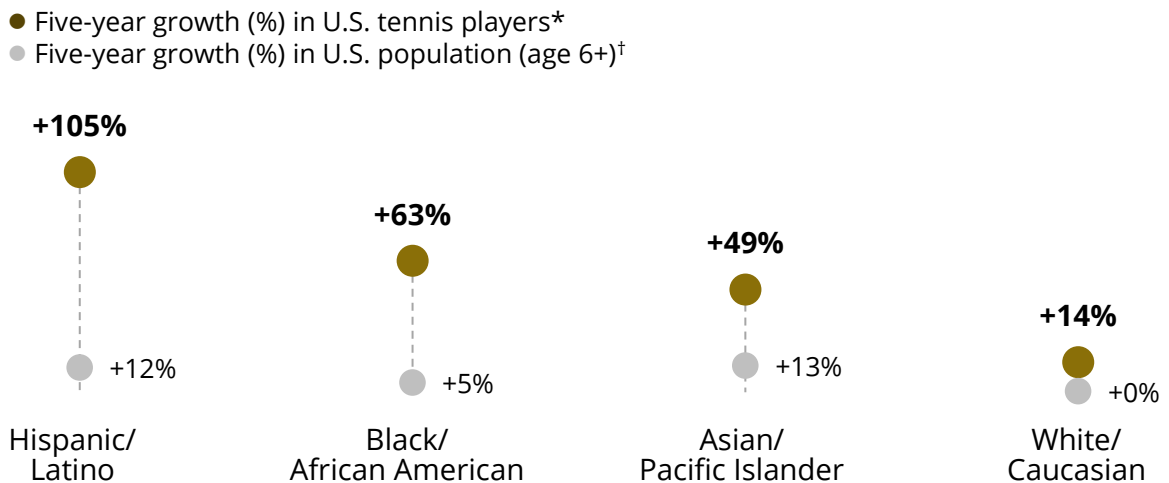
The makeup of the U.S. tennis population has been changing at a remarkable rate. It was only five years ago that 7 out of 10 players were White. Since then, there's been consistent and significant growth across other race-ethnicity groups, to where, in the past year, 40% of participants represented people of color – another new high mark.

Chart 6. Millions of Americans, by race-ethnicity, who played tennis 1+ times in the calendar year



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Chart 7. Five-year growth in racial-ethnic cohorts (2019-2023)



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)
 *Percentage changes in Chart 7 may not align with percentage changes computed based on the data presented in Chart 6 due to rounding.

[†] Source: U.S. Census Bureau

Trend in Players by USTA Section

In 2023, Hawaii Pacific and Missouri Valley showed the strongest year-over-year growth. Perhaps not coincidentally, Kansas was one of two states whose tennis online search popularity score increased 10% or more vs. 2022.

Table 4. Tennis participant estimates 2019-2023, by USTA section (in millions)

	Avg. Annual Growth %	2023	2022	2021	2020	2019
Total USA	7.8%	23,835,000	23,586,000	22,543,000	21,642,000	17,684,000
Eastern	5.6%	2,107,000	2,130,000	2,326,000	1,865,000	1,695,000
Florida	9.3%	1,721,000	1,653,000	1,638,000	1,518,000	1,207,000
Hawaii Pacific	*	95,000	80,000	-	-	-
Intermountain	8.6%	998,000	1,063,000	979,000	933,000	718,000
Mid-Atlantic	3.0%	1,273,000	1,231,000	1,264,000	1,311,000	1,133,000
Middle States	11.0%	1,103,000	1,109,000	1,127,000	924,000	726,000
Midwest	0.4%	2,786,000	2,715,000	2,731,000	3,449,000	2,743,000
Missouri Valley	12.5%	1,242,000	1,010,000	959,000	1,014,000	776,000
New England	8.9%	1,048,000	1,139,000	992,000	944,000	744,000
Northern	1.5%	465,000	475,000	510,000	475,000	439,000
N. California	10.4%	1,409,000	1,330,000	1,194,000	1,021,000	948,000
Pacific Northwest	15.9%	1,285,000	1,337,000	1,100,000	807,000	712,000
Southern	8.3%	3,265,000	3,310,000	3,049,000	3,113,000	2,375,000
S. California	9.6%	2,182,000	2,170,000	2,037,000	1,894,000	1,515,000
Southwest	3.7%	601,000	665,000	644,000	582,000	520,000
Texas	12.0%	2,255,000	2,168,000	1,994,000	1,791,000	1,433,000

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Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Due to small sample size, estimate is unavailable for the Caribbean Section















*Estimate of Hawaii Pacific tennis players unavailable for 2019

Annual growth % represents the compound annual growth rate, by section, from 2019 to 2023

Trend in Participation Rate by USTA Section

Some sections, though significantly smaller than others on a volume basis, have rates of tennis participation that are much higher than the national average. Northern California, for example, has the 7th most players but the second highest rate of participation (9.7%).

Table 5. Tennis participation rates, by USTA section

	Y/Y Change	2023	2022	2021	2020	2019
Total USA	0.0%	7.7%	7.7%	7.4%	7.1%	5.8%
Eastern	0.0%	9.4%	9.4%	10.1%	8.0%	7.1%
Florida	 0.3%	8.3%	8.0%	8.1%	7.5%	6.1%
Hawaii Pacific	 1.2%	7.2%	6.0%	–	–	–
Intermountain	-0.4% 	7.4%	7.8%	7.3%	7.0%	5.5%
Mid-Atlantic	 0.3%	8.4%	8.1%	8.3%	8.6%	7.4%
Middle States	0.0%	6.8%	6.8%	6.9%	5.7%	4.4%
Midwest	 0.2%	6.4%	6.2%	6.2%	7.8%	6.2%
Missouri Valley	 1.4%	7.4%	6.0%	5.7%	6.0%	4.6%
New England	-0.6% 	7.6%	8.2%	7.1%	6.7%	5.3%
Northern	-0.1% 	6.3%	6.4%	6.9%	6.4%	6.0%
Northern California	 0.6%	9.7%	9.1%	8.1%	6.9%	6.4%
Pacific Northwest	-0.2% 	7.8%	8.0%	6.6%	6.6%	5.9%
Southern	-0.1% 	6.6%	6.7%	6.2%	6.4%	4.9%
Southern California	 0.2%	10.1%	9.9%	9.2%	8.5%	6.8%
Southwest	-0.6% 	6.3%	6.9%	6.7%	6.1%	5.6%
Texas	 0.3%	8.5%	8.2%	7.7%	7.0%	5.7%

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Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

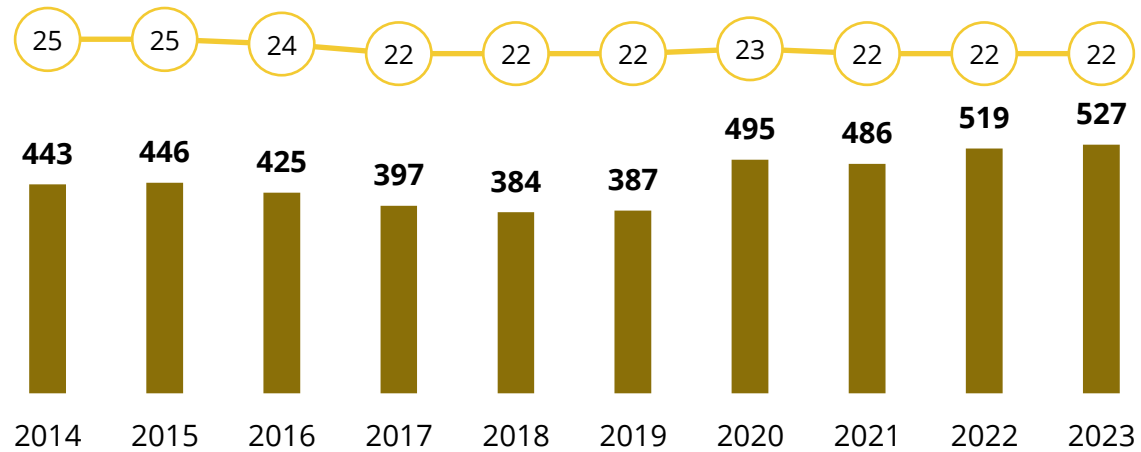
Due to small sample size, estimate is unavailable for the Caribbean Section

Trend in Total Play Occasions

For a second straight year, total play occasions in the U.S. outmatched the year before. For context, there were virtually the same number of tennis occasions in 2023 (527MM) as rounds of golf played (531 MM). Meanwhile, online search data shows a recent decline in searches for 'tennis balls,' which can sometimes serve as a leading indicator for play.

Chart 8. Total and average number of play occasions, by year

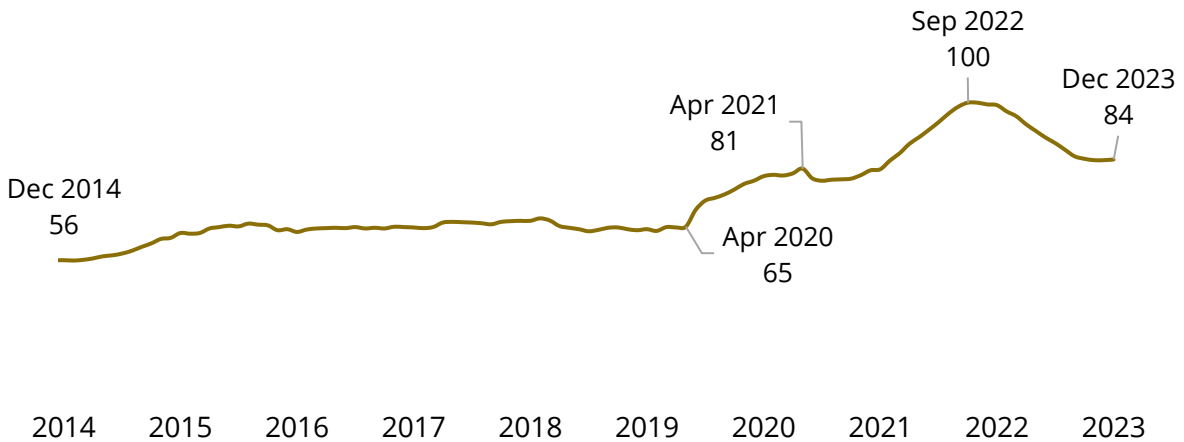
- Average number of play occasions in the calendar year, per player
- Total play occasions, in millions



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Chart 9. Online search popularity for 'tennis balls' in the U.S.

- 12-month rolling average



Source(s): Google Trends

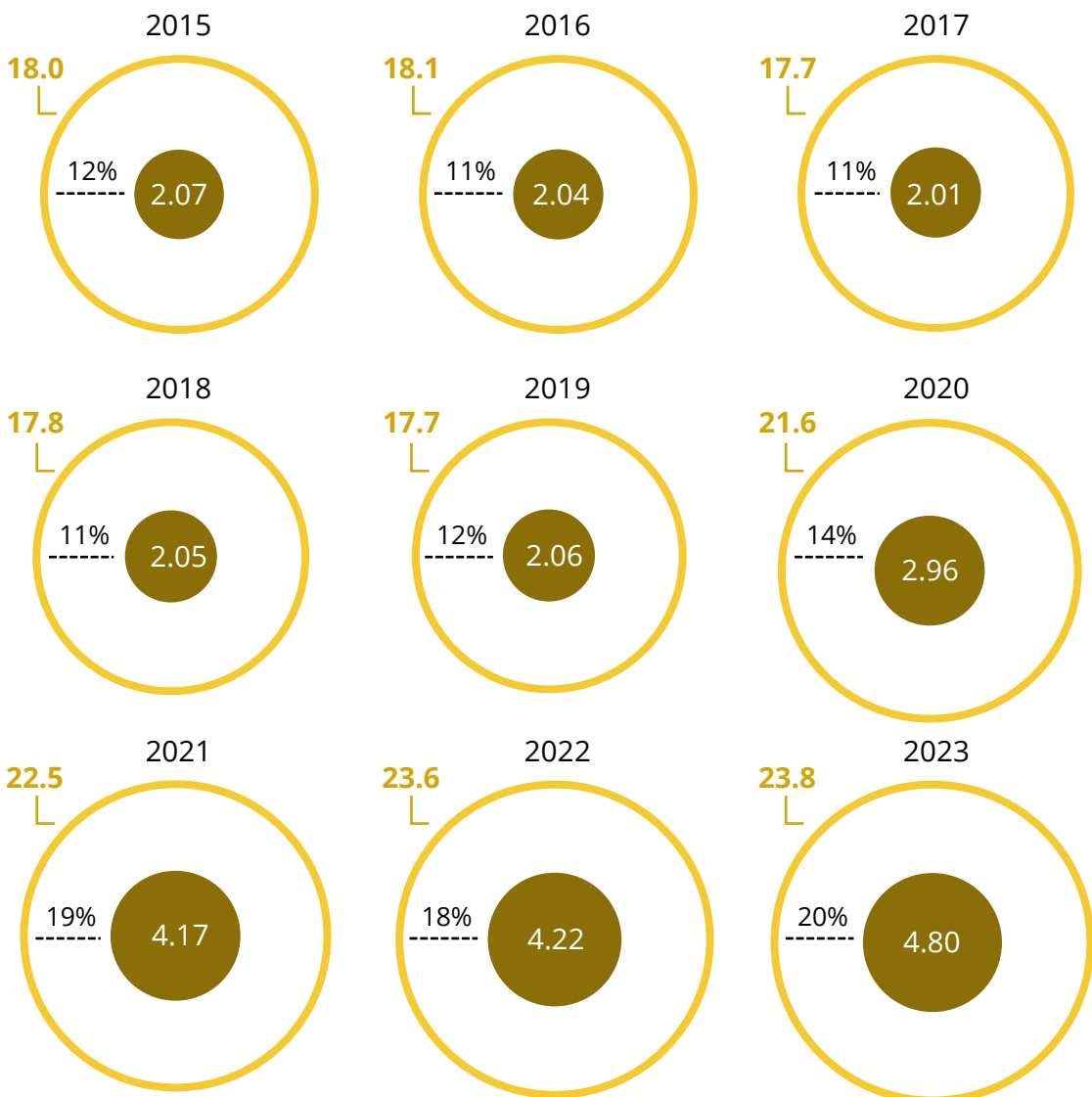
*Results include searches containing the word "tennis balls"; Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A value of 0 means there was not enough data for this term. The analysis above uses a 12-month rolling average and is re-indexed so that the peak point has a value of 100.

Trend in Beginners

The number of first-time tennis participants in 2023 outmatched 2022 by 14%, with close to five million Americans giving it a try for the very first time. This represents roughly 20% of the total U.S. tennis population – a significantly larger proportion than pre-pandemic. Perhaps more than ever, this should reinforce the importance of fostering a positive and approachable court environment.

Chart 10. Number of Americans, ages 6 and older, who played tennis for the first time in the calendar year

- Total U.S. tennis players, in millions
- First-time tennis players, in millions



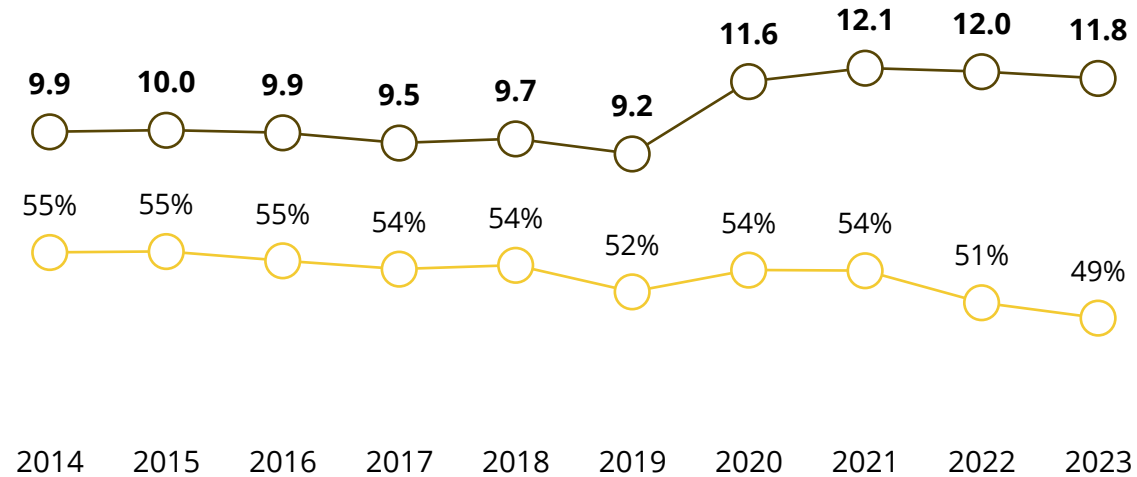
Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)
Percentages within each circle represent the proportion of all U.S. tennis players who are beginners in each calendar year

Trend in Core Players

As interest in tennis rises, and the number of first-time players increases along with it, the proportion of participants playing 10+ occasions in a year has begun to decline. But this shouldn't be viewed as a worrisome trend, as the volume of Core players has held strong since peaking at 12.1 million in 2021 – with two million more in 2023 than the five-year pre-pandemic average (2015-2019).

Chart 11. Total and proportion of Core players, by year

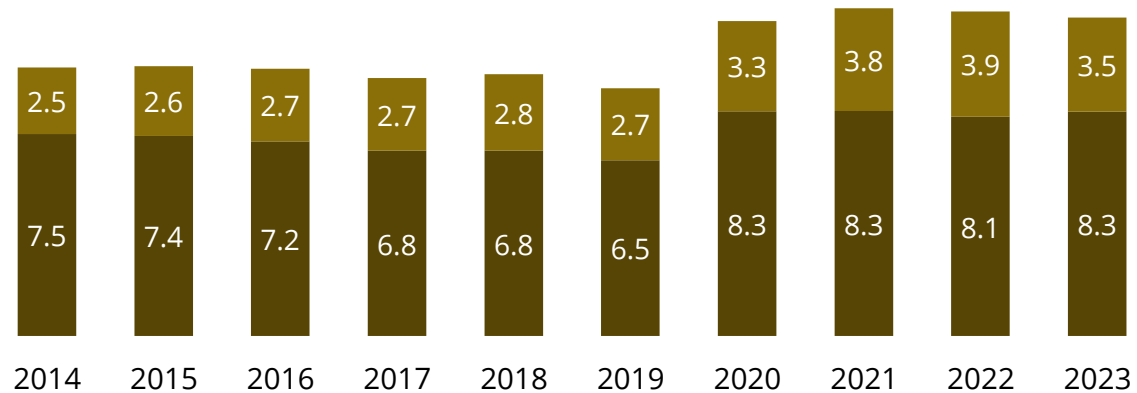
- Number of U.S. tennis players who played 10+ occasions, in millions
- Proportion of U.S. tennis players who played 10+ occasions



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Chart 12. Core tennis players, youth vs. adult, by year

- Number of U.S. youth (ages 6-17) tennis players who played 10+ occasions, in millions
- Number of U.S. adult (ages 18+) tennis players who played 10+ occasions, in millions



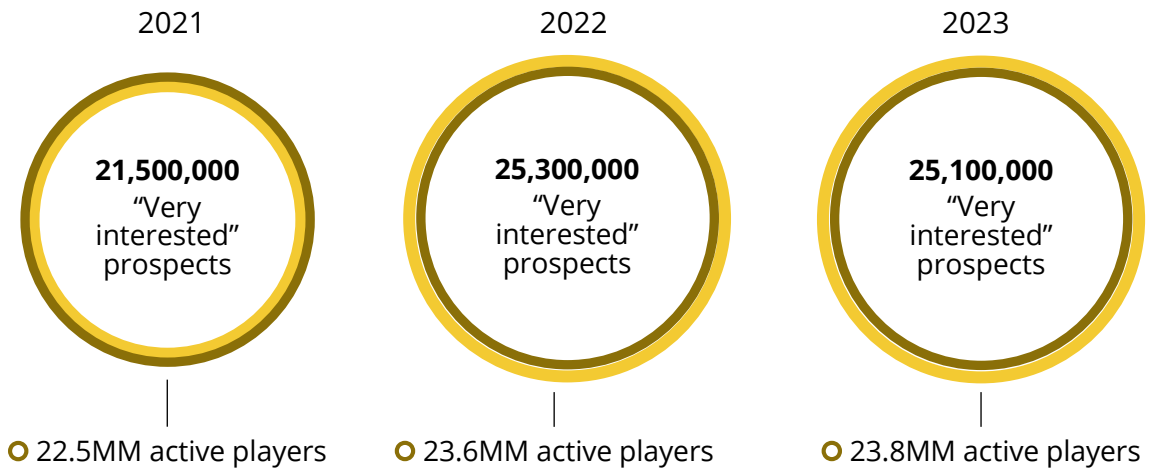
Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Trend in Latent Demand for Tennis

As the active participant base has grown, so too has the number of Americans interested in playing tennis – matching 2022 and up almost four million versus 2021.

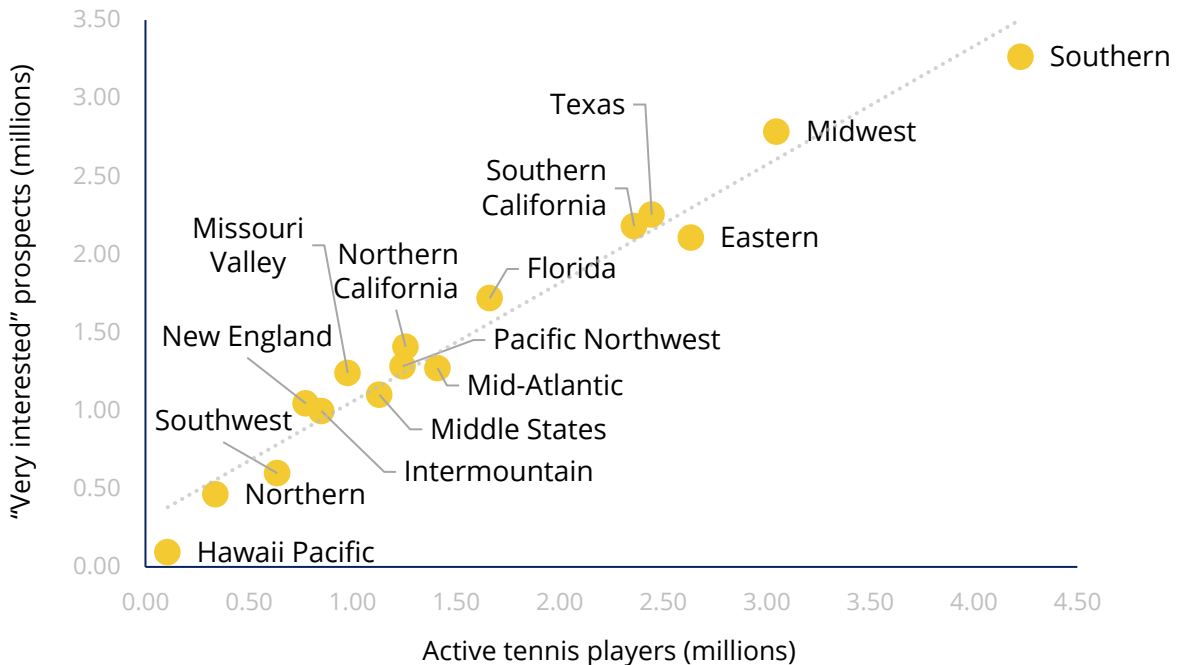
Chart 13. Total number of “very interested” prospects, by year

- Americans (age 6+) who played tennis in past 12 months
- Americans (age 6+) who didn't play tennis in past 12 months but are “very interested”



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)

Chart 14. 2023 players vs. “very interested” prospects, by USTA section



Source(s): Physical Activity Council Study on Sports and Physical Activity (PAC) and TIA Participation and Engagement Study (PES)
 Due to small sample size, estimate is unavailable for the Caribbean section

Disclaimers

All survey research is subject to sampling error and bias — that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. The margin of error in estimating tennis participation through the combined sample approach is 0.2% at the 95 percent confidence level. Thus, based on a population of 308.5 million U.S. individuals ages 6 and older, the estimated number of tennis participants in 2023, accounting for margin of error, is 23.8 million +/- 600K.

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