State of the Pickleball Industry
State of the Pickleball Facilities Industry

June 20, 2025

Boston Regional IAPF Meetup

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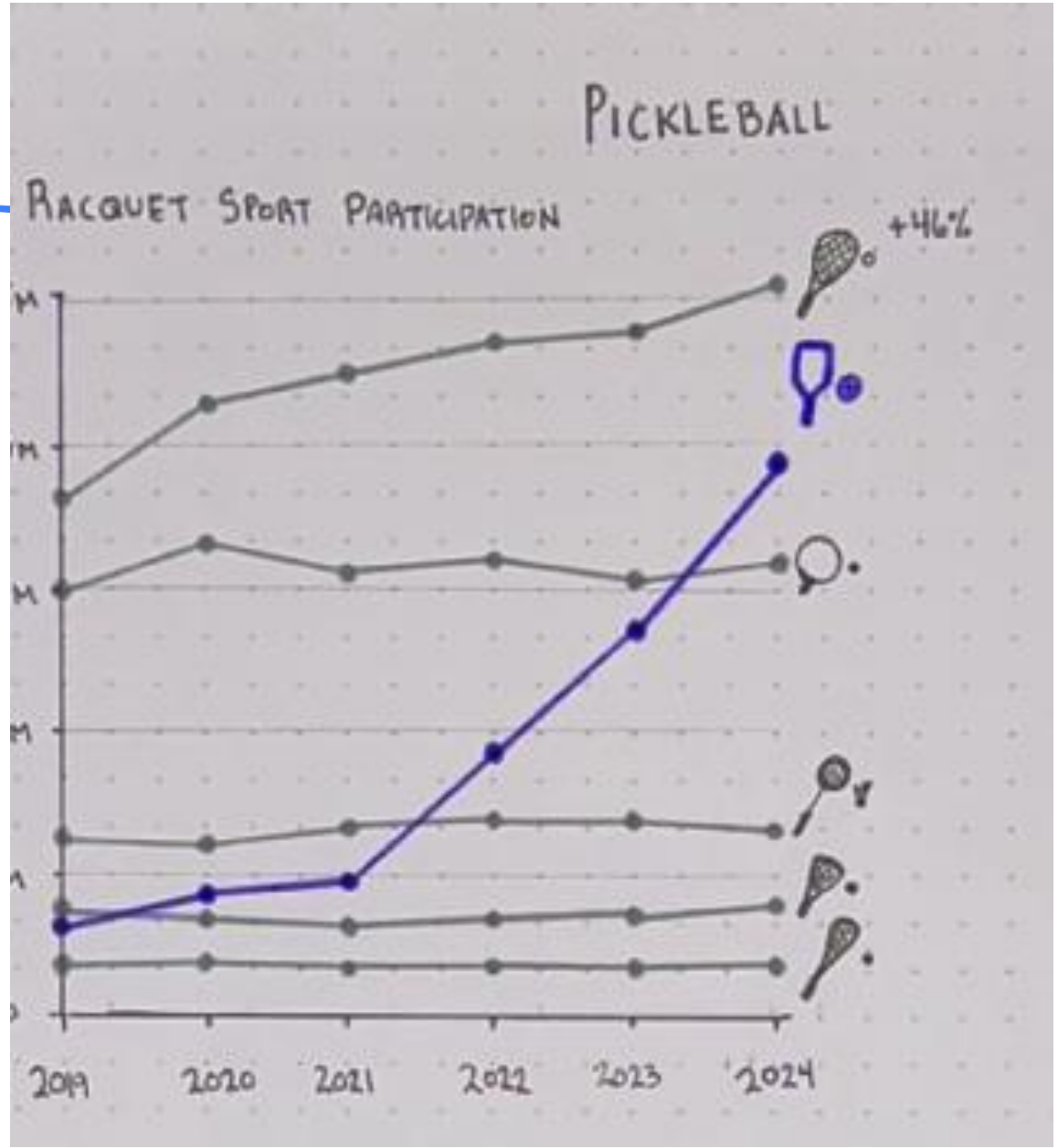
Pickleball Station - 2018

Pickleball: The Fastest Growing Sport



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Current State of the Pickleball Industry

- # of Players
- # of Facilities & Courts
- Global

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Pickleball Forecast Growth

	SFIA Actuals					The Business of Pickleball Forecast				
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Pickleball Players	4,200,000	4,800,000	8,900,000	13,600,000	19,807,000	24,560,680	28,981,602	33,328,843	36,995,015	40,324,567
Tennis Players	21,640,000	22,620,000	23,600,000	23,800,000	25,742,000	26,771,680	27,842,547	28,956,249	30,114,499	31,319,079
YOY Pickleball	20%	14%	85%	53%	46%	24%	18%	15%	11%	9%
YOY Tennis	22%	5%	4%	1%	8%	4%	4%	4%	4%	4%

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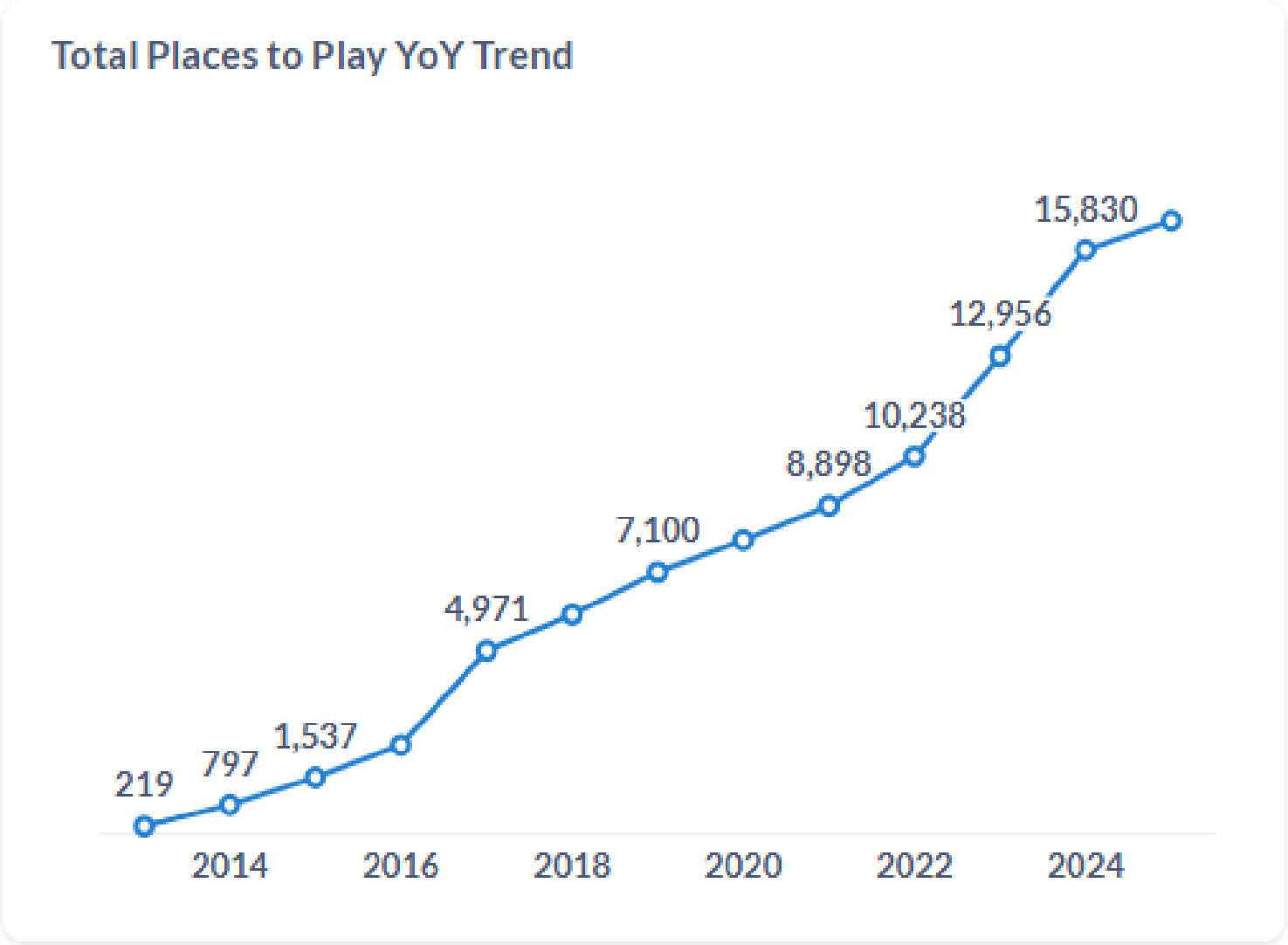
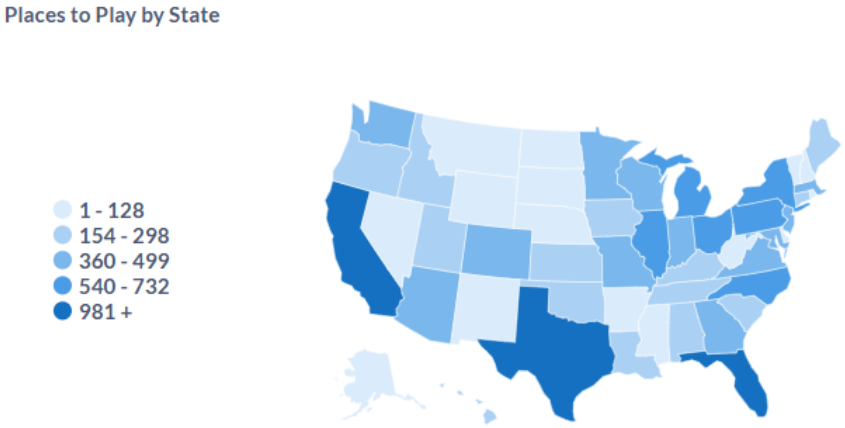
Places to Play Pickleball





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Indoor vs Outdoor Places to Play

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Global

- Players
  - US – 20 million
  - Canada – 1.5 Million
  - India – 100,000
  - China - ?
- Governing Bodies
  - Canada – 85,000
  - US – 62,000
  - Australia – 19,000
  - England – 12,000

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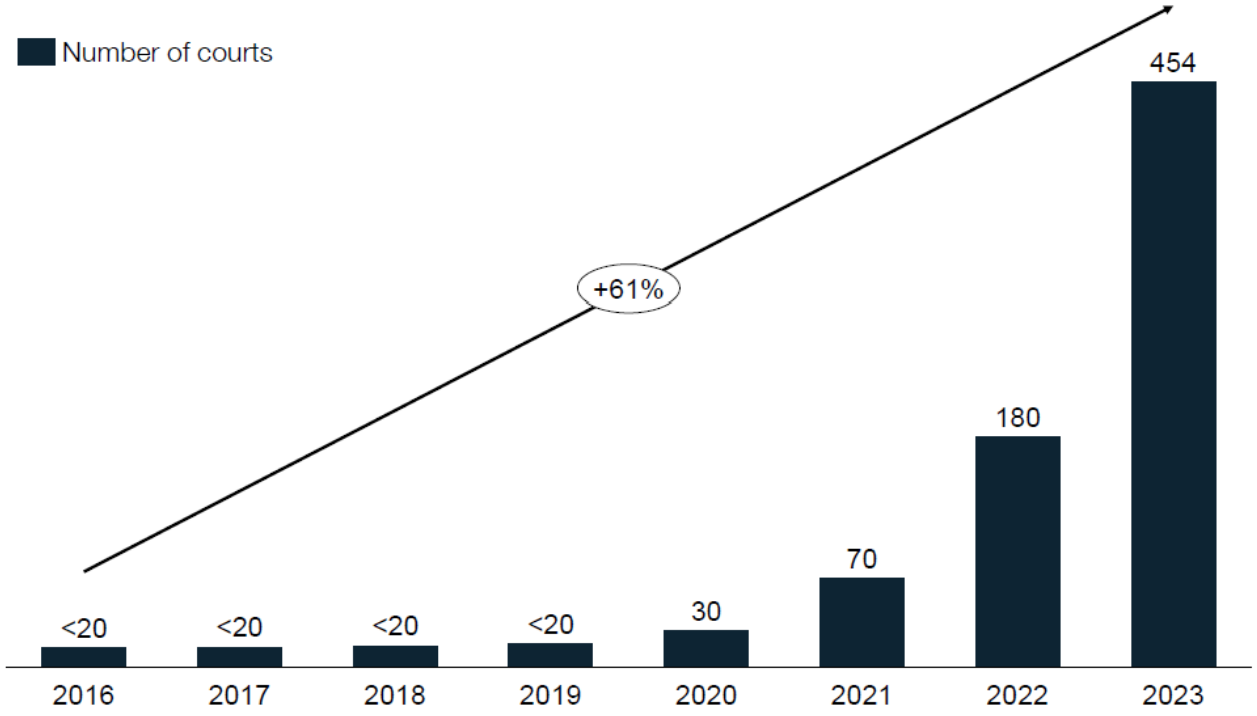
Padel in the US

Number of amateur players	100k
% of court saturation	0.4%
Number of padel venues	82
Courts per million inhabitants	1.3



Source(s): Local federations, Press releases, Strategy& analysis

Global Padel Report by Playtomic

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Pickleball & Padel

	Padel	**Pickleball**
Major participation region	Europe	U.S.
Worldwide Players	30 million	26 million
Worldwide Places to Play	19,800	19,000
Worldwide Courts	63,000	90,000
Operations & Capex from facilities (2025 estimate)	n/a	$3.3 billion

Sources: SFIA. The Business of Pickleball. International Padel Federation

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Padel Market

Worldwide Padel Phenomenon

PADEL IN NUMBERS

IN THE PRESENT

+90 Countries

Padel Courts & Players

51
National Federations in FIP

+18 M
Active Padel Players

300 K
Federated Players

IN THE FUTURE

PADEL strives to become WORLDWIDE & an EXHIBITION SPORT in the Olympics of 2024

Source: International Federation of Padel (FIP)

Monitor Deloitte.

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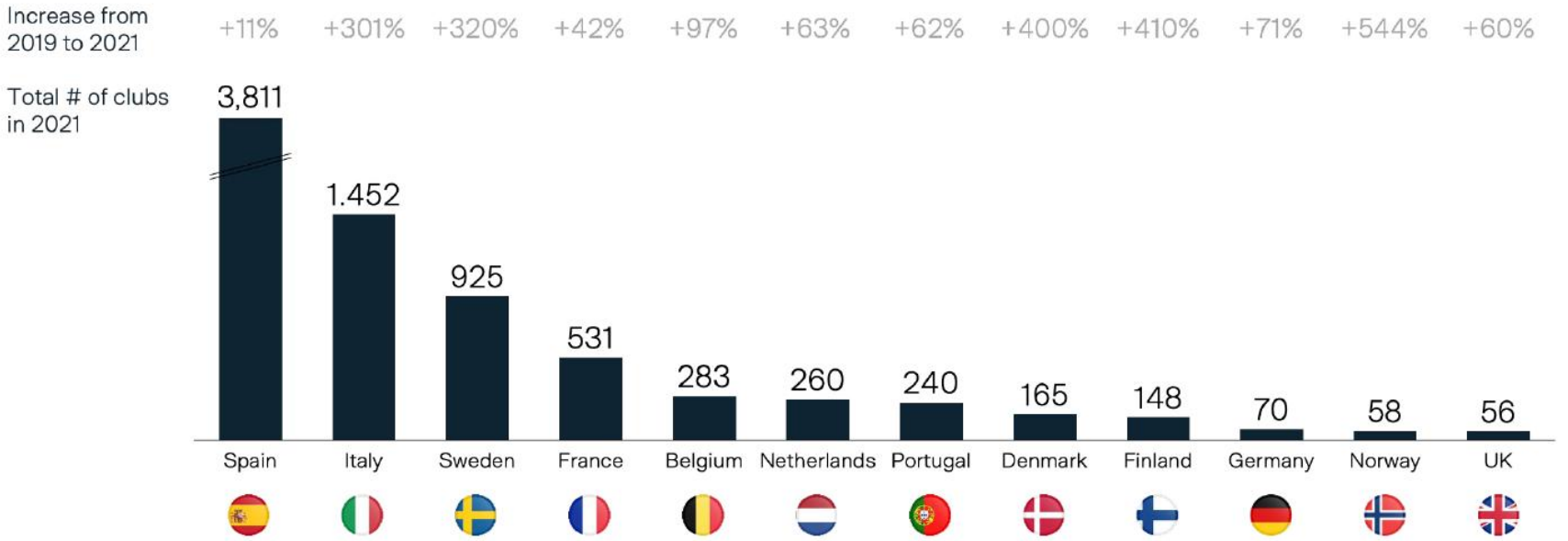
Padel Clubs

Clubs and courts

PADEL CLUBS GROWTH BY COUNTRY



Source: Padel Lands, All For Padel, Padelonomics, Local federations

Padel Courts – Indoor / Outdoor

Clubs and courts

COURTS BY TYPE 2021

	Indoor	Outdoor	Roofed
Spain	32%	55%	14%
Italy	20%	61%	19%
Sweden	73%	26%	1%
France	40%	50%	10%
Netherland	67%	27%	6%
Portugal	30%	31%	24%
Finland	61%	38%	1%
Denmark	86%	14%	0%
Norway	90%	9%	1%
Germany	33%	67%	0%
Belgium	16%	69%	15%
Total average	37%	50%	11%

Monitor Deloitte.

Source: Playtomic, 4PADEL, Monitor Deloitte

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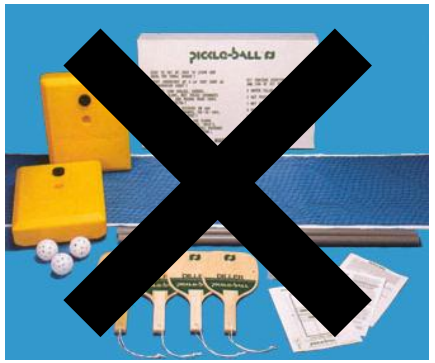
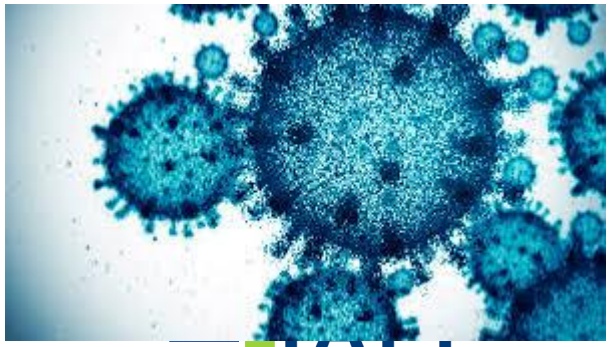
Three Drivers of Historic Pickleball Growth

- USA Pickleball Ambassadors



- Good Portable Net



- Covid

Three Drivers of Future Pickleball Growth

- Facilities
- Youth – high school and collegiate
- Global Expansion

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Pickleball Franchises

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Ace Pickleball	4	6	8	11 / 152	11 /152	11/152	12/163	13/176	14/189
Dill Dinkers	7	9	9	11 /100	11 /100	14/139	16/162	17/174	18/179
Pickleball Kingdom	2	4	4	6 / 79	8/ 104	8/104	9/113	12/154	12/154
The Picklr	14	17	19	22 / 214	26 / 258	31/300	37/367	42/412	44/430
PickleRage	1	1	2	3 /28	3 / 28	3/28	3/28	4/40	4/40

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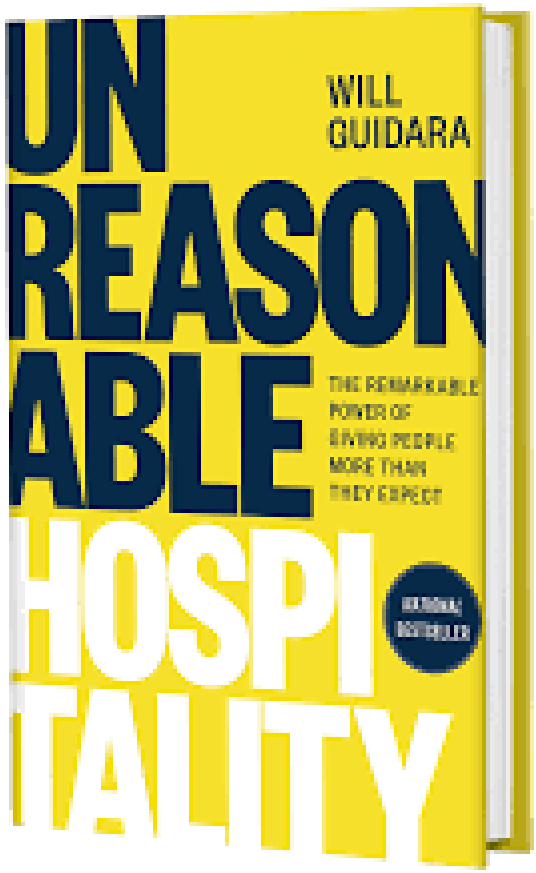
The State of The Pickleball Facilities Industry

Hospitality – and it ain't easy



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Pickleball Court Counts

Pickleball Courts - Indoor and Outdoor

	August	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Indoor	21,012	21,441	21,864	22,129	22,407	22,867	24,165	24,584	24,941	25,297
Outdoor	44,001	44,908	45,567	45,853	46,099	46,672	47,075	47,662	48,319	49,063
Total Courts	65,013	66,349	67,431	67,982	68,506	69,539	71,240	72.246	73,260	74,360

source: Pickleheads

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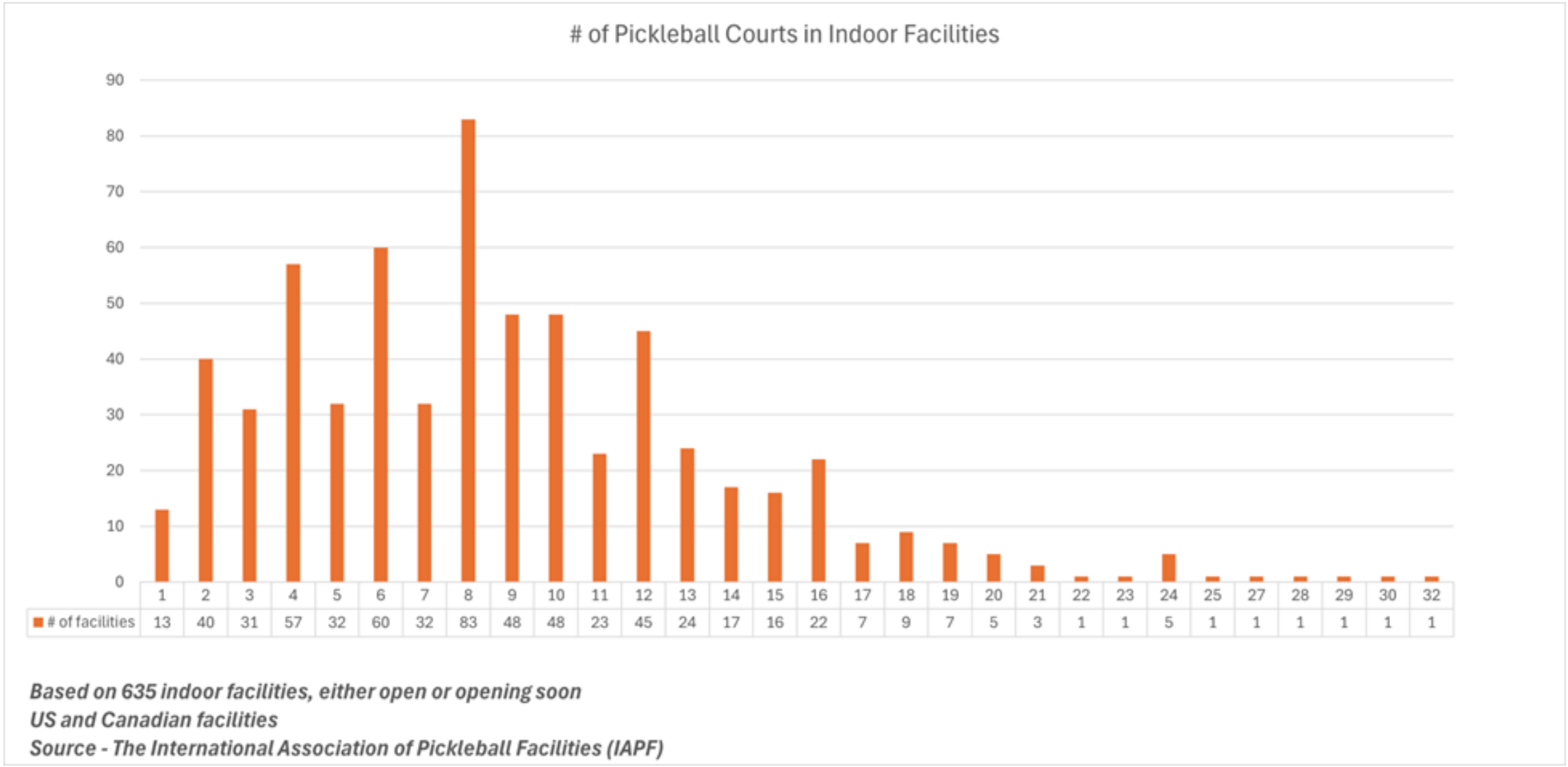
of Courts in Indoor Facilities

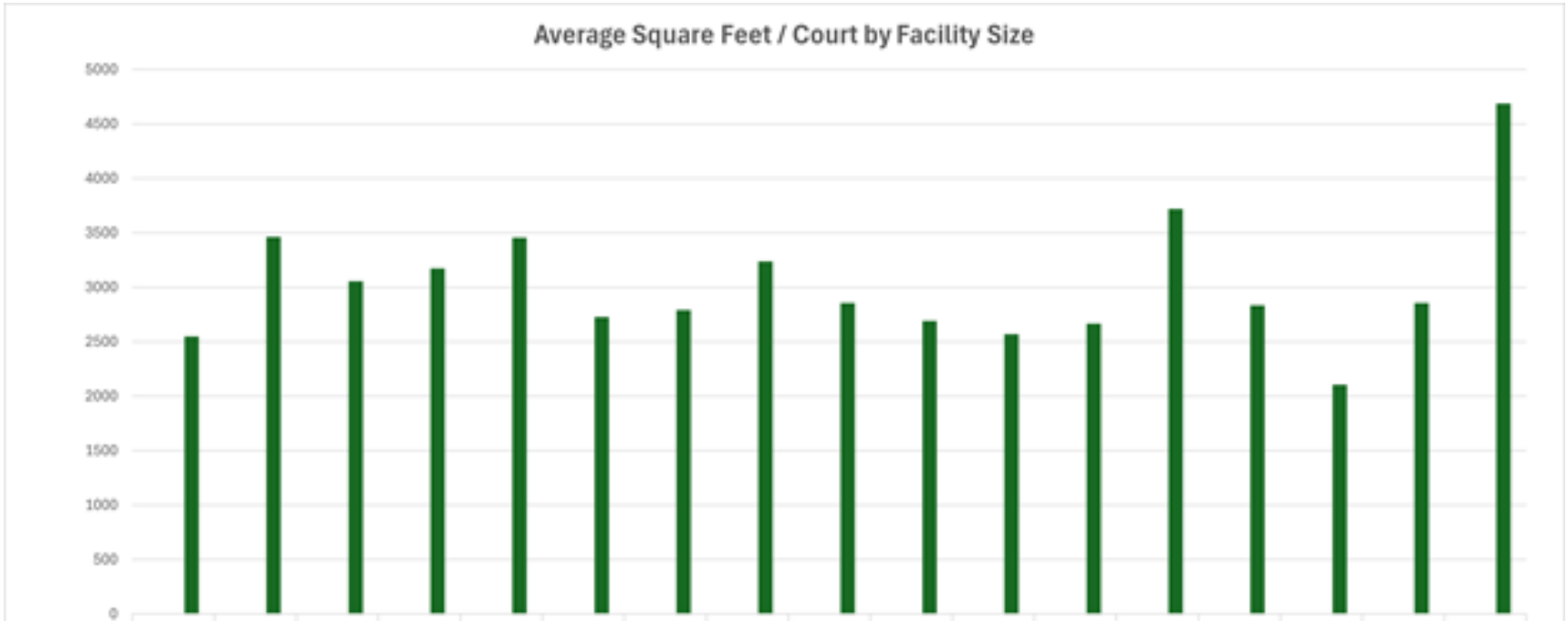


	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	27	28	29	30	32
# of facilities	13	40	31	57	32	60	32	83	48	48	23	45	24	17	16	22	7	9	7	5	3	1	1	5	1	1	1	1	1	1

Based on 635 indoor facilities, either open or opening soon
US and Canadian facilities
Source - The International Association of Pickleball Facilities (IAPF)

Average Size of Indoor Facility

- The average size of an indoor pickleball facility is approximately 3,000 square feet times the number of courts in the facility.



# of courts	4	5	6	7	8	9	10	11	12	13	14	15	16	18	19	28	32
# of facilities	2	1	3	4	4	9	10	5	4	3	1	1	2	1	1	1	1
Avg SF / court	2,550	3,463	3,056	3,175	3,457	2,729	2,790	3,236	2,854	2,692	2,571	2,667	3,719	2,833	2,105	2,857	4,688

Data represents 53 facilities in the US and Canada where facility square footage was available.
Facilities with restauarants were excluded.
SF / court can be impacted by space used for pro shops, cafes, bathrooms and similar

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Initiation Fees

- 18 of 69 indoor facilities charge initiation fees (23%)
- High - $750
- Low - $20
- Average - $119

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Average # of Courts - Franchises

"Big Five" Franchises - Average Courts per Facility				
Pickle Rage	The Picklr	Dill Dinkers	Pickleball Kingdom	Ace Pickleball Club
9.33	9.92	10.10	12.60	13.6

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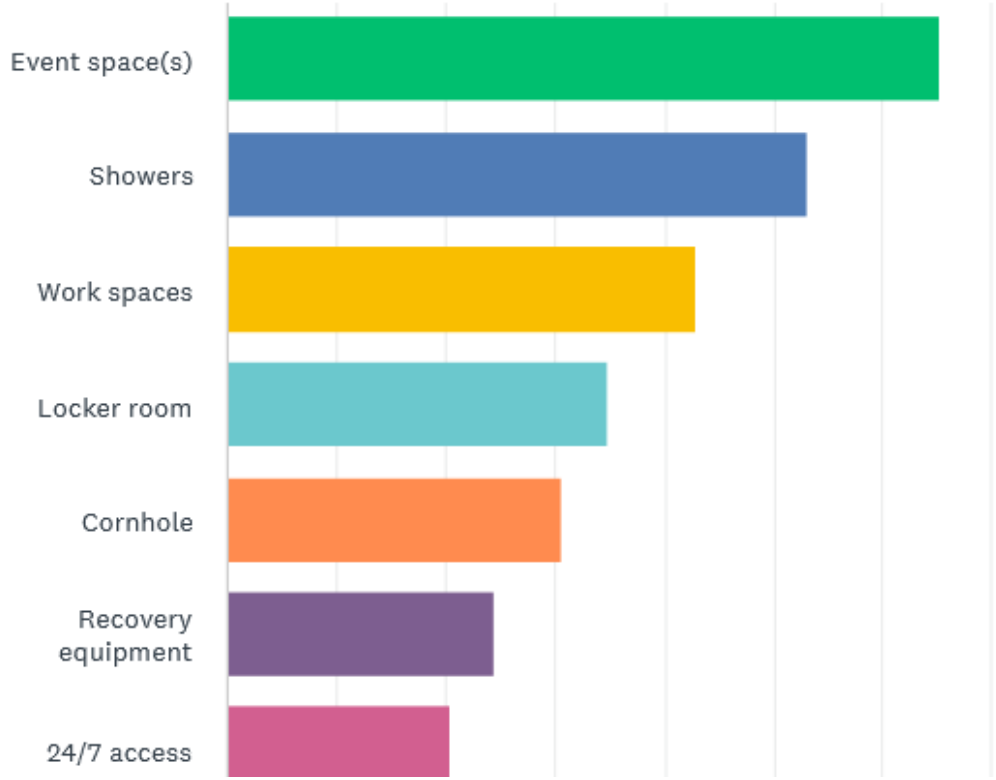
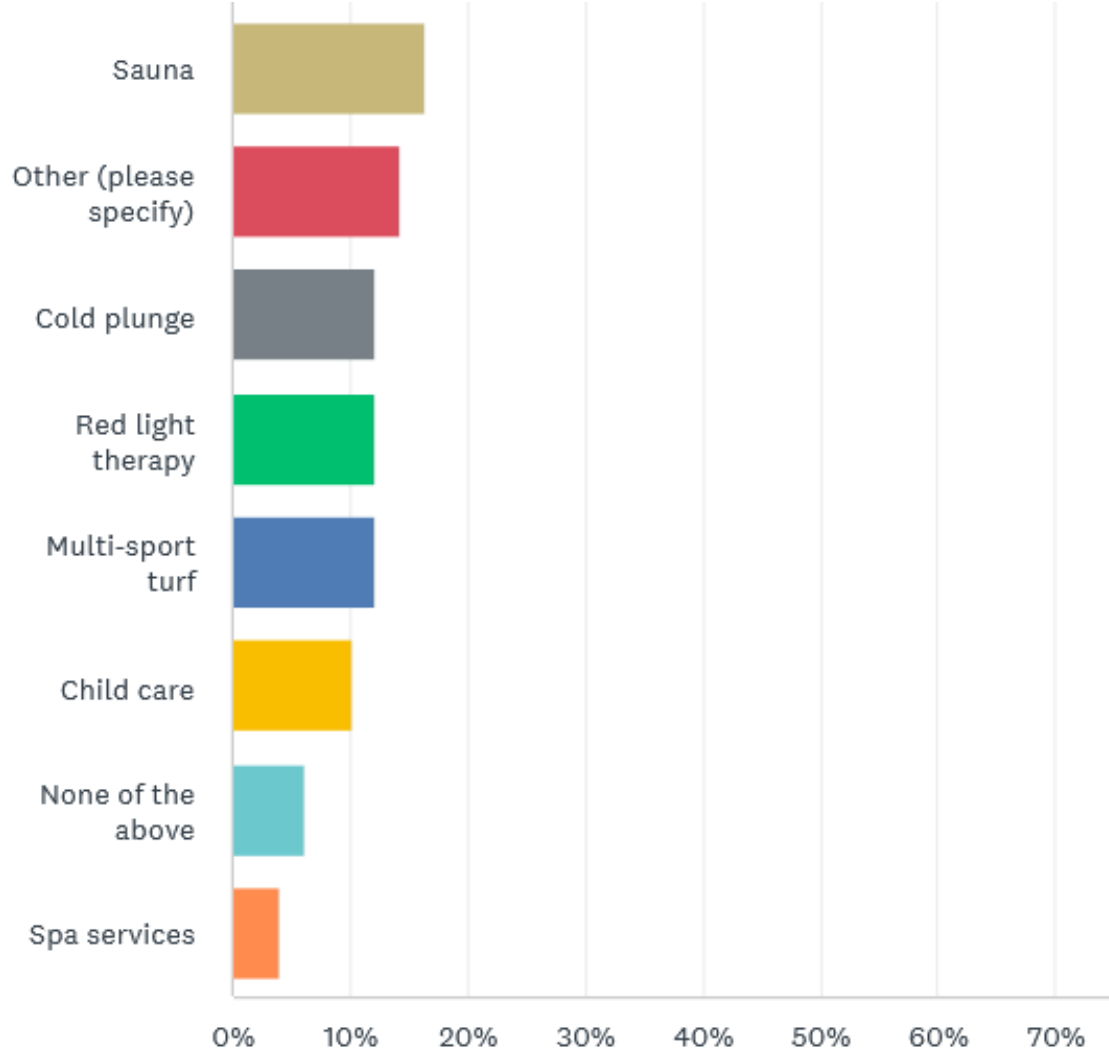
Amenities

Amenities – other? (select all that apply)

Answered: 49 Skipped: 3





Pickleball Facility Segments

	Budget	Serious	Upscale
Pickleball Only			
Independent	Indianapolis Pickleball Club	Side Out Pickleball Club	Bosse
Franchise		Dill Dinkers Picklr Ace	
Chain		Center Court Wolverine	
Eatertainment		Chicken N Pickle	Painted Pickle

Multi-sport			
Pickleball / Padel		Pure Pickleball & Padel	Picklewood
Fitness			Life Time
Country Club			
Tennis Club			
Parks & Rec			
Community Centers/YMCAs			

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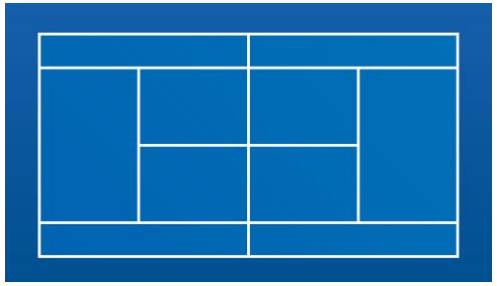
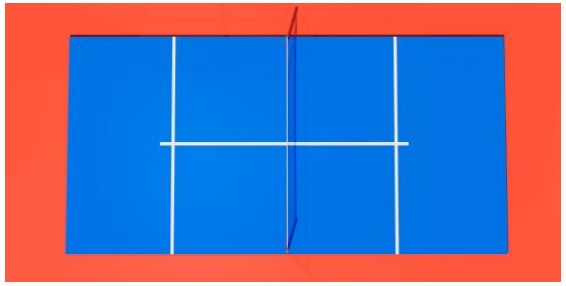
Economic Density By Facility Type



Tennis Court
2,808 sf

Typically 2 players
1,404 sf / player

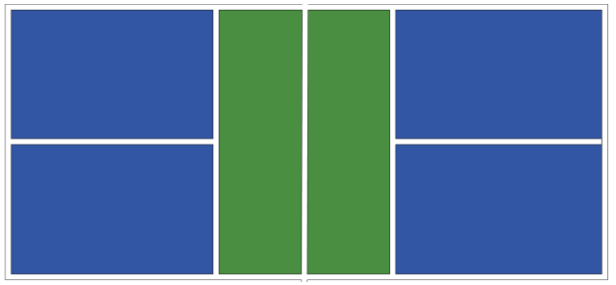
$$$



Padel Court
2,178 sf

Typically 4 players
544 sf / player

$$



Pickleball Court
880 sf

Typically 4 players
220 sf / player

$

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Economic Density By Court

Court Economic Density							
Revenue Only							
	Memberships	**Court Rental**	**Open Play**	**League**	**2-day Tournament**	**Clinic**	**Corporate Event**
# of courts	10	1	5	5	10	1	3
cost to participate	$129.00	$20.00	$10.00	$140.00	$110.00	$20.00	$3,200.00
# of participants	800		50	20	200	8	1
# of hours			3	2	10	1	2
# of sessions				7	2	1	1
# hours open per month (30x15)	450						
Total membership revenue / month	103,200						
Revenue per court hour	**$22.93**	**$20.00**	**$33.33**	**$40.00**	**$110.00**	**$160.00**	**$533.33**

Trends

- Multi-Sport Facilities – especially pickleball & padel
- Technology Innovations
- Right-Sizing Food & Beverage
- Increased M&A Opportunities

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Multi-Sport Facilities – Pickleball & Padel

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Tail Winds

- Continued growth of the sport
- Ratings – DUPR
- More data – better decisions
- Better Technology

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Head Winds

- Competition - Commoditization
- Been there, done that syndrome
- Lack of technology integration
- Noise
- Macro economy
- Finding appropriate spaces

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