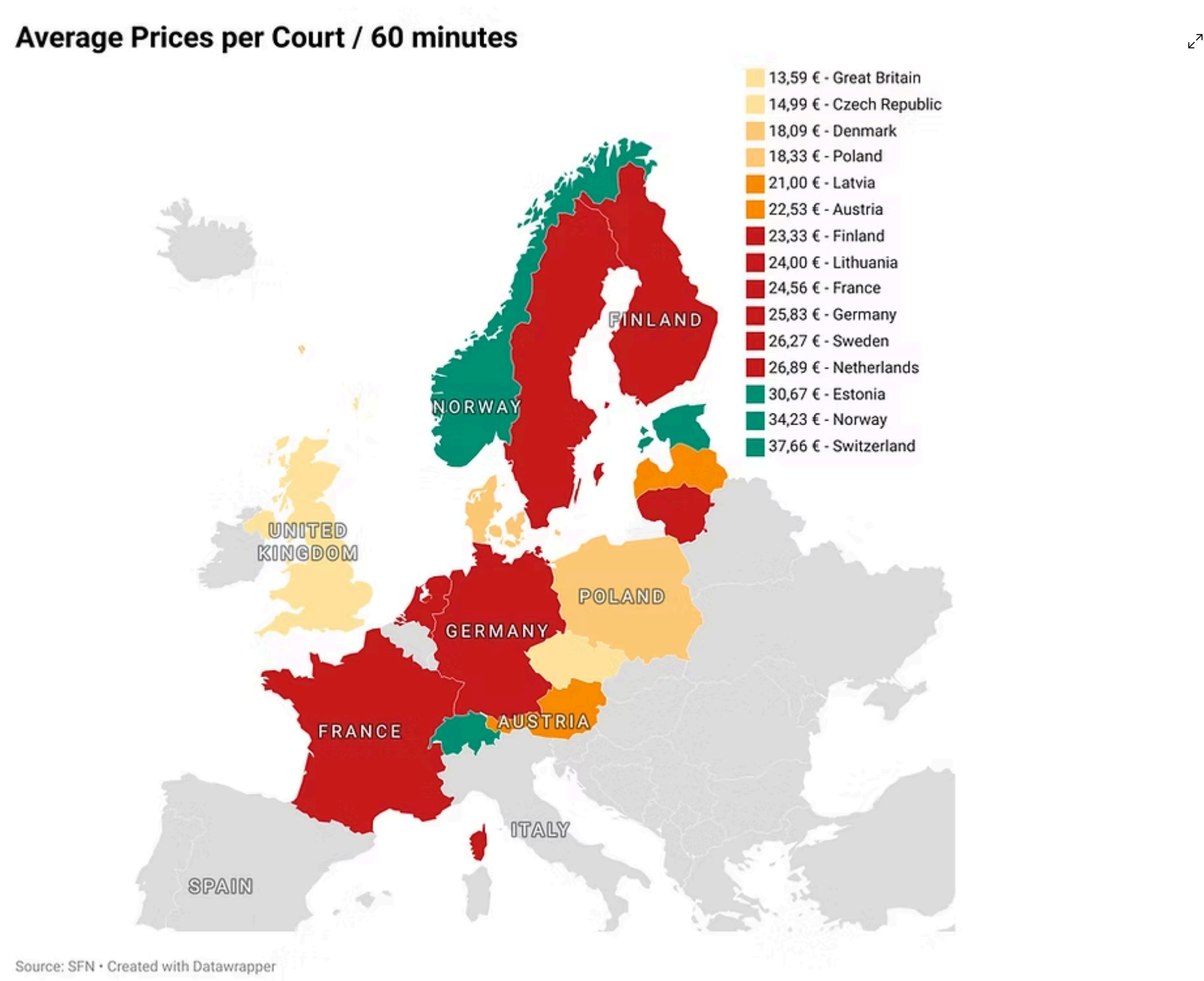


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Europe's Squash Scene: A Court Fee Survey



In January 2025, the SFN conducted an extensive survey of more than four hundred squash venues. The focus was to determine how much it costs to play squash in different countries and to compare these findings to other markets in Australia and the United States.

Only centers with at least three courts were considered, because single-court or double-court locations often use squash as a secondary service. All prices were converted into euros, which allowed for consistent comparisons. Pay & Play costs were calculated for sixty-minute peak-time slots, and membership fees were examined on the basis of a twelve-month adult contract. The results reveal intriguing insights about how much European players pay, what models dominate in different regions, and how these figures measure up against other parts of the world.

Pay & Play vs. Membership: Survey of Different Revenue Models

Squash clubs typically follow one of two main income models: **Pay & Play** or **Membership**. While both approaches serve the same goal—bringing players onto the courts—they differ greatly in how revenue is generated and what kind of value is offered to the community.

A **Pay & Play** system is straightforward and appeals to those who prefer an on-demand experience. Players book a court for a set timeframe and pay a fixed fee each time they play. This à la carte structure often suits individuals or casual users who want minimal commitment and the freedom to play whenever they choose. It can be an excellent way to lure newcomers who are still exploring the sport, as well as travelers or occasional participants who may not be willing to sign contracts. From a management perspective, Pay & Play revenue fluctuates with seasonality, local demand, and even daily schedules, requiring clubs to keep their calendars busy through efficient marketing and accessible booking options.

By contrast, a **Membership** model creates consistent, predictable income throughout the year. Instead of paying per session, members commit to a monthly or annual fee that covers court time and often includes extra perks such as coaching clinics, league play, and social events. This structure tends to foster a tight-knit community because members return regularly, get to know each other, and invest themselves in the club’s culture. Facilities that adopt a membership strategy can allocate resources toward programming, with the assurance that funds will continue to flow even outside of peak playing seasons. The downside is that some casual players might shy away from the upfront commitment—especially if they can’t predict how often they’ll use the courts.

While many venues stick to one model, **hybrid approaches** are becoming more common. Some offer an appealing membership package alongside the option for occasional Pay & Play. In doing so, they cater to both frequent players seeking a sense of belonging and those wanting flexibility with their schedules. From an operational standpoint, balancing both structures allows a club to diversify its revenue streams while retaining a broader range of customers.

Ultimately, a club’s decision to focus on Pay & Play or Membership reflects its philosophy and objectives. Those aiming for high-volume participation and easy entry into the sport frequently lean on Pay & Play. Venues seeking to invest in expanded services and create a strong community typically rely on memberships for financial stability. No matter which path a facility chooses, it’s evident that aligning the business model with the expectations and habits of local players lies at the heart of sustainable growth for squash clubs everywhere.

Europe’s Pay & Play Landscape: Costs and Comparisons

In purely numerical terms—based on the ratio of average Pay & Play cost to average net monthly income—it’s correct to say that the lower the cost ratio, the cheaper squash is relative to local net income.

Country	Pay & Play Average fee (€)	Approx. Net Monthly Income (€)	Cost Ratio (%) P&P fee / net income
England	13.59	2700	0.50
Wales	13.83	2700	0.51
Denmark	18.09	3500	0.52
Finland	23.33	3000	0.78
Austria	22.53	2850	0.79
Netherlands	26.89	3100	0.87
Norway	34.23	3900	0.88
Germany	25.83	2950	0.88
Sweden	26.27	3000	0.88
France	24.56	2700	0.91

Czech Republic	14.99	1200	1.25
Poland	18.33	1200	1.53
Baltic States	24.80	1400	1.77

- **Lowest Cost Ratios in England, Wales, and Denmark**
 - England has the lowest cost ratio at **0.50**, making squash “cheapest” relative to local net income.
 - Wales follows closely at **0.51**, with Denmark at **0.52**.
 - A key factor behind England’s affordability is the prevalence of community-based leisure centers that prioritize public access over profit.
- **Mid-Range Group (Finland, Austria, Netherlands, Norway, Germany, Sweden, France)**
 - These countries all have cost ratios between approximately **0.78** and **0.91**.
 - Higher net monthly incomes (e.g., in Norway and Denmark) help keep the cost ratio lower, even when the actual court fee is somewhat higher.
 - In nations like France, where income is moderate, the cost ratio edges closer to 1.0, indicating that a larger share of monthly income goes toward squash.
- **Highest Cost Ratios in Czech Republic, Poland, and the Baltic States**
 - Despite lower Pay & Play fees in absolute terms, these regions have lower average salaries, resulting in higher cost ratios ranging from **1.25** up to **1.77**.
 - This means that, relative to local earning power, squash is the most expensive in these countries.

Overall, England’s communal leisure facilities keep hourly rates low relative to income, placing it at the most affordable end of the spectrum. Meanwhile, countries with lower incomes (Czech Republic, Poland, Baltic States) see higher ratios.

Membership Fee Affordability: A Quick Look Across Europe

In Europe, membership fees are generally not the primary revenue model for most squash venues. They are found predominantly in traditional member clubs or fitness centers that include squash courts. However, an increasing number of facilities are starting to offer membership packages as an alternative—or complement—to Pay & Play sessions.

Country	Membership Average (€)	Membership Range (€)	Approx. Net Income (€)	Cost Ratio (%) P&P fee / net income
Denmark	25.39	14–38	3500	0.73%
Norway	40.58	20–100	3900	1.04%
Wales	30.52	10–45	2700	1.13%
Ireland	31.56	15–65	2650	1.19%
Netherlands	40.15	20–100	3100	1.30%
Austria	47.90	39–57	2850	1.68%
France	45.65	38–50	2700	1.69%
Germany	53.78	30–80	2950	1.82%
England	57.92	10–120	2700	2.15%

- **Most Affordable Relative to Income**
 - **Denmark** shows the lowest cost ratio at **0.73%**, making it the most affordable option when factoring in average earnings.
 - **Norway** also remains relatively cost-effective at **1.04%** despite a higher average fee, thanks to its strong net monthly income.
- **Moderate Middle Group**
 - **Wales, Ireland,** and the **Netherlands** fall into a mid-range bracket, with cost ratios between **1.13%** and **1.30%**, indicating moderate affordability.
 - These countries balance a moderate membership fee with a reasonably strong net monthly income.
- **Higher Ratios in Central Europe**
 - **Austria** (1.68%) and **France** (1.69%) start to push toward the higher end of the spectrum, reflecting membership costs that, relative to income, become more expensive.
- **Germany and England at the Top**
 - **Germany** (1.82%) and especially **England** (2.15%) have the highest cost ratios, making their memberships the most expensive in comparison to local net incomes.
 - England also has the highest average membership fee at **€57.92**, reinforcing its position as the priciest market in the table.

In contrast to the lowest Pay & Play fees the membership fees of England rank among the highest in Europe. The reason is undoubtedly tied to the fact that membership clubs in England differ fundamentally from community leisure centers in their overall orientation.

Spotlight on Major International Markets: Australia & the US

The survey also included some of the world's biggest squash markets, providing a broader perspective on global pricing trends.

Australia

- **Pay & Play Profit:** Average **18.27 €** (Range from 10 € to 27 €)
- **Membership:** Average **43.14 €** (Range from 20 € to 84 €)

Australia's average Pay & Play fee sits roughly in the middle of the European spectrum.

United States

In the United States, Pay & Play does not play an important role. However, the few facilities offering Pay & Play charge peak-time rates ranging from **USD 45 to 75 per hour**.

Membership fees vary significantly by facility type:

- Commercial clubs average around **USD 139** per month
- Non-profit clubs about **USD 118**
- University-based facilities roughly **USD 84**

These higher fees contribute to some of the highest annual per-court revenues globally, often starting at around **USD 100,000** and reaching **USD 400,000–500,000** in top-tier operations, largely thanks to extensive programming.

In contrast, European squash facilities generally offer much lower prices: average Pay & Play fees typically range between €13 and €34, and monthly membership fees fall between approximately €25 and €58. This clear disparity highlights the differing market dynamics, cost structures, and service models between North America and Europe—and in short probably explains the differences in the status of squash in Europe compared to the USA.

Conclusion: Services, Pricing, and the Future of Squash

In most parts of Europe, Pay & Play sessions remain the primary revenue source, whereas in the United States, membership-based models dominate—and tend to yield higher overall fees. This often reflects the level of extra services provided, such as coaching, tournaments, and organized programming. Facilities that invest in comprehensive offerings generally charge higher prices and attract players who are willing to pay for a richer experience. The U.S. market shows this clearly, where fees can be double or triple those found in Europe.

For both continents, squash players typically rank among those with the highest household incomes. This demographic reality suggests that a higher price is not the barrier many fear. Rather, the real deciding factor is the quality of service and programming. In the U.S., the success of squash may well stem from the substantial costs being matched by equally substantial benefits—underlining that it’s not the price itself but the overall value proposition that drives growth.

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