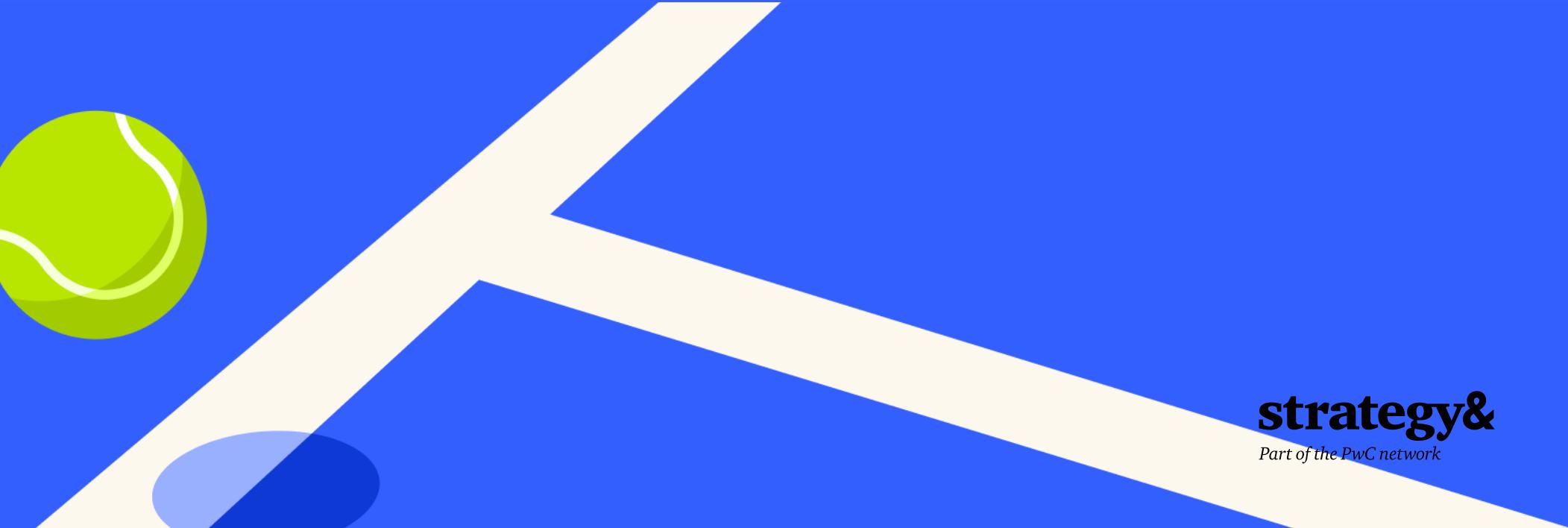




Global Padel Report

2025 Release



strategy&
Part of the PwC network

The future is being shaped now, and it's in our hands



Pablo Carro
Co-Founder



Antonio Robert
Managing Director



Elena Martín
Partner

Dear community,

As a company immersed in building this industry from the ground up, we can say this with full conviction: **the future of padel will be defined by the performance the current business, and by the collective responsibility of every key stakeholder in this ecosystem.**

Yes, the numbers are exciting. A 26% increase in club openings, 7,000 new courts built worldwide, and record-breaking player retention. But what really matters now is not just what we build, but how we build it together.

Because the truth is: we are not just competing with other sports. We're competing with every possible way people can spend their time and attention. In a world of overwhelming entertainment options and deep uncertainty, the relevance of padel will depend on our ability to create not just courts, but compelling experiences, sustainable, inclusive, and digitally native.

This is a shared mission. Clubs are the frontlines, but federations, racket and apparel brands, court manufacturers, digital platforms, and players themselves all carry part of the weight. The transition from exclusive to accessible, from traditional to tech-enabled, is already underway. We are no longer just growing, we are professionalizing.

What lies ahead is an opportunity to position padel as a global sport of the future. One that unites passion, innovation, and community. But seizing that opportunity means embracing a higher standard, from operations to storytelling, from user experience to long-term vision.

At this stage, excellence is not optional. It's what will separate industries that thrive from those that fade.

Let's rise to that challenge, together.

With conviction and commitment,

Pablo Carro
Co-Founder Playtomic

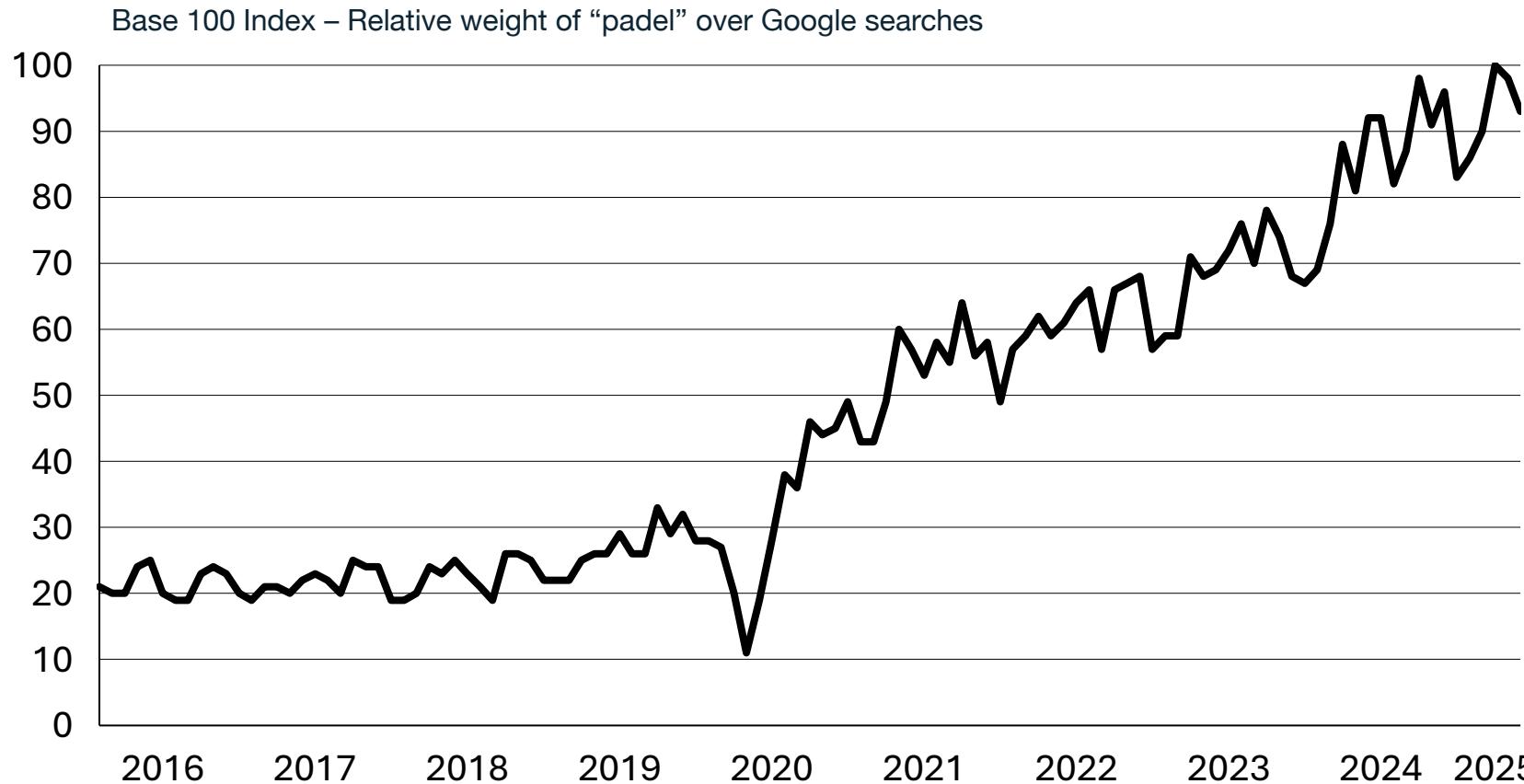
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Introduction

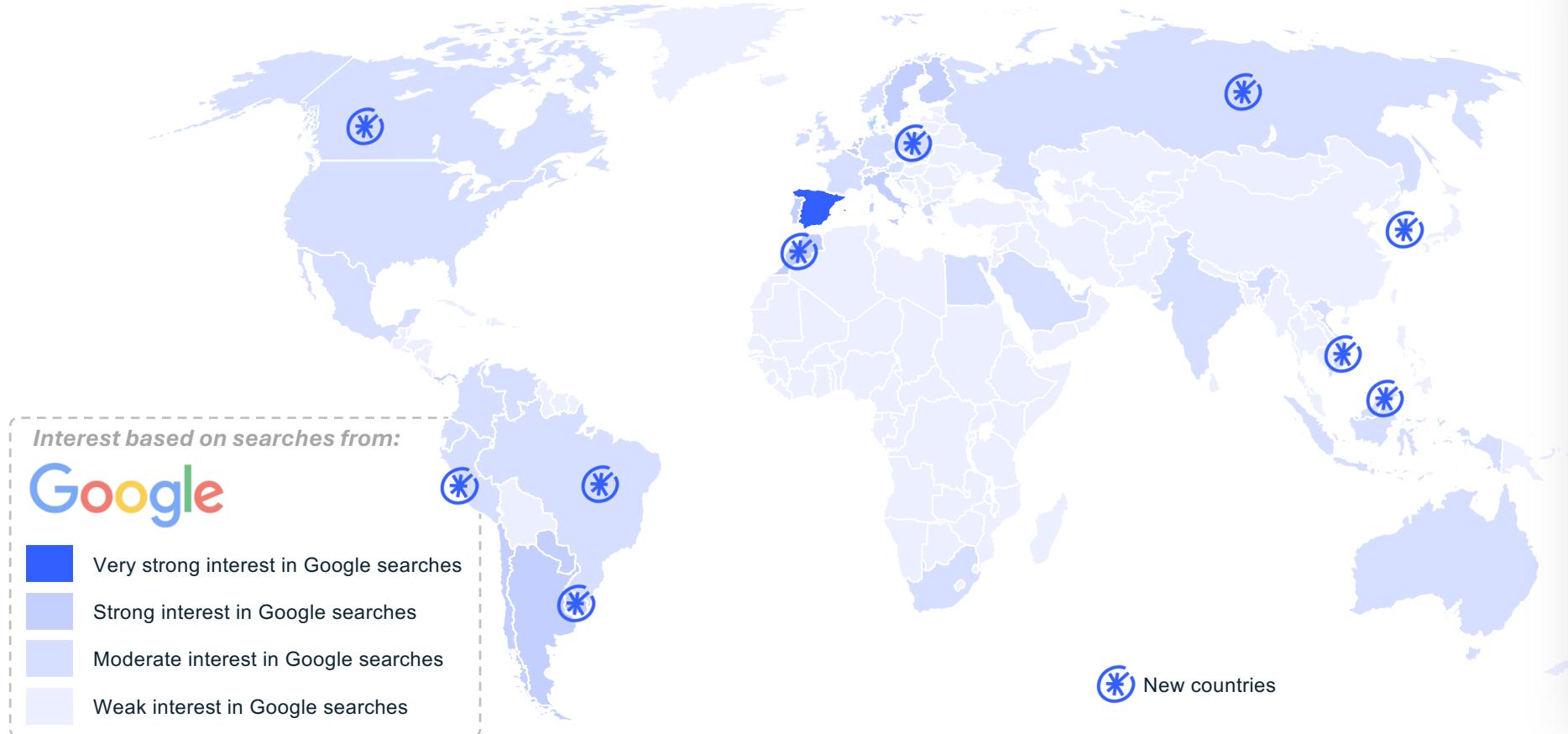
Padel continues to drive increasing global interest



* The volume of “padel” Google searches has continued to rise, with a significant increase since 2016, indicating a surge in worldwide interest

Introduction

As more regions embrace padel, the sport gains momentum



Note(s): (1) Ranked by interest growth ('23' vs '24'), weighted by each country's share of global search volume, excluding leading countries.

Source(s): Google Trends for keyword "padel" worldwide (as of May 2025), Strategy& analysis



CHAPTER 1

Market Analysis



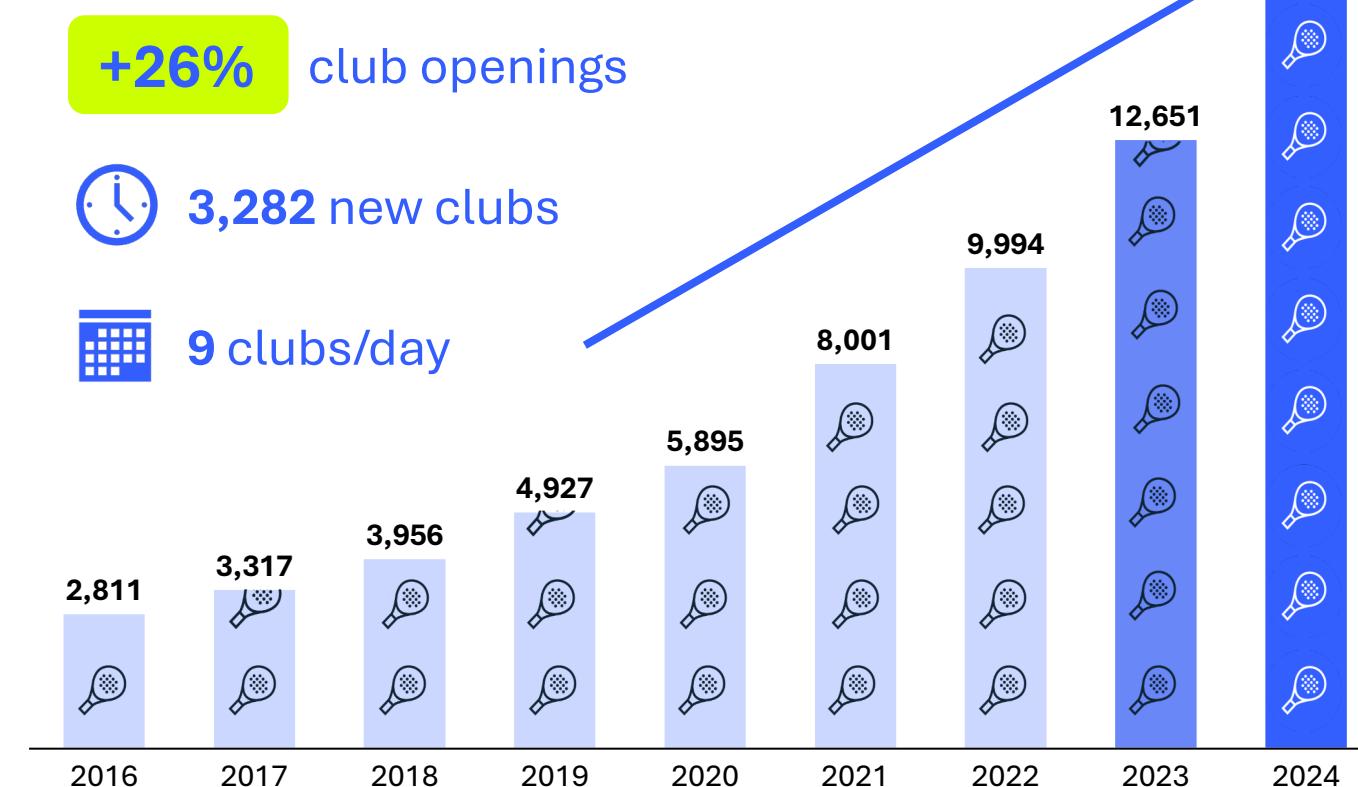
Padel's global expansion remains strong and sustained. In 2024, 3,282 new clubs were opened, averaging nearly 9 per day, representing a 26% increase from the previous year (~7 per day in 2023).

Over 7k new courts were built, bringing the global total to 50,017 courts, **above forecast.** Growth has now stabilized along a pre-COVID trajectory, with regional dynamics evolving.

While growth rates vary across countries, **padel is now growing both faster and more sustainably.**

Club openings increased by 26% in 2024

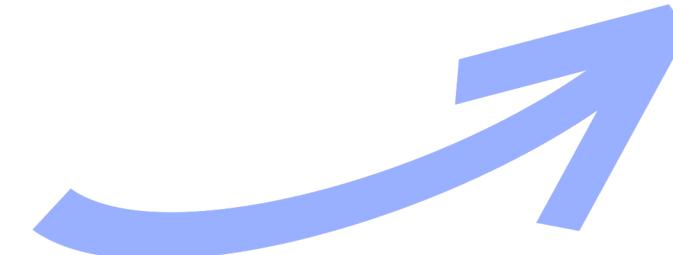
Number of clubs built yearly



Source(s): Court manufacturers, Strategy& analysis

In 2024, 3,282 new clubs were added, translating to **nearly 9 clubs opening every single day**, reinforcing the sport's momentum and global adoption

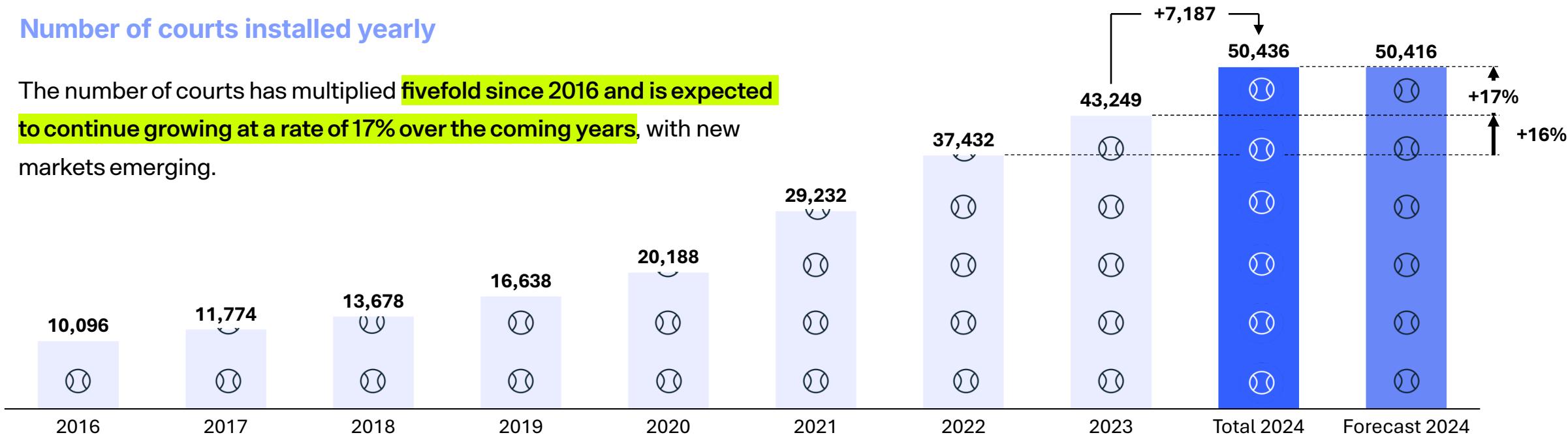
Building on strong growth in 2023, **new padel club openings in 2024 have increased by 26%** year-over-year, a clear indication that padel is far from saturation



More than 7,000 new courts were built globally

Number of courts installed yearly

The number of courts has multiplied **fivefold since 2016 and is expected to continue growing at a rate of 17% over the coming years**, with new markets emerging.

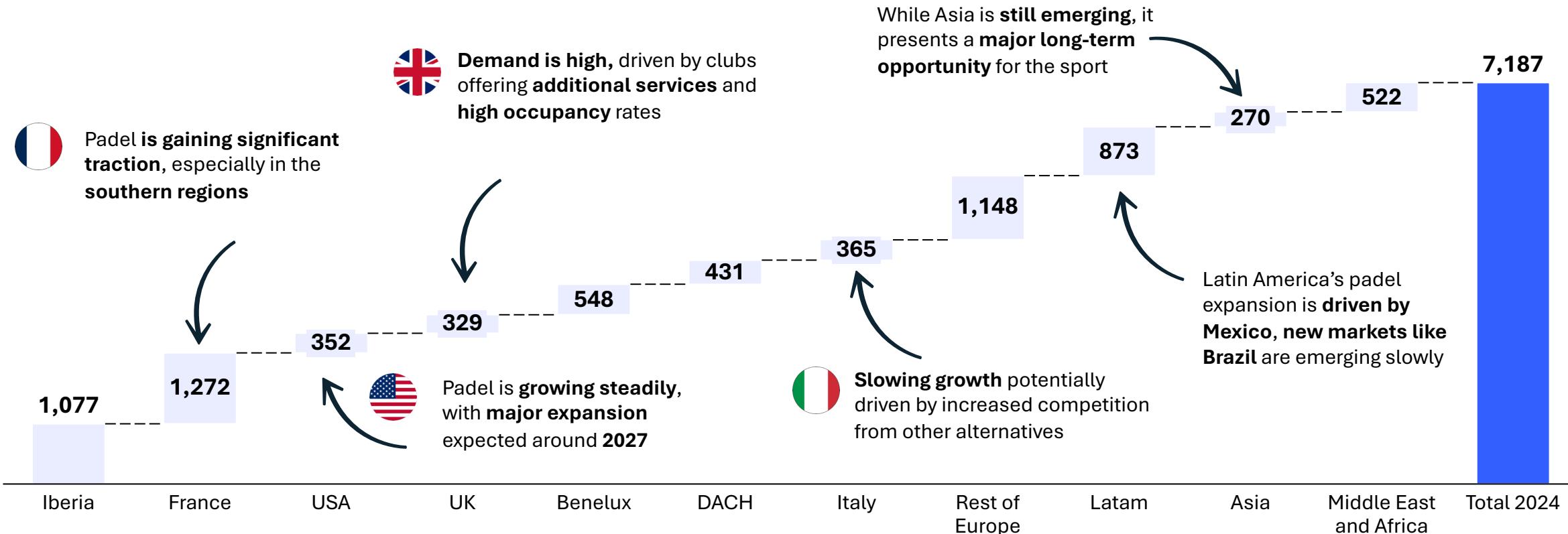


The 2024 forecast has been surpassed, with the number of courts reaching 50k, a 17% increase compared to 2023 and consistent with the previous year's growth rate (16% in the 2022–23 period)

Market Analysis

New regions are gaining relevance while in developing ones, growth is picking up

New courts built in 2024 by country



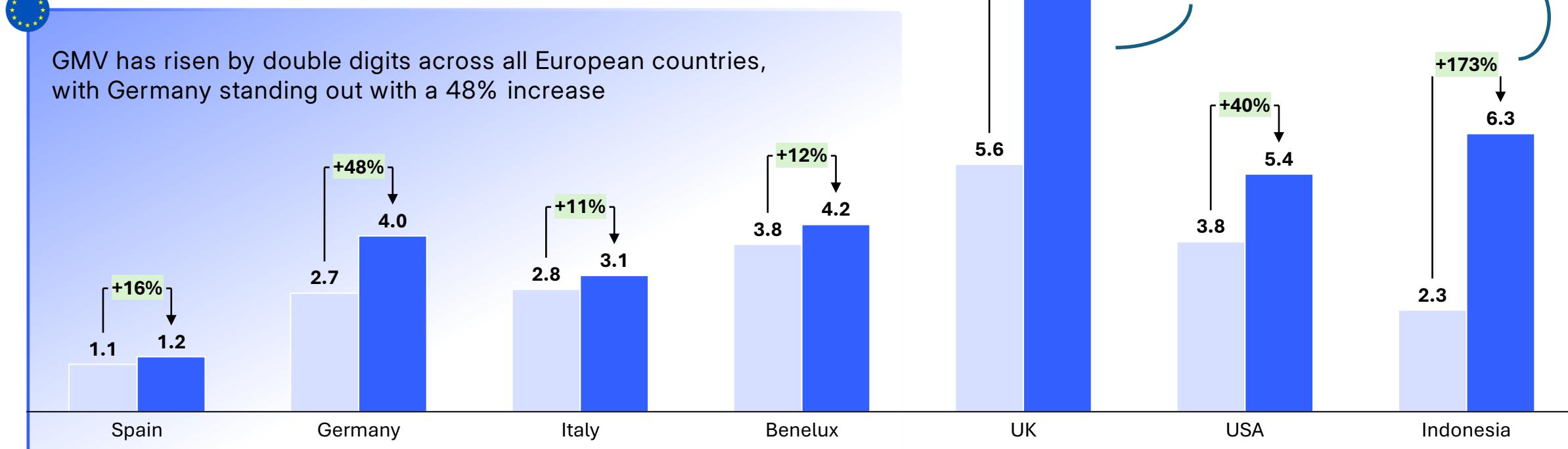
Market Analysis

Increase in popularity has been accompanied by an increase in gross monetary value (GMV)

Gross Monetary value evolution [€k per court and month]



GMV has risen by double digits across all European countries, with Germany standing out with a 48% increase



2023-24 saw the **UK** rise to the top of the GMV per court, after a 74% increase

The undisputed **GMV leader for 2023-24 was Indonesia**, reaching over €6k after a **173% increase**

Padel growth rates vary across countries

Growth stage by country



*This reflects the **general growth curve of padel across countries**, typically starting gradually and accelerating over time, but the **pace and steepness can vary significantly depending on local investment, infrastructure, and legal restrictions.**

Projected growth for the **US is expected to be more exponential**, while countries such as the **UK are projected to see a more gradual trend.**



Beginning

Growth

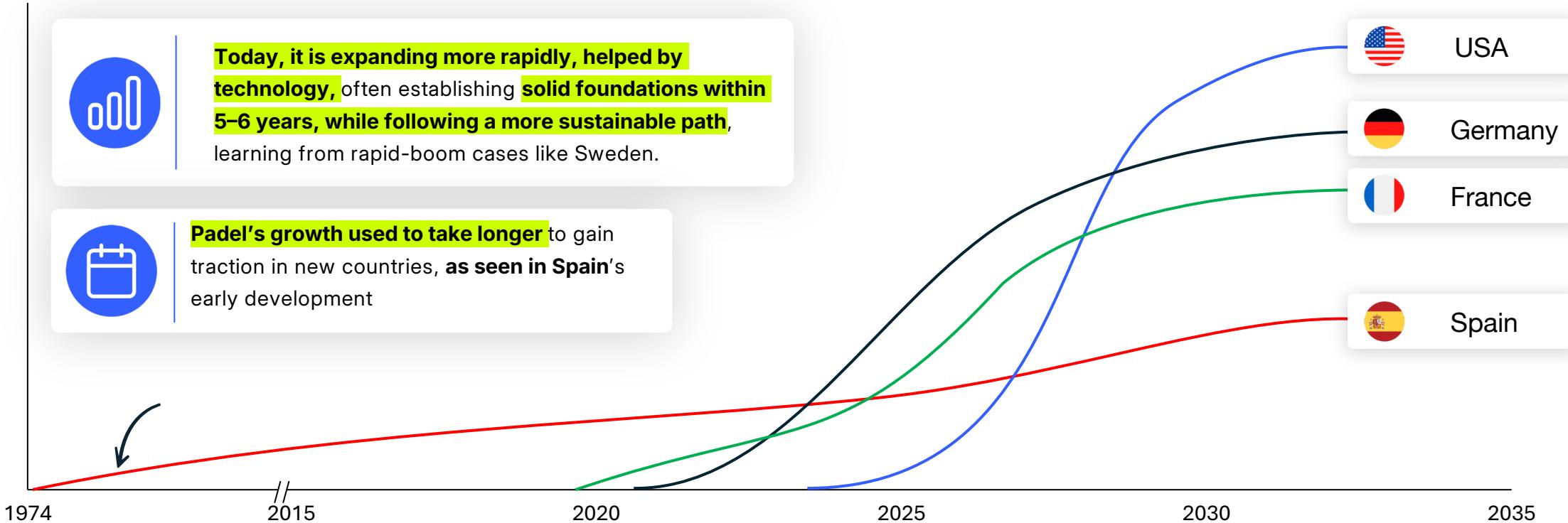
Consolidation

Maturity

Market Analysis

Padel is now growing faster and more sustainably, with stronger foundations in place

Number of courts



Rising hubs across Europe, US, APAC and Latin America drive dynamic growth

USA:

- Growth remains scattered, with hotspots like Miami and Texas
- Faster expansion expected in 2026, with real acceleration projected for 2027

Number of courts 0.8k

Latin America:

- Argentina stands out as a traditional, active padel market
- Countries like Mexico are growing steadily, Brazil is emerging, with signs of digitalization
- While chains emerge in Mexico, multiclubs rise in Colombia

Europe:

- Italy** faces a slowdown in growth, likely due to tennis popularity
- France** continues to grow, showing potential for acceleration
- The **UK** is becoming a solid market despite its struggles with bureaucracy

Number of courts 44k

Middle East:

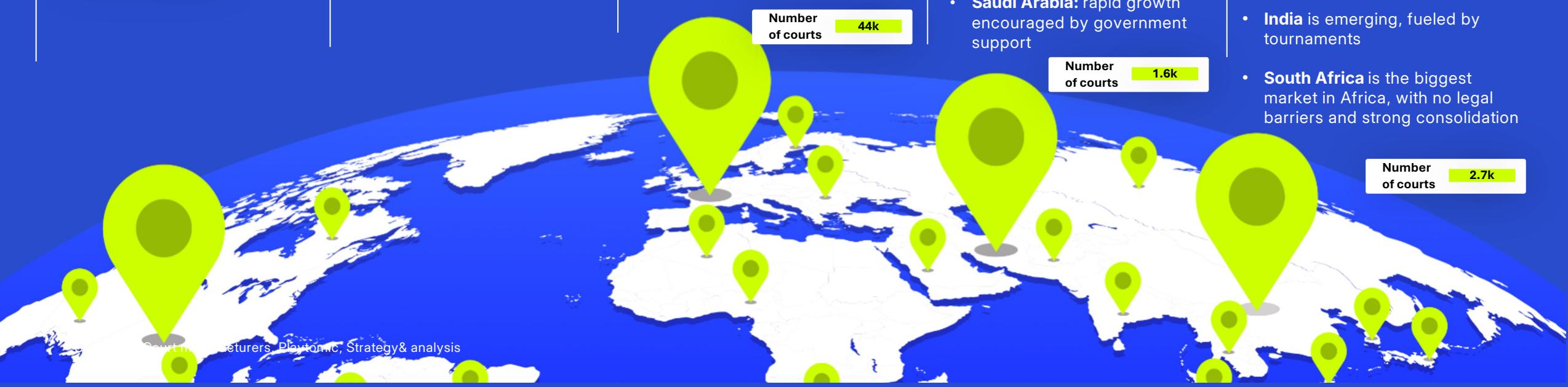
- Qatar**: Government restrictions for new club openings
- UAE**: consolidated markets, with new openings restricted to large indoor clubs
- Saudi Arabia**: rapid growth encouraged by government support

Number of courts 1.6k

APAC and Africa:

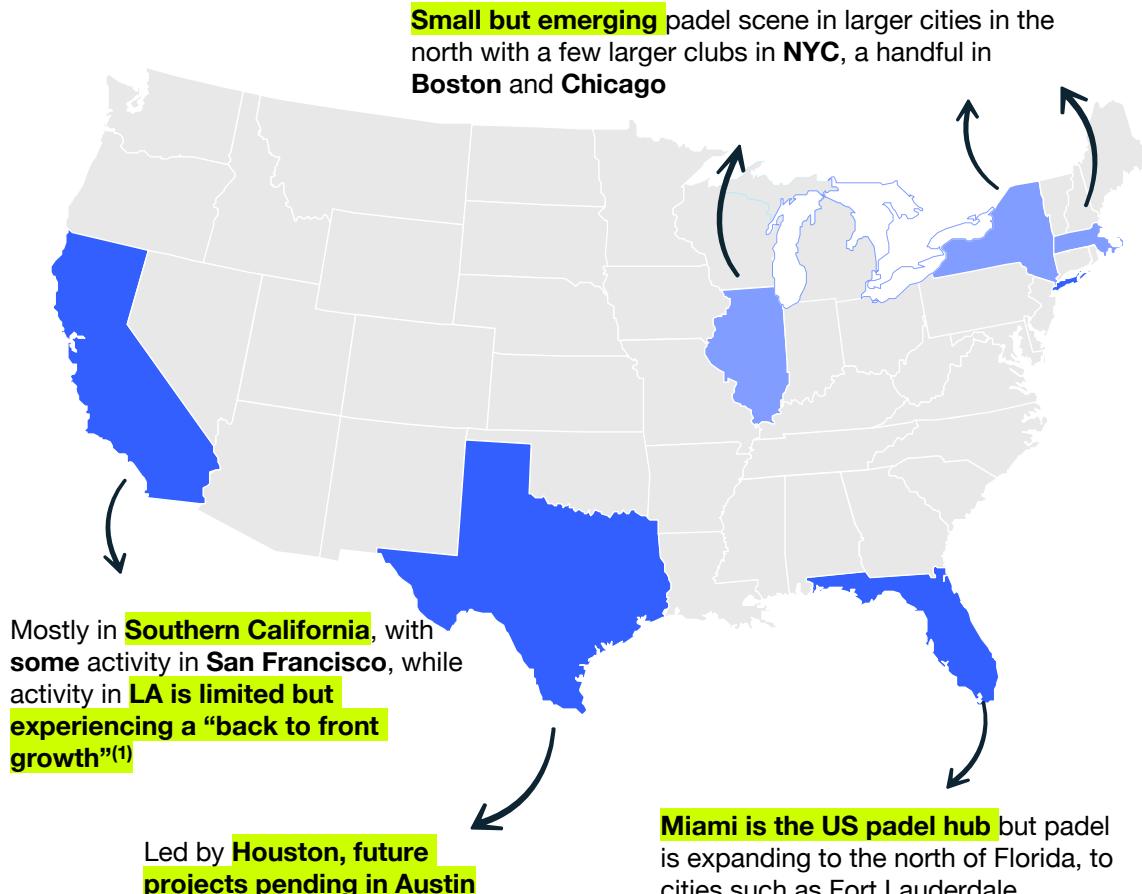
- Early-stage growth in countries like **Indonesia and Thailand**
- Australia** faces slower development due to bureaucracy and competition from pickleball
- China** remains focused primarily on manufacturing
- India** is emerging, fueled by tournaments
- South Africa** is the biggest market in Africa, with no legal barriers and strong consolidation

Number of courts 2.7k



Market Analysis

US padel is concentrated in a handful of locations



Note(s): (1) Padel in LA has been a big private court sport and is now beginning to be publicly available
 Source(s): News Reports, Strategy& analysis

US market dynamics and trends

Padel clubs located **1–2 miles apart**, show alarming performance differences, with one **outperforming its neighbor by 3–5x** due to stronger digital infrastructure, better site selection (e.g., safer neighborhoods), and skilled management.

Safety and zoning concerns influence lot selection

Crime rates and neighborhood perception play a significant role in club success

Digitalization and club operations

Booking systems, customer experience platforms are key competitive advantages

Emerging padel chains

sensa PADEL



Padel Haus



Reserve



TAKTIKA PADEL

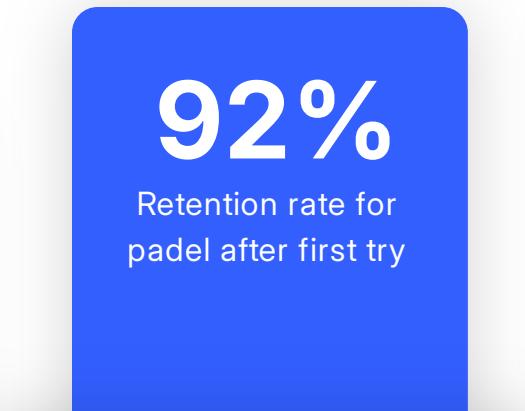


Pickleball and padel: a healthy coexistence



30%

Of padel clubs have
pickleball courts



"Any racket sport, I think they all help each other out. I see the same with pickleball players trying padel for the first time. The conversion in most cases is one way, meaning people try padel and they just want to play padel; they don't want to go back to tennis or pickleball. We have a 92% retention rate in terms of people who come to try this sport for a second time returning for a third time."

- Santiago Gomez, CEO of Padel Haus

Pickleball, the American sport, is more widely known in the US than padel, however, that is starting to change...In addition, its smaller courts attract different player profiles compared to padel

Padel requires strong cardiovascular endurance, agility, and strength to sustain performance levels. While pickleball also demands good footwork and quick reflexes, its smaller court and lighter ball require less physical exertion.

Market Analysis

Brazil grows while facing beach tennis competition, and Colombia via multiclubs



Brazil

"The Brazil padel market is growing at a speed of 3 courts per day" –

President of the Brazilian Padel Federation

Digitalization

Brazil has a high level of digitalization, bookings, communities, and communication for both sports are mobile-first

Argentina

Proximity to Argentina has influenced the sport's growth in southern Brazil. But cultural rivalry with Argentina makes padel feel "foreign"

Perception

Padel is often seen as an upscale sport due to its strong association with Spain and exclusive clubs. Beach tennis is viewed as accessible

Cost level

Lower average ticket for padel compared to Europe, but there's growing demand as more people want to try the sport.

Beach tennis

Transition from beach tennis to padel is relatively easy due to similar skill sets. Beach tennis has an edge in affordability

Professionalization

A lot of padel academies are emerging, mostly linked to investments in the professionalization of new generations



Colombia

Región Costeña

21 Clubs
62 Courts

Medellín

36 Clubs
117 Courts

Eje Cafetero

12 Clubs
33 Courts

Valle del Cauca

21 Clubs
61 Courts

Ibagué

9 Clubs
21 Courts

Bucaramanga

6 Clubs
15 Courts

Cúcuta

4 Clubs
12 Courts

Bogotá

40 Clubs
126 Courts

Chía/Cajicá

13 Clubs
36 Courts

Villavicencio

21 Clubs
21 Courts



Clubs



Courts

Market Analysis

In Mexico, padel is experiencing solid growth in major cities and outside urban centers

Main trends of padel in Mexico



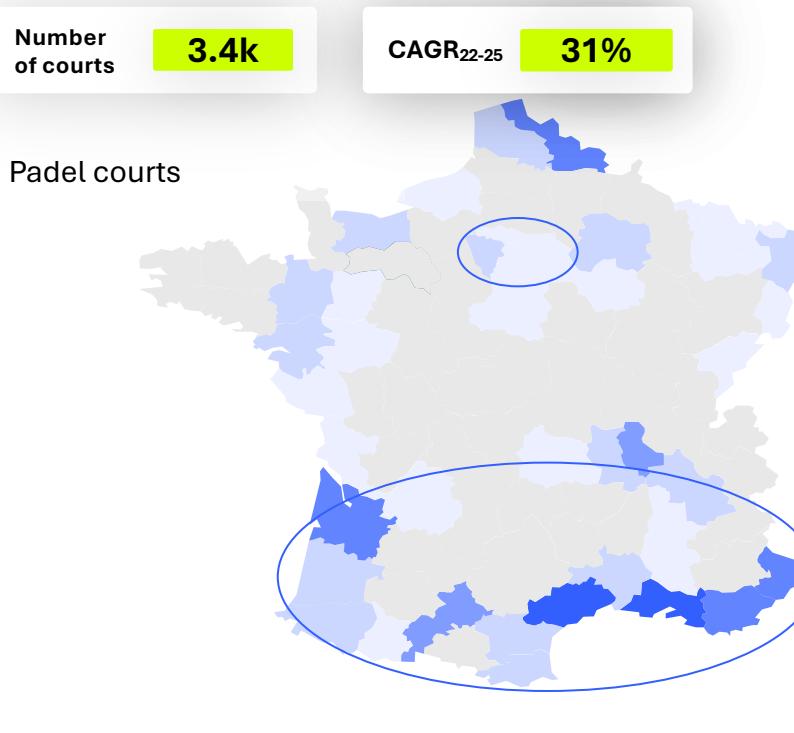
Mexico's dynamics vary across cities, Monterrey showing a highly developed market, while Mexico City presents growth opportunities due to a lower current club presence

- **Comparatively high prices in relation to mature markets such as Italy or Spain :** Some padel clubs operate with a 5-year lifespan but manage to become profitable quickly
- With many clubs and a mobile player base, clubs are forced to **create engaging products during off-peak hours:** open matches, rankings, Americanas

Emerging padel chains



The Padel Riviera - France's padel boom continues



The most dynamic region is the **Southeast of France** (Montpellier, Marseille, French Riviera) followed by the **Paris region and the Southwest (Bordeaux)**

Fondness for racket sports (similarities with tennis)

Initially tennis clubs opened padel courts, transferable skills

Celebrity role models driving interest

Zidane and Tony Parker as examples of investors and players

Appearance of padel in Roland-Garros

Premier Padel Tour held at the tennis stadium, increasing visibility

Lack of Marketplace App

Limits accessibility and connections between players and clubs

Affiliation requirement to play tournaments

Limits participation, discouraging newer, casual participants

Padel has entered mainstream society in the UK

Number of courts **0.8k**

CAGR₂₂₋₂₅ **50%**

Padel is also beginning to emerge in **Glasgow**, which has grown from 0 to 6 clubs in the past 6 months and is still underserved, due to its population of 3.5 million



Padel in the UK is steadily growing, with regional chains expanding into nationwide ones. In addition to celebrity money, brands like Slazenger are increasingly engaging with the sport, either through acquisitions or organic growth.



“Slazenger to open its first UK padel club”
The Padel Paper, September 2024

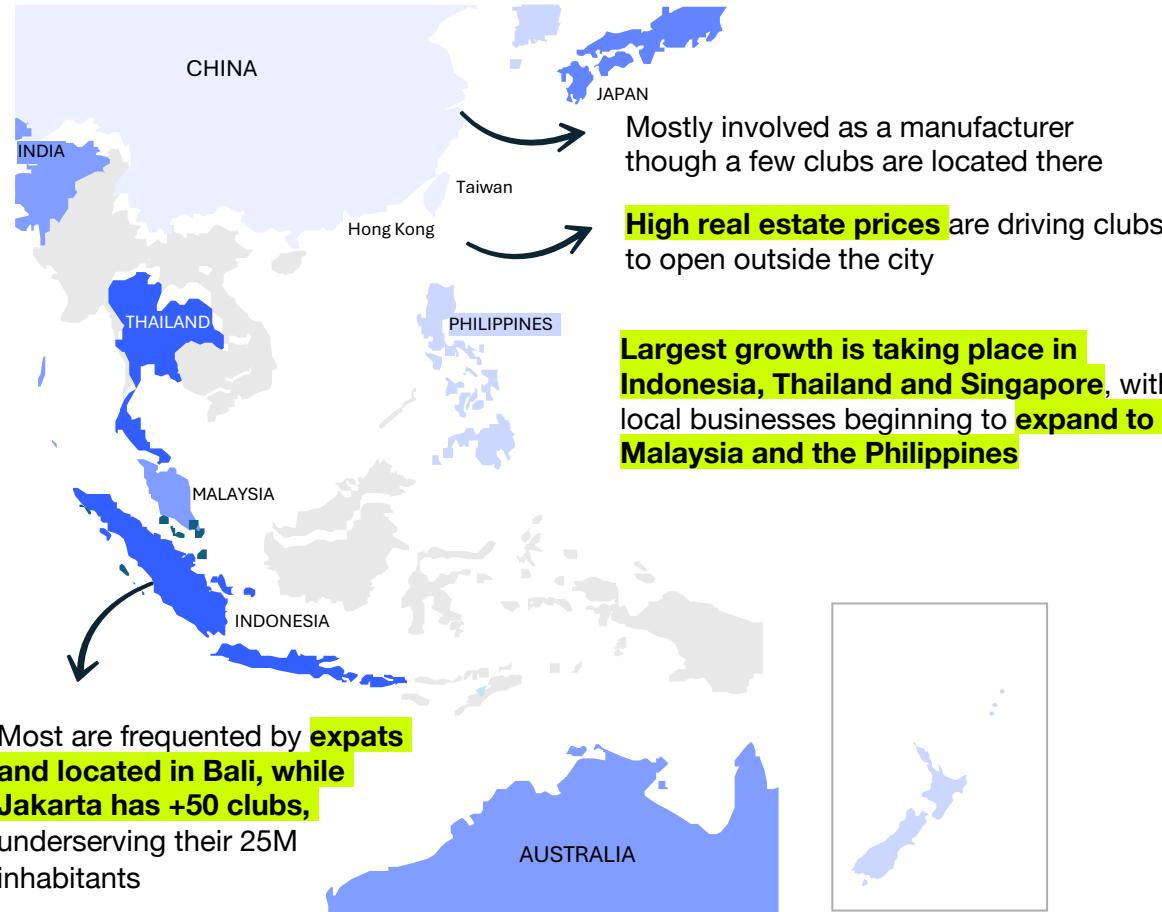
“Slazenger are to open their first UK padel club in Leeds on 11 October with the wheels already in motion on a further 11 locations. Slazenger Padel Clubs are backed by Frasers Group, the UK’s largest retail group, which owns the likes of Sports Direct, House of Fraser, Everlast Gyms and Jack Wills.”.



“Britain now third biggest market in world”
City AM, June 2025

“Britain is now one of the top three padel markets in the world by revenue, fuelled by new club openings and ever-increasing demand for court bookings. By games of padel played, Britain ranks as the fifth biggest market in the world, while it has also been dubbed the “most social” nation because it has the highest ratio of open matches to regular bookings worldwide”.

Padel expands across APAC, led by Indonesia



- 1
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Expat-Driven Growth

Expats sparked early interest, with locals joining as federations and motivated by seeing international exhibition matches develop

Collaborative Spirit

Clubs often team up to grow the sport and reach wider communities

Payment Challenges

Adapting to local payment systems is key to enabling smooth bookings

Multi-Site Club Development

Successful clubs often expand by replicating a proven model across new sites

High Demand for Bookings in Advance

Courts fill quickly and months in advance due to strong interest in academies and social play

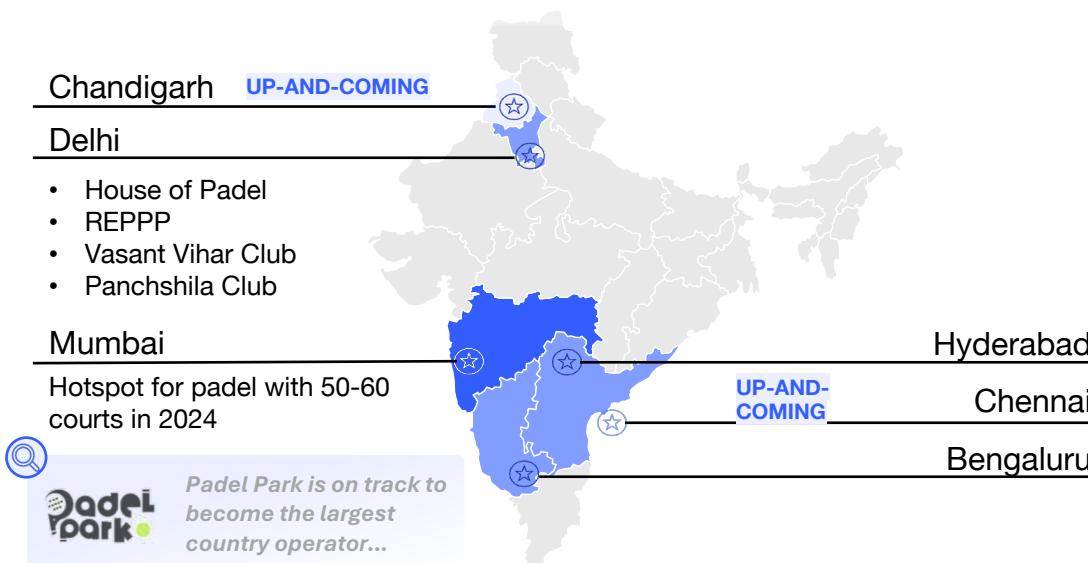
Market Analysis

Major tournaments are driving court infrastructure in India



In spite of higher infrastructure and attendant costs, the sport is spreading from big cities to small towns, though significant growth is not expected in the short term

Padel is making waves, especially in **corporate India** and exclusive **members-only clubs** who now have more options than golf for cardio and camaraderie.



Source(s): News Reports, Strategy & analysis

Celebrities with large follower bases, including **Bollywood actors, cricket players and tennis champions**, as well as the organization of **tournaments**, including official ones by the FIP and amateur events, are playing a large role in promoting padel.



"India Padel Open: Spain dominate, win men's and women's pair titles"
Hindustan Times, November 2024

"Greater Noida: At the Bennett University, on the balmy Sunday evening, the men's and women's pair from the tennis-mad nation walked away with titles as the first edition of FIP Promotion India Padel Open drew to a close."

"Padel is growing quickly in India, and it is great to bring such High Ranking Padel players to our country. This should give a boost to all sports fans and Padel fans. With a 400 % growth of Padel courts in the country and the sport will continue to grow."

- Mahesh Bhupati, Indian tennis champion

60M

Even though only around **5% of India's population is considered affluent**, meaning they have sufficient disposable income for premium leisure activities, that still translates to over **60 million people** – which is **equivalent to the entire population of countries like Italy or Spain**, where padel is booming.

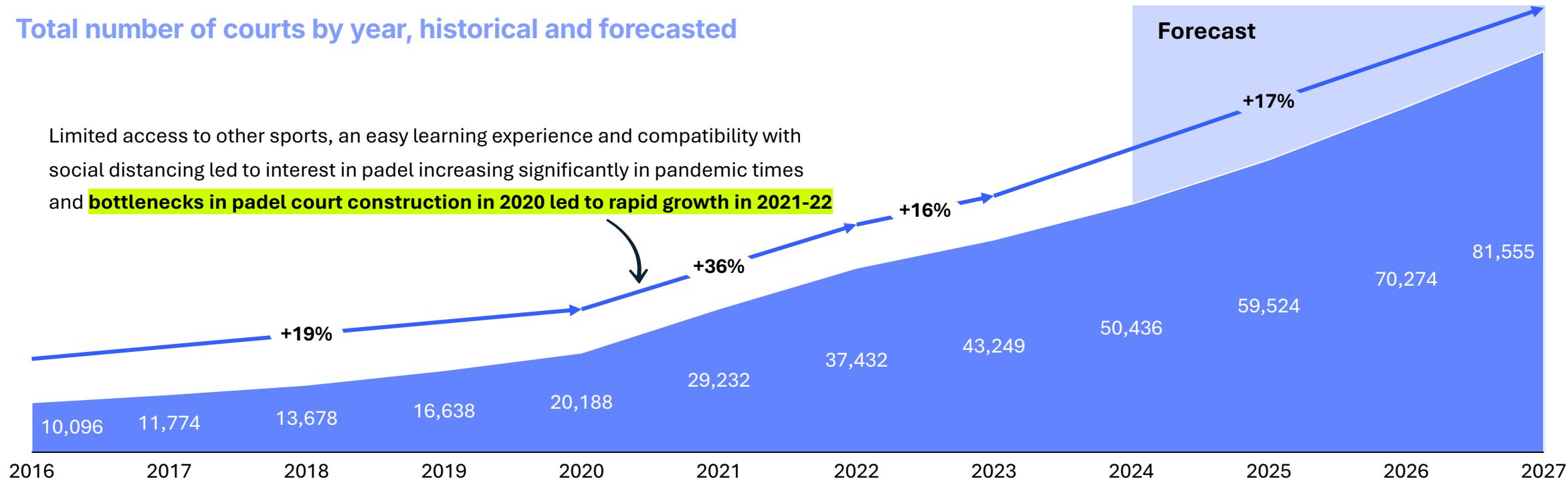
In the Middle East, the future of padel is indoors

	 Qatar	 United Arab Emirates	 Saudi Arabia
Commonalities	<ul style="list-style-type: none"> High seasonality, with indoor clubs filling up while outdoor clubs lose momentum Service driven, with employees that work to drive up demand, low digital value Local investors but high number of international players (expats) Competitive sports have little tradition, but padel is gaining traction thanks to its ease for newcomers and royal involvement 		
Club openings, consolidation	Almost none due to government restrictions that attempt to limit number of clubs based on users	Only very large clubs emerging , highly consolidated	Only very large clubs emerging , government incentives for sports infrastructure
Maturity stage	Mature market , clubs distinguish themselves through very high-quality services (e.g. Sports Dom)	Very mature, consolidated market , small outdoor clubs closing down and very few new openings	Golden years , high growth
Gender aspects	Separate courts for women or differing playing times	Almost no gender separation	Fewer and fewer separation by gender
<p>→ Women remain a minority, more female expats than local padel players</p>			

Market Analysis

The sport is expected to continue growing at pre-covid levels

Total number of courts by year, historical and forecasted



After a **significant acceleration during and following the pandemic**, the rise of padel has stabilized, **returning to the pre-covid path with a similar growth rate**, which padel is expected to maintain in the next years



CHAPTER 2

Economics

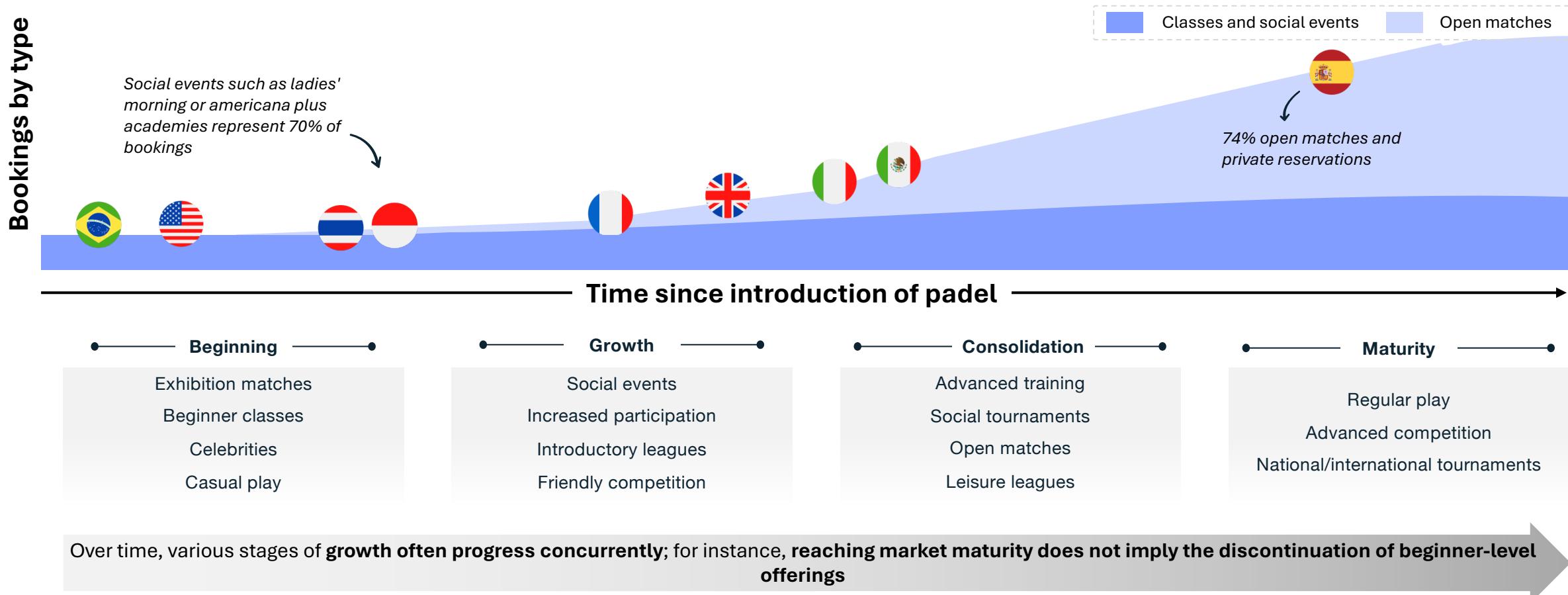


Padel economics show a clear evolution from beginner-focused activities to competitive open play. In early markets, bookings are dominated by classes and social events, helping players get started.

As participation grows, players shift toward self-organized matches, boosting bookings. This trend reflects rising confidence and skill levels.

Indoor and outdoor court balance also affects pricing and availability, **with weather conditions influencing court usage and overall revenue.**

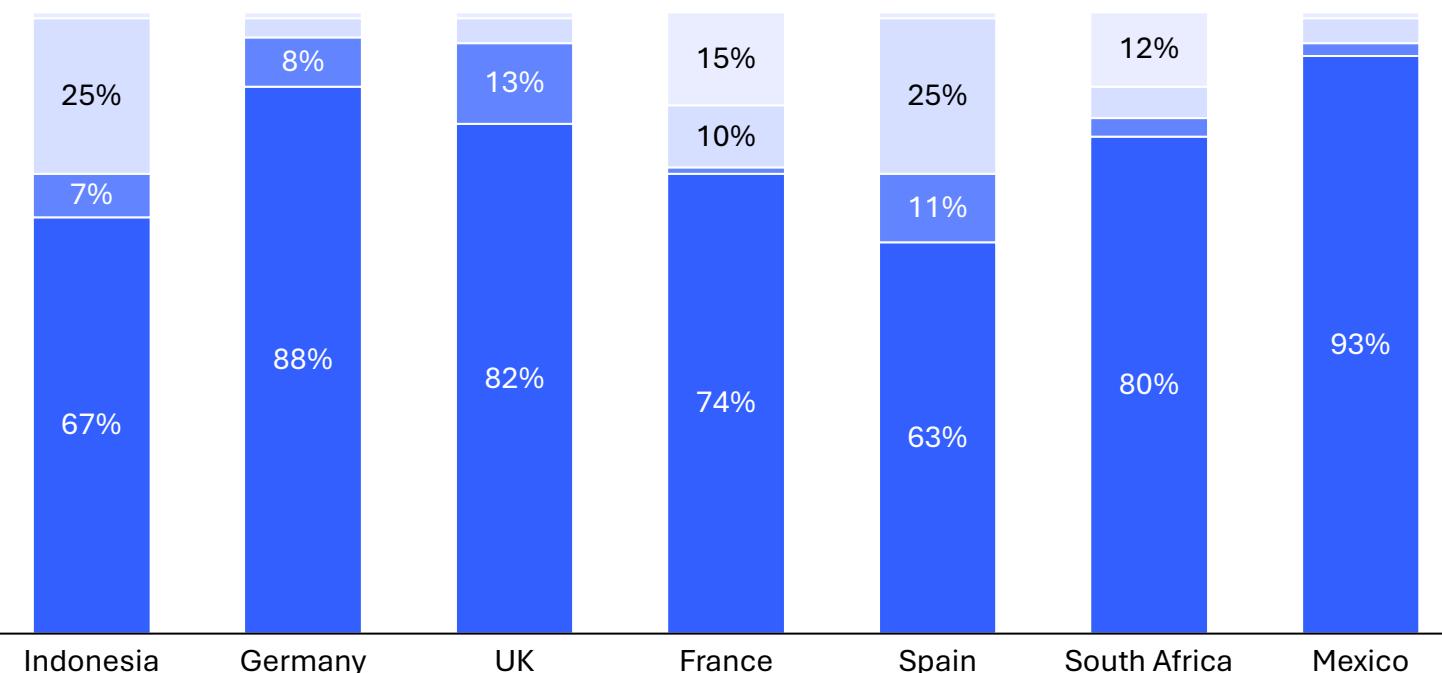
Booking share shifts from social events and classes to open matches over time



Booking types vary by region, with open matches usually favored by experienced players

Occupation by booking type (%)

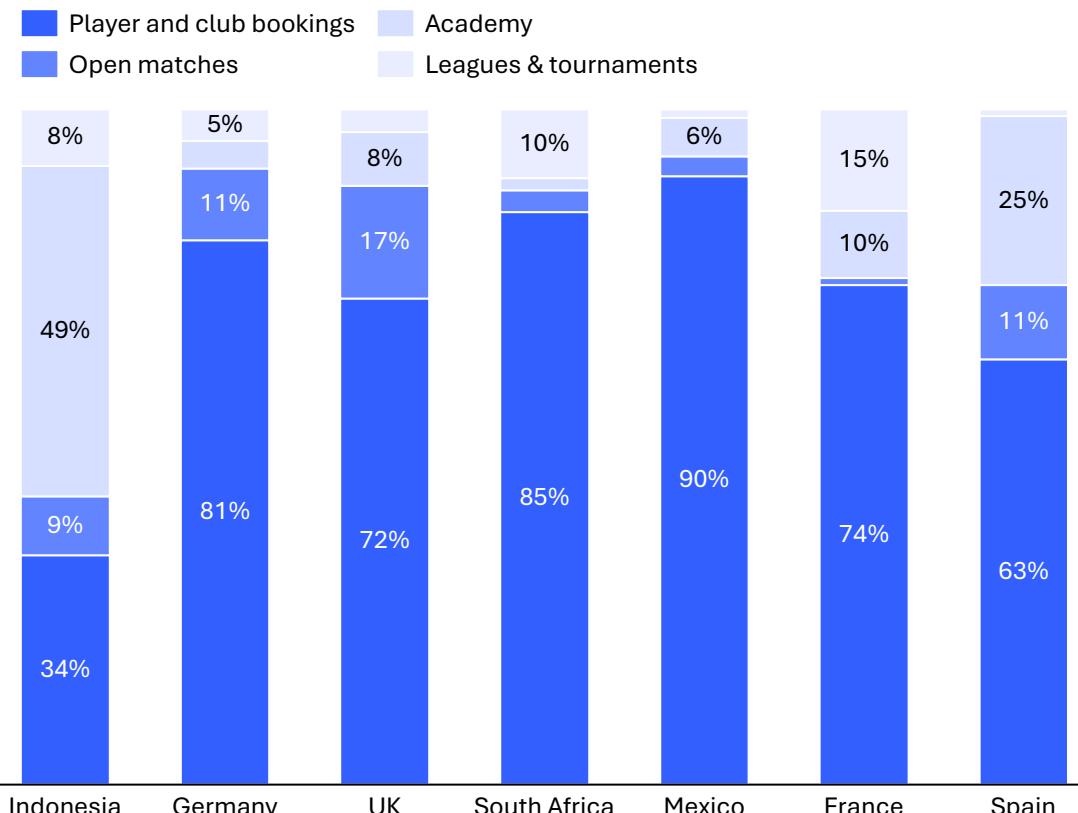
Player and club bookings	Academy
Open matches	Leagues & tournaments



- Emerging markets (e.g., Indonesia) show higher booking rates for single and course classes (academy), since players are new to the game
- As players improve their skills, they begin to lose interest in classes and start booking more direct matches reservations, so that their level increases and is more accurately reflected
- Once a country reaches full maturity (as in the case of Spain), experienced players tend to continue playing through private bookings, while newcomers typically enter the sport by enrolling in classes
- Social factors have a significant impact on the appeal of open matches, as reduced safety undermines users' trust in playing with strangers. This issue particularly affects open matches in South Africa and Mexico

Open matches are the most profitable booking, though only popular in mature markets

Booking types a % of gross value



Note(s): (1) The average ticket is the average price per reservation and not per hour (a reservation may be for a period of time longer or shorter than an hour), though 60–90 minutes matches are the norm
 Source(s): Playtomic, Strategy& analysis

Since leagues & tournaments include recurring games, they are more expensive

Price per hour by booking type [€/h]

Country	Player and club bookings	Open matches	Academy	Leagues	Tournaments
Indonesia	33 €	33 €	54 €	N/A	51 €
Germany	43 €	48 €	44 €	50 €	71 €
UK	52 €	65 €	75 €	125 €	70 €
South Africa	23 €	30 €	22 €	47 €	68 €
Mexico	34 €	49 €	24 €	27 €	64 €
France	29 €	32 €	30 €	N/A	25 €
Spain	24 €	27 €	28 €	26 €	42 €

Avg. ticket 28 € 30 € 34 € 55 € 56 €

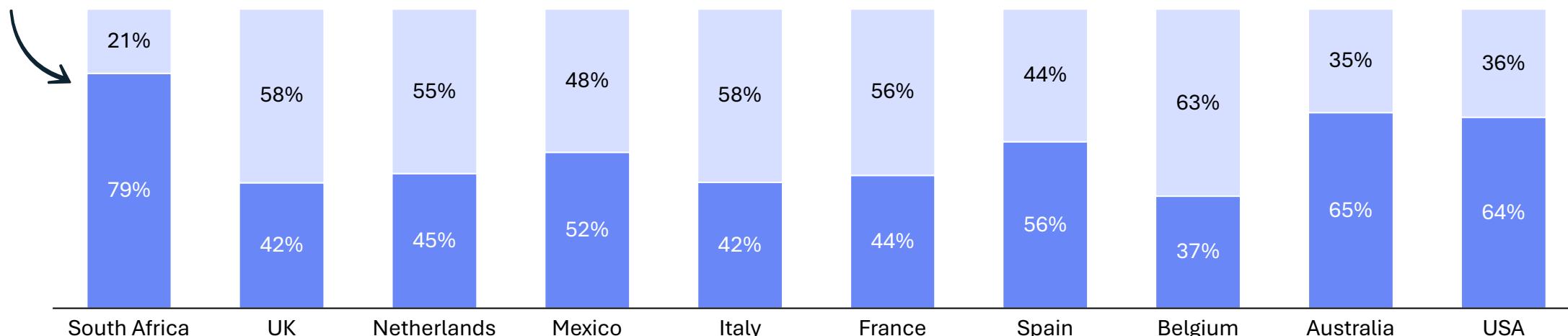
Indoor vs outdoor courts: prices and availability

Avg. ticket⁽¹⁾ by court

Indoor courts	25 €	57 €	40 €	39 €	49 €	32 €	25 €	37 €	70 €	90 €
Outdoor courts	23 €	48 €	36 €	29 €	37 €	24 €	22 €	33 €	53 €	60 €

South Africa has recently experienced booking challenges due to frequent rainfall and a high proportion of outdoor courts, vulnerable to weather disruptions

Indoor courts Outdoor courts



Achieving **higher occupancy levels depends heavily on accurately balancing** indoor and outdoor court availability,

taking into account **price sensitivity and weather patterns to optimize both accessibility and revenue**



CHAPTER 3

Professionalization & role of software

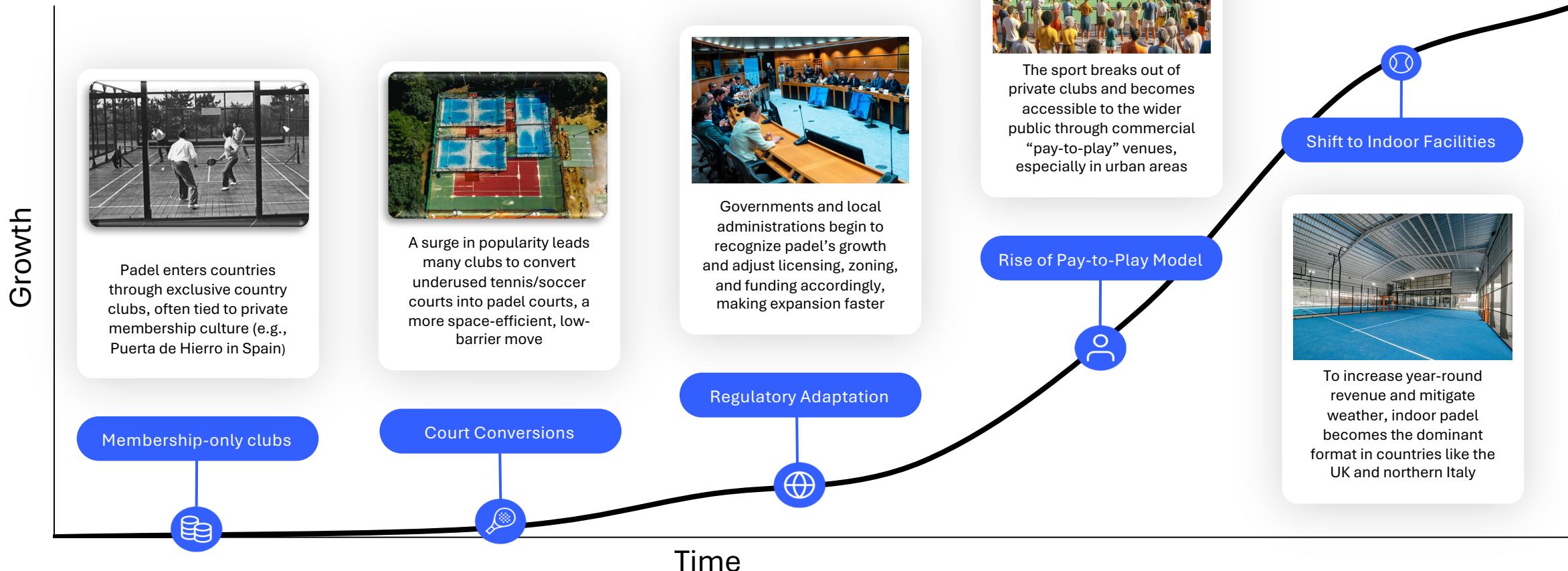
Padel's business model has evolved from exclusive, membership-only clubs to a more inclusive, pay-to-play ecosystem, driven by urban demand, regulatory adaptation, and commercial potential.

This shift has unlocked broader access, replacing long-term fees and entry barriers with flexible, app-based bookings. **As a result, participation has surged.**

Digital platforms now play a central role, **enhancing user experience, enabling data-driven coaching, and fostering community growth.**

Professionalization and Role of Software

Padel has evolved from a membership-only to a pay-to-play model...



Source(s): News Reports, Strategy& analysis

...with different access and experience types

1

Membership model

- ① **Requisites:** Usually require recommendations for entry, family tradition of belonging to the club or someone leaving to take their place
- ② **Fees:** One time entry down payment and recurring monthly membership fee

Real Club Puerta de Hierro

Entry down payment: €300k
Trimester quota: €333

Hurlingham Club

Entry down payment: £400k
Trimester quota: £1,400

- ③ **Use of the courts:** included at no extra charge, though no-shows may incur a penalty
- ④ System is generally less digitalized

2

Pay-to-play model

- ① **Requisites:** Open access
- ② **Fees:** Pay per use; rates vary based on location, time slot, and court type
- ③ No long-term commitment required
- ④ Prices often reflect local real estate value, premium areas may charge significantly more
- ⑤ **More digitalized:** booking and payments are typically done through apps or online platforms
- ⑥ **Optional add-ons:** Equipment rental, coaching, lighting (for evening play), recording of match highlights etc.

Digitalization, advantages for padel development



Increased Accessibility and Participation

Lower barriers for new players lead to regular play, encouraging skill development



Data and Analytics for Clubs and Coaches

Professional infrastructure and personalized experiences improve, making clubs and coaching more viable and scalable



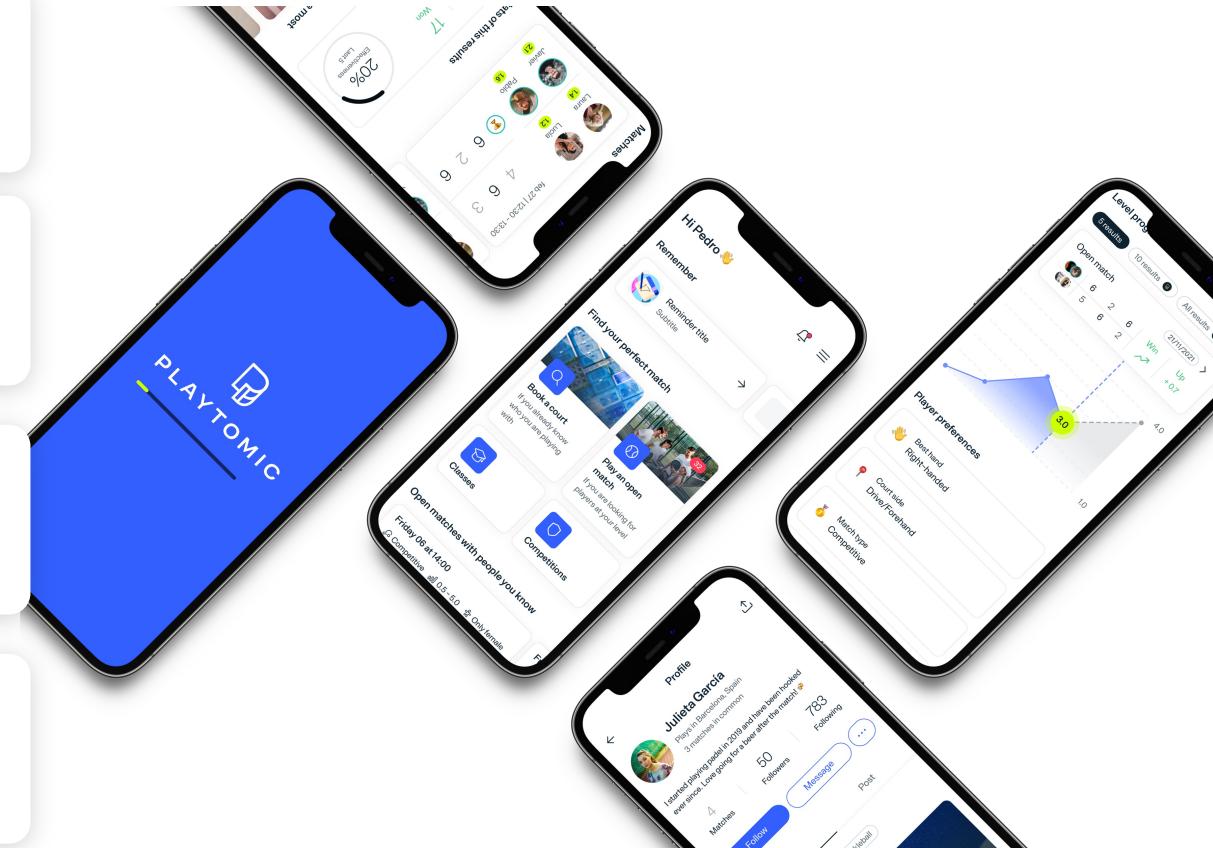
Community Building and Competitive Ecosystem

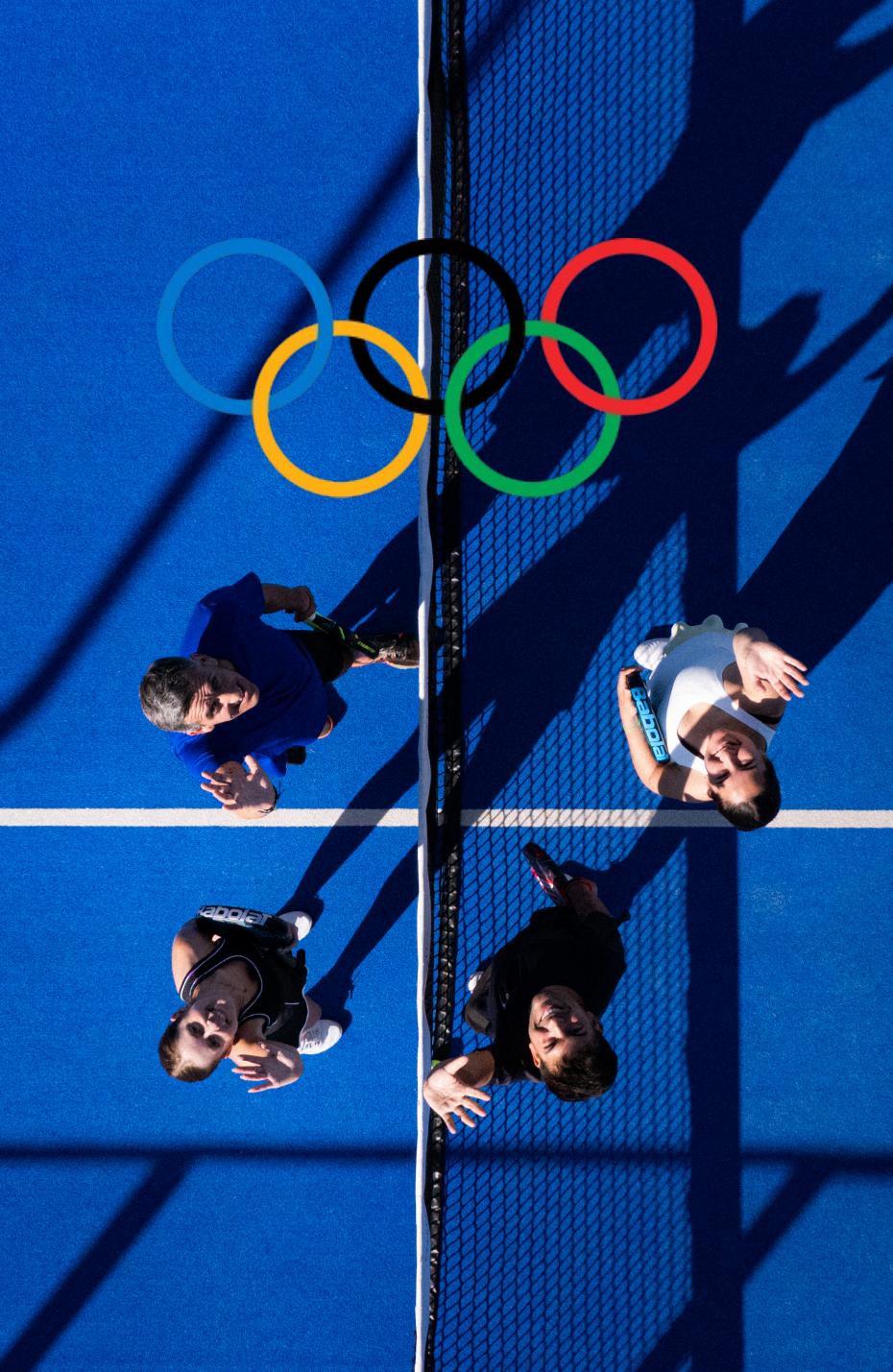
Creates a sustainable ecosystem that mirrors more mature sports.



Professional Pathways and Talent Identification

Creates a bridge between recreational and professional play, increasing career opportunities in padel





CHAPTER 4

Olympic Path

While padel is aligning well with Olympic values, such as gender equality, ethical standards, and growing international reach, its path to inclusion is hindered by the fact that only Spain and Argentina currently play the sport at a truly elite level.

Nonetheless, the FIP's (The International Padel Federation) active efforts to globalize padel through youth programs, partnerships, and expanded tournaments show strong intent to close this competitive gap.

Olympic inclusion would bring major benefits, including increased funding, visibility, and athlete support.

Requisites to be an Olympic sport



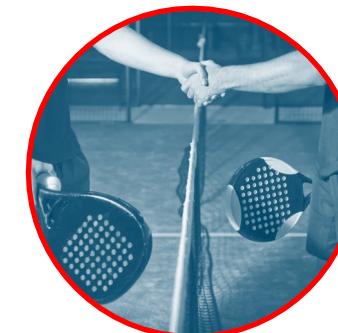
Compliance

- Olympic Charter**
- World Anti-Doping programme**
- Olympic Movement Code on the Prevention of the Manipulation of Competition**



Global Reach

- Practised by
60 Countries and 3 continents



Well Established Rules

The sport must have **standard rules that are applied internationally** at all competition levels required to have a **history in hosting competitions and events.**



Ethical considerations

Related to the ethics of the Olympics, **promoting peace, respect and fairness** for all participants. It should **not promote** any form of **discrimination or violence.**



Approval time frame

A new sport needs to be approved **7 years prior** to the Olympic Games it will be included in.

Chief Sport Officer of the Brisbane 2032 Organising Committee, Kit McConnell stated that,
"We had a very clear vision about the games being more youth, more urban, more women."



Olympic Track

2025, a key year for padel

"The IOC Executive Board, meeting today in Costa Navarino, Greece, has decided that the initial sports programme of the Olympic Games Brisbane 2032 will be determined at an IOC Session in 2026."

The Olympic Charter's Rule 45 states that the **Olympic Programme is decided** by the IOC Session "in principle **seven years prior** to the opening of the concerned Olympic Games."

The **one-year extension** was agreed upon by the IOC and the Brisbane 2032 Organising Committee.

Olympic Track

Where Padel stands on the Olympic track

87

National federations are currently affiliated with the FIP



2

Padel also has (1) well established rules that are applied internationally and a history of tournaments, including Premier Padel and Hexagon Cup and (2) promotes peace, respect and fairness



5

Continents where padel is currently played, with the highest representation of players in Europe (59%)



3

Complies with (1) Olympic Charter, (2) World Anti-Doping Code, (3) Olympic Movement Code on the Prevention of the Manipulation of Competition



40

Percent of padel players were female in 2024, reflecting the FIP's Gender Equality Policy, further reinforced by the IPF Code of Ethics



Since January 2025, 16 National Federations have adhered to the FIP, reaching 87 federations.

Source(s): Olympic Charter, Strategy& analysis

Olympic politics: additional factors



Host Preferences

In the new process of selecting sports, the IOC **has given a lot of flexibility to the local organising committee** to make recommendations.

Facility Legacy

There is a very strong push to **eliminate the need for costly facilities that later fall out of use**, a strong criticism of the 2004 Athens Olympics.

TV Appeal

As **broadcasting rights represent the primary revenue stream** for the Games, the IOC aims to align with broadcasters' and audience's preferences.

Next Generation

Attracting young athletes uninterested in traditional sports and **ensuring long-term relevance** by selecting sports that appeal to next-gen viewers.

Cultural diversity

Promoting global reach by including sports that engage **underrepresented regions**, such as cricket that may spark interest in South Asia.



Moreover, it is problematic for a sport to be played proficiently only in Spain and Argentina to become part of the Olympic Games. Countries where the sport is still emerging struggle to compete with those where players have trained their entire lives.

The FIP is highly involved in the Olympic goal

FIP Strategic Priorities 2025-2027:



"Increase the number of players and the countries where padel is played in the world and in particular the number of national federations affiliated with the FIP"



"Monitoring and supporting the growth of new generations is one of FIP's primary objectives on a global level"



"Giving more visibility to senior athletes as custodians of great experience, technical skills and values"

Which they plan to achieve through 5 programs:

1 Sports Programme

2 Communication and Digital plan

3 Development Programme

4 Sustainability Programme

5 Social Programme



"FIP strengthens ties with Padel America and Padel Asia to drive globalisation of padel and its Olympic pathway mission"
International Padel Cluster, April 2025

"At the Qatar Major Premier Padel 2025, the FIP and Padel America and Asia formalized their partnership, focusing on infrastructure, youth development, and expanding into new markets."



"Premier Padel, Hexagon Cup and FIP strike strategic partnership as padel targets Olympic inclusion"
SportsPro, February 2025

"Buenaventura, founder of the Hexagon Cup, stated "Together, we have the goal of globalising the sport and achieving its Olympic inclusion at the earliest opportunity."



"FIP looks to the future: President Carraro at the European Olympic Committees (EOC) Assembly"

FIP News, March 2025

"President Carraro met with Bach, President of the IOC and Samaranch, candidate for the upcoming presidency to reinforce a shared vision for padel's continued global expansion and prominence."



"IOC President Thomas Bach visits BNL Italy Major Premier Padel"
Padel FIP, June 2025

"The International Padel Federation (FIP) and Premier Padel were delighted to meet International Olympic Committee (IOC) President Thomas Bach at the BNL Italy Major Premier tournament today at the iconic Foro Italico."

Impact of becoming an Olympic sport

Olympic status offers institutional...

Regulations by the National Sports Comission

Example of Spain

Top priority at National High-Performance Centers:

- Elite infrastructure, specialized coaching, and advanced medical and scientific support

Benefits for athletes:

- Reserved educational spots and merit-based advantages in public sector job access
- Tax exemptions, special Social Security agreements, grants

Preferential Access to funding for Olympic Sports

Annual ordinary subsidy

60M

allocated in 2025
by the CSD to all
sports federations,
*priority for Olympic
disciplines*

Next Generation EU funds

500K

Max per federation
out of 6M for
technological
upgrades

... as well as commercial benefits

The commercial appeal of the Games is expanding.



60%

Uplift in sponsorship revenue in the Paris Olympics

New Olympians are gaining massive social media visibility.



8M

New Social Media followers for Brazilian skateboarder after Olympic performance

Sport-related posts show significant increases.



75%

#Surfing posts after surfer Gabriel Medina's performance in 2024 Olympics



CHAPTER 5

Conclusions

Padel continues its global rise, with strong growth in 2024 and projected increases in court numbers in the near future. **Interest is spreading fast, especially in the US, APAC, and Latin America**, with digitalization emerging as a key differentiator for club performance.

With 92% player retention and increasing tournament activity, **padel is evolving into a sustainable sport with strong Olympic ambitions for the Brisbane 2032 games**.



Key takeaways

- 1** Club openings increased by 26%, with 7k new courts built globally in 2024, signaling sustained growth across multiple regions
- 2** Even though growth rates vary by country, with some seeing gradual increases and others accelerating more rapidly, padel is now growing at a faster and more sustainable pace
- 3** Growth has now stabilized along a pre-COVID trajectory, after reaching an all-time high, likely due to a backlog of court installations postponed during the pandemic
- 4** Pickleball and padel are expected to coexist healthily, with 30% of padel clubs in the US also having pickleball courts, and a 92% retention rate among first-time padel players
- 5** While classes and social events are the most common types of bookings in countries where padel is still emerging, private reservations and open matches become predominant as players improve their skills

Key takeaways

- 6** Open matches allow clubs to charge higher ticket prices than classes, though player and club SaaS bookings remain the main source of revenue due to their strong popularity
- 7** Achieving higher occupancy levels relies heavily on effectively balancing indoor and outdoor court availability, taking into account price sensitivity and weather patterns to optimize accessibility and revenue
- 8** Padel has evolved from a membership-only model to a pay-to-play approach: a more digitalized way to experience the sport that has accelerated its expansion and development through greater accessibility
- 9** 2025 is a key year for padel's Brisbane 2032 Olympic track, with the FIP highly involved advancing this goal. However, it remains challenging for a sport played at a high level in just 2 countries to be added to the Olympic programme.
- 10** Becoming an Olympic sport would bring benefits both institutionally (increased funding, grants and improved training facilities) and commercially (greater sponsorship revenue and wider social media visibility)

A photograph of two young men on a padel court. The man on the left is wearing a dark t-shirt and shorts, flexing his right arm and shouting with excitement. The man on the right is wearing a white t-shirt and shorts, with his mouth wide open as if shouting or cheering. They are standing behind a black and yellow padel racket. In the background, there are green trees and a clear blue sky. The word "OYSHO" is printed on the glass panels of the court fence.

Where padel **happens**



PLAYTOMIC



#FINDYOURPERFECTMATCH