

# Global Padel Report

2024 Release



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# 01

## Introduction



## Introduction

# Navigating the shifting winds of padel

## From unexpectedly explosive growth to the solid, sustained expansion of a thriving global community

*Dear padel enthusiast,*

*We are thrilled to present to you with the latest report on the global padel industry, compiled by Playtomic and Strategy& from PwC group.*

*Although the levels of development and participation vary widely between different nations, padel clearly established itself as a steadily expanding global sport in 2023.*

*This comprehensive document not only details the various booming markets of the padel industry, but also highlights the regions which have gained in importance, as well as those that didn't meet their growth forecasts last year.*

*Using comprehensive data, this report further examines the growth and behavior of players around the world, and highlights how the incredibly accessible and social nature of padel has helped transform it into a rapidly growing global sports phenomenon.*

*Padel has a bit of everything. It gives players the opportunity to both spend time with old friends and meet new people... sharpen their skills and get great exercise... compete fiercely on the court and socialize leisurely off it, all in an incredibly fun and dynamic environment that offers something for everybody.*

*Ultimately, we believe this report underscores the sport's remarkable potential and demonstrates that collaboration across the global padel landscape will ensure its continued success. So, let us leverage this opportunity to all work together to secure a bright future for this extraordinary sport.*

**Pablo Carro**  
Co-Founder Playtomic

**Elena Martín**  
Partner Strategy&

## PLAYTOMIC



CO-FOUNDER  
Pablo Carro



MANAGING DIRECTOR  
Antonio Robert



CHAIRMAN  
Per Roman

## strategy&

Part of the PwC network



PARTNER  
Elena Martín



MANAGER  
Marcos Manen

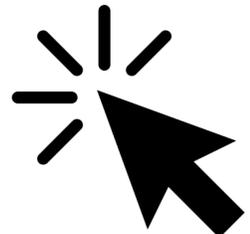


CONSULTANT  
Ana Carrasco

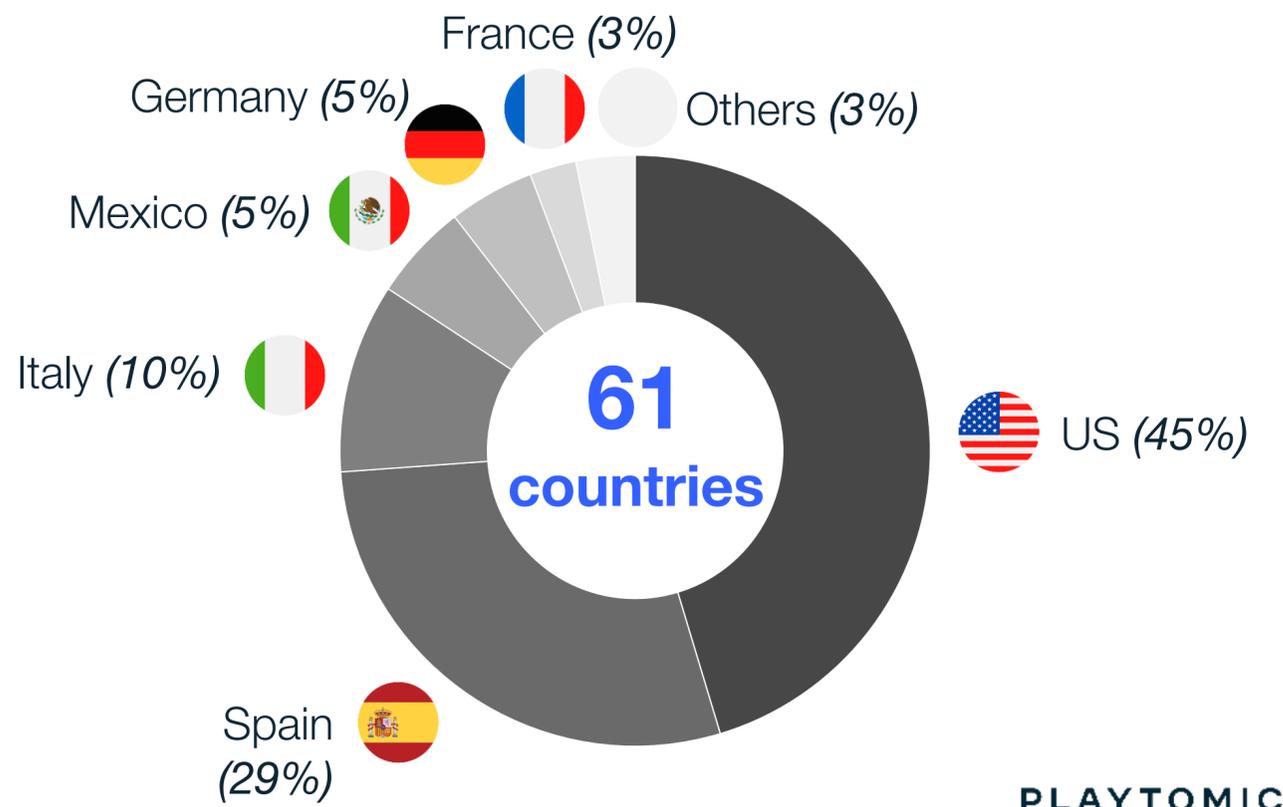
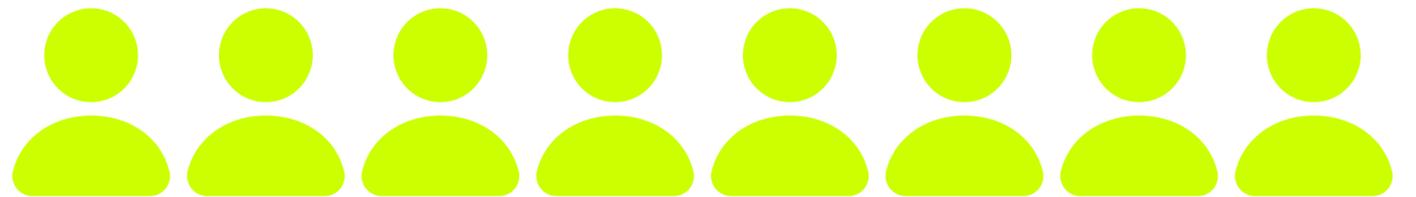
Introduction

# Highlights from 2023 report

**800+** citations and other notable mentions in the global media



# 88M+ views



# 2023 media citations by source type



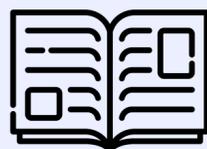
**470+** Online news sites



**210+** Newspapers



**55+** Blogs



**10+** Trade publications

**“Playtomic report: the padel industry will grow to reach 6 billion euros in 2026”**

*Yahoo! Finance, June 2023*

“Playtomic has published a report highlighting the booming markets of the padel industry and highlighting how social relations are driving the growth of the sport.”

**“El informe de Playtomic analiza el crecimiento de la industria del pádel”**

*Europa Press, Junio 2023*

“Playtomic, la plataforma líder en reservas de pistas de pádel ha publicado *Global Padel Report 2023*. Este completo informe analiza el sólido crecimiento y el prometedor futuro del pádel.”

**“Rapport Playtomic: le secteur du padel va croître pour atteindre six milliards d’euros en 2026”**

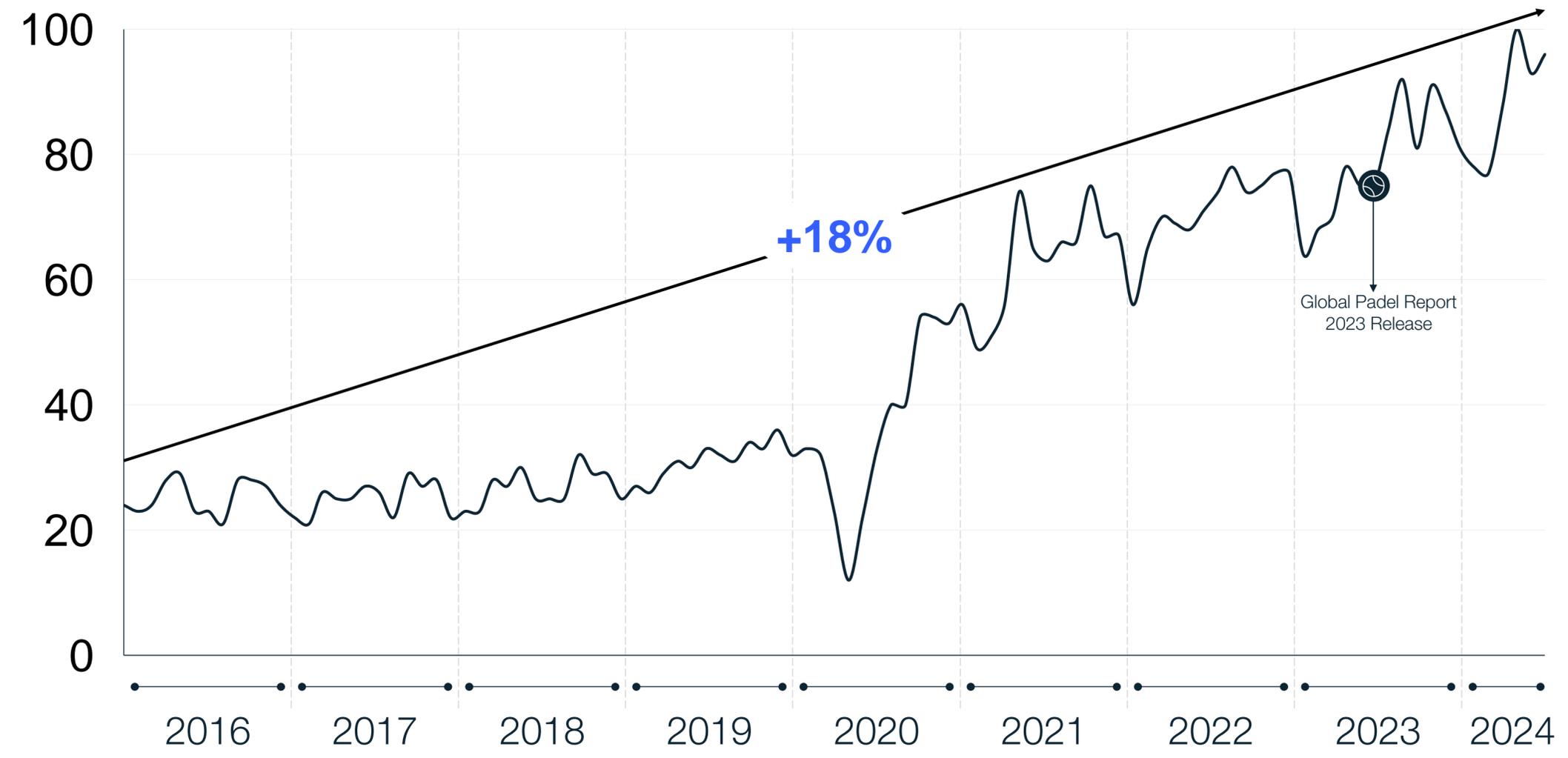
*PR Newswire, Juin 2023*

“Playtomic a publié un rapport soulignant les marchés en plein essor du secteur du padel, ainsi que la façon dont les relations sociales stimulent la croissance de ce sport.”

# Introduction

# Google searches for “padel” continue to grow YoY

Base 100 Index – Relative weight of “padel” over Google searches



The volume of searches for “padel” on Google has grown by an impressive 18% per year since 2016, highlighting the rising interest in the sport around the world

Source(s): Google Trends for keyword “padel” worldwide (as of May 2024), Strategy& analysis  
Global Padel Report by Playtomic

# Introduction

# Interest in the sport is growing significantly across the globe

 New country vs. Global Padel Report 2023



## Top growth countries vs. 2023

# 1	Denmark
# 2	Portugal
# 3	Netherlands
# 4	Belgium
# 5	Panama
# 6	Italy
# 7	Chile
# 8	Norway
# 9	South Africa
# 10	Croatia
# 11	Paraguay
# 12	Finland
# 13	Argentina
# 14	UAE
# 15	France

Padel is rapidly **gaining momentum on a global scale** and steadily evolving into a widespread international sporting phenomenon

Note(s): (1) Relative interest by country and variation compared to Global Padel Report 2023  
Source(s): Google Trends for keyword "padel" worldwide (as of May 2024), Strategy& analysis

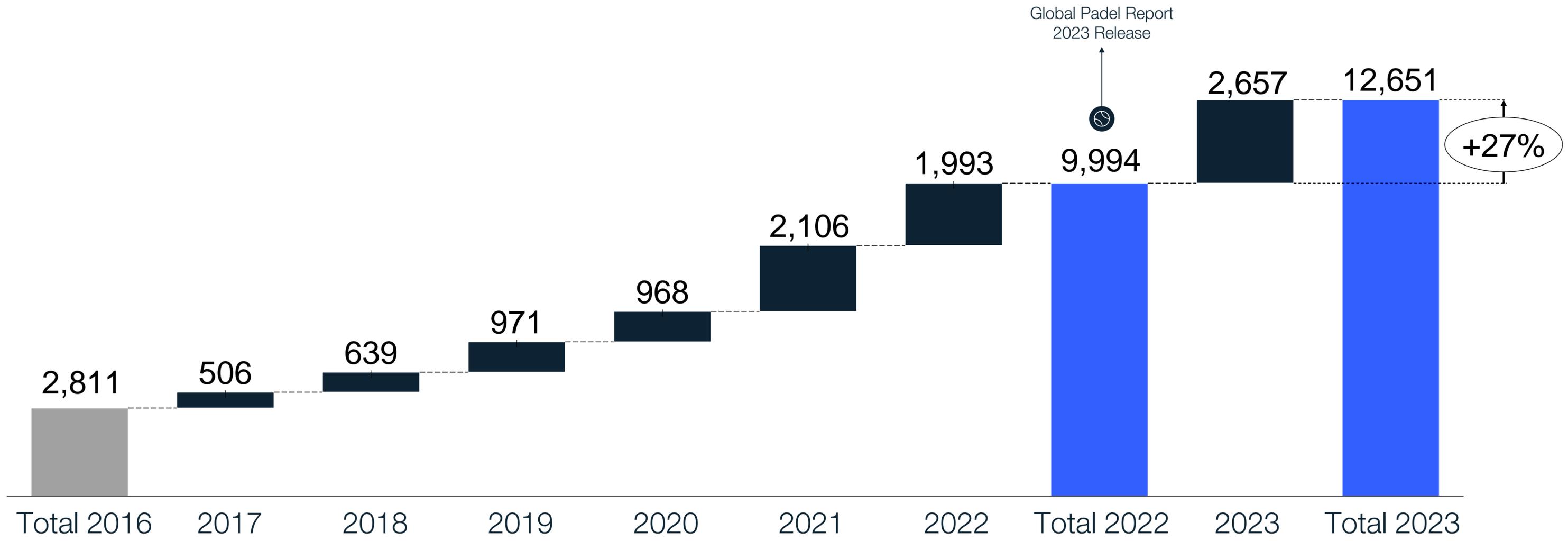
# 02

## Market Analysis



# Market Analysis

## Last year alone, 2,500+ new padel clubs opened...<sup>(1)</sup>



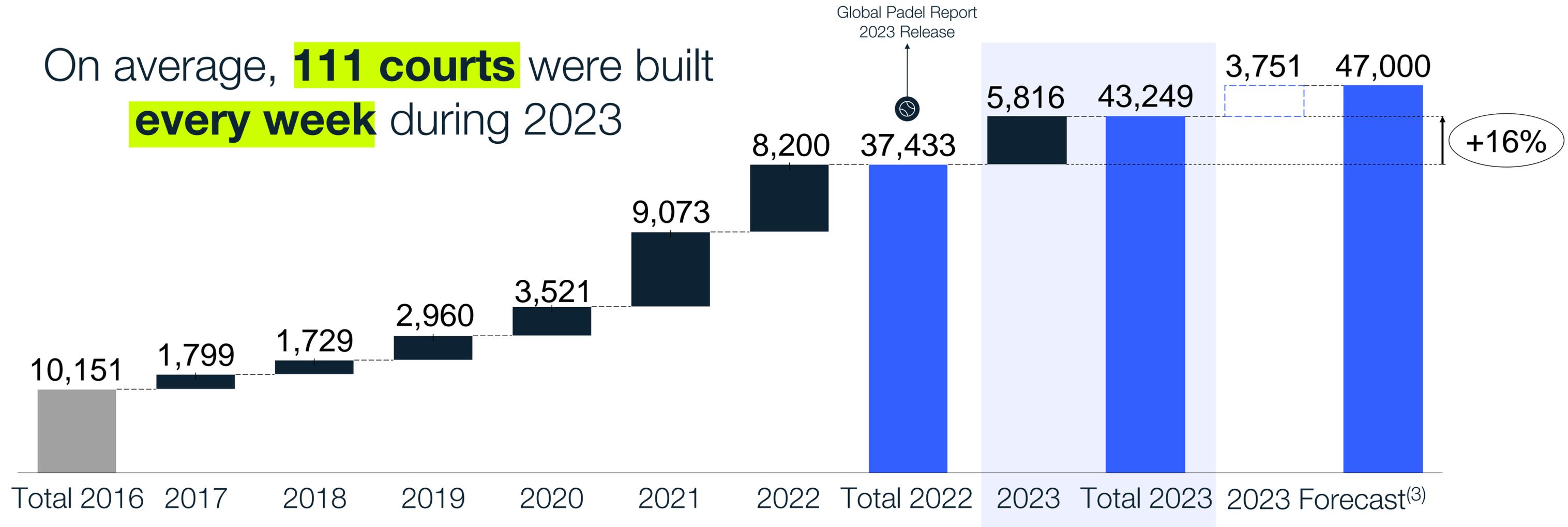
On average, **51 clubs** were opened **every week** during 2023

Note(s): (1) Accommodation facilities not included. LATAM has been excluded due to lack of reliable information. Data may differ from previous reports due to the use of more reliable sources  
Source(s): Local federations, Padel Lands, Playtomic, Strategy& analysis

Market Analysis

... and almost 6,000 new padel courts were built globally<sup>(1)</sup>

On average, **111 courts** were built **every week** during 2023



The total number of padel courts around the world grew by 16% in 2023 – but **even greater growth is expected for 2024**

Note(s): (1) Calculations based on top court manufacturers sales. LATAM has been excluded due to lack of reliable information (2) Around 2,500 courts built during 2021 were delayed projects from 2020 due to the pandemic restrictions. "Real" courts built during 2021 would have been c.6,500. (3)

Expected courts for 2023 from Global Padel Report 2023

Source(s): Court manufacturers, Local federations, Padel Lands, Playtomic, Strategy& analysis

# Market Analysis

## In 2023, regions outside Europe began gaining importance<sup>(1)</sup>

In 2023, court manufacturers focused more of their commercial efforts on the remaining regions in Europe, as well as the US

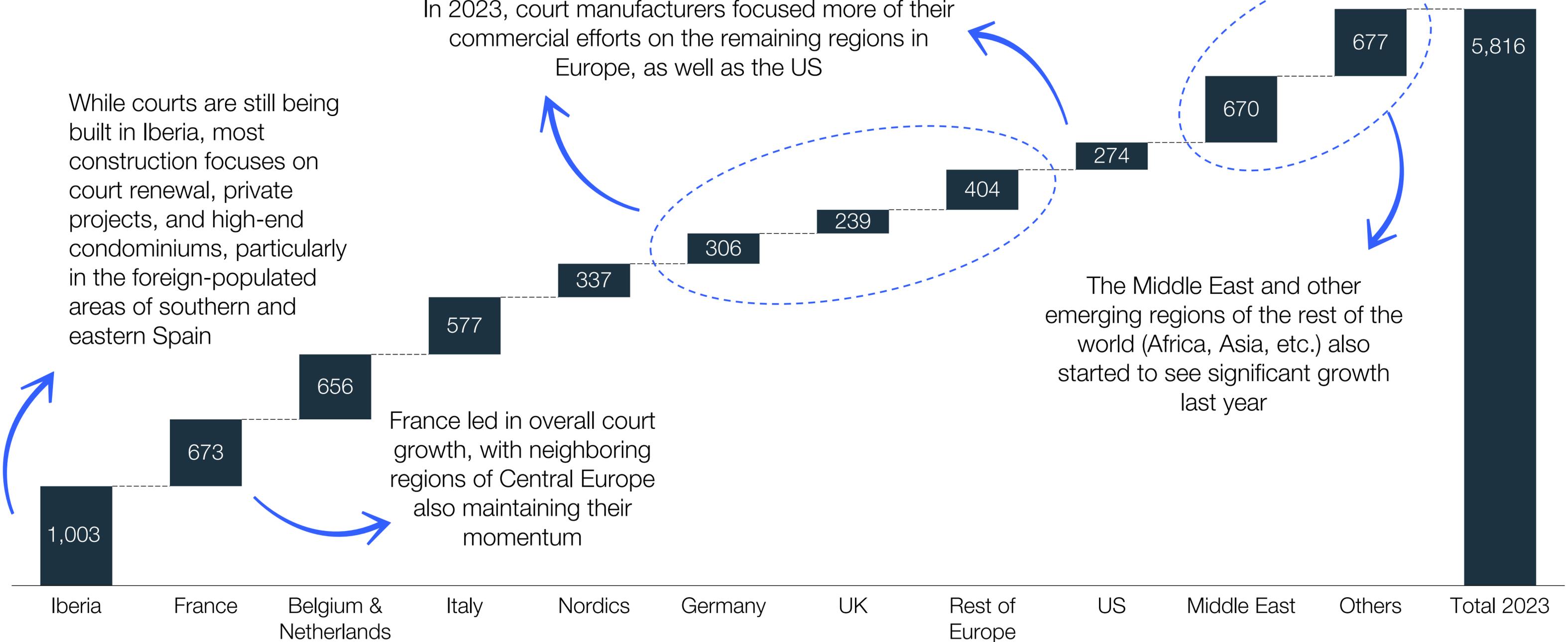
While courts are still being built in Iberia, most construction focuses on court renewal, private projects, and high-end condominiums, particularly in the foreign-populated areas of southern and eastern Spain

Iberia  
1,003

France  
673

Belgium & Netherlands  
656

France led in overall court growth, with neighboring regions of Central Europe also maintaining their momentum



The Middle East and other emerging regions of the rest of the world (Africa, Asia, etc.) also started to see significant growth last year

Note(s): (1) Calculations based on top court manufacturers sales. LATAM has been excluded due to lack of reliable information  
 Source(s): Court manufacturers, Local federations, Padel Lands, Playtomic, Strategy& analysis

Market Analysis

# Spain and Italy are still the leaders in the number of courts

Δ vs. forecasted courts GPR 2023 <sup>(1)</sup>	-1,239	-73	199	-192	-287	-348	-17	-212	-94	-211	-146
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# New Courts built during 2023	826 +5%	577 +7%	673 +45%	368 +26%	288 +20%	177 +18%	233 +30%	48 +6%	306 +122%	239 +95%	274 +152%
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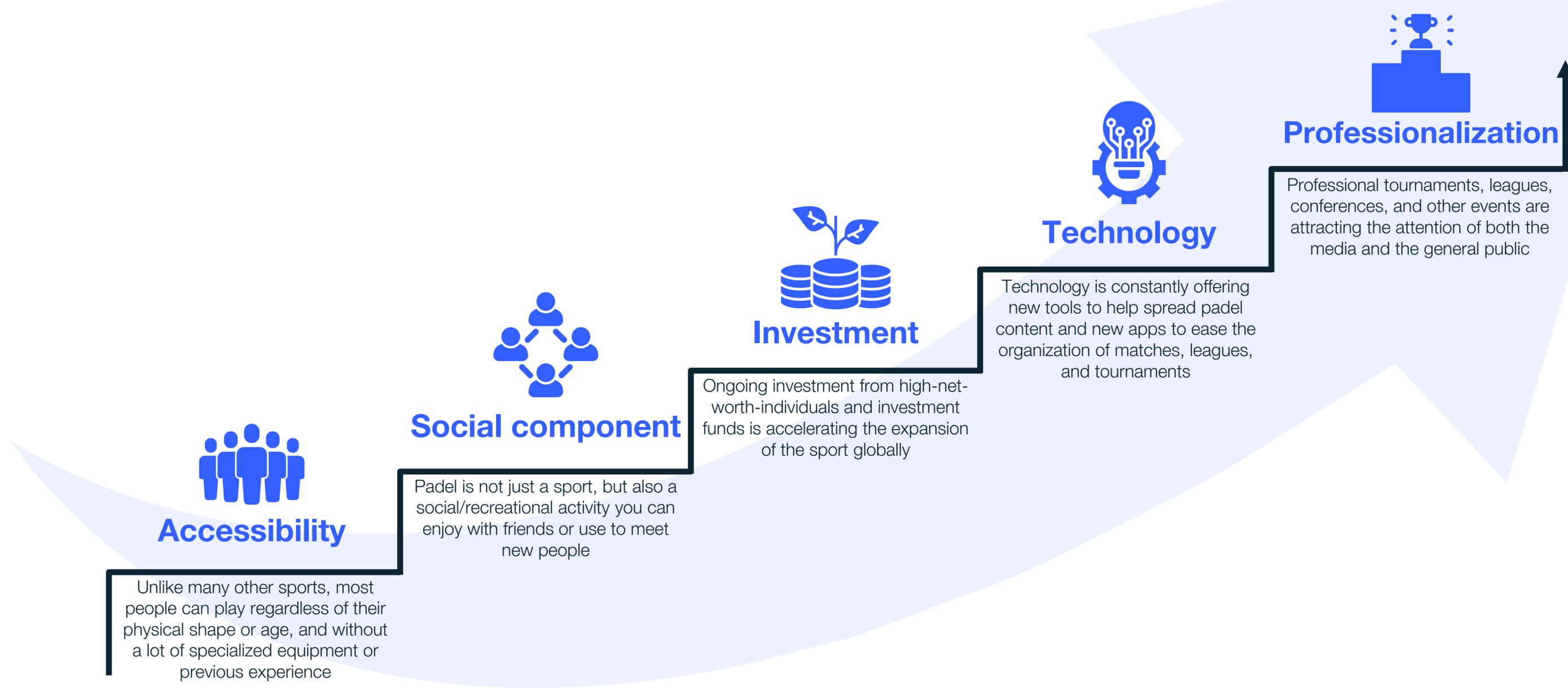
# Total Courts as of Jan 2024



... even though they fell short of their 2023 growth forecasts

Note(s): (1) Difference between the forecasted number of padel courts in the Global Padel Report 2023 and the actual number of courts. Italy base number of 2022 courts has been adjusted from previous report due to the use of more reliable data sources  
 Source(s): Court manufacturers, Local federations, Padel Lands, Playtomic, Strategy& analysis

# Multiple factors are driving padel's continued expansion



The single biggest factors boosting padel's growth are **technology** and **professionalization**

Market Analysis

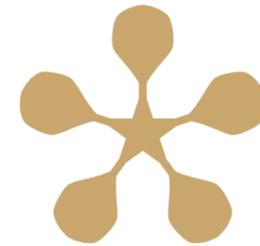
# Internationalization of professional padel

FINLAND NETHERLANDS

SWEDEN ARGENTINA

UAE KUWAIT CHILE

FRANCE ITALY



PREMIER

**PADEL**

SAUDI ARABIA EGYPT

QATAR MEXICO

BELGIUM VENEZUELA

SPAIN PARAGUAY

17 countries participating in the largest **PROFESSIONAL PADEL** competition

## Market Analysis

# Professionalization is key to the growth of padel...



## Most notable events

### French Tour Padel

- 29<sup>th</sup> Sept – 1<sup>st</sup> Oct 2023
- Nice, France
- 1<sup>st</sup> edition
- 70 exhibitors
- 17,000 m<sup>2</sup> (~183,000 ft<sup>2</sup>)

### Padel Trend Expo

- 19<sup>th</sup> – 21<sup>st</sup> Jan 2024
- Milan, Italy
- 2<sup>nd</sup> edition
- 120 exhibitors
- 18,000 m<sup>2</sup> (~194,000 ft<sup>2</sup>)

### Padel World Summit

- 21<sup>st</sup> – 23<sup>rd</sup> May 2024
- Málaga, Spain
- 1<sup>st</sup> edition
- 140 exhibitors
- 15,000 m<sup>2</sup> (~161,500 ft<sup>2</sup>)

### Racquet Show

- Date TBD
- Brazil
- 1<sup>st</sup> edition
- 60 exhibitors
- 9,000 m<sup>2</sup> (~97,000 ft<sup>2</sup>)

### Expo Padel World

- 29<sup>th</sup> – 30<sup>th</sup> June 2024
- Lisbon, Portugal
- 1<sup>st</sup> edition
- 2,200 m<sup>2</sup> (~24,000 ft<sup>2</sup>)

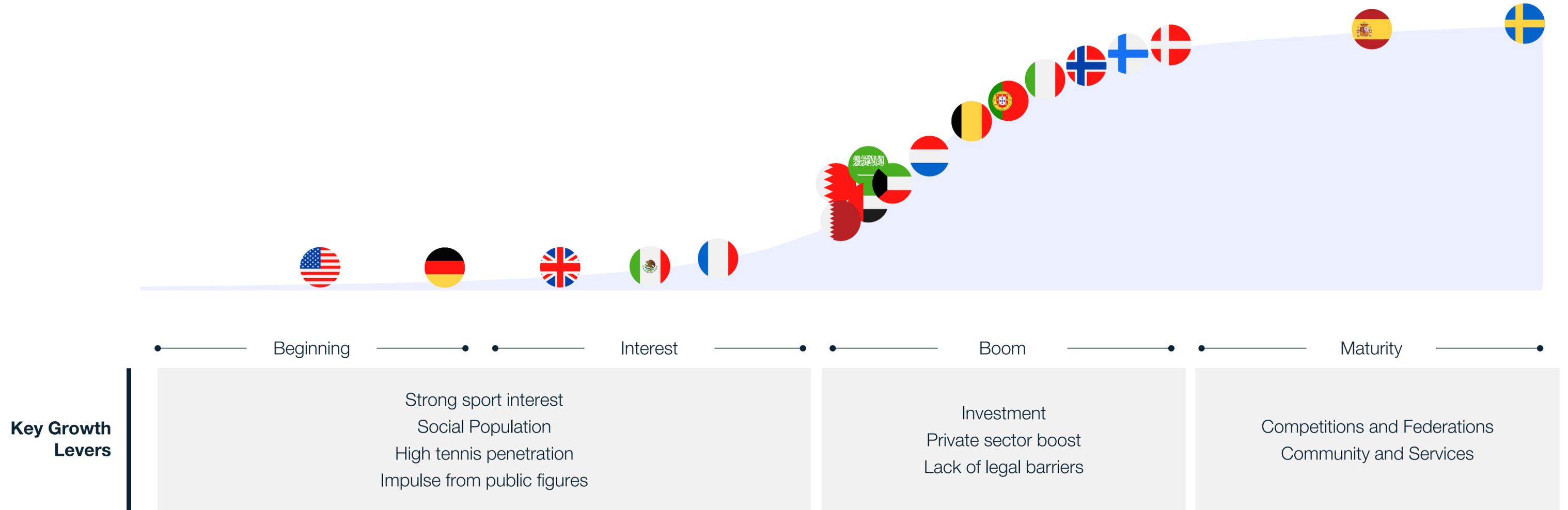
### RacquetX

- 23<sup>rd</sup> – 25<sup>th</sup> Mar 2025
- Miami, USA
- 2<sup>nd</sup> edition
- 5,600 m<sup>2</sup> (~60,000 ft<sup>2</sup>)

# Market Analysis

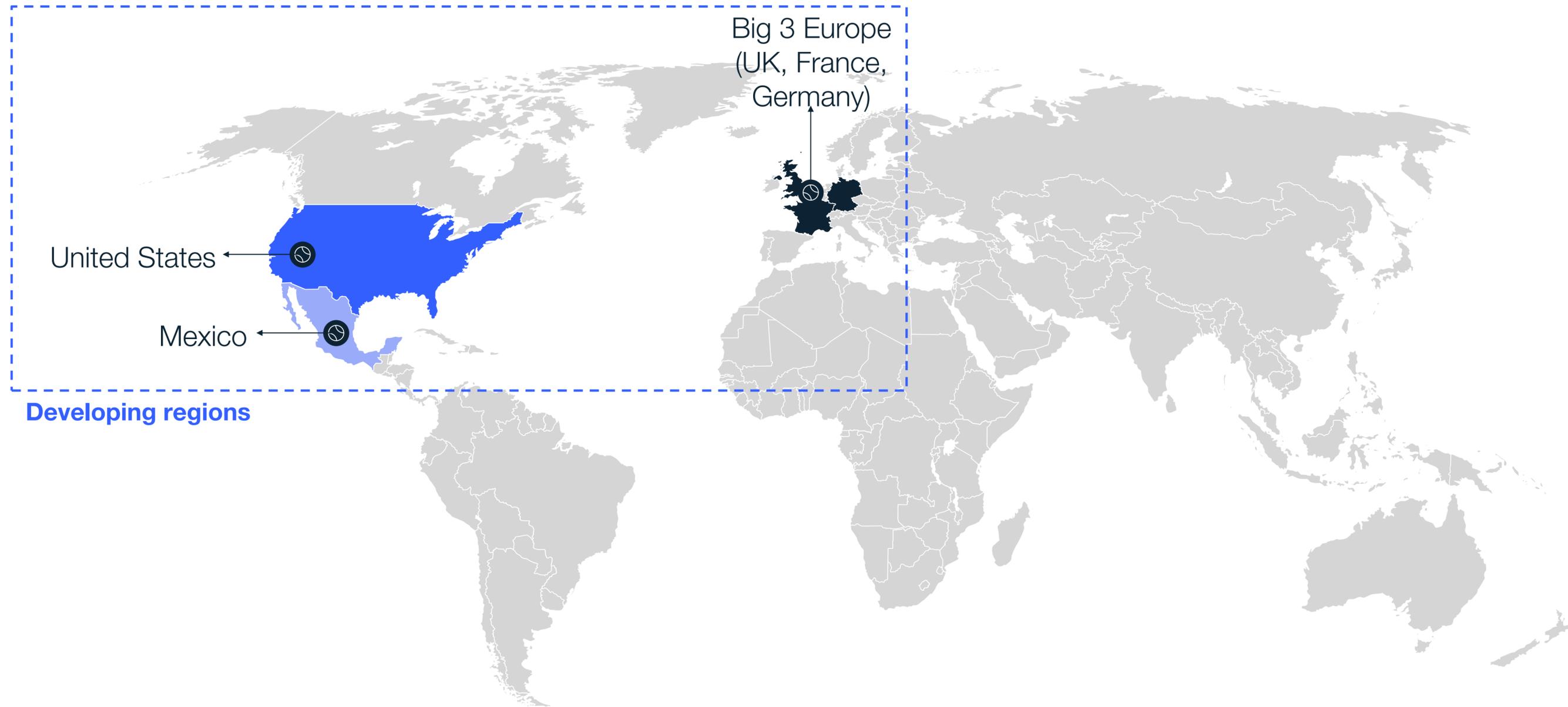
## ... as it promotes *quicker development* in many countries...

The arch of padel growth and development



Although padel has become well-established and has seen significant growth, there is still **a lot of potential in many key countries that currently struggle with regulations and real estate prices**

# ... and *raises awareness* in countries with great potential

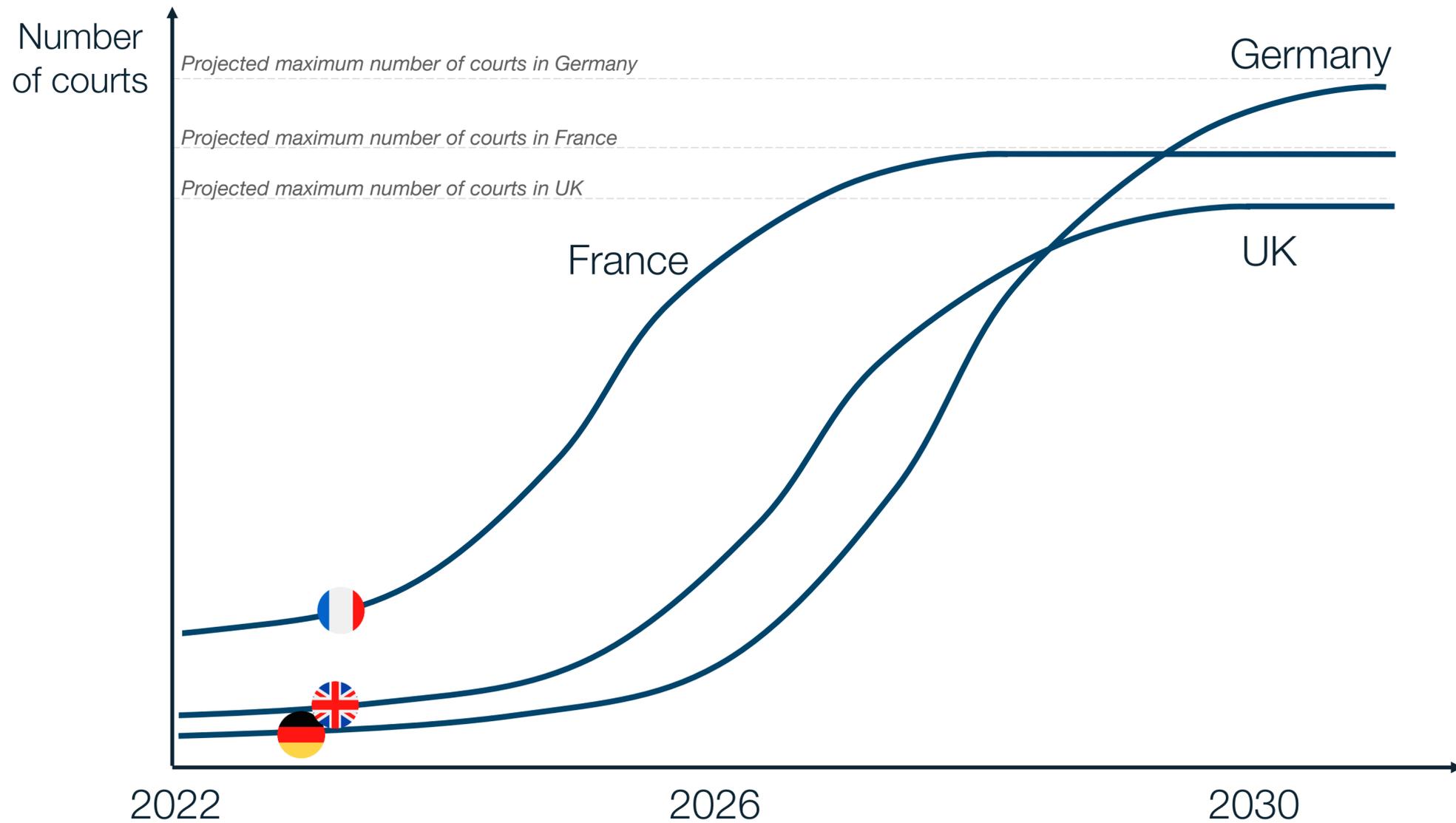


Padel is rapidly becoming a *worldwide sport*, and its future growth will be **fueled by its expansion into strategic new areas**

# Market Analysis

## Europe's "Big Three" are starting to take off -

Estimated growth trajectory of the Big Three



**France took the lead in court expansion** in 2023

due to being a relatively more mature market.

The **UK is steadily progressing** along the curve, and we anticipate a potential acceleration in the latter half of 2024 or the beginning of 2025.

**Germany's development may be temporarily hindered** by regulatory requirements.

# Market Analysis

# France continues with its steady growth -



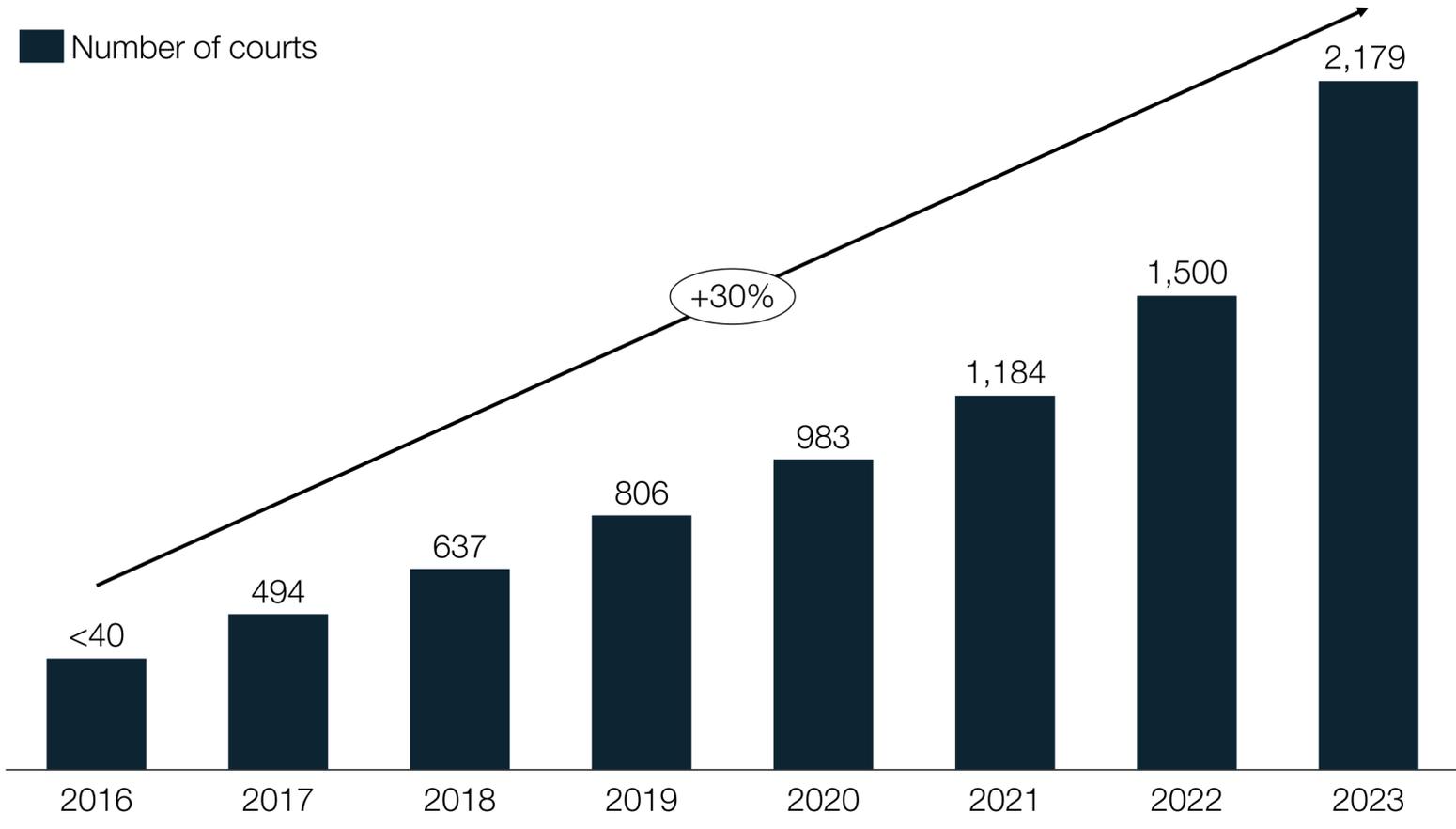
## Key Padel Metrics and Evolution

Number of amateur players **500k**

% of court saturation **8.8%**

Number of padel venues **741**

Courts per million inhabitants **33.6**



## Relevant News

### “Padel craze is sweeping across France”

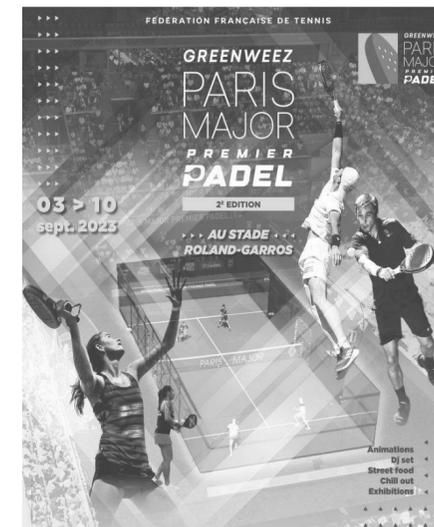
*Le Monde*, March 2024

“This ultra-popular racket sport in Spain, booming in France as well as almost everywhere in Europe. For less than five years, the number of sites has expanded throughout the country reaching record numbers.”

### “Boom of Padel in France: in just 4 years!”

*Fan2Padel*, August 2023

“The explosion of padel in France is undeniable. Citing data provided by the Fédération Française de Tennis, the number of practitioners has exploded in recent years. From 80,000 in 2018 to more than 400,000 today.”



Paris Major Premier Padel sign announcing the tournament held at the Roland Garros facilities



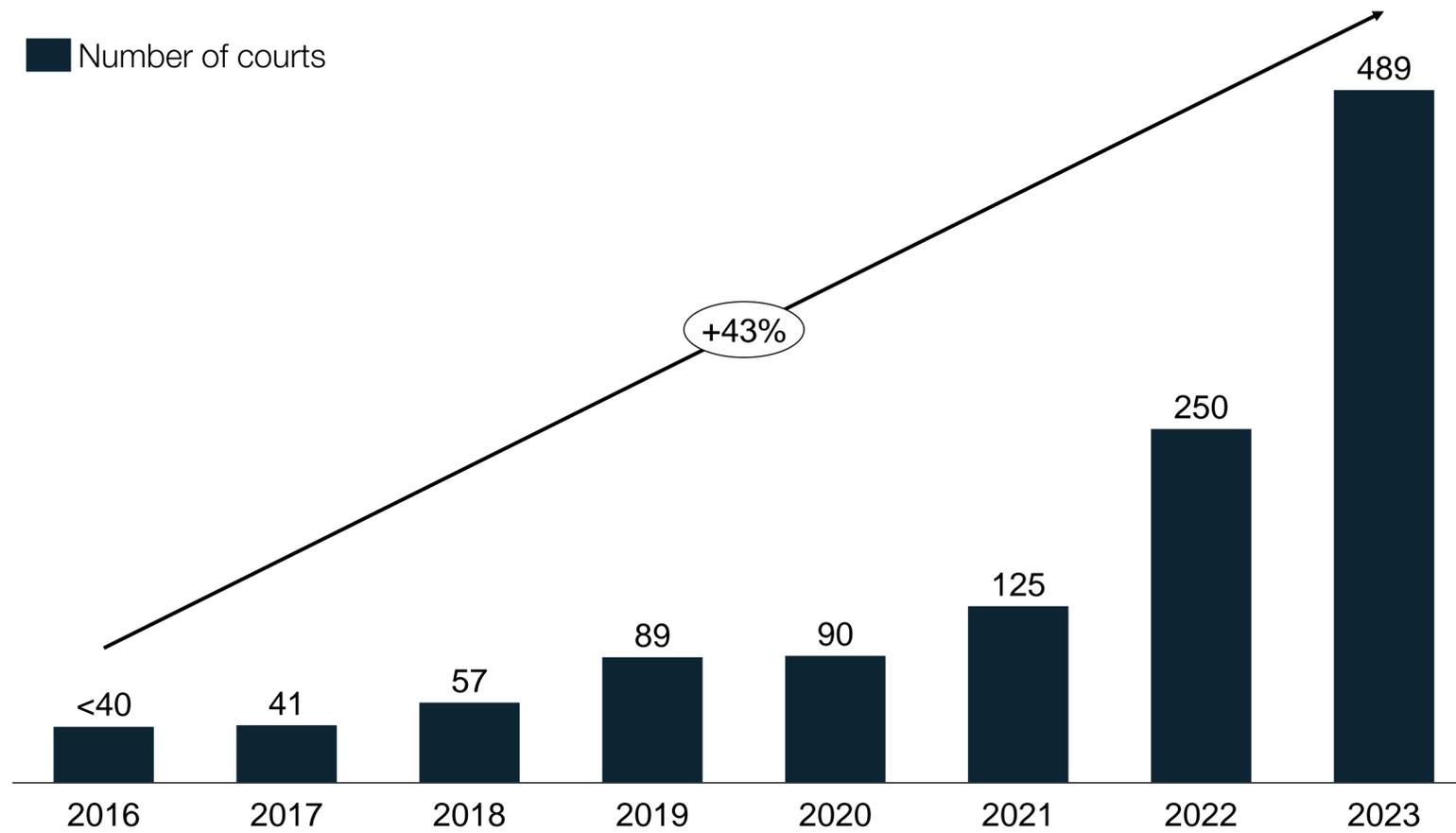
Alix Collombon, French professional padel player ranked 31<sup>st</sup> on the World Padel Tour

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

# Market Analysis

# Meanwhile, the UK is on the brink of significant growth -

## Key Padel Metrics and Evolution



## Relevant News

### “England's lawn tennis clubs gripped by padel fever”

*Financial Times*, November 2023

“The Lawn Tennis Association estimates that about 90,000 people currently play padel in the UK, up from just 6,000 in 2020. The LTA hopes there will be 1,000 courts and 600,000 players by the end of 2026, according to Tom Murray, its head of padel.”

### “Padel: Plan for £2.5m centre for booming racquet sport”

*BBC News*, April 2024

“Developers Peel Waters have been given permission to build a £2.5m complex dedicated to one of the fastest-growing sports in the UK. The facilities will include 11 padel courts, a clubhouse and a gym near the Trafford Centre in Greater Manchester.”

A **potential acceleration** in the latter half of 2024 or the beginning of 2025 is anticipated

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

# Market Analysis

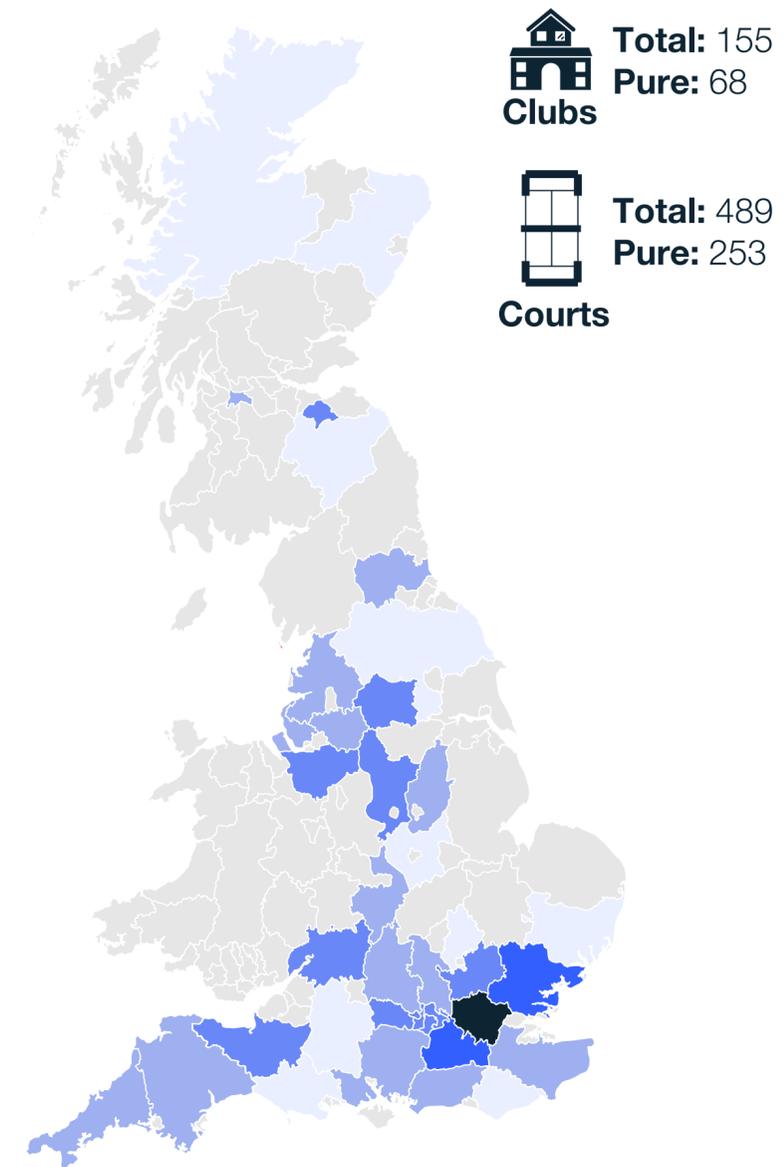
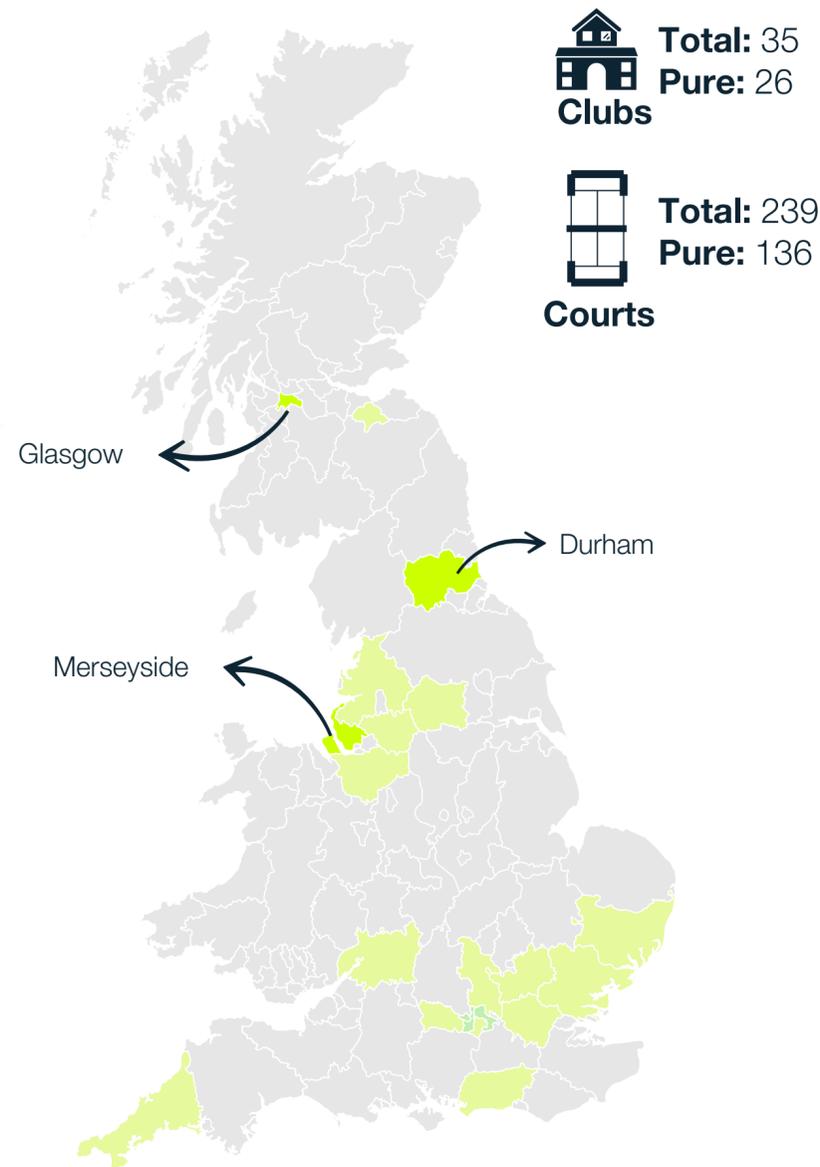
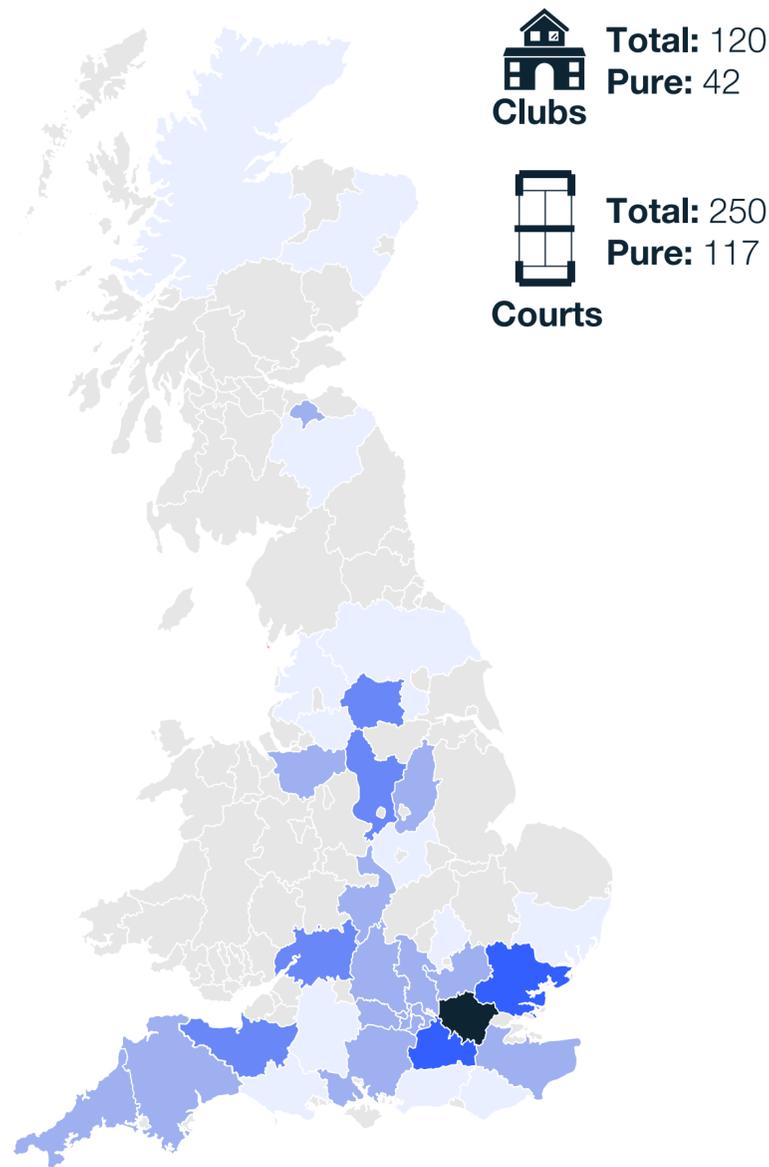
Developing regions

# 35 new clubs and 200+ new padel courts in 2023<sup>(1)</sup> -

### Snapshot January 2023

### Development during 2023

### Snapshot January 2024



Top 5 counties

London
Surrey
Essex
West Yorkshire
Gloucestershire

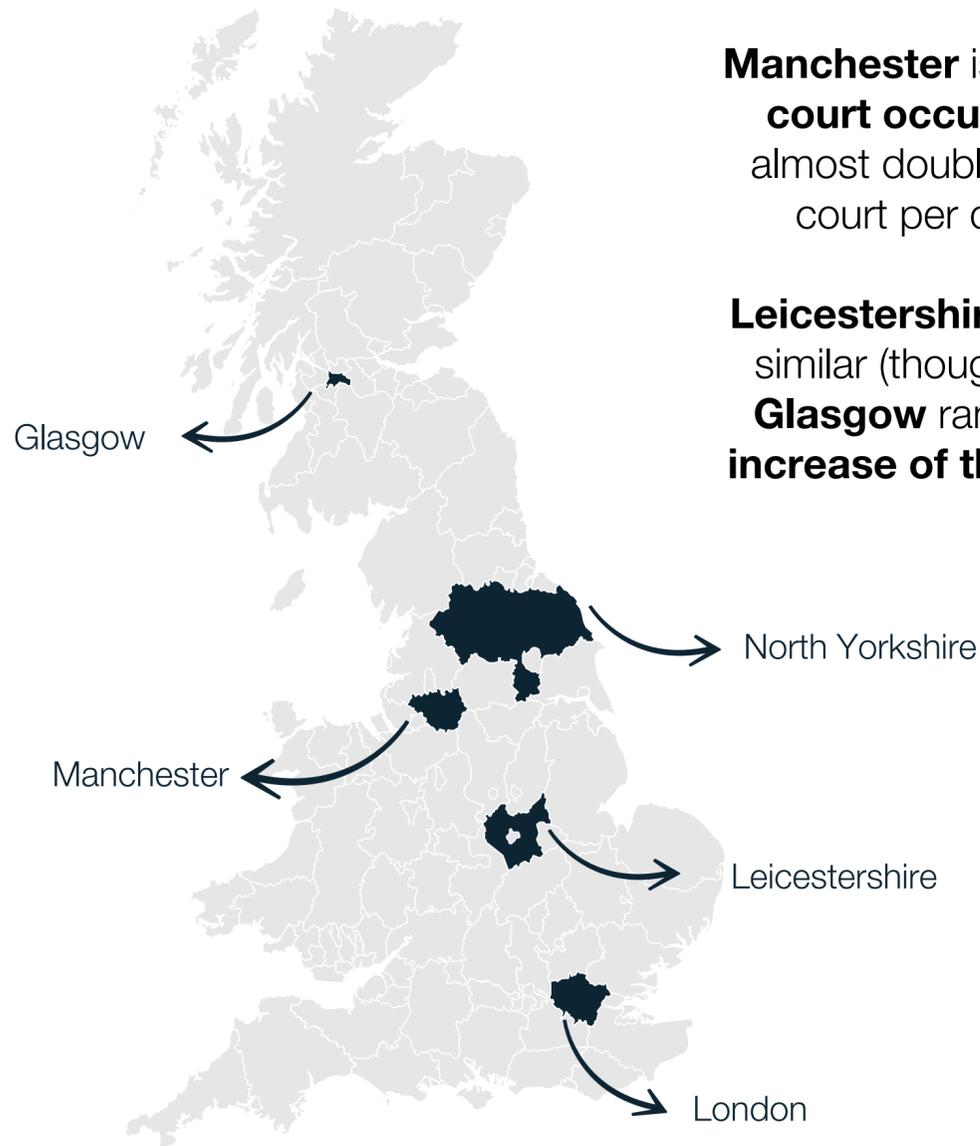
Legend

	+50 courts
	26-50 courts
	11-25 courts
	5-10 courts
	<5 courts
	None
	New region
	Existing region

Note(s): (1) Pure clubs are those in which there are only facilities to play padel and no other sport can be practiced  
Source(s): Local federations, Playtomic, Strategy& analysis

# Participation is growing throughout the country -

## Counties with the highest court occupancy rates

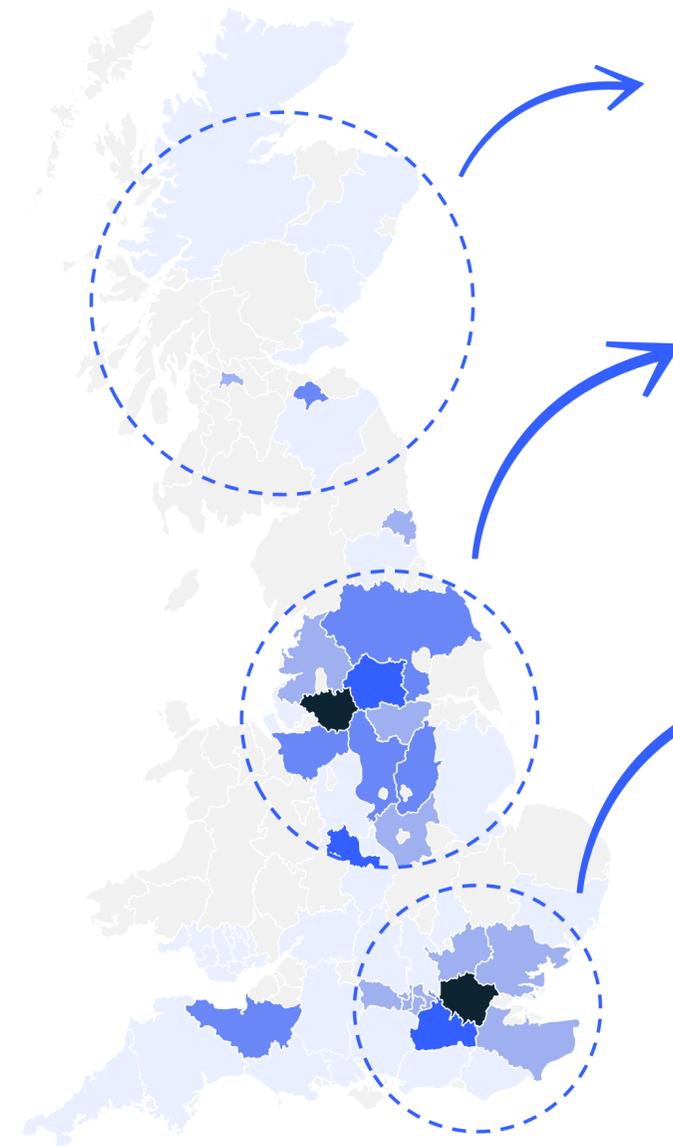


**Manchester** is the county with the **highest court occupancy rate of the courts**, almost doubling the number of hours per court per day compared to London.

**Leicestershire** and **North Yorkshire** have similar (though slightly lower) rates, while **Glasgow** ranks fifth, indicating a **strong increase of the sport's popularity in the region.**

Top 5 counties	
#1	Manchester
#2	London
#3	Leicestershire
#4	N.Yorkshire
#5	Glasgow

## Current demand <sup>(1)</sup>



The region of Scotland, despite not having a large number of courts, is beginning to show signs of interest, especially in two counties: Glasgow and Midlothian

Manchester is the area that accumulates the second most bookings, exceeding 55,000 annually. In addition, the development of new infrastructure has allowed padel to be promoted in this region

The London area sees the most bookings, with over 250,000 per year. Some of its neighboring areas have also benefited by taking on part of the unmet demand spilling over from London

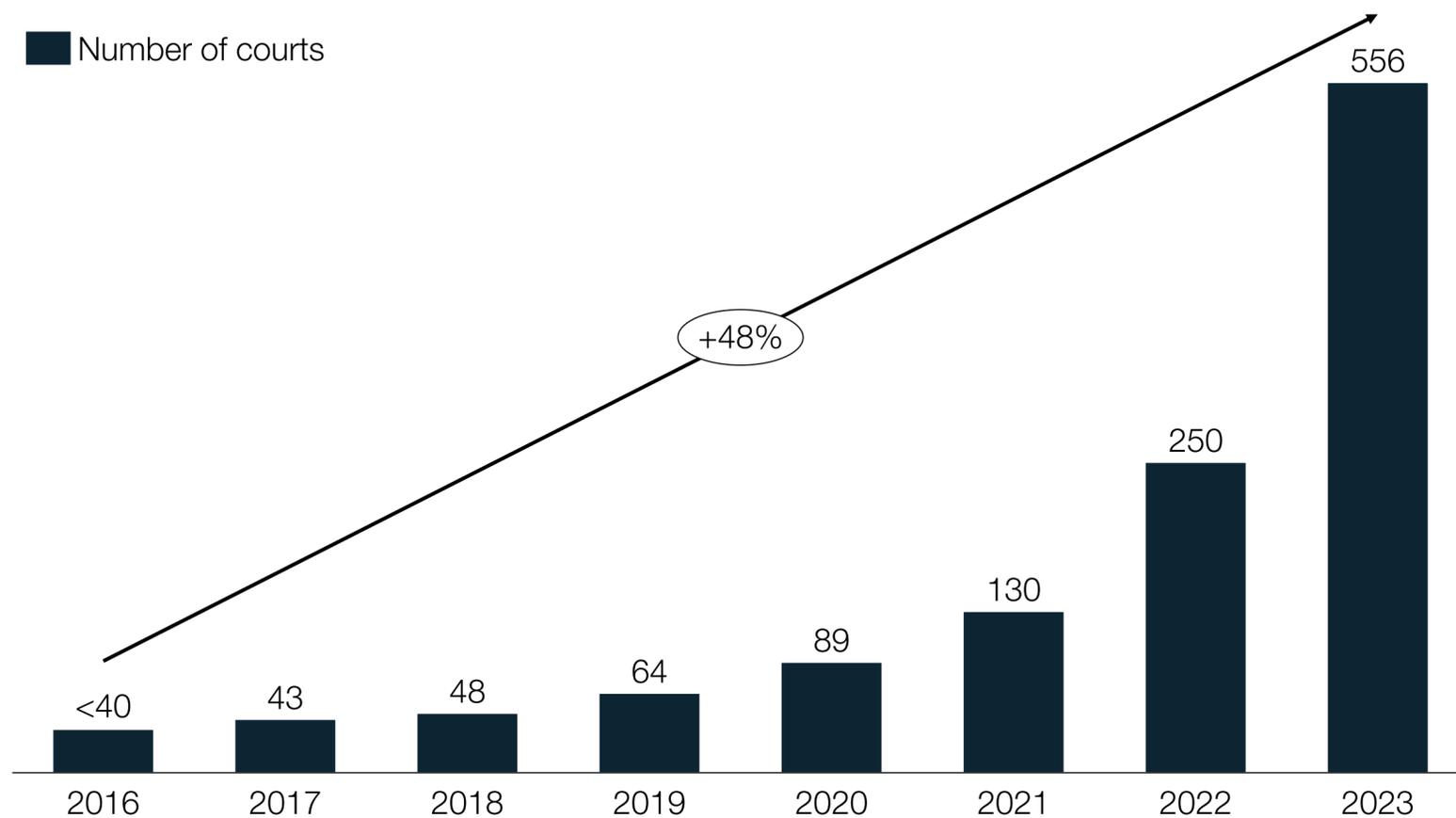
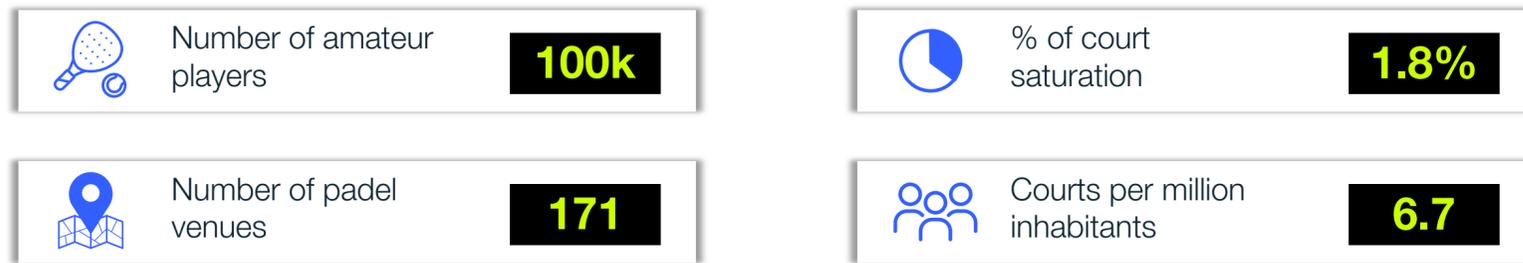
Legend	
	+50,000 bookings
	25,001-50,000 bookings
	10,001-25,000 bookings
	5,000-10,000 bookings
	<5,000 bookings
	None

Note(s): (1) Demand calculated from the bookings registered by Playtomic users during 2023  
 Source(s): Local federations, Playtomic, Strategy& analysis

# Market Analysis

# But, Germany is still far from reaching its full potential -

## Key Padel Metrics and Evolution



## Relevant News

### “Germany, the 20<sup>th</sup> country to host an official WPT tournament”

World Padel Tour, September 2023

“Germany will be the fourth country to make its World Padel Tour debut in 2023 after Chile, Paraguay and Finland. Now, for the very first time, padel fans in the country will be able to see their favorite players up close.”

### “Padel is conquering Germany”

Zuma Sande, April 2024

“Padel has found a home in Frankfurt and will keep it. Whether as a leisure activity or a competitive sport - this mix of action, tactics and sociability has what it takes to be permanently anchored in the sports calendar in Hesse.”

Germany's development may be temporarily hindered by regulatory requirements and the type of facilities where Germans usually practice sport

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

# Two key factors limiting the growth of padel in Germany

Why is padel in Germany slightly behind compared to other countries?

## #1

**In Germany, a padel court is considered a building**

The administrative process to build a padel court in Germany is the most demanding in Europe as it is similar to building a house. Therefore, the cost and time to build a padel court there is higher than in other countries, where it is normally considered a removable installation, due to the extra amount of permits and licenses needed.

## #2

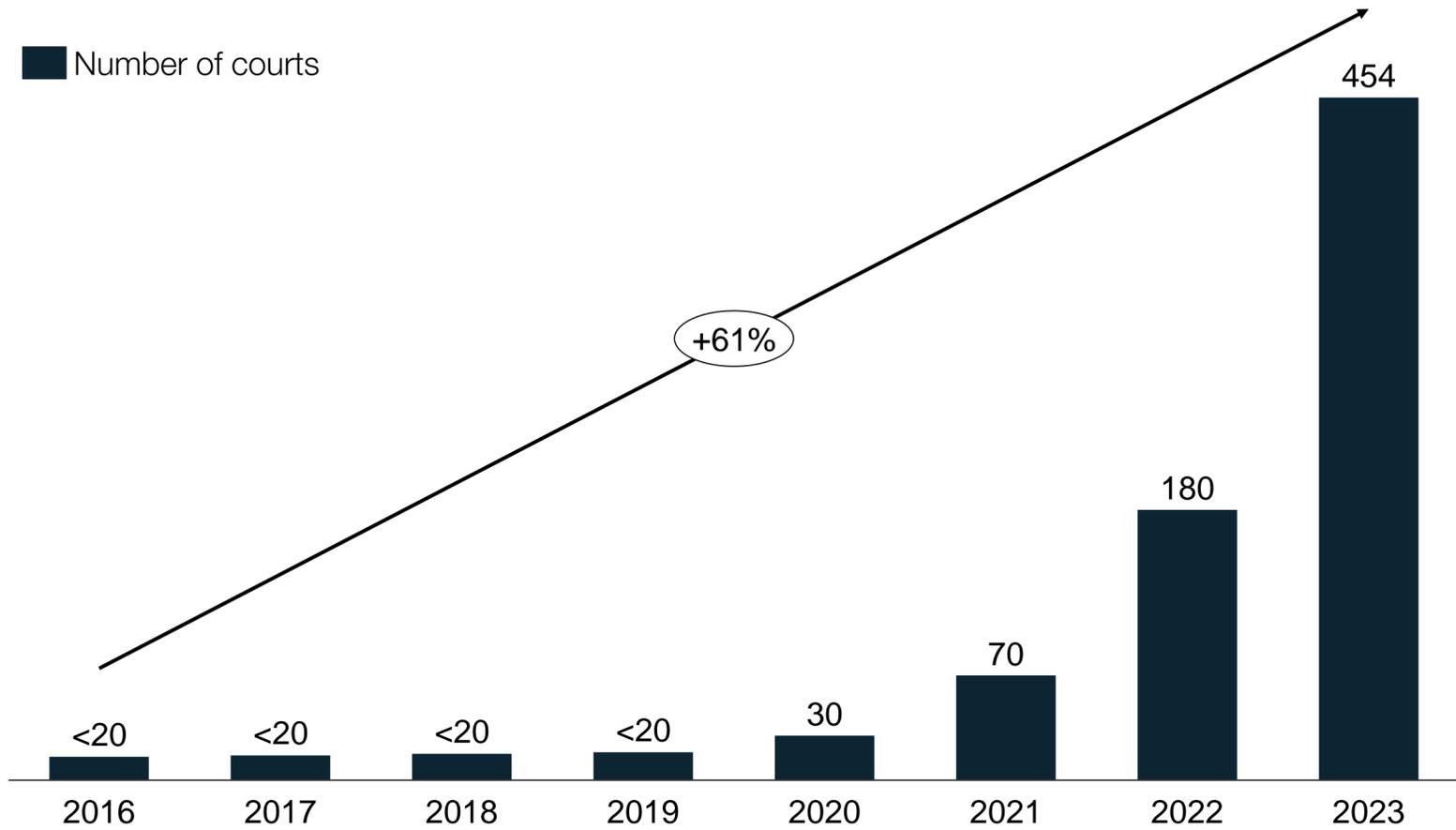
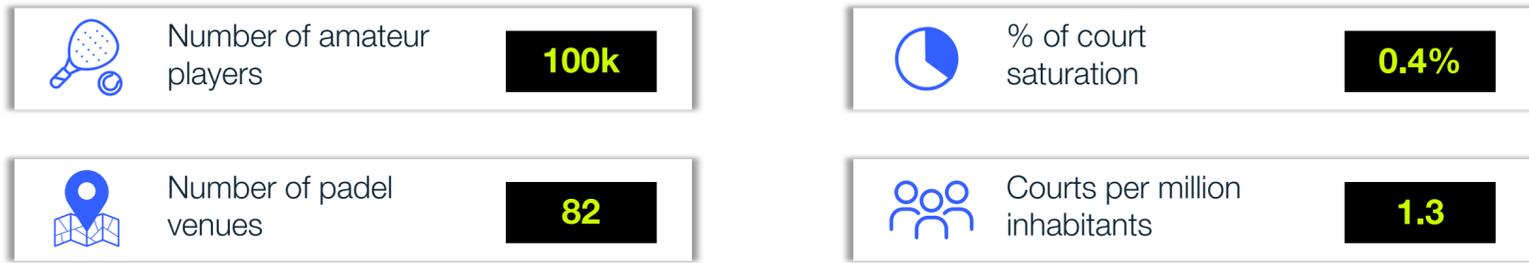
**Most German sports facilities are classified as non-profit organizations**

These “non-profit” clubs are not taxed and are subsidized by the government. Consequently they are not allowed to generate profit and can only charge small amounts for their services. If commercial organizations come to Germany they will need to charge much higher prices compared to non-profit clubs in order to recoup the investment.

# Market Analysis

## A lot of buzz in the U.S., but limited court growth in 2023 -

### Key Padel Metrics and Evolution



### Relevant News

**“Padel, racket sport played in at least 90 countries, is gaining attention in U.S.”**

*CBS News, June 2023*

“Padel is gaining attention in the US and New Yorkers are now getting a taste of the sport, at the city's very first padel club, Padel Haus, in Brooklyn.”

**“A world-class festival of thought, connection and experiential learning in the racquet sports industry”**

*The RacquetX, March 2024*

“A unique, fun and fast-paced event for both the industry and consumers. It’s a true immersive and all-inclusive racquet sports community for fans, players and brands.”

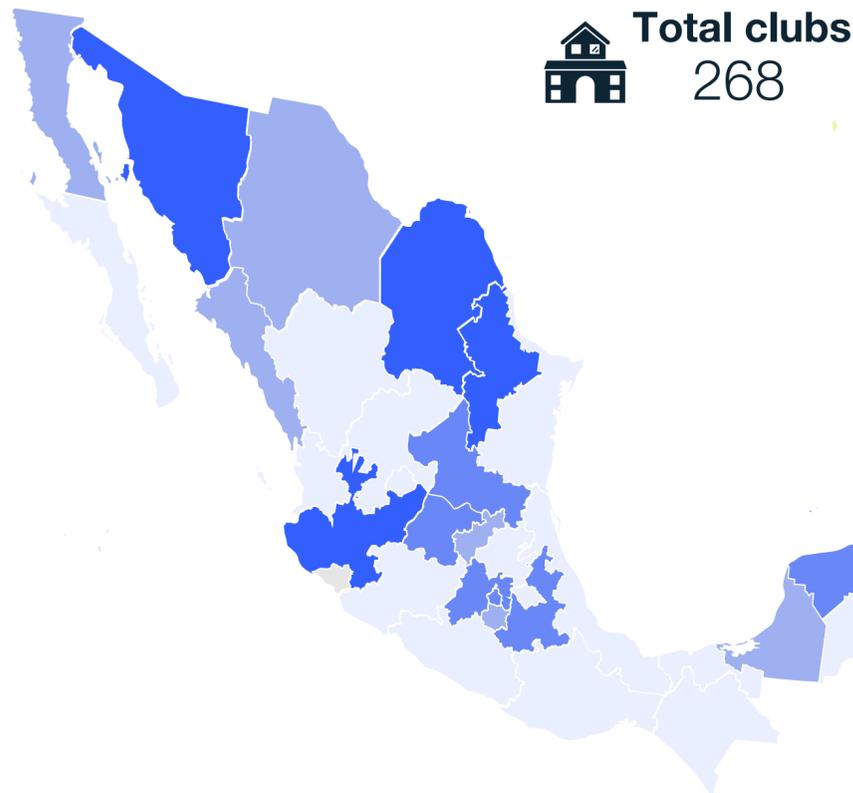
We expect **2024 to be the breakthrough year for padel in the US**, with great interest shown in several regions, including New York, San Francisco, Los Angeles, Texas and Florida

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

# Market Analysis

## Mexico: 100+ new clubs in 2023, reaching ~400 clubs -

Snapshot January 2023



**Top 5 cities with largest number of clubs**

Zapopan (Jalisco)	19
Monterrey (Nuevo León)	18
Mérida (Yucatán)	18
San Luis Potosí (San Luis Potosí)	15
Torreón (Coahuila)	14

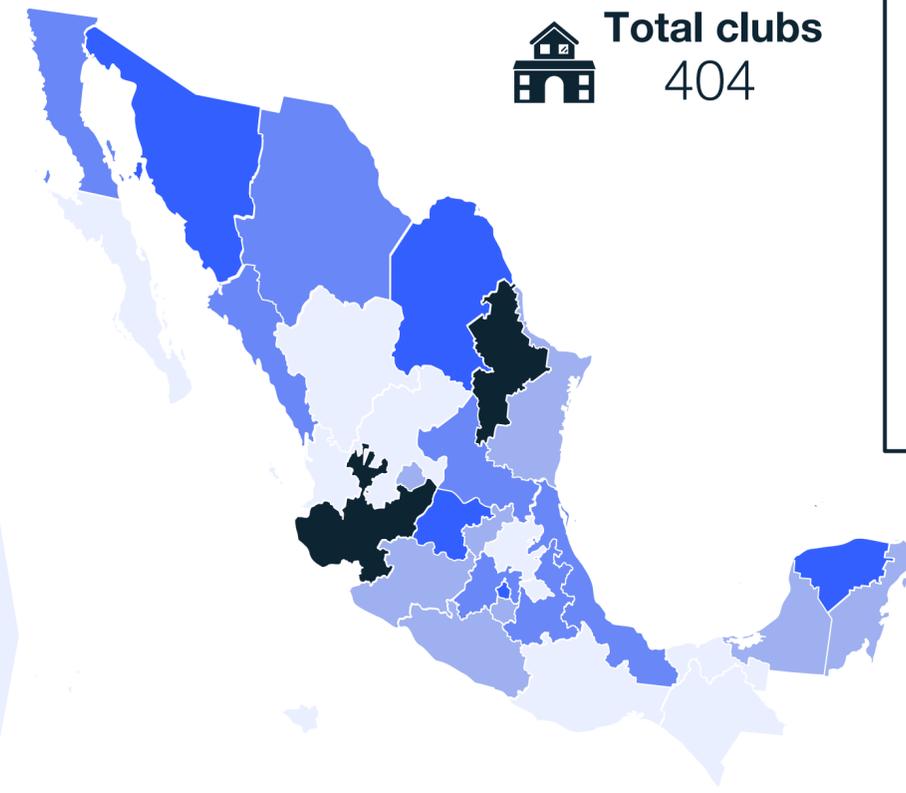
Development during 2023



**New clubs in remaining states**

Ciudad de México	8
Querétaro	3
Colima	1

Snapshot January 2024



**Top 5 cities with largest number of clubs)**

Monterrey (Nuevo León)	29	▲ 1
Mérida (Yucatán)	23	▲ 1
Zapopan (Jalisco)	20	▼ 2
San Luis Potosí (San Luis Potosí)	18	—
León (Guanajuato)	15	NEW



Source(s): Local federations, Playtomic, Strategy& analysis

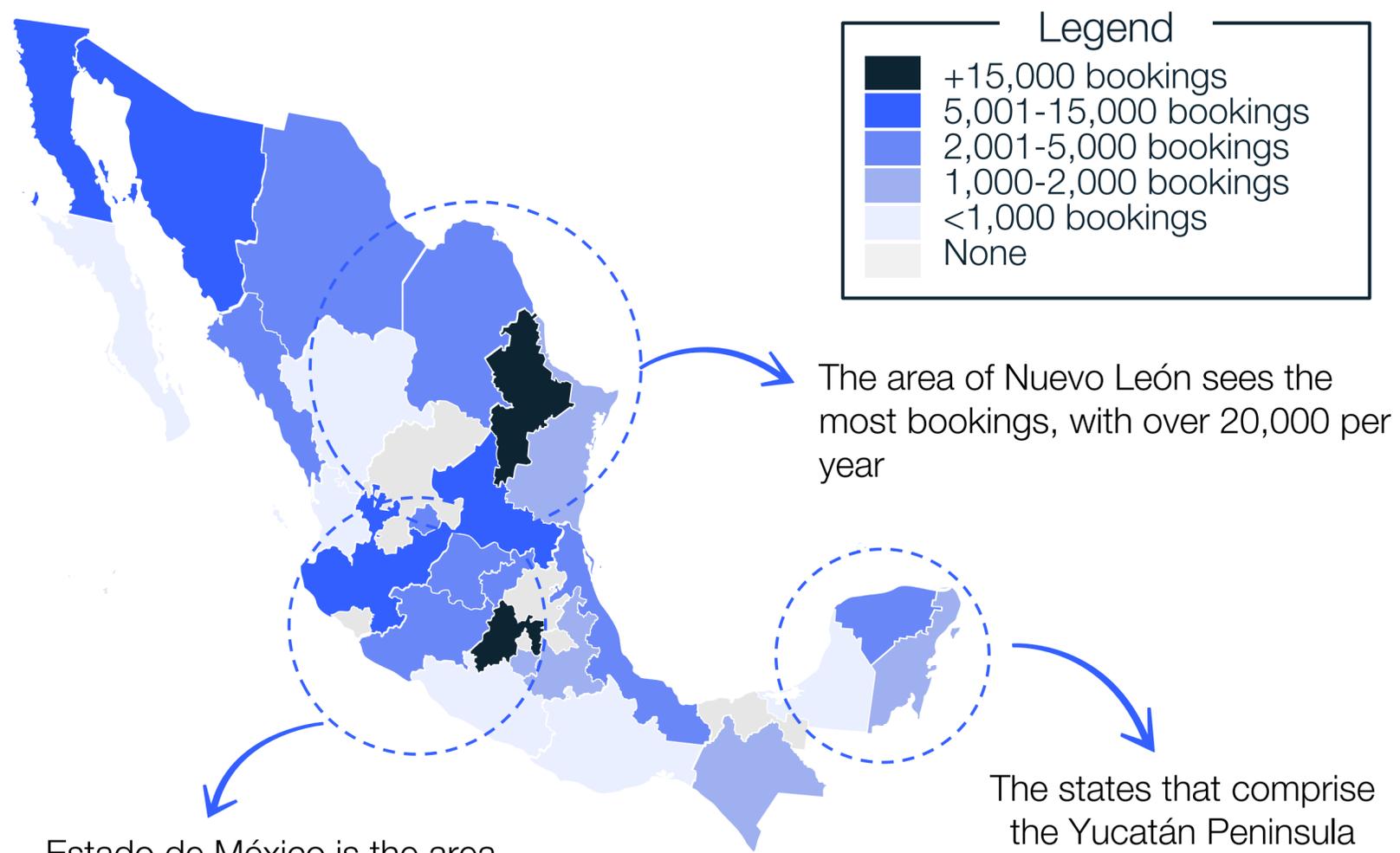
# Interest in padel is expanding throughout the country -

### States with the highest club occupancy rates



**Baja California** is the state with the **highest club occupancy rate, followed closely by Estado de México**. The next three positions are occupied by **Chiapas, Jalisco** and **Querétaro** with **similar occupancy rates**

### Current demand <sup>(1)</sup>



Estado de México is the area that accumulates the second most bookings, exceeding 16,000 annually. It is followed closely by the nearby region of Jalisco (14,000+ bookings)

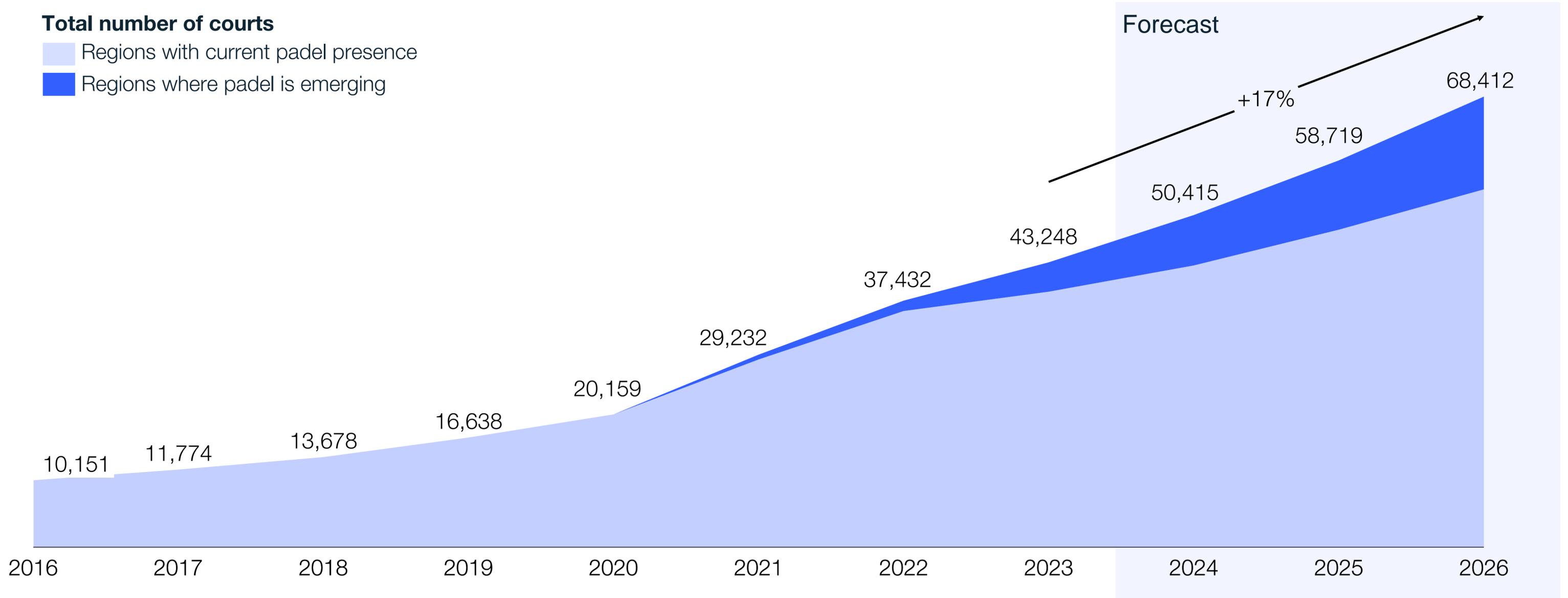
The area of Nuevo León sees the most bookings, with over 20,000 per year

The states that comprise the Yucatán Peninsula have seen a moderate number of bookings but a significant growth in the number of clubs during 2023

Note(s): (1) Demand calculated from the bookings registered by Playtomic users during 2023  
 Source(s): Local federations, Playtomic, Strategy& analysis

# Market Analysis

## Global padel boom will lead to almost 70,000 courts by 2026



Post-COVID years saw exceptionally accelerated growth of over 20% year-over-year; subsequently, global padel court installations **have stabilized to a healthy 17% annualized growth rate**

Source(s): Court manufacturers, Local federations, Padel Lands, Playtomic, Strategy& analysis

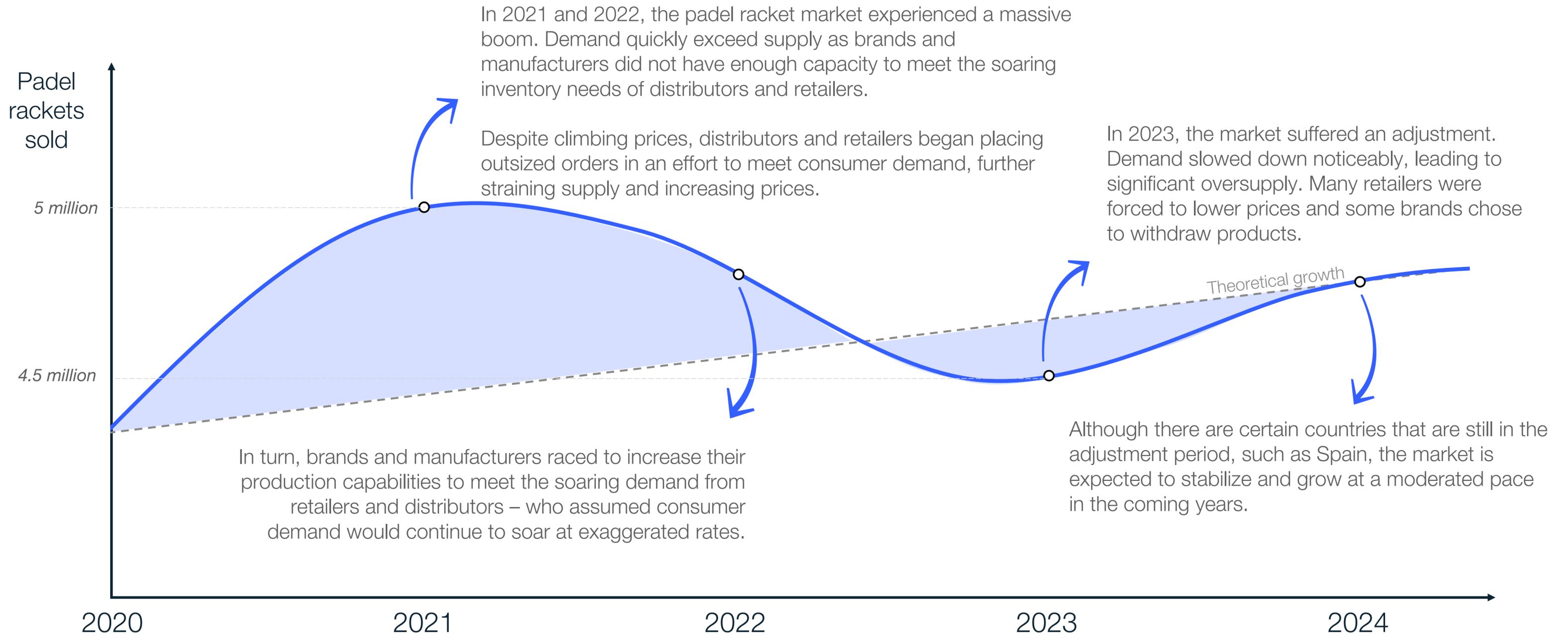
# Padel racket market overview: 4.5M+ rackets sold in 2023



An estimated **4.5+ million total padel rackets were sold in 2023** at an average price of 130€. However, 2023 was also a year marked by an **imbalance between supply and demand**

# Market Analysis

## The stabilization following the racket market “boom”



Source(s): Padel racket manufacturers, Strategy& analysis

# 03

## Player Insights



# Increasingly positive sentiment about padel suggest the market still has great potential

1

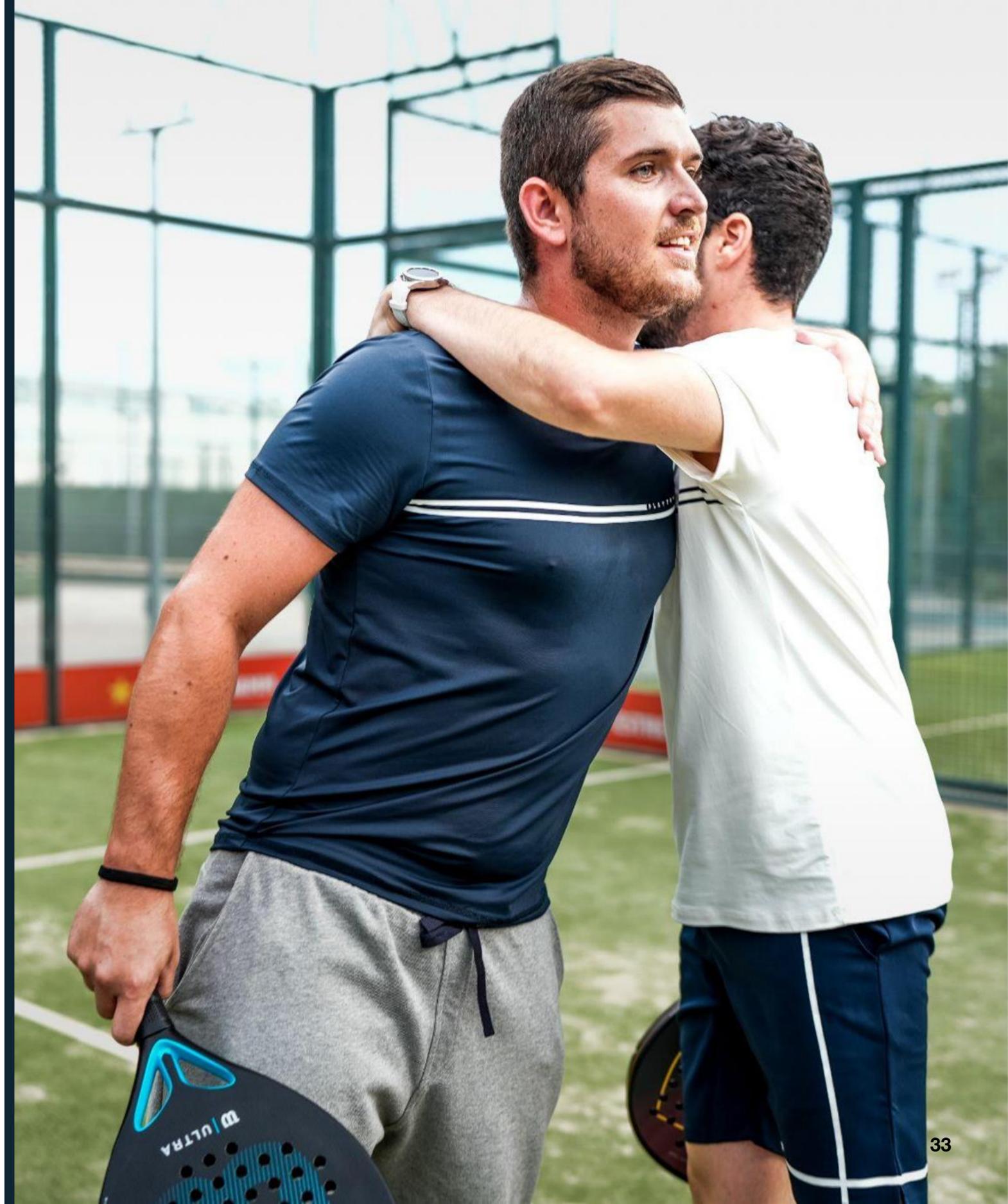
Padel is increasingly perceived as both a **social & competitive activity...**

2

...with **players wanting to play more** despite the challenge of finding courts...

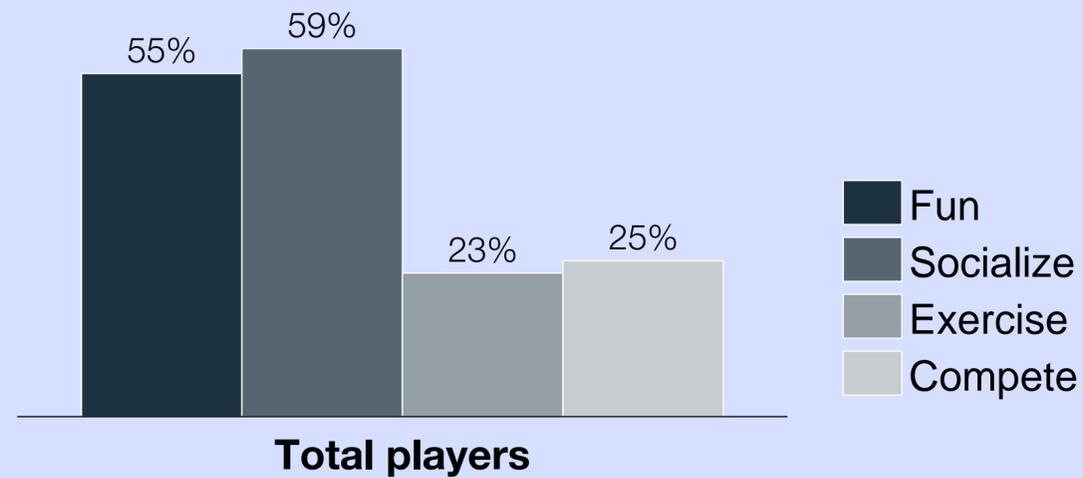
3

...resulting in a booming **community of multi-club players**

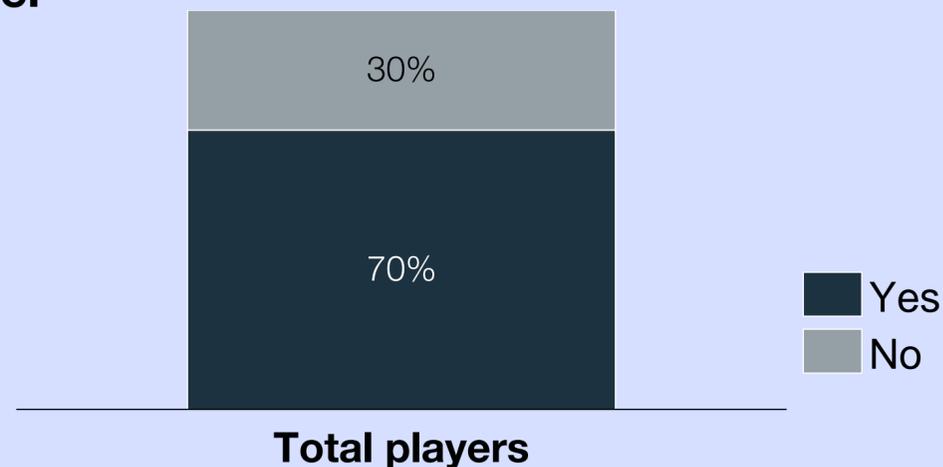


# Padel players highly value both the exercise the sport offers and its very social nature

## Reasons to start playing padel



## Craving to engage in more activities after playing padel



### 🕒 Exercise that is both *fun* and *social*

- Players report top reasons for playing padel are that it's both "*fun & social*" and a great "*way to exercise*"
- Padel offers not only exercise but also the chance to socialize both during and after the match
- These same sentiments are echoed around the world

### 🕒 Embraces everyone:

- Padel can be played by (almost) everyone regardless of age, gender, socioeconomic level, or physical condition
- Padel is more inclusive than other endurance activities or individual sports (i.e. ball sports, running, etc.)

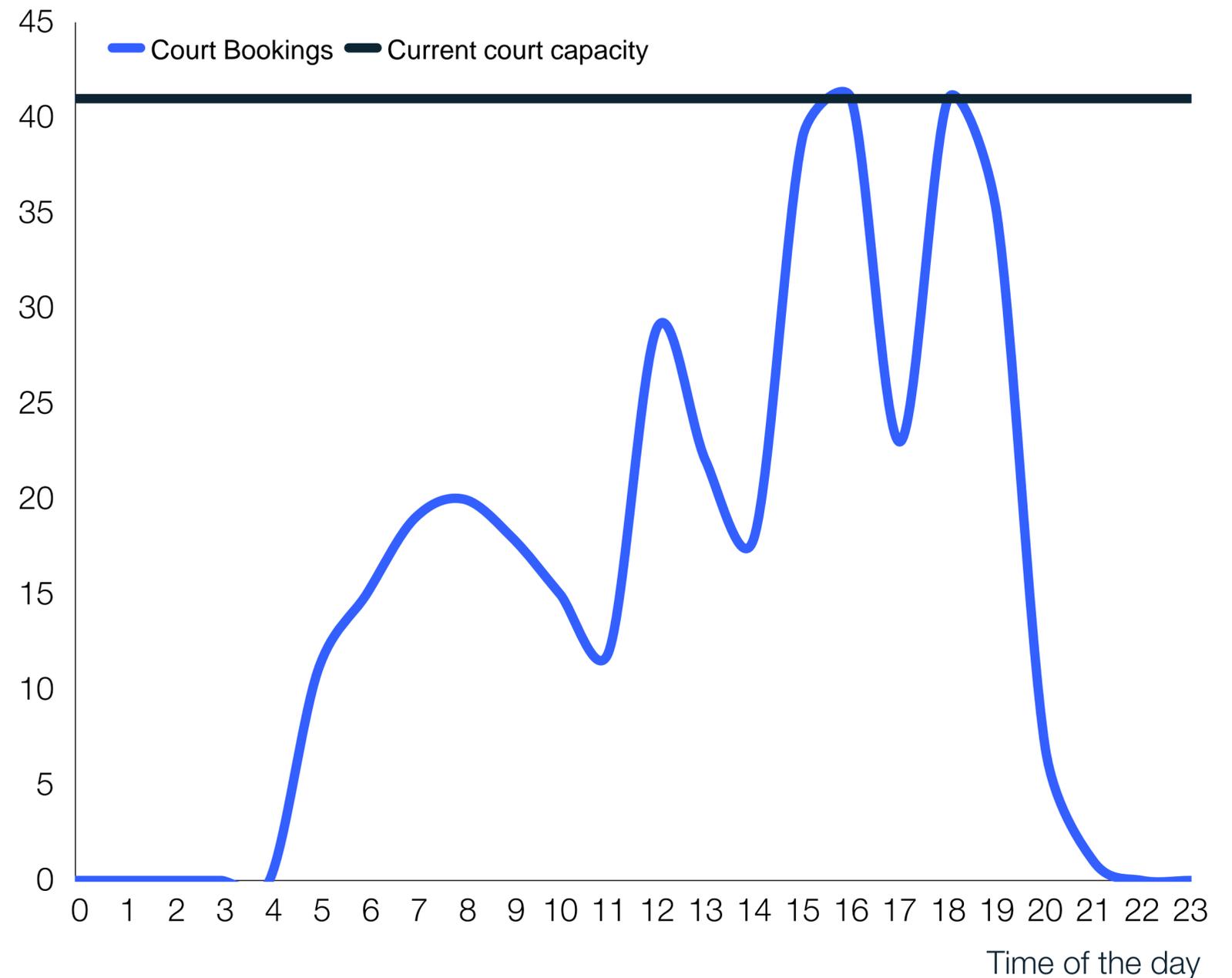
### 🕒 Higher demand:

- The unique combination of these characteristics creates even more desire to play, both among new and existing players

# Players want to play more despite some major barriers – which the industry should address

**There are currently numerous barriers that prevent more people from playing padel more often**

- Difficulty in finding available courts:** players have to invest a lot of time to find available courts and often have to travel significant distances to play
- Challenges in finding players of similar levels:** while padel communities and clubs can help you find other players, it can be hard to organize competitive matches with players of similar skill levels
- Time-consuming to coordinate matches:** organizing a match requires multiple burdensome steps (finding other players, scheduling the match, booking the court, splitting court costs, etc.)

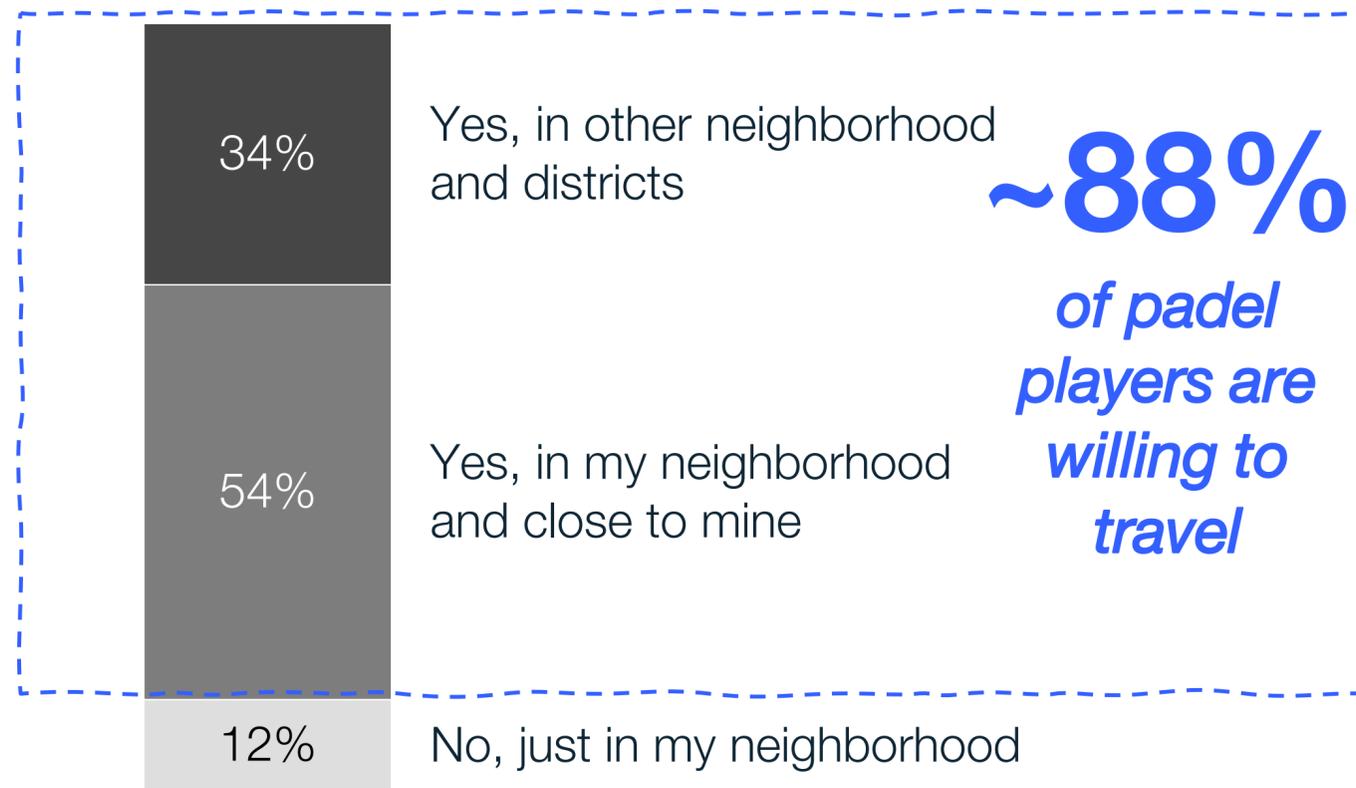


Note(s): Graph showing data for Amsterdam (08/05/2024)  
Source(s): Playtomic Proprietary Survey, Strategy& analysis

# These challenges often push people eager to play padel to become multi-club customers

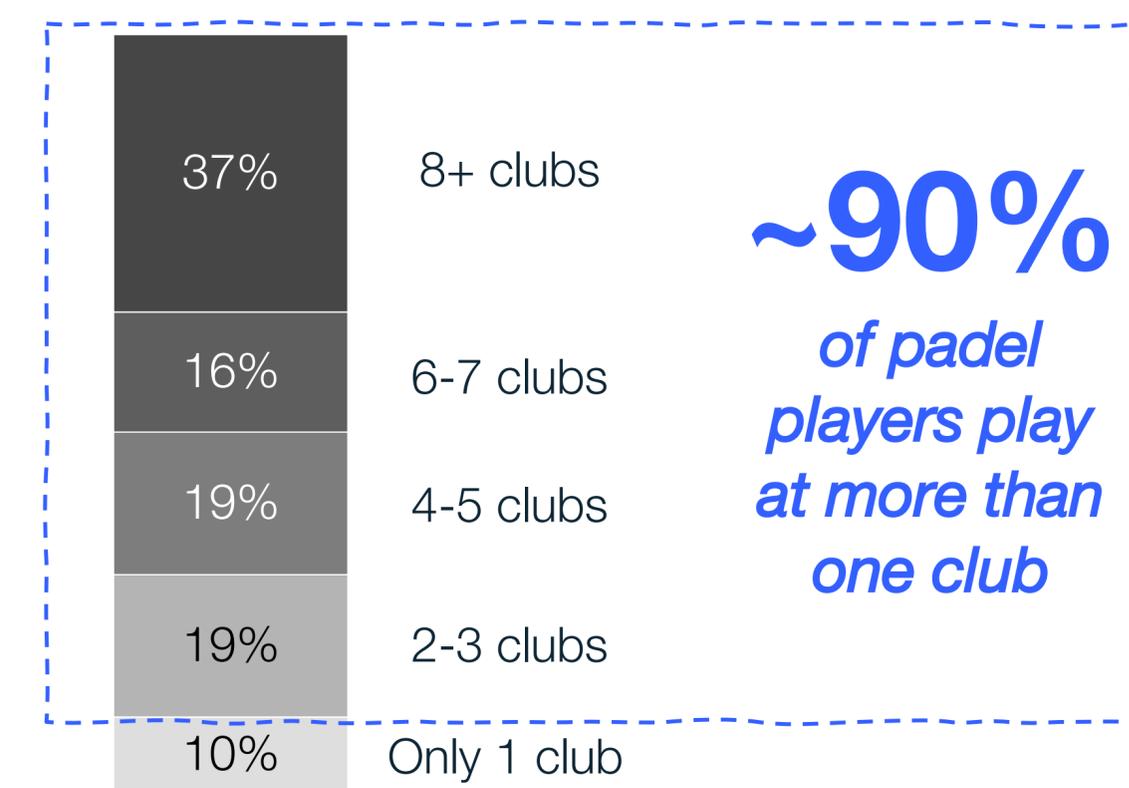
The difficulties that players encounter (i.e. locating available courts, finding other players, and coordinating matches) often result in players being willing to travel to play at multiple different clubs

Willingness of players to travel to play padel



Total players

Number of clubs in which players play



Total players

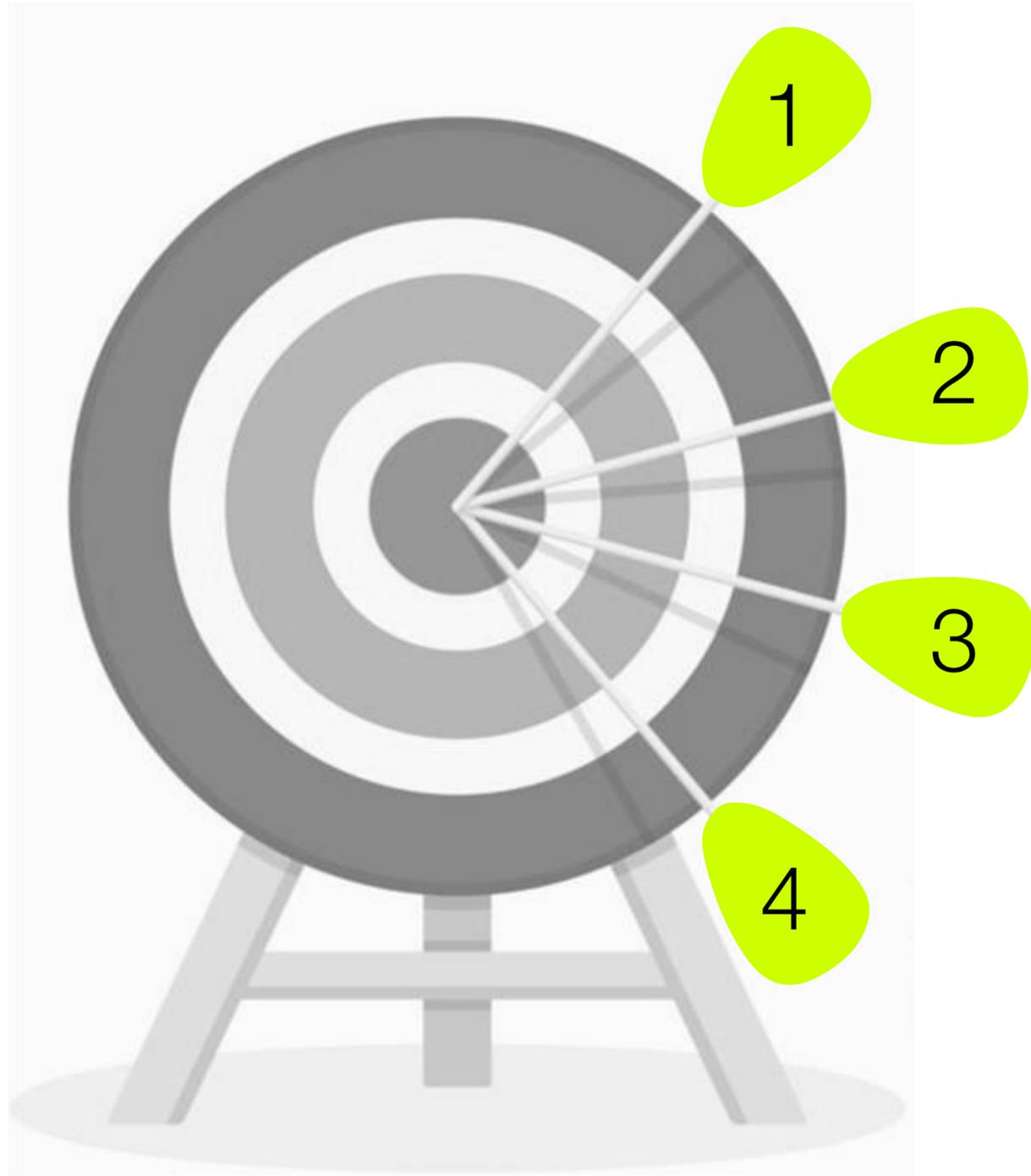
# 04

## Key Factors for Running a Successful Padel Club



# Key Factors for Running a Successful Padel Club

## Beyond the courts



1

### Infrastructure

A good location, quality facilities, and good maintenance are essential

2

### Services

Services at both sport and social level are key for players and their families

3

### Financials

Good financial health of the club is essential to be able to operate it

4

### Technology

Technological tools that connect players with other players and clubs are a must

## Key Factors for Running a Successful Padel Club

# Major infrastructure-related considerations when opening a club

### 1 Location

Choosing a good location is a key step to successfully run a padel club. Although the price of real estate may influence this decision, you have to make the right decision based on your target audience

### 2 Permits

Obtaining permits can sometimes be a costly and time-consuming process. In addition, the amount of permits and the process to obtain them may vary depending on the location where the club is going to be built. Make sure you plan ahead to make the process as streamlined as possible

### 3 Civil work

Once the project has been approved, it is time to start the civil work. The first step is to prepare the site; this includes clearing the area, leveling the ground and ensuring proper drainage. The next step is to lay the foundations for the padel courts. Building over old tennis courts can make this step much easier

### 4 Courts and other spaces

Now it's time to set up the courts. You can choose amongst an almost limitless number of configurations for what best suits your project, but be sure to always use good quality materials. You must also think about the other spaces your club will offer (parking, bar, etc.)

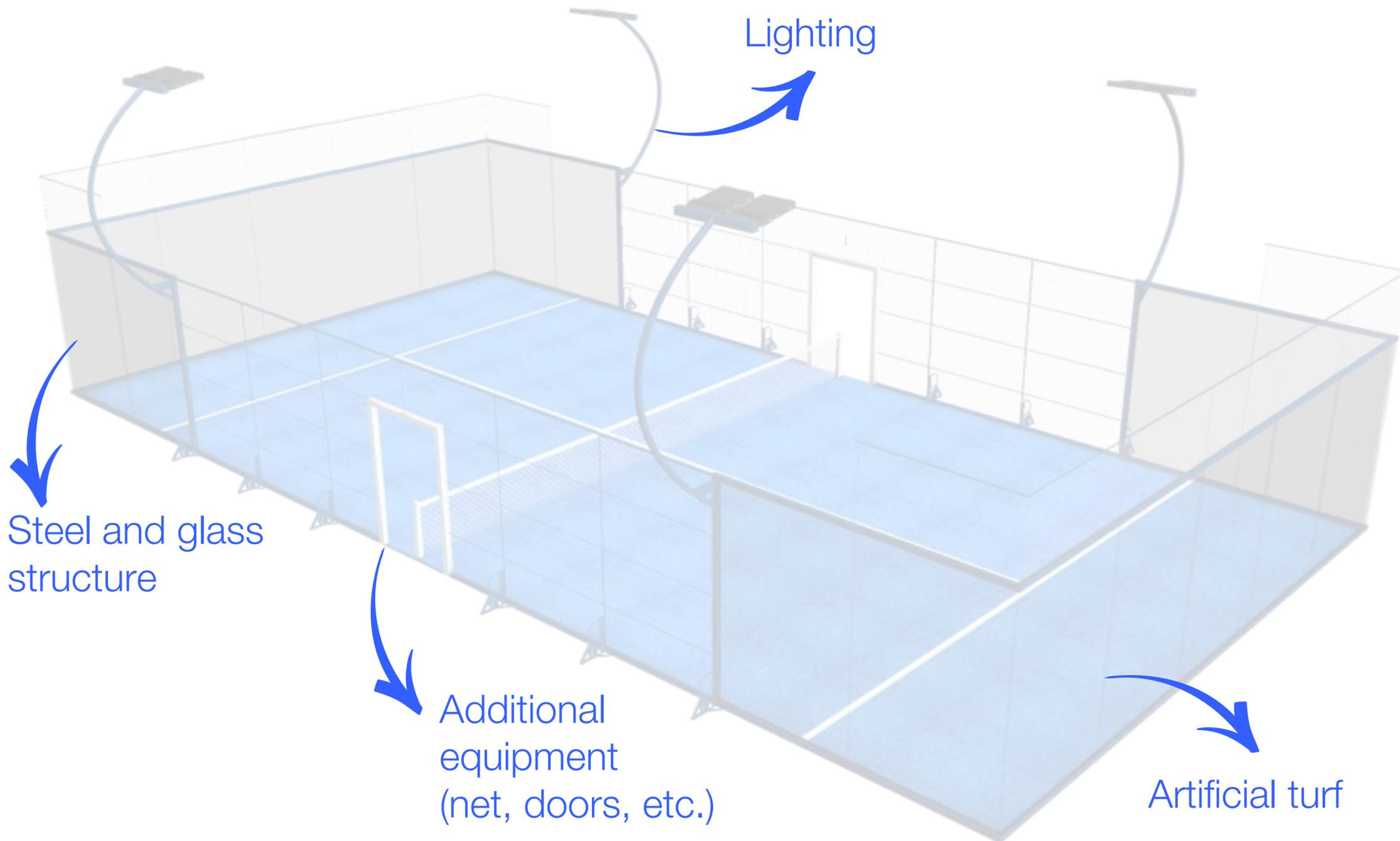
### Maintenance

5

Once your courts are completed, you should expect regular maintenance work to be carried out on them. This is partly to maintain a good playing experience for users and partly to optimize the lifespan of the courts

# Key Factors for Running a Successful Padel Club

## Costs of a standard padel court



### One-off costs

Steel and glass structure	16,000€
Artificial turf	3,500€
Lighting	1,000€
Additional equipment	500€
Installation	2,000-4,000€

**TOTAL<sup>(1)</sup> 23,000-25,000€**

### Maintenance

- Routine maintenance includes cleaning, sand redistribution and removal of fungus and moss
- Deep maintenance includes surface decompaction and joint inspection
- Artificial turf should be replaced approximately every 4 years

**TOTAL<sup>(2)</sup> 300-700€/yr**

Note(s): (1) The shown costs are for a standard padel court (2) Artificial turf replacement not included  
 Source(s): Court manufacturers, Strategy& analysis

# Key Factors for Running a Successful Padel Club

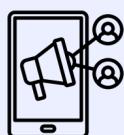
## Social and sporting services that should be offered

The **social** component of your club can be enhanced through...



### ... food & beverage

with places for members to relax and socialize



### ... social events

and friendly tournaments to foster community



### ... seasonal camps

focusing on skill development and fun activities



### ... lounge areas

where members can relax and spectate in comfort



### ... other amenities

such as a pro shop or a kids club

At a **sporting** level, a club should provide...



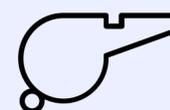
### ... padel courts

well maintained and with good lighting



### ... locker rooms

clean and well equipped with showers and lockers



### ... private and group lessons

with qualified coaches for different skill levels



### ... leagues and tournaments

regularly organized for all player categories

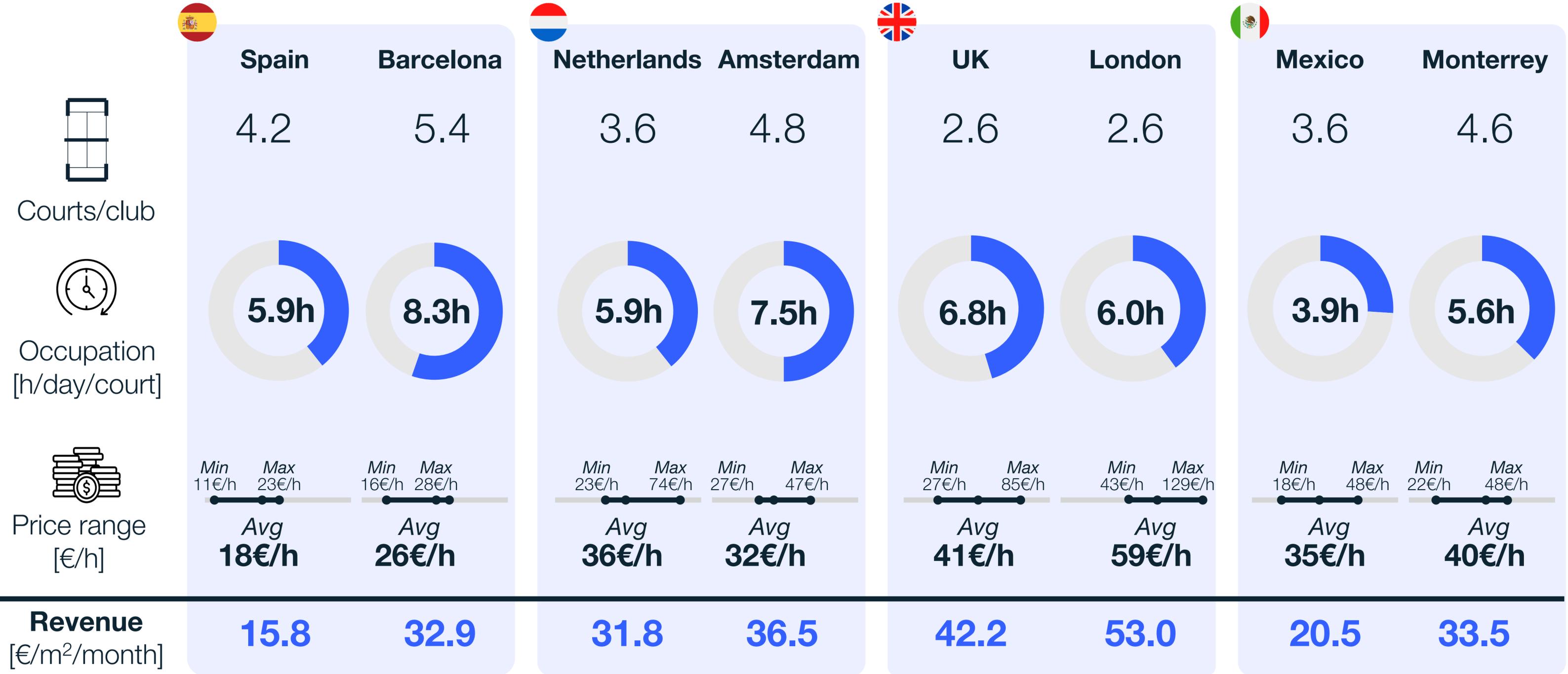


### ... equipment rental

Including rackets and balls

# Key Factors for Running a Successful Padel Club

## The cases: Barcelona, Amsterdam, London & Monterrey



Source(s): Playtomic, Strategy& analysis

## Key Factors for Running a Successful Padel Club

Link between real estate market and padel<sup>(1)</sup>

	 Space per club [m <sup>2</sup> /club]	 Revenue per club [€/m <sup>2</sup> /month]	 Prime rent logist. [€/m <sup>2</sup> /month]	 Prime rent resid. [€/m <sup>2</sup> /month]	 Estimated rent [€/m <sup>2</sup> /month]	Rent over revenue [%]
Barcelona	~1,450	24.7	8.0	18.6	10.1	41
Amsterdam	~1,275	27.4	9.4	30.3	13.6	50
London	~690	39.9	27.8	46.3	31.5	79
Monterrey	~1,225	25.2	6.3	15.0	8.0	32

The cost of **leasing land is generally a club's biggest expense**, and often offsets a large percentage of a club's revenue from court rental, especially in emerging regions. Which is why it's important to consider how **other sources of income** (classes, events, food & beverage, etc.) **can help enhance profitability**

Note(s): (1) Space per club considers ~1,3 times the space required by the courts. Prime rent is defined as the average rent of the top lettings in each submarket and not the most top rent realised  
Source(s): Cushman & Wakefield, Savills, Press releases, Strategy& analysis

# Key Factors for Running a Successful Padel Club

## Utilize technology to meet players' many wants and needs

### Tournament info and entry

Offer a calendar of tournaments and leagues available by skill level and give players a way to sign up easily

### Court booking

Give players the ability to quickly and easily see the availability of courts at clubs within a certain area and reserve them with just a few clicks

### Joining open matches

Provide players with an easy way to sign up for friendly or competitive matches with others who are looking to play, depending on the available slots

### Split payments

Make it quick and easy for players to each pay for their portion of a court fee or other expense without hassle or embarrassment

### Lesson booking

Make it possible to book classes and clinics with coaches that best suit the schedules and preferences of each player

### Player matching

Make it easy for players to find other players of similar skill levels who are looking for matches at certain times of the day or week



### Special offers

Create special rates and incentives to meet the needs of different types of players

# 05

## Conclusions



## Conclusions

# Key takeaways about padel's global growth trajectory

- 1** The growth of padel globally continues at a high rate, with **an increasing number of padel courts and clubs being built**, although less rapidly than in the years immediately following the COVID-19 pandemic
- 2** Padel is **steadily evolving into a worldwide sport**, but the level of development and adoption varies widely across different countries and regions
- 3** Over the next few years, the growth trajectory of padel is expected to be fueled by **significant uptake in regions that have major potential** but are currently struggling with real estate prices and regulations
- 4** As a result of this expansion, **growth is expected to stabilize at a healthy 17% annual rate**, slightly below the exceptional rate observed in post-COVID years
- 5** The recent surge in padel's global popularity greatly benefited the padel racket market, with **an estimated 4.5M+ padel rackets being sold in 2023 alone**

## Conclusions

# Key takeaways about the state of padel players and clubs

**6** Despite being a relatively new sport, padel has **gained substantial popularity** due to its **accessibility** and the fact it is seen as **being both a highly competitive and social activity**

**7** Even though the sport is attracting more and more players, **there are still multiple barriers-to-play that the industry should address** including the difficulty of locating available courts, finding other players (of similar skill levels), and coordinating matches

**8** These difficulties are pushing players to become **multi-club customers**, with many players now willing to travel considerable distances to play at numerous different venues

**9** When it comes to clubs, **padel extends well beyond the courts**. In order to run a successful club it is essential to have the appropriate **infrastructure**, offer a wide catalog of **services**, strive for **financial stability**, and leverage **technology** wherever possible to maximize player engagement and enjoyment

**10** **Leasing land is generally a club's biggest expense by far** and can often **offset more than half of the revenue** a club generates from court rentals, so it's important to consider secondary revenue streams

# About Us

## PLAYTOMIC

Playtomic is the largest community for rackets sports players and clubs worldwide. Through the app, players can easily find and book courts for padel, tennis or pickleball, meet new players, find rivals, join groups with other players or improve their game.

Playtomic is the leading racket sports marketplace in the world, the definitive link between the player and the sports club, connecting 4 million players with 5,500 partner clubs over 52 countries



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