

THE PICKLEBALL MARKET:

# GROWTH, PROJECTIONS & INVESTMENT OPPORTUNITIES



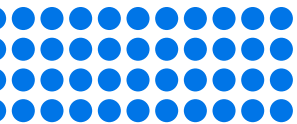
Prepared: April 2025  
Market Outlook: 2024–2034

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# THE PICKLR

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# EXECUTIVE OVERVIEW & RESEARCH FOUNDATION

## Introduction

The global rise of pickleball has moved well beyond a recreational trend—it now represents a rapidly scaling, multi-dimensional sports economy. With over 48.3 million U.S. players in 2024 and a compound annual growth rate (CAGR) between 11.3% and 15.3%, pickleball is not just the fastest-growing sport in America—it is a high-velocity investment sector, lifestyle movement, and media-ready entertainment product.

This report comprehensively analyzes the pickleball market from 2024 through 2034. It blends primary data from real players and consumers with secondary research from leading industry sources. It offers a full-spectrum view of participation, consumer segmentation, facility demand, market size projections, brand competition, and future trends.

This document aims to equip investors, operators, and brand strategists with the tools to navigate the current landscape and capitalize on pickleball's decade-defining trajectory through detailed market intelligence and actionable insights.



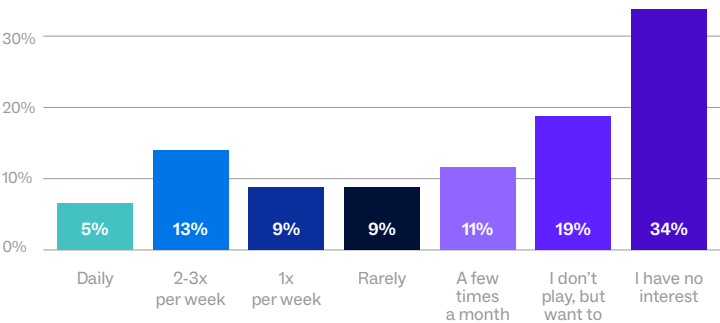
# PRIMARY RESEARCH

Our team at Highwater Agency conducted an in-depth research study designed to deliver actionable insights grounded in robust data collection methodologies. The study engaged 561 participants across diverse channels, including surveys; targeted Facebook groups; and on-the-ground, in-person intercepts. Research was conducted across 10 U.S. states, ensuring broad geographic representation, and included one international market—Italy—to introduce a comparative global perspective.

This multifaceted approach was intentionally designed to capture a broad spectrum of demographic insights, particularly on the retiree segment. Including domestic and international markets and varied data collection methods enhances the study’s validity and relevance, ensuring findings reflect nuanced consumer behaviors, preferences, and attitudes within this key demographic cohort.

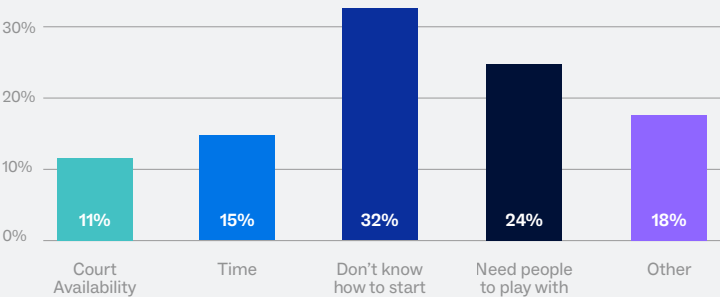
## Frequency of Play

The data reveals that 38% of respondents play pickleball frequently, while only 9% rarely play. This suggests a high engagement rate among players. Most players participate weekly or more, reinforcing pickleball’s stickiness and potential for recurring revenue through memberships or regular court fees.



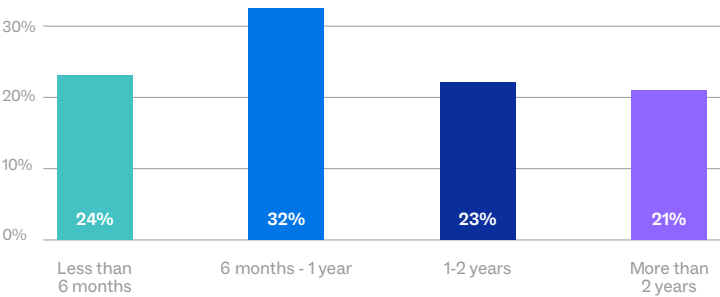
## Reasons Non-Players Are Not Participating

Among those interested in playing but not currently active, the most cited barrier is confusion on how to get started (32%), followed by a lack of others to play with (24%). These results point to opportunities in flexible scheduling, better court availability, and community-building to help new-comers find playing partners.



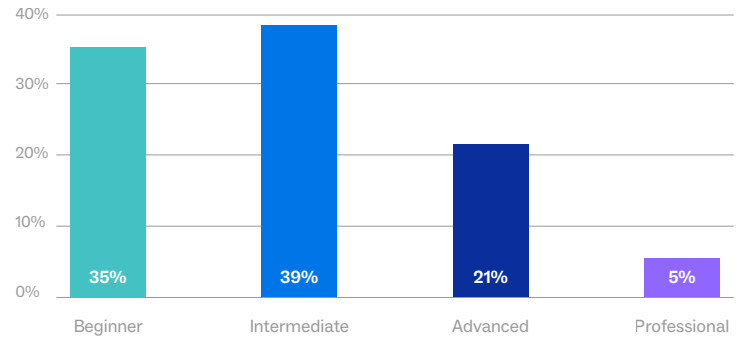
## Length of Time Playing Pickleball

Over half of the players have been playing for less than a year (56%), indicating that pickleball is rapidly gaining new participants. This trend underscores the need for beginner-focused programming and onboarding.



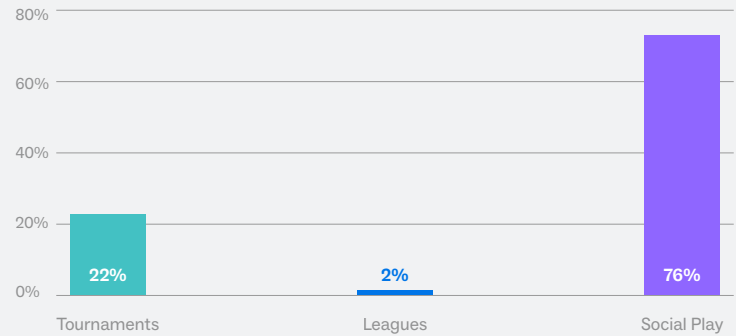
Skill Levels

Nearly three-quarters of respondents identify as beginner (35%) or intermediate (39%). This points to a need for skill development programming and the creation of less intimidating environments for entry-level play.



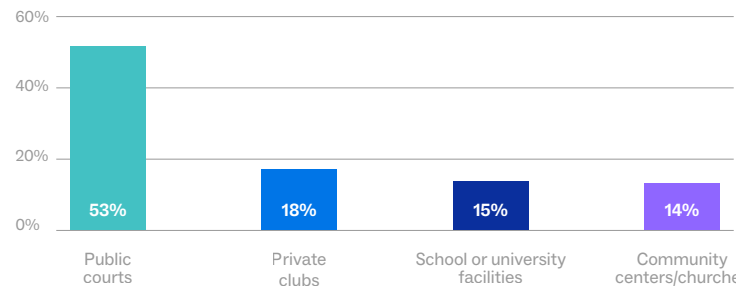
Playing Environments

Players predominantly play socially (76%), with a small portion playing in tournaments (22%). This highlights a market preference for casual playing environments with a focus on socializing or learning the sport, rather than competing to win.



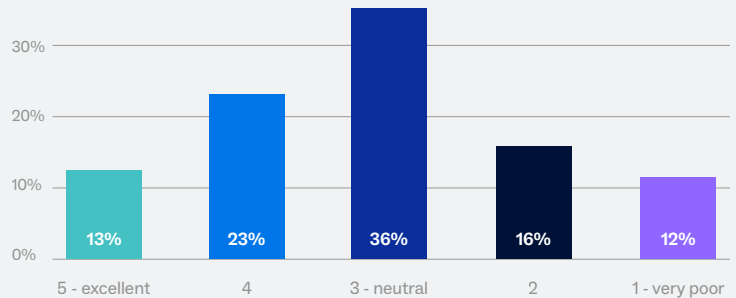
Primary Facility Types

53% of players use public pickleball facilities, while a minority play in private clubs or repurposed courts. This majority of public players may represent an available market for the future growth of private club memberships and league players.



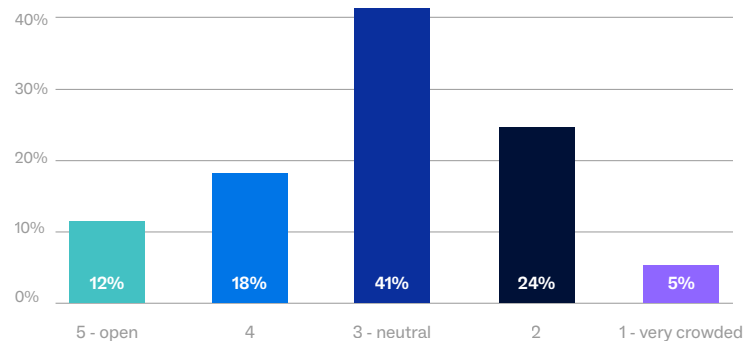
Court Availability Ratings

Court access is a moderate concern, with only 13% rating availability as excellent. 36% said access is average, and 12% said it is very poor, emphasizing the need for more facilities or optimized court scheduling.



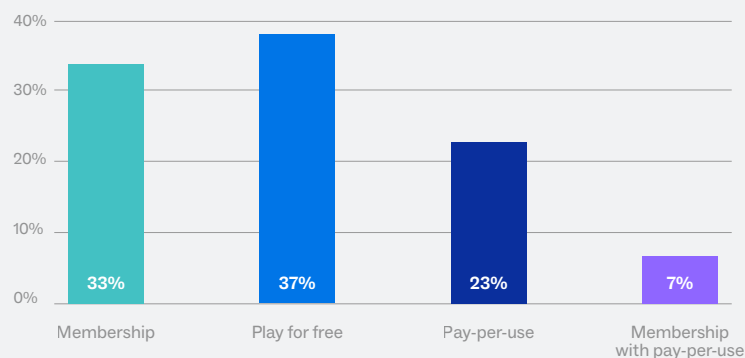
## Court Crowdedness Ratings

A significant 41% rated court crowding as moderate, with 29% reporting high levels of crowding. This reinforces the unmet demand for court space and supports business cases for expansion.



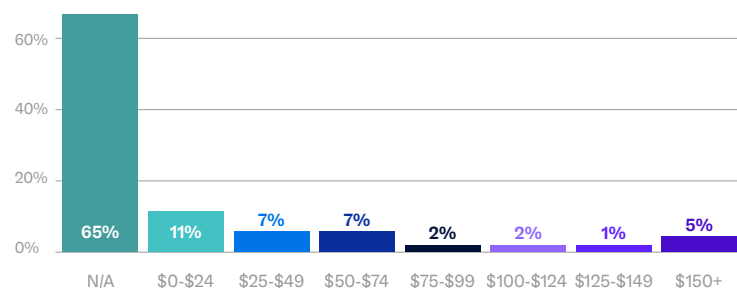
## Fee Structure

23% of players pay per use, 40% have memberships, and 37% do not pay to play. This spread reveals a significant opportunity to convert pay-per-play and non-paying users into subscription members.



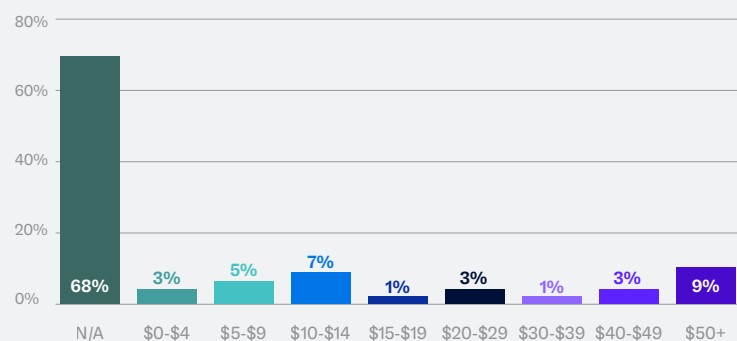
## Monthly Membership Cost

18% of players pay less than \$50/month. This data suggests the market is price-sensitive, though niche offerings could command higher-tier pricing if bundled with perks.



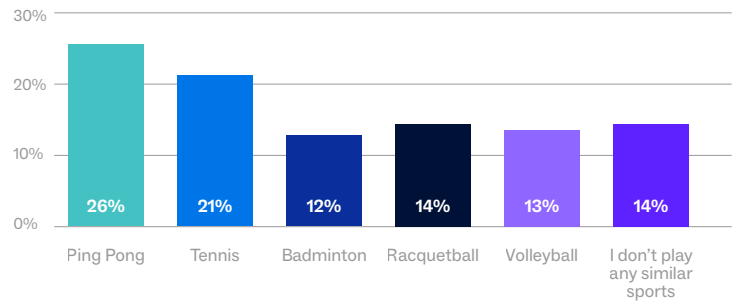
## Pay-Per-Use Spending

16% of players spend under \$20/month when paying per use. Most players are not heavy spenders individually, which validates volume-based models and discounted memberships.



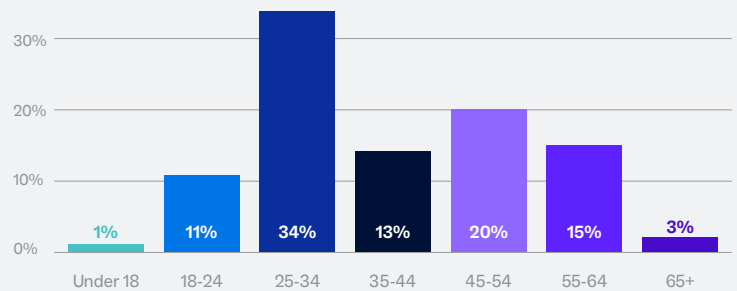
## Other Sports Played

Tennis, ping pong, and racquetball were the most common alternatives. This suggests crossover potential in marketing and facility usage.



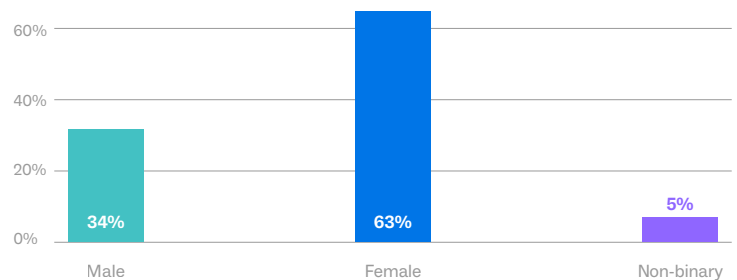
## Age Distribution

Most players are between 30 and 60, with the largest single group in the 30–40 range. This confirms that pickleball appeals across generations, with strong participation from working-age adults.



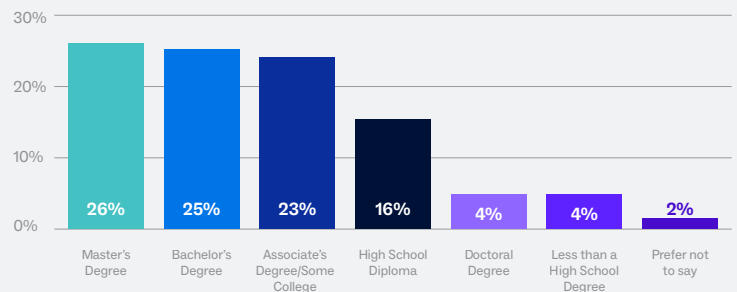
## Gender Breakdown

34% of respondents are male, 63% female. This modest skew suggests co-ed programming is appropriate but also highlights a growth opportunity among men.



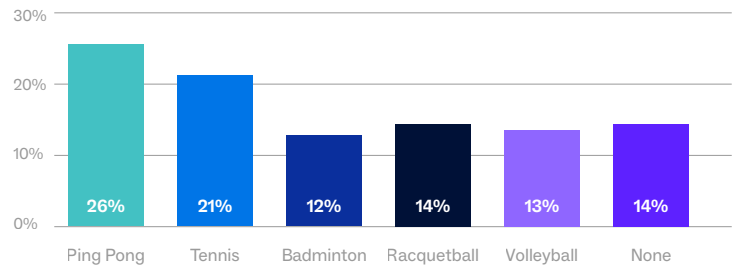
## Education Levels

51% of respondents have earned a Bachelor's degree or higher. This indicates a relatively educated market likely responsive to structured programs and formal communications.



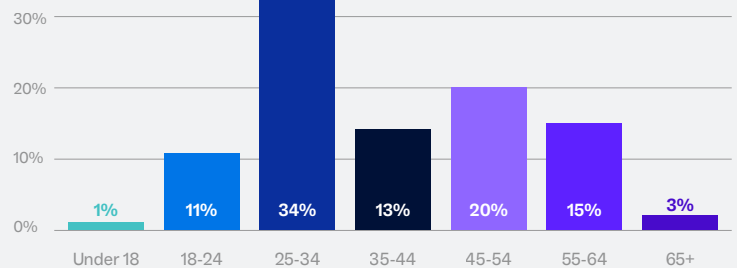
## Marital Status

56% of respondents are married. This supports the creation of couple-oriented events, leagues, and promotions.



## Income Levels

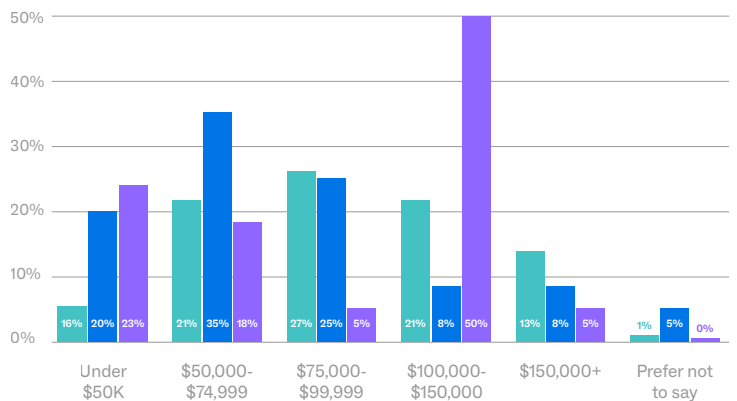
There is a wide distribution, but a substantial portion of respondents earn over \$100K. This supports tiered offerings and premium options.



## Income by Marital Status

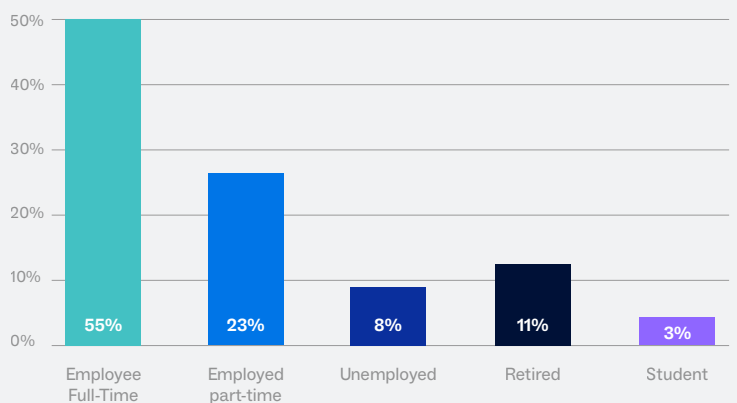
Married individuals are more likely to have higher incomes, while single and divorced participants show more modest earnings. This demographic data can inform pricing models and targeted promotions.

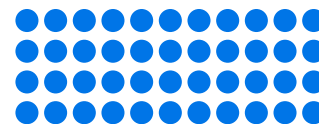
■ Married
 ■ Single/Widowed
 ■ Divorced



## Employment Status

11% of respondents are retired, with the rest employed full-time, part-time, or unemployed. An existing retired audience suggests the potential for daytime programming and senior-friendly services, while the employed majority suggest a continued need for evening and weekend programming.





# U.S. PICKLEBALL POPULATION COMPARED TO THE PICKLR MEMBERSHIP



This section analyzes the U.S. pickleball population and compares it to The Picklr member base.

## Key Takeaways

**Affluence Across Segments:** Over 72% of the Picklr Members and Retail Purchasers report annual household incomes above \$100K, significantly outperforming the national average. Picklr Members in particular show an intense concentration above \$150K, with robust homeownership and financial stability indicators.

**Discretionary Spending Power:** Both audiences exhibit high-value consumer behaviors, such as luxury vehicle purchases, fitness equipment, and financial advisory services, highlighting their readiness to invest in premium recreational experiences and memberships.

**Demographic Alignment:** While both groups tend to skew slightly male and older (especially 55+ for retail purchasers), their profiles suggest ideal targets for lifestyle and leisure marketing initiatives. There is also a notable concentration in segments such as “Already Affluent” and “Young-at-Heart,” pointing to financially stable, lifestyle-driven consumers. With more brand awareness activity in your key local market areas, ROR can assist in expanding this age group into younger, affluent demos.

**Strategic Potential:** These insights support a strong case for activating high-value custom audiences via ROR (powered by ActivImpact) to drive membership growth for The Picklr—nationally and in local markets.



AUDIENCE PROFILE REPORT 1

Pickleball Equipment & Apparel Purchasers Compared to U.S. Population

Audience Analysis

Approach

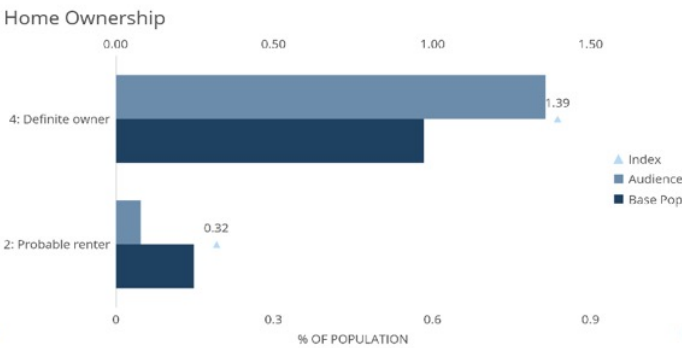
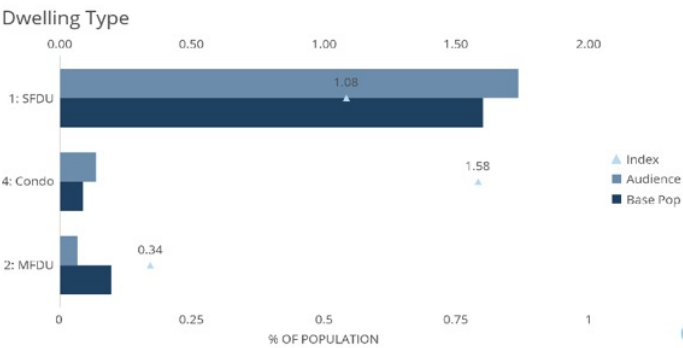
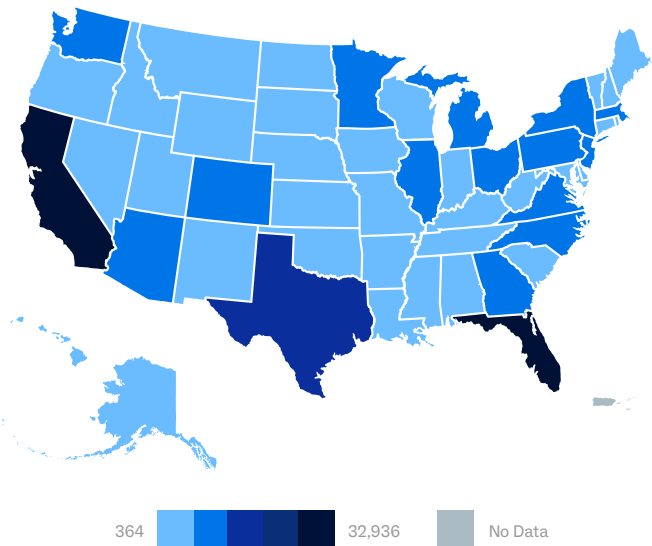
- Extracted customers from billing platform
- Ingested into ActivImpact platform, cleansed contacts, matched to U.S. master file
- Appended attributes covering a range of demographic, financial, behavioral, attitudinal dimensions
- Identified attributes where client population is materially different from U.S. population
- Identified specific attributes, not available within Meta, which are highly predictive of a purchase from you brand

Consumer Attributes Evaluated

46.47K

Audience Records Evaluated

297.49K



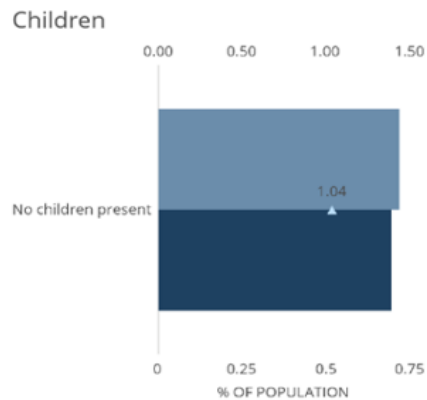
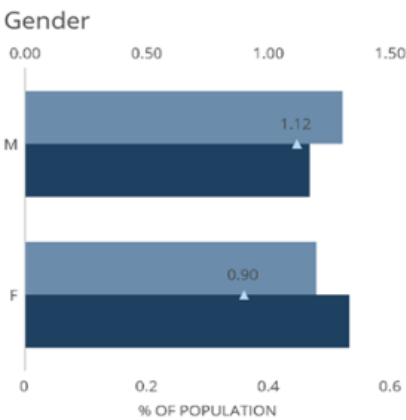
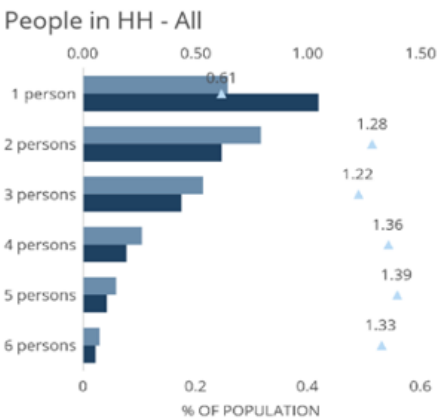
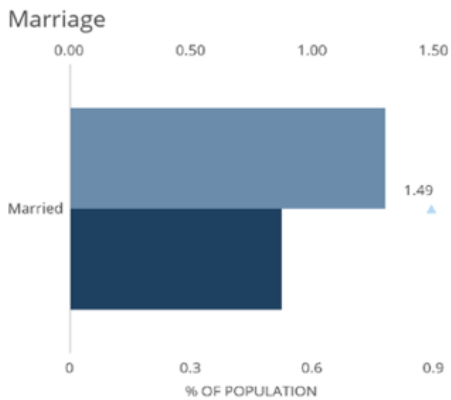
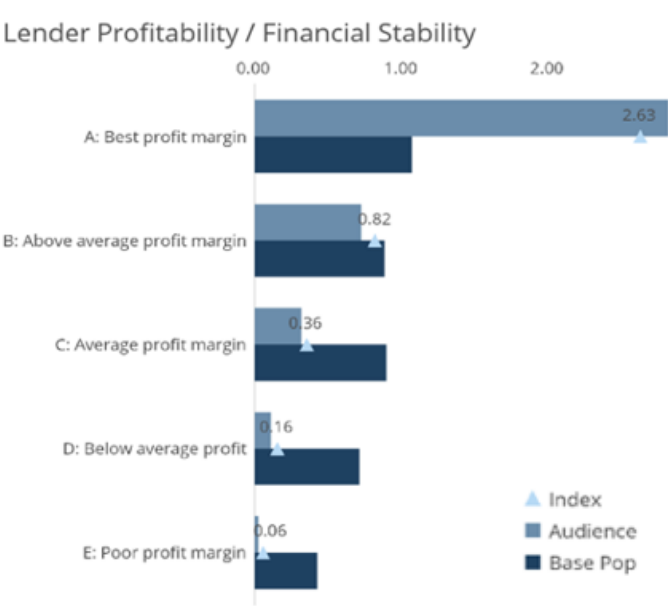
Both **Pickleball Equipment & Apparel Purchasers** and the U.S. population tend to over index for home ownership in a Single Family Dwelling Unit (SFDU) with **Equipment & Apparel Purchasers** being 39% more likely than the national average to be homeowners.

Key:

Audience = Pickleball Equipment & Apparel Purchasers  
Base Pop = U.S. Population

Income

ATTRIBUTE_VALUE_DESC	Index	AUDIE..	BASE_..
\$500,000 or more	3.44	12.6%	3.7%
\$250,000 - \$499,999	2.37	13.3%	5.6%
\$200,000 - \$249,999	1.97	10.2%	5.2%
\$175,000 - \$199,999	1.84	7.5%	4.1%
\$150,000 - \$174,999	1.61	6.4%	4.0%
\$125,000 - \$149,999	1.36	12.4%	9.2%
\$100,000 - \$124,999	1.12	10.0%	9.0%
\$ 75,000 - \$ 99,999	0.87	11.0%	12.7%
\$ 50,000 - \$ 74,999	0.58	9.1%	15.6%
\$ 40,000 - \$ 49,999	0.40	3.6%	9.1%
\$ 30,000 - \$ 39,999	0.26	1.7%	6.7%
\$ 20,000 - \$ 29,999	0.22	1.4%	6.1%
\$ 15,000 - \$ 19,999	0.12	0.4%	3.1%
\$ 0 - \$ 14,999	0.05	0.3%	6.1%
GRAND TOTAL	1.00	100.0%	100.0%

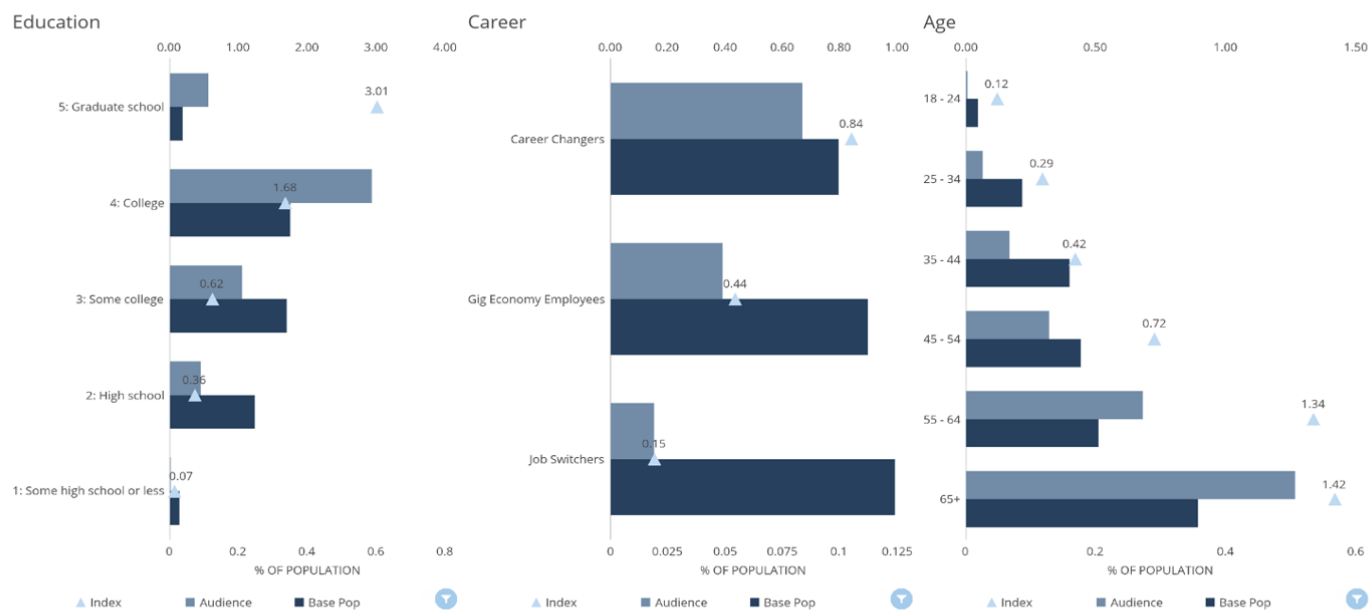


▲ Index  
■ Audience  
■ Base Pop

Compared to the general U.S. population, **Pickleball Equipment & Apparel Purchasers** demonstrate significantly higher affluence. Over 72% of these consumers have a household income exceeding \$100K annually, indexing well above the national average. Additionally, this segment shows stronger indicators of financial stability and lender profitability, suggesting they represent a lower financial risk profile than the average U.S. consumer.

Demographically, both the general U.S. population and Pickleball **Equipment & Apparel Purchasers** tend to be married, with a relatively balanced gender distribution that slightly skews male. This may point to family-based purchases that fall under a male head of household, particularly in households with shared or family memberships.

PICKLEBALL EQUIPMENT & APPAREL PURCHASERS COMPARED TO U.S. POPULATION



Compared to the general U.S. population, **Pickleball Equipment & Apparel Purchasers** are notably well-educated, with a higher proportion holding a four-year college degree or higher.

This audience also skews older, with a significant concentration of individuals aged 55 and above—outpacing the national average. This age profile may indicate greater lifestyle flexibility and the potential for early retirement, aligning with the group’s overall affluence.

Dwelling Type

ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
4: Condo	1.58	0.07	0.04
1: SFDU	1.08	0.87	0.80
2: MFDU	0.34	0.03	0.10
GRAND TOTAL	1.03	0.97	0.94

Home Ownership

ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
4: Definite owner	1.39	0.81	0.58
3: Probable owner	0.51	0.12	0.24
2: Probable renter	0.32	0.05	0.15
GRAND TOTAL	1.01	0.98	0.97

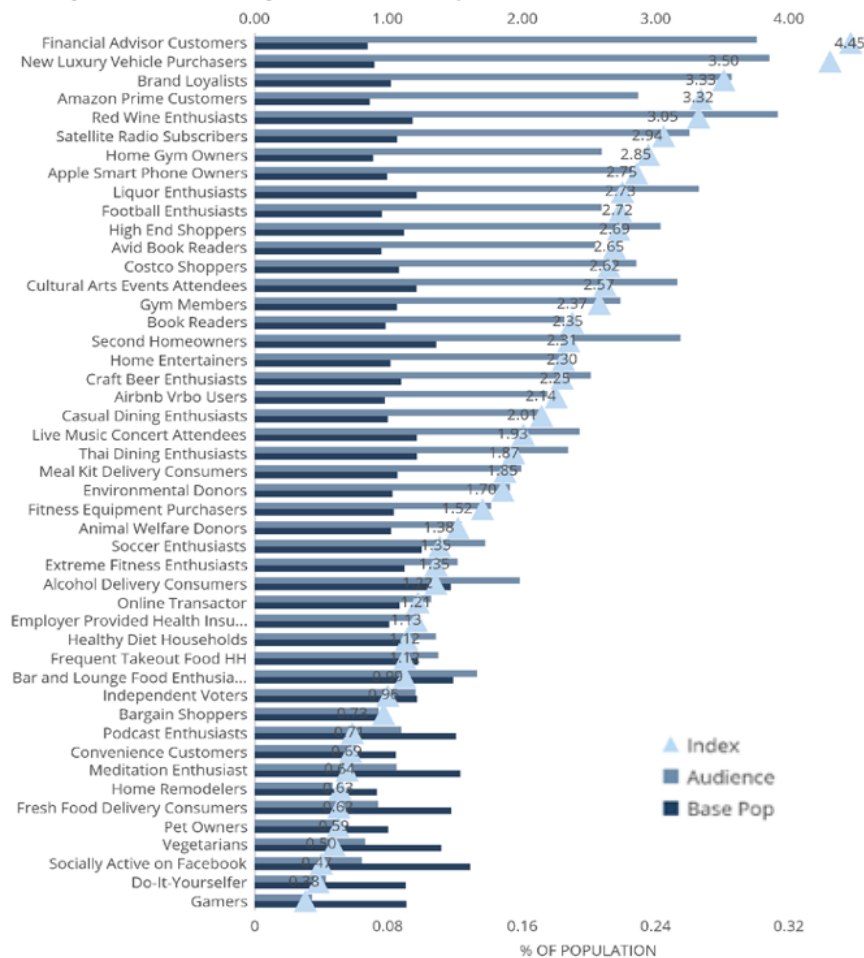
Education

ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
5: Graduate school	3.01	0.11	0.04
4: College	1.68	0.59	0.35
3: Some college	0.62	0.21	0.34
2: High school	0.36	0.09	0.25
1: Some high school or less	0.07	0.00	0.03
GRAND TOTAL	1.00	1.00	1.00

Age

ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
65-74 years old	1.82	0.33	0.18
55-64 years old	1.32	0.26	0.20
75+ years old	1.18	0.17	0.14
45-54 years old	0.77	0.13	0.16
35-44 years old	0.42	0.09	0.21
25-34 years old	0.32	0.03	0.09
18-24 years old	0.09	0.00	0.01
GRAND TOTAL	1.00	1.00	1.00

Lifestyles & Interests by Audience Group



Lifestyles & Interests - All

ATTRIBUTE_DESC	Index
Financial Advisor Customers	4.45
New Luxury Vehicle Purchasers	4.30
Brand Loyalists	3.50
Amazon Prime Customers	3.33
Red Wine Enthusiasts	3.32
Satellite Radio Subscribers	3.05
Home Gym Owners	2.94
Apple Smart Phone Owners	2.85
Liquor Enthusiasts	2.75
Football Enthusiasts	2.73
High End Shoppers	2.72
Avid Book Readers	2.69
Costco Shoppers	2.65
Cultural Arts Events Attendees	2.62
Gym Members	2.57
Book Readers	2.37

Lifestyles & Interests - All

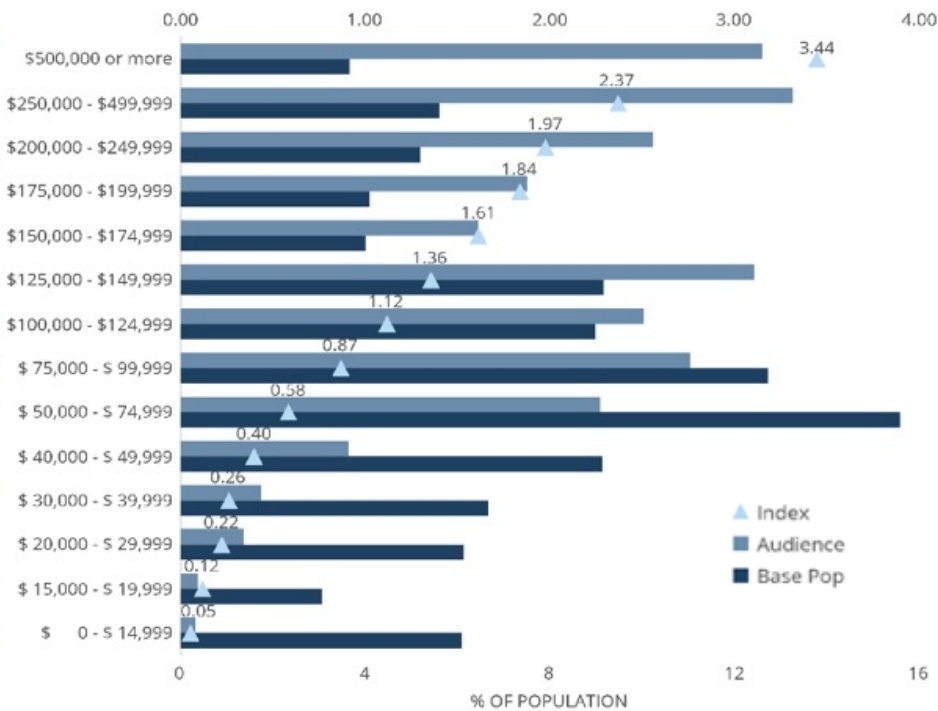
ATTRIBUTE_DESC	Index
Second Homeowners	2.35
Home Entertainers	2.31
Craft Beer Enthusiasts	2.30
Airbnb Vrbo Users	2.25
Casual Dining Enthusiasts	2.14
Live Music Concert Attendees	2.01
Thai Dining Enthusiasts	1.93
Meal Kit Delivery Consumers	1.87
Environmental Donors	1.85
Fitness Equipment Purchasers	1.70
Animal Welfare Donors	1.52
Soccer Enthusiasts	1.38
Extreme Fitness Enthusiasts	1.35
Alcohol Delivery Consumers	1.35
Online Transactor	1.21

Pickleball Equipment & Apparel Purchasers exhibit lifestyle traits and interests that reflect affluence and significant discretionary income. In addition to strong brand loyalty, this audience demonstrates a higher likelihood of purchasing new luxury vehicles and engaging with financial advisors—signals that point to greater long-term value and alignment with the ideal The Picklr member profile.

Niches

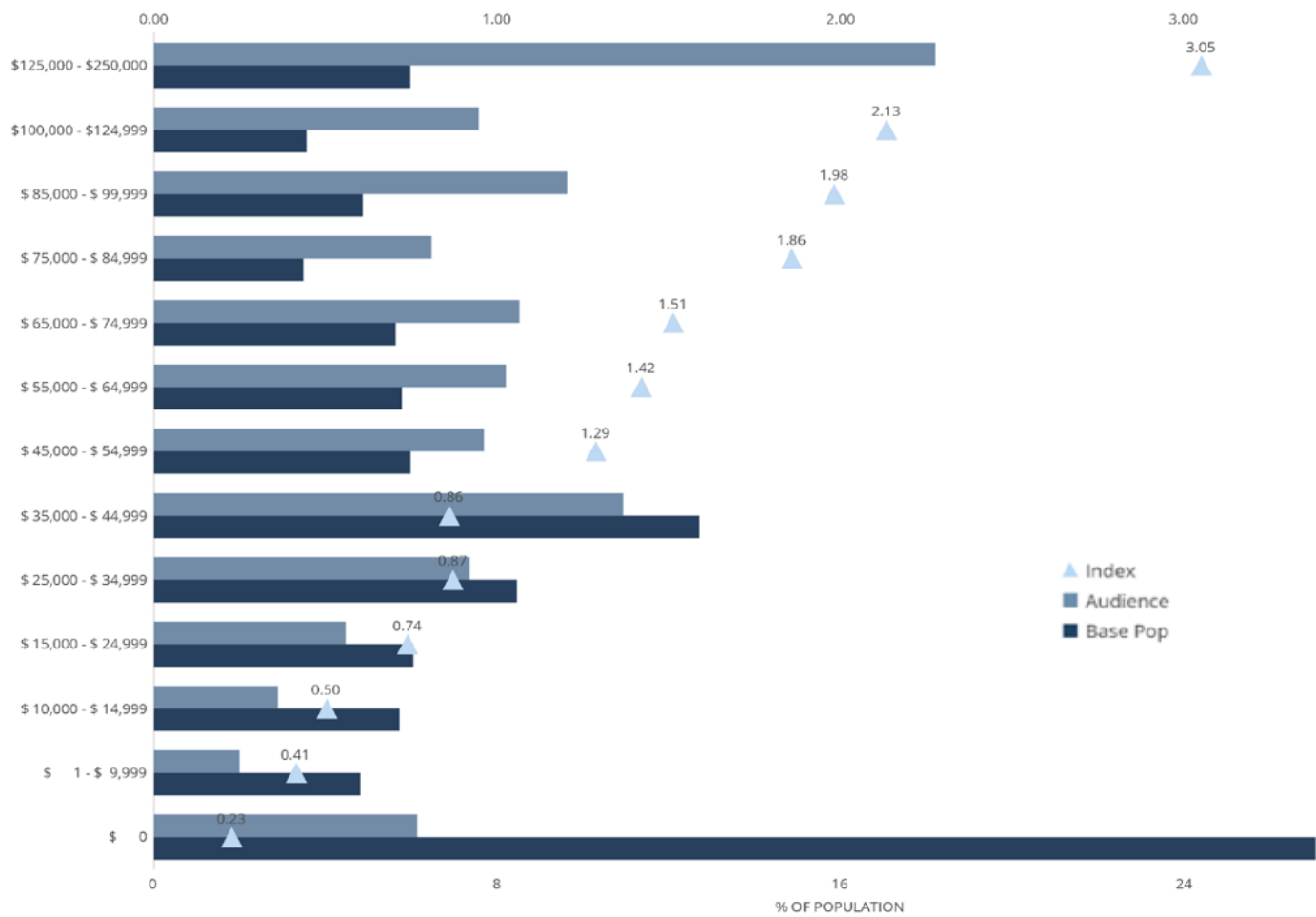
PROFILE_DESC	Index	AUDIEN..	BASE_PCT	AUDIEN..	BASE_RE..
Chic Society	3.28	28%	9%	63,555	21,478,4..
Easy Street	2.46	10%	4%	28,291	9,692,017
IRA Spenders	2.12	20%	9%	58,031	23,061,4..
Doing Well and Donating	2.10	8%	4%	23,326	9,264,046
Big Spender Parents	1.04	4%	4%	13,028	10,557,4..
Nice and Easy Living	0.93	9%	10%	26,944	24,321,4..
Home Hoppers	0.93	3%	3%	8,661	7,824,342
Feathering-the-Nest	0.86	1%	1%	2,182	2,137,885
Mid-Life Munchkins	0.69	1%	1%	2,744	3,357,798
Young-at-Heart	0.66	3%	4%	7,770	9,627,565
Already Affluent	0.64	1%	1%	2,288	2,992,458
Quiet Homebodies	0.60	2%	4%	7,139	10,100,3..
Go-Go Families	0.55	1%	2%	3,132	4,759,686
Loose Change	0.53	1%	2%	3,233	5,096,187
Still Going Strong	0.45	1%	2%	3,132	5,830,009
Kiddie Kastles	0.35	2%	5%	4,966	12,063,8..
Zone of Contentment	0.33	3%	9%	8,658	22,233,2..
Just Sailing Along	0.27	1%	4%	3,621	11,149,4..
X-Tra Time on Their Hands	0.14	1%	4%	1,851	11,251,3..
Tireless and On The Move	0.13	0%	1%	584	3,706,839
Resourceful Realists	0.13	1%	5%	2,433	15,826,7..
Oodles of Offspring	0.12	0%	1%	420	2,993,130
Undaunted Do It Yourselfers	0.10	0%	2%	592	4,818,966
Parks, Parts and Playgrounds	0.06	0%	2%	292	3,793,402
Value Focused	0.04	0%	3%	474	8,151,785
Working Hard	0.04	0%	2%	189	4,370,499
GRAND TOTAL	1.00	100%	100%	297,486	250,860,...

Income



Building on earlier insights, [Pickleball Equipment & Apparel Purchasers](#) consistently exhibit high-income levels—exceeding \$100K annually—and demonstrate niche, high-spending lifestyle interests that surpass national averages.

PICKLEBALL EQUIPMENT & APPAREL PURCHASERS COMPARED TO U.S. POPULATION



**Pickleball Equipment & Apparel Purchasers** skew heavily toward higher-income consumers. The chart clearly shows that as income increases, the likelihood of being in the audience also increases—especially in the \$125k–\$250k range. Conversely, lower-income consumers are significantly underrepresented.

**Pickleball Equipment & Apparel Purchasers** have discretionary income to spend on sports equipment, apparel, and memberships at high end clubs like The Picklr.

AUDIENCE PROFILE REPORT 2

Picklr Members Compared to U.S. Population

Audience Analysis

Approach

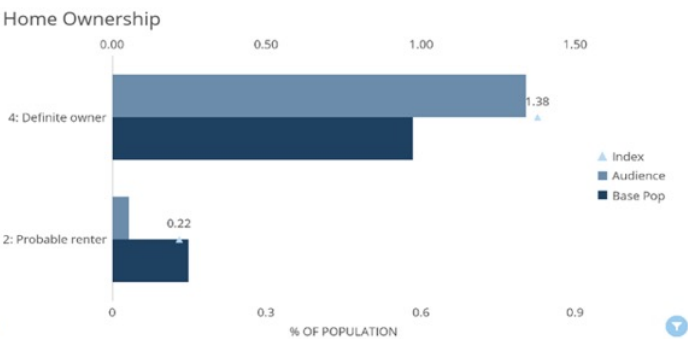
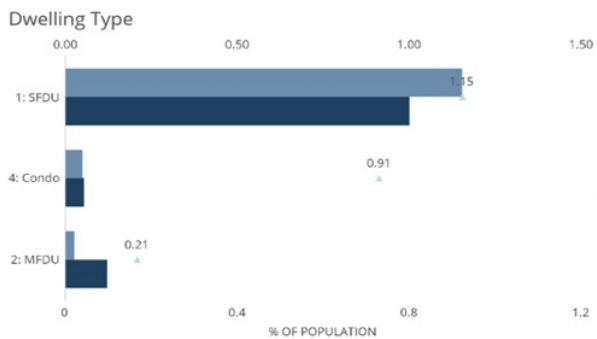
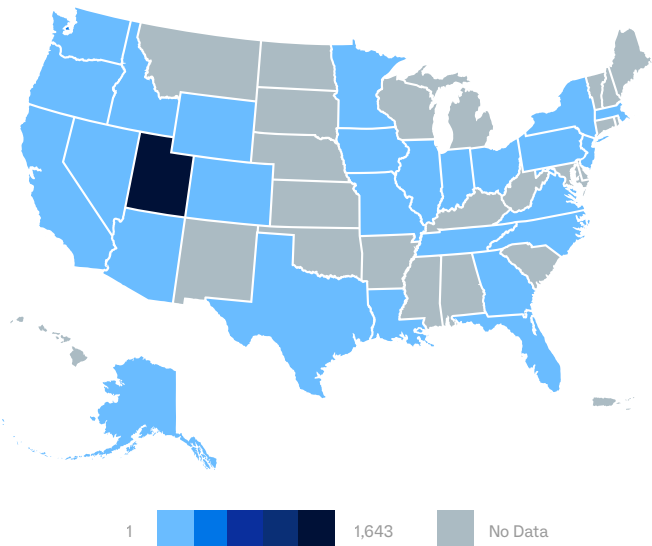
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Consumer Attributes Evaluated

46.47K

Audience Records Evaluated

2.13K



Both **The PicklR Members** and the general U.S. population show a strong tendency to reside in single-family dwelling units (SFDU). However, **The PicklR Members** are 38% more likely to be homeowners compared to the national average, underscoring their elevated financial stability and long-term residential investment.

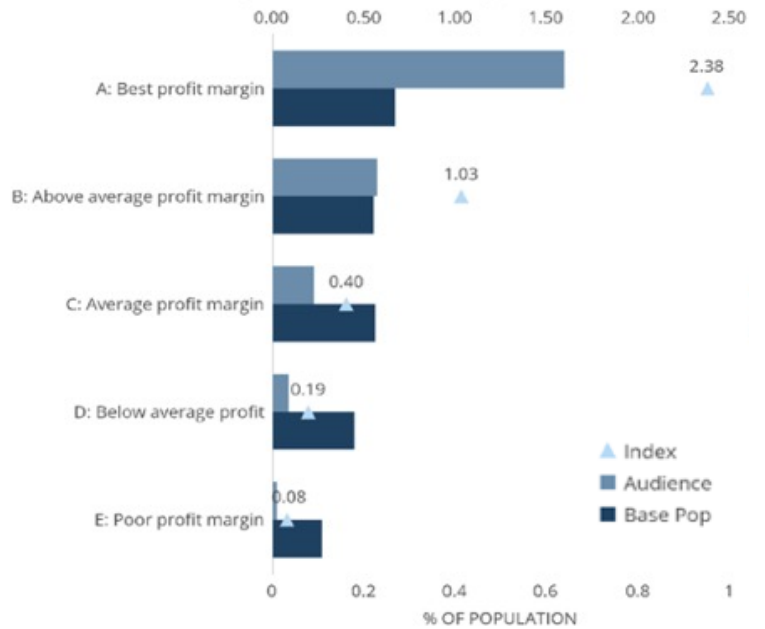
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Audience = Pickleball Equipment & Apparel Purchasers  
Base Pop = U.S. Population

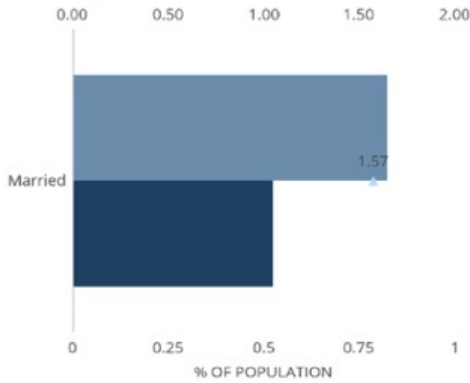
## Income

ATTRIBUTE_VALUE_DESC	Index	AUDIE..	BASE_..
\$500,000 or more	3.18	11.6%	3.7%
\$200,000 - \$249,999	2.80	14.5%	5.2%
\$250,000 - \$499,999	2.67	15.0%	5.6%
\$175,000 - \$199,999	2.28	9.3%	4.1%
\$125,000 - \$149,999	1.84	16.9%	9.2%
\$150,000 - \$174,999	1.05	4.2%	4.0%
\$ 75,000 - \$ 99,999	0.78	9.9%	12.7%
\$100,000 - \$124,999	0.74	6.6%	9.0%
\$ 50,000 - \$ 74,999	0.47	7.3%	15.6%
\$ 40,000 - \$ 49,999	0.24	2.2%	9.1%
\$ 30,000 - \$ 39,999	0.21	1.4%	6.7%
\$ 20,000 - \$ 29,999	0.13	0.8%	6.1%
\$ 15,000 - \$ 19,999	0.05	0.1%	3.1%
\$ 0 - \$ 14,999	0.02	0.1%	6.1%
GRAND TOTAL	1.00	100.0%	100.0%

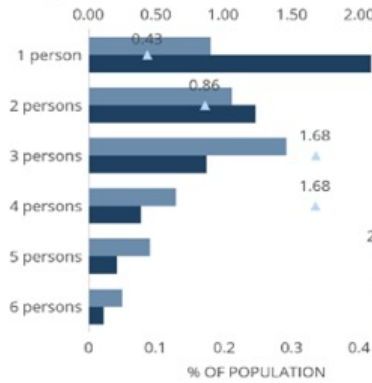
## Lender Profitability / Financial Stability



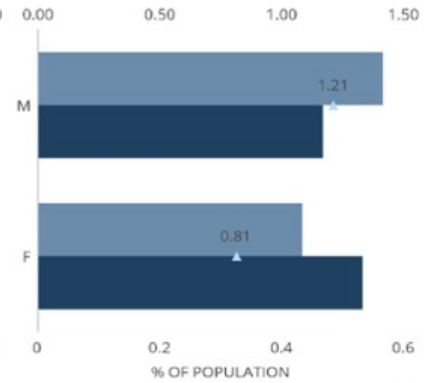
## Marriage



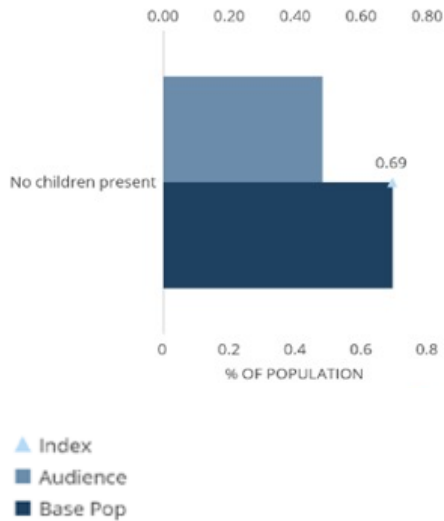
## People in HH - All



## Gender

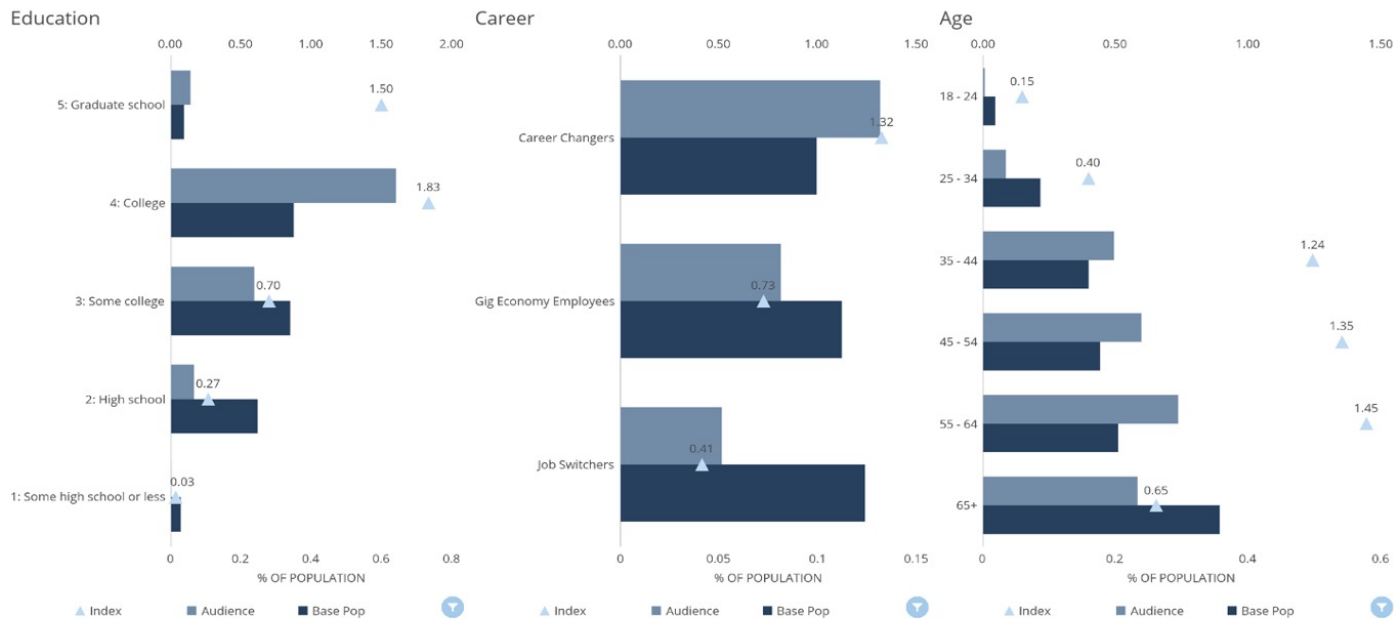


## Children



An analysis of [The Picklr Member](#) base reveals a notably affluent audience. Over 71% of members report household incomes exceeding \$150,000 annually—substantially higher than the national average. This elevated income level is further reflected in homeownership rates referenced on the previous slide, with a significantly larger share of [The Picklr Members](#) owning their homes compared to the general U.S. population. These indicators collectively underscore the financial strength and stability of The Picklr community.

From a demographic standpoint, marital status trends reference The Picklr Members are 50% more likely than the general U.S. population to be married. However, gender distribution within The Picklr skews slightly male, whereas the general population leans female. This discrepancy may suggest that family memberships are often registered under a male head of household.



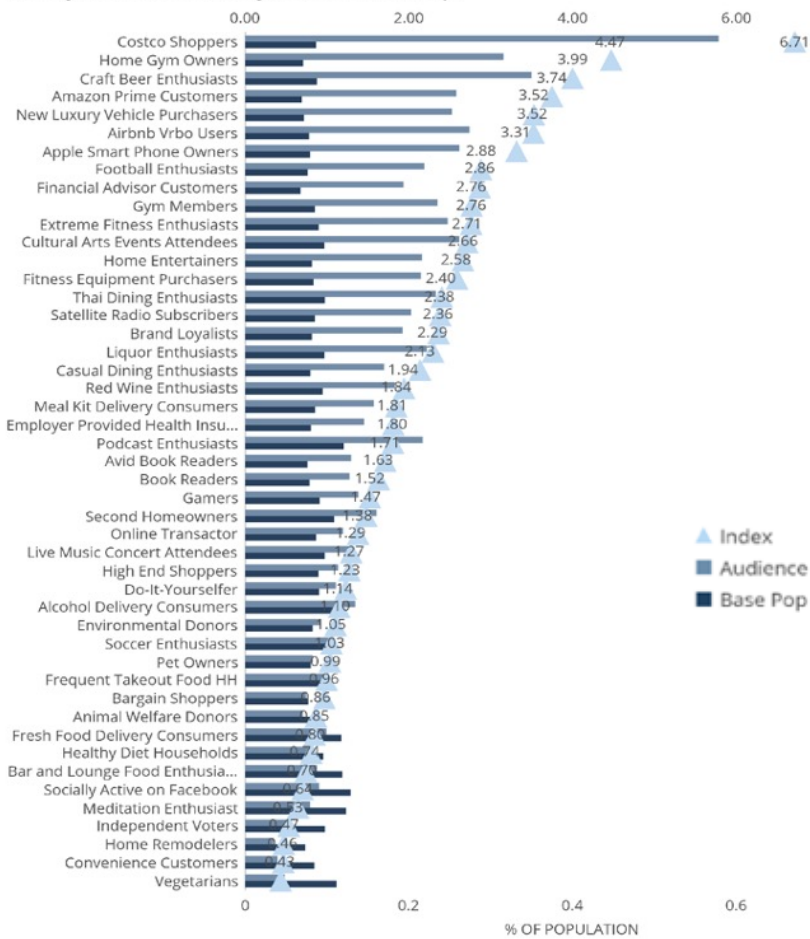
Compared to the general U.S. population, **Members of The Picklr** exhibit notably higher levels of educational attainment. A greater proportion of Picklr members have completed a four-year college degree or higher, highlighting a well-educated member base.

Additionally, there appears to be a meaningful correlation between Picklr membership and significant professional transitions. A high index of members within the 35–64 age range suggests trends such as career advancement—potentially linked to increased earning potential—or early retirement. These insights point to a lifestyle that supports both financial flexibility and a greater investment in recreational activities like pickleball.

Dwelling Type				Education			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..	ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
1: SFDU	1.15	0.92	0.80	4: College	1.83	0.64	0.35
4: Condo	0.91	0.04	0.04	5: Graduate school	1.50	0.06	0.04
2: MFDU	0.21	0.02	0.10	3: Some college	0.70	0.24	0.34
GRAND TOTAL	1.05	0.98	0.94	2: High school	0.27	0.07	0.25
				1: Some high school or less	0.03	0.00	0.03
				GRAND TOTAL	1.00	1.00	1.00

Home Ownership				Age			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..	ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
4: Definite owner	1.38	0.80	0.58	55-64 years old	1.39	0.27	0.20
3: Probable owner	0.66	0.16	0.24	45-54 years old	1.35	0.22	0.16
2: Probable renter	0.22	0.03	0.15	65-74 years old	1.12	0.20	0.18
GRAND TOTAL	1.02	0.99	0.97	35-44 years old	1.05	0.22	0.21
				25-34 years old	0.52	0.05	0.09
				75+ years old	0.22	0.03	0.14
				18-24 years old	0.21	0.00	0.01
				GRAND TOTAL	1.00	1.00	1.00

Lifestyles & Interests by Audience Group



Lifestyles & Interests - All

ATTRIBUTE_DESC	Index
Costco Shoppers	6.71
Home Gym Owners	4.47
Craft Beer Enthusiasts	3.99
Amazon Prime Customers	3.74
New Luxury Vehicle Purchasers	3.52
Airbnb Vrbo Users	3.52
Apple Smart Phone Owners	3.31
Football Enthusiasts	2.88
Financial Advisor Customers	2.86
Gym Members	2.76
Extreme Fitness Enthusiasts	2.71
Cultural Arts Events Attendees	2.66
Home Entertainers	2.66
Fitness Equipment Purchasers	2.58
Thai Dining Enthusiasts	2.40
Satellite Radio Subscribers	2.38

Lifestyles & Interests - All

ATTRIBUTE_DESC	Index
Brand Loyalists	2.36
Liquor Enthusiasts	2.29
Casual Dining Enthusiasts	2.13
Red Wine Enthusiasts	1.94
Meal Kit Delivery Consumers	1.84
Employer Provided Health Insurance Policy Holders	1.81
Podcast Enthusiasts	1.80
Avid Book Readers	1.71
Book Readers	1.63
Gamers	1.52
Second Homeowners	1.47
Online Transactor	1.38
Live Music Concert Attendees	1.29
High End Shoppers	1.27
Do-It-Yourselfer	1.14

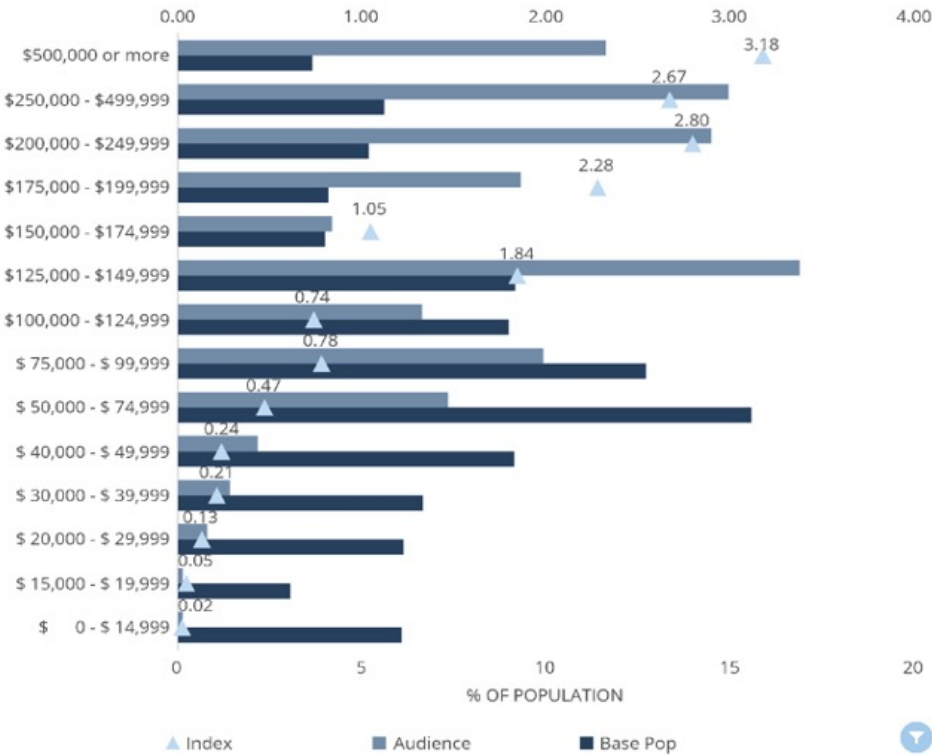
Compared to the general U.S. population, **Members of The Picklr** exhibit notably higher levels of educational attainment. A greater proportion of Picklr members have completed a four-year college degree or higher, highlighting a well-educated member base.

The lifestyle and interest profiles of **The Picklr Members** reflect a high level of affluence and discretionary spending power. Compared to the national average, **The Picklr members** are significantly more likely to fall into categories such as “New Luxury Vehicle Purchasers,” “Fitness Equipment Purchasers,” and “Financial Advisor Clients.” These indicators suggest a strong capacity and willingness to invest in premium recreational memberships.

Niches

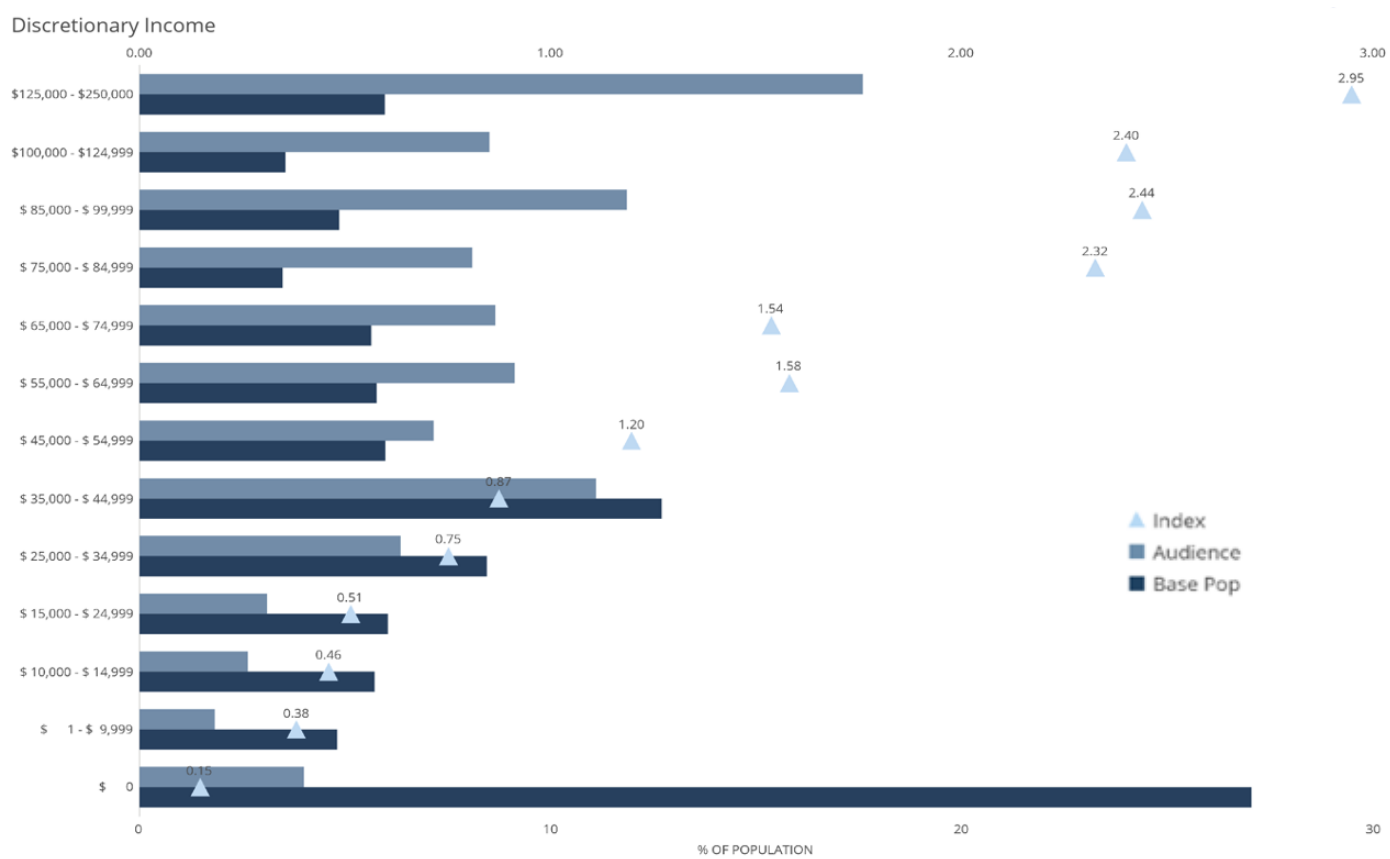
PROFILE_DESC	Index	AUDIEN..	BASE_PCT	AUDIEN..	BASE_RE..
Doing Well and Donating	3.58	13%	4%	284	9,364,046
Big Spender Parents	3.25	14%	4%	291	10,557,4...
Easy Street	2.61	10%	4%	214	9,692,017
Feathering the Nest	2.37	2%	1%	43	2,137,885
Chic Society	2.29	20%	9%	417	21,478,4...
IRA Spenders	1.35	12%	9%	263	23,061,4...
Go-Go Families	1.31	2%	2%	53	4,759,686
Mid-Life Munchkins	1.15	2%	1%	33	3,357,798
Kiddie Kastles	0.97	5%	5%	99	12,063,8...
Quiet Homebodies	0.85	3%	4%	74	10,100,3...
Loose Change	0.75	2%	2%	33	5,096,187
Nice and Easy Living	0.60	6%	10%	123	24,321,4...
Still Going Strong	0.51	1%	2%	25	5,830,009
Home Hoppers	0.42	1%	3%	28	7,824,342
Already Affluent	0.39	0%	1%	10	2,992,458
Just Sailing Along	0.30	1%	4%	28	11,149,4...
Oodles of Offspring	0.28	0%	1%	7	2,993,130
Undaunted Do It Yourselfers	0.24	0%	2%	10	4,818,966
Parks, Parts and Playgrounds	0.22	0%	2%	7	3,793,402
Resourceful Realists	0.21	1%	6%	28	15,826,7...
Tireless and On The Move	0.19	0%	1%	6	3,706,839
X-Tra Time on Their Hands	0.13	1%	4%	12	11,251,3...
Young-at-Heart	0.12	0%	4%	10	9,927,565
Zone of Contentment	0.11	1%	9%	21	22,233,2...
Working Hard	0.08	0%	2%	3	4,370,499
Value Focused	0.05	0%	3%	4	8,151,785
GRAND TOTAL	1.00	100%	100%	2,126	250,860,...

Income



As previously noted, [The Picklr Members](#) significantly outpace the national average in household income, with a strong concentration earning over \$150,000 annually. This elevated income level translates into greater discretionary spending power, particularly within specialized lifestyle and recreational categories.

PICKLR MEMBERS COMPARED TO U.S. POPULATION



**Members of The Picklr** are overwhelmingly concentrated in high-income tiers, indexing well above average in the US general average. This affirms their strong purchasing power, financial stability, and potential responsiveness to premium offerings.

This audience profile presents significant opportunities for targeted marketing, sponsorships, and membership growth strategies focused on affluent consumer segments. As previously referenced, ROR can directly attribute these insights to media campaigns to help drive membership growth for the Picklr brand.

AUDIENCE PROFILE REPORT 3

Pickleball Retail & Equipment Purchasers Compared to The Picklr Current Members

Audience Analysis

Approach

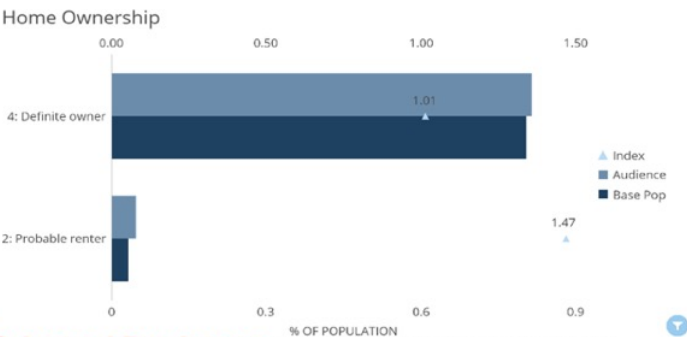
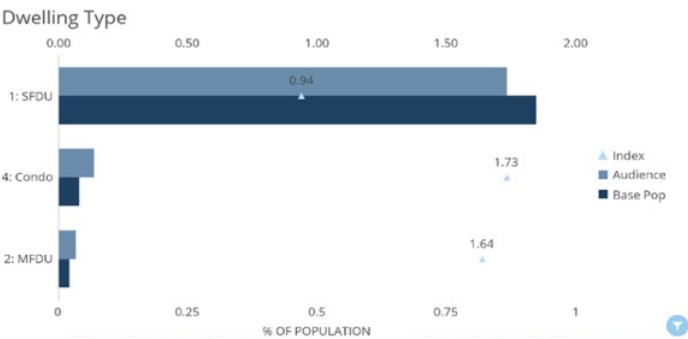
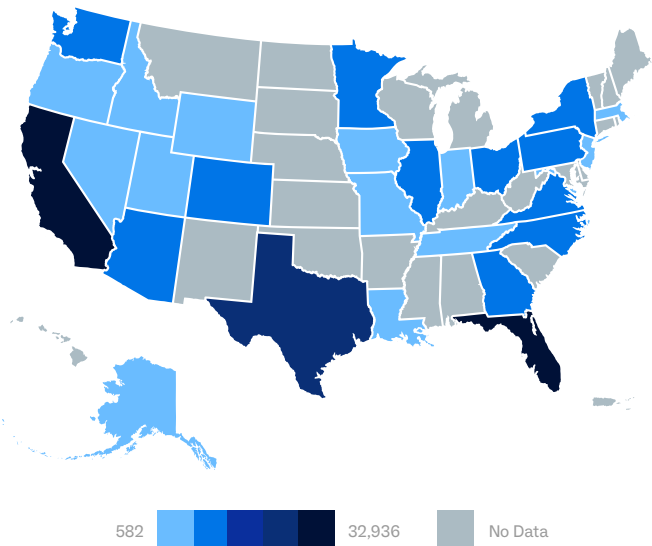
- Extracted customers from billing platform
- Ingested into ActivImpact platform, cleansed contacts, matched to U.S. master file
- Appended attributes covering a range of demographic, financial, behavioral, attitudinal dimensions
- Identified attributes where client population is materially different from U.S. population
- Identified specific attributes, not available within Meta, which are highly predictive of a purchase from you brand

Consumer Attributes Evaluated

46.47K

Audience Records Evaluated

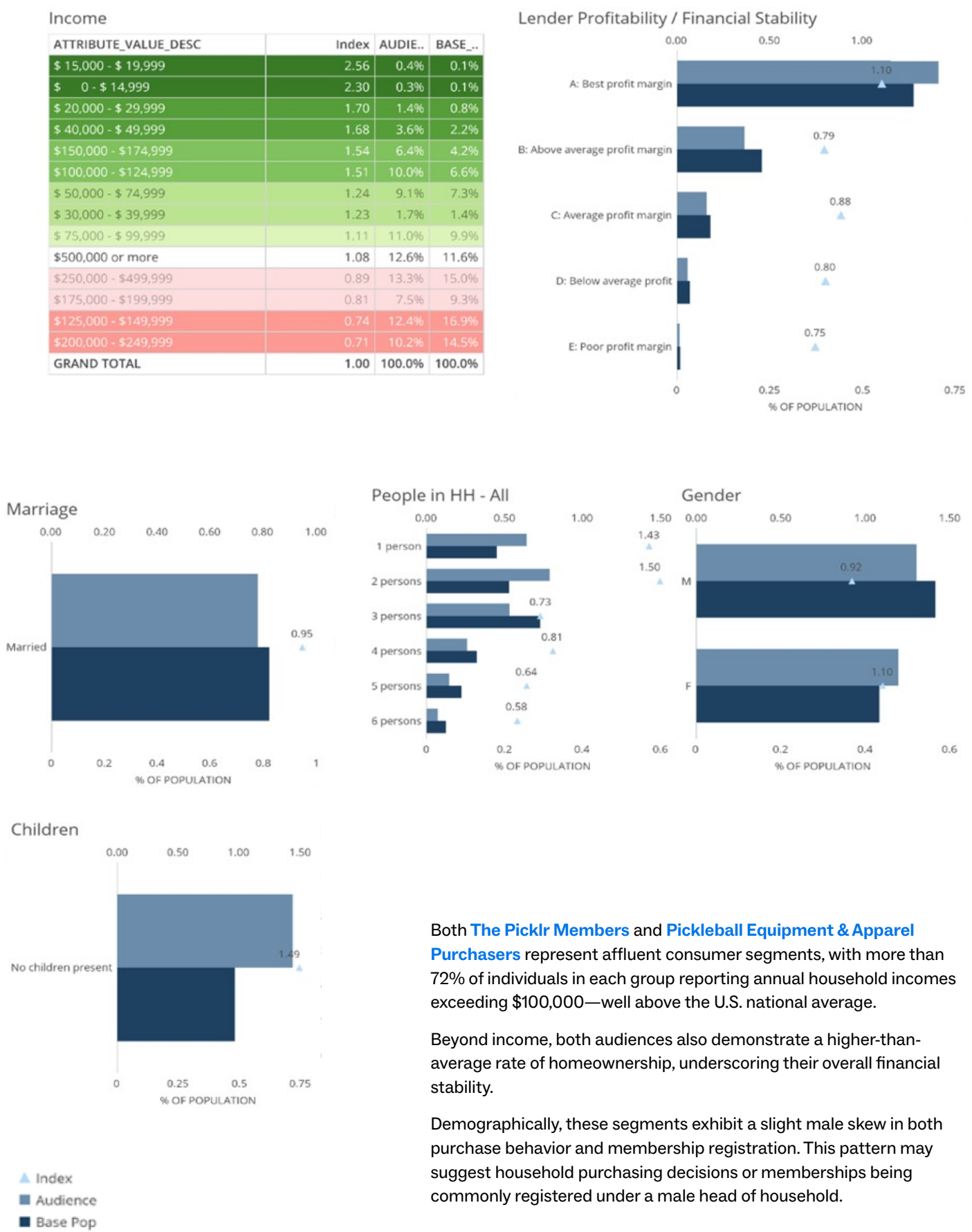
297.49K



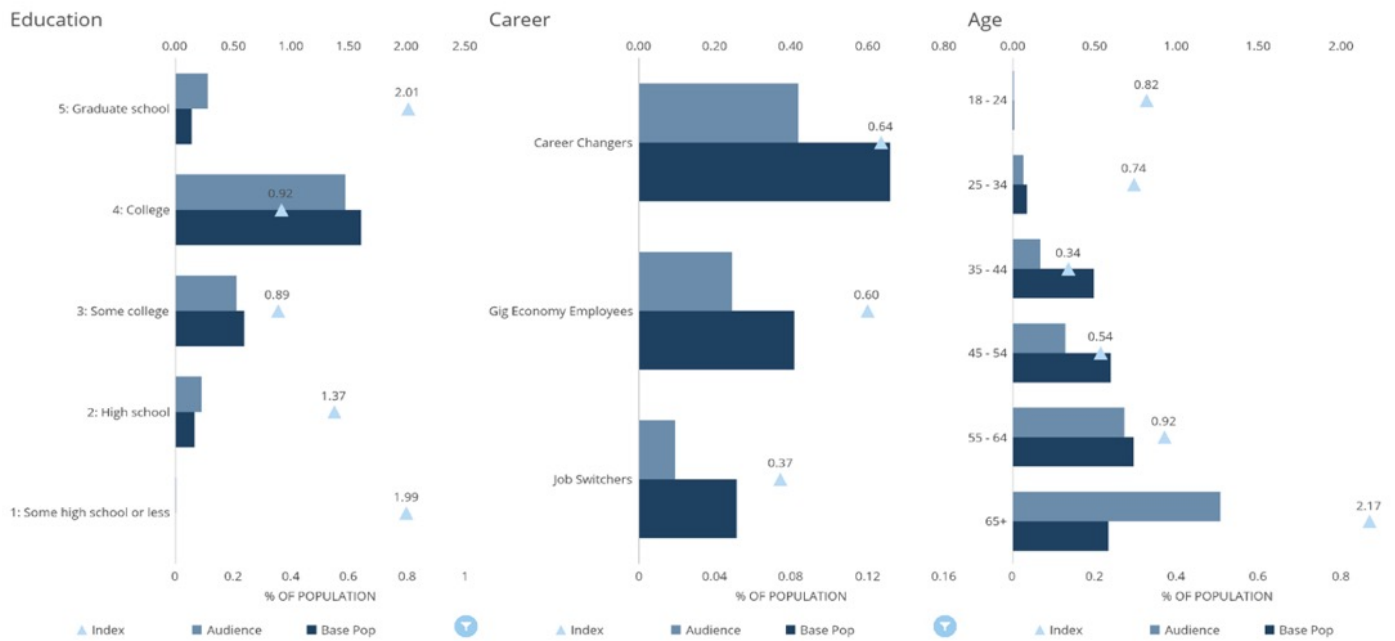
Both **The Picklr Members** and the **Pickleball Equipment & Apparel Purchasers** exhibit a higher-than-average propensity for homeownership, particularly within Single Family Dwelling Units (SFDU).

Key:

Audience = Pickleball Equipment & Apparel Purchasers  
Base Pop = U.S. Population



PICKLEBALL RETAIL & EQUIPMENT PURCHASERS COMPARED TO THE PICKLR CURRENT MEMBERS



The **Pickleball Equipment & Apparel Purchaser** audience skews older, more affluent, and more educated, but also includes a notable subset with lower education (high school) attainment, suggesting diverse appeal across socioeconomic backgrounds.

They show greater professional and financial stability and are less transient in their careers.

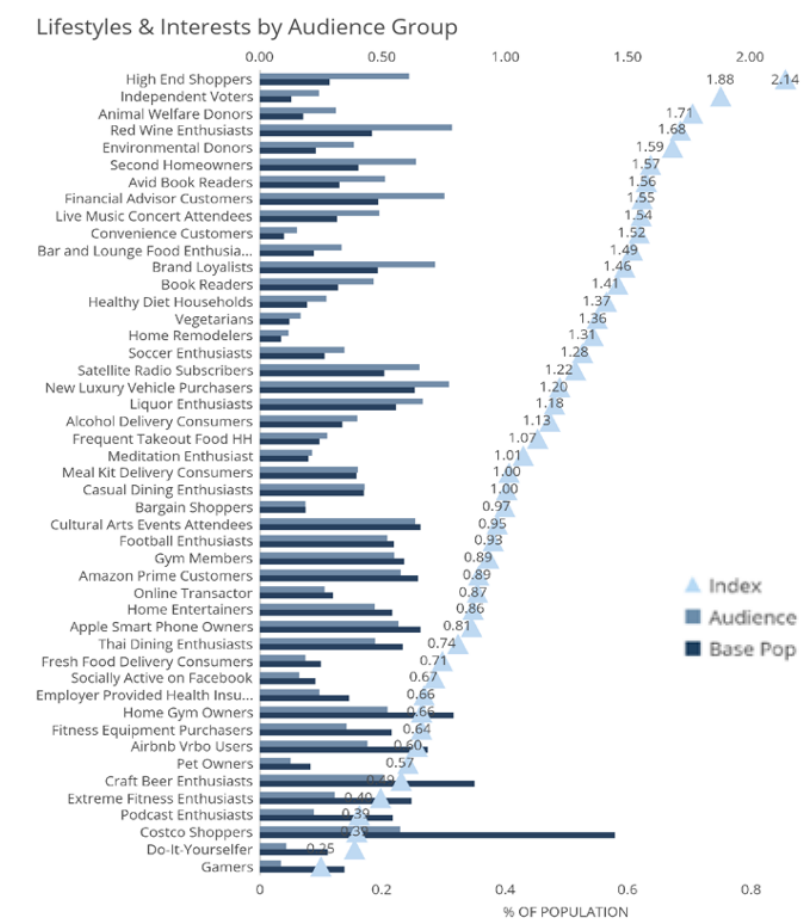
This demographic profile makes them a strong target for premium products, loyalty programs, and value-added services aimed at new and up-and-coming pickleball enthusiasts to become **The Picklr Members**.

Dwelling Type			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
4: Condo	1.73	0.07	0.04
2: MFDU	1.64	0.03	0.02
1: SFDU	0.94	0.87	0.92
GRAND TOTAL	0.98	0.97	0.98

Education			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
5: Graduate school	2.01	0.11	0.06
1: Some high school or less	1.99	0.00	0.00
2: High school	1.37	0.09	0.07
4: College	0.92	0.59	0.64
3: Some college	0.89	0.21	0.24
GRAND TOTAL	1.00	1.00	1.00

Home Ownership			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
2: Probable renter	1.47	0.05	0.03
4: Definite owner	1.01	0.81	0.80
3: Probable owner	0.77	0.12	0.16
GRAND TOTAL	0.99	0.98	0.99

Age			
ATTRIBUTE_VALUE_DESC	Index	AUD..	BAS..
75+ years old	5.29	0.17	0.03
65-74 years old	1.63	0.33	0.20
55-64 years old	0.95	0.26	0.27
25-34 years old	0.63	0.03	0.05
45-54 years old	0.57	0.13	0.22
18-24 years old	0.45	0.00	0.00
35-44 years old	0.40	0.09	0.22
GRAND TOTAL	1.00	1.00	1.00



Lifestyles & Interests - All

ATTRIBUTE_DESC	Index
High End Shoppers	2.14
Independent Voters	1.88
Animal Welfare Donors	1.76
Red Wine Enthusiasts	1.71
Environmental Donors	1.68
Second Homeowners	1.59
Avid Book Readers	1.57
Financial Advisor Customers	1.56
Live Music Concert Attendees	1.55
Convenience Customers	1.54
Bar and Lounge Food Enthusiasts	1.52
Brand Loyalists	1.49
Book Readers	1.46
Healthy Diet Households	1.41
Vegetarians	1.37

Lifestyles & Interests - All

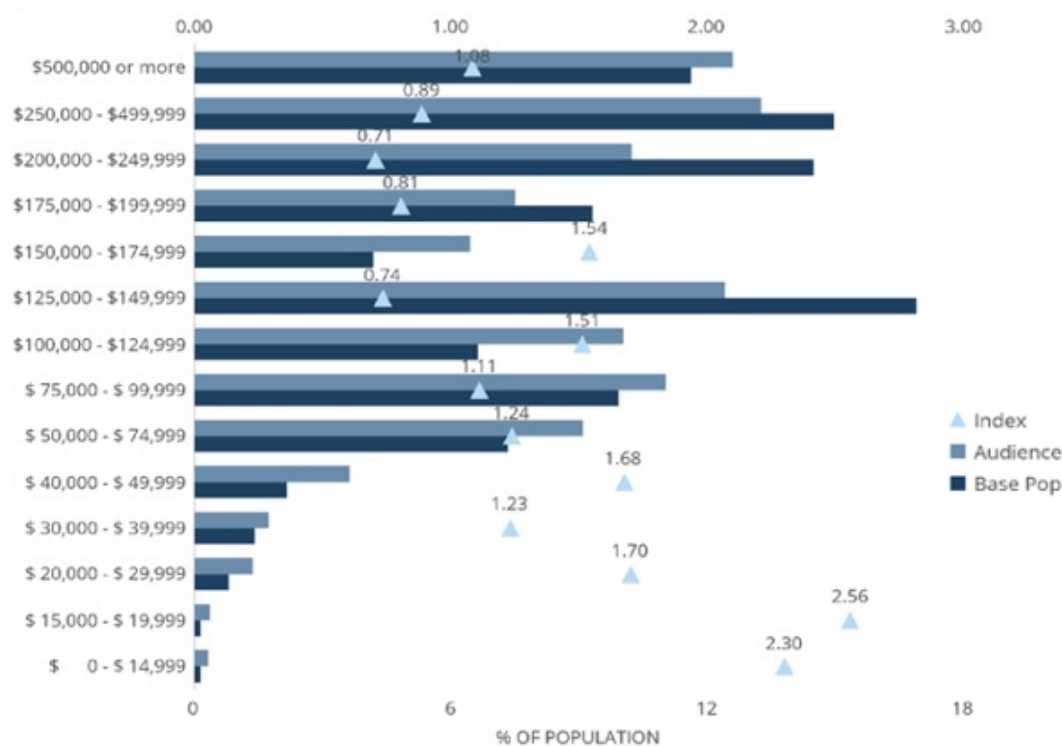
ATTRIBUTE_DESC	Index
Home Remodelers	1.36
Soccer Enthusiasts	1.31
Satellite Radio Subscribers	1.28
New Luxury Vehicle Purchasers	1.22
Liquor Enthusiasts	1.20
Alcohol Delivery Consumers	1.18
Frequent Takeout Food HH	1.13
Meditation Enthusiast	1.07
Meal Kit Delivery Consumers	1.01
Casual Dining Enthusiasts	1.00
Bargain Shoppers	1.00
Cultural Arts Events Attendees	0.97
Football Enthusiasts	0.95
Gym Members	0.93
Amazon Prime Customers	0.89
Online Transactor	0.87

Both [The Picklr Members](#) and [Pickleball Equipment & Apparel Purchasers](#) demonstrate a strong propensity toward high-value consumer behaviors. They significantly over-index for attributes such as high-end retail shopping, charitable giving—particularly toward causes like animal welfare and environmental protection—and being clients of financial advisory services, as identified in previous analyses. These indicators point to a level of discretionary income that supports both club memberships and recurring retail purchases related to pickleball.

Niches

PROFILE_DESC	Index	AUDIEN...	BASE_PCT	AUDIEN...	BASE_RE...
Young-at-Heart	5.55	3%	0%	7,770	10
Zone of Contentment	2.95	3%	1%	8,658	21
Home Hoppers	2.21	3%	1%	8,661	28
Already Affluent	1.64	1%	0%	2,288	10
IRA Spenders	1.58	20%	12%	58,031	263
Nice and Easy Living	1.57	9%	6%	26,944	123
Chic Society	1.43	28%	20%	83,555	417
X-Tra Time on Their Hands	1.10	1%	1%	1,851	12
Easy Street	0.94	10%	10%	28,291	214
Just Sailing Along	0.92	1%	1%	3,621	28
Still Going Strong	0.90	1%	1%	3,132	25
Value Focused	0.76	0%	0%	424	4
Loose Change	0.70	1%	2%	3,233	33
Tireless and On The Move	0.70	0%	0%	584	6
Quiet Homebodies	0.69	2%	3%	7,139	74
Resourceful Realists	0.62	1%	1%	2,433	28
Mid-Life Munchkins	0.59	1%	2%	2,744	33
Doing Well and Donating	0.59	8%	13%	23,326	284
Working Hard	0.45	0%	0%	189	3
Oodles of Offspring	0.43	0%	0%	420	7
Undaunted Do It Yourselfers	0.42	0%	0%	592	10
Go-Go Families	0.42	1%	2%	3,132	53
Feathering-the-Nest	0.36	1%	2%	2,182	43
Kiddie Kastles	0.36	2%	5%	4,966	99
Big Spender Parents	0.32	4%	14%	13,028	291
Parks, Parts and Playgrounds	0.30	0%	0%	292	7
GRAND TOTAL	1.00	100%	100%	297,486	2,126

Income



Both the [Pickleball Equipment & Apparel Purchaser](#) Audience and [The Picklr Members](#) skews toward affluent, older, and lifestyle-driven consumers, with far less penetration among younger, price-sensitive, or family-centric segments.

The Audiences over-index most heavily in the \$125K–\$199K income range while niche audience segments like “Young-at-Heart” & “Zone of Contentment” signify older, relaxed consumers with strong purchasing power. In addition, “IRA Spenders” and “Already Affluent” niches denote wealthier, retirement-aged segments.

# SECONDARY RESEARCH - KEY FINDINGS

The pickleball market is rapidly transforming from a grassroots pastime into a structured, multi-billion-dollar global industry. Surging participation rates, corporate investments, facility expansion, and technological innovations fuel its growth trajectory. As of 2024, pickleball boasts over 48.3 million players in the United States (Association of Pickleball Professionals (APP)), marking a phenomenal increase of over 259% in just three years. The sport is no longer limited to older adults but has expanded across demographics, particularly among millennials, Gen Z, and high-income professionals. This section explores the several factors that are driving the expansion of the pickleball industry.

## Unprecedented Participation Growth

- Pickleball is the **fastest-growing sport in the U.S. for the third consecutive year**, surpassing traditional racket sports like tennis and squash (Sports & Fitness Industry Association, 2024).
- Approximately **15% of the U.S. population**, including casual and one-time participants, has tried pickleball at least once, contributing to its mainstream adoption (Grand View Research, 2024).
- The sport's multi-generational appeal makes it attractive to a broad spectrum of players, from retirees to young professionals.
- Female participation has surged, with women making up nearly **45%** of all players, an 11-percentage-point increase since 2020 from previous years (Pickleball Central, 2024).

## Economic & Investment Boom

- The U.S. pickleball market is valued at **\$2.37 billion** in 2024, with a combined CAGR of **11.3%-15.3%**
  - Apparel, Footwear, Equipment - **\$2.2B** Market. US, Court Construction - **\$300M**, USA Pickleball Annual Growth Report, PlaybyPoint - **\$650M**, Mordor Intelligence, Sponsorships - **\$200M**, NYMag.com)
- Market forecasts predict that by 2027, the U.S. industry will reach **\$4.1 billion (20% CAGR)**; by 2034, it is expected to exceed \$8.6-11 billion in value (11.3-15.3% CAGR) (Grand View Research, Mordor Intelligence, Future Market Insights, Market.US, IBISWorld (2024), PlaybyPoint).
- The global pickleball market is valued at **\$200-300 million** in 2024 and is projected to surpass **\$4-5 billion** by 2034.

- The surge in dedicated pickleball courts, franchise investments, and retail demand has led to a compound annual growth rate (**CAGR**) of **20%** in the near term and slowing to 11.3%-15.3% (Future Market Insights, Grandview Research, Playbypoint, Market. US 2024), with higher growth rates in pay-to-play/membership clubs (17.4%) and the equipment/apparel/footwear market (15.1%)
- The influx of corporate sponsorships, professional leagues, and media rights deals accelerates market expansion. (IBISWorld, 2024)
- The pay-to-play segment alone is worth **\$650 million in 2024**, with 1,800 clubs averaging \$382K in pay-to-play and/or membership revenue annually. (Mordor Intelligence 2024 PlaybyPoint 2025)
- Family offices increasingly invest in pickleball, America's fastest-growing sport, targeting recreational and professional sectors. (Crain Currency)
- Thirty-5 Capital, led by Ron Saslow, has made significant investments, including ownership of the Chicago Slice (a Major League Pickleball team) and paddle brands ProXR, Paddletek, and Boundless Pickleball. They are also launching a pickleball clothing line with Muev and a ProXR pickleball shoe in collaboration with Sqairz. (Crain Currency)

## Market Trends Summary

The future of the pickleball market is defined by several overarching trends that will dictate its expansion over the next two decades. These trends include rising player participation, professional league development, increased infrastructure investments, retail and equipment innovations, and international expansion.

## Professionalization of Pickleball

The formation of structured leagues like the Professional Pickleball Association (PPA), Major League Pickleball (MLP), and the Association of Pickleball Professionals (APP) has transitioned pickleball from a recreational sport to a competitive, professionalized industry (MarketWatch, 2024).

- High-profile celebrity and corporate investments—such as those of LeBron James (LRMR Ventures), Kevin Durant (Boardroom Sports Holdings), Richard Chaifetz (Chaifetz Group), and the DeVos family, have invested in MLP teams, including the New York Hustlers, Brooklyn Aces, St. Louis Shock, and Orlando Squeeze, respectively. (Crain Currency)
- Television broadcasting and streaming services, such as ESPN, CBS Sports, FS1, and Amazon Prime, have expanded coverage, increasing the sport's visibility (Deloitte Sports Reports, 2024).

## Infrastructure Expansion & Facility Investments

- Pickleball-specific facilities have grown exponentially, with over **10,000 public and private courts** in the U.S. alone (Pickleball USA, 2024). **The US currently lacks over 25,000 pickleball courts** (SFIA).
- Multi-sport facilities, fitness clubs, and private clubs are integrating pickleball to accommodate demand.

## Innovation in Equipment & Technology

- Smart paddles embedded with sensors for shot analysis and AI-driven coaching apps are transforming the sport (Future Market Insights, 2024).
- The pickleball paddle market is shifting toward carbon fiber and thermoformed paddles, increasing durability and performance (Mordor Intelligence, 2024).
- Retail & e-commerce sales of pickleball gear have surged, with online purchases now making up 60% of equipment sales (IBISWorld, 2024).
- Augmented Reality (AR) coaching and virtual pickleball training programs are gaining traction among competitive and recreational players (Wingfield, 2024).

## Health & Wellness Alignment

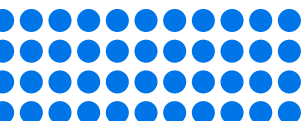
- Pickleball aligns with growing fitness and wellness trends, attracting active lifestyle consumers who prioritize social exercise (Statista, 2024).
- The sport is widely recognized for its low-impact, cardiovascular benefits, which make it appealing to players of all ages.
- Corporate wellness programs incorporate pickleball into employee health initiatives, boosting workplace engagement (Deloitte Sports Reports, 2024).

## Global Expansion & International Market Penetration

- While the U.S. remains the dominant market, pickleball is experiencing rapid adoption in Canada, Europe, and Australia (Grand View Research, 2024).
- Asia is emerging as a key growth market, with China and India investing in facility development and tournament hosting (BusinessWire, 2024).
- Efforts to introduce pickleball as an Olympic sport could accelerate international recognition and investment (BusinessWire, 2024).
- The World Pickleball Cup was held in Lima, Peru, in October 2024, with 32 countries represented.

## Explosive Participation Growth Across Demographics

- Pickleball has evolved from a senior-focused activity to a mainstream, cross-generational sport.
- Millennials and Gen Z now represent 35% of new players, with younger demographics driving recreational and social pickleball adoption.
- Youth participation is up 30% year-over-year, with school programs and junior tournaments expanding rapidly.
- High School and University programs and Utah Tech offered the first scholarships in 2024.
- Women's participation is growing, with a 45% female player base, up from 34% in 2020. (SFIA, 2024).
- The rise of social and casual leagues has boosted local participation, with 40% of new court bookings attributed to organized community leagues.



## Rapid Professionalization & Commercialization

- Professional pickleball has gained legitimacy, with competitive circuits like the PPA, MLP, and APP offering structured tournament pathways.
- Financial backing is driven by sponsorship deals with major brands, including Nike, Adidas, Franklin Sports, and Wilson.
- Live broadcasting and media coverage have surged, with networks like ESPN, FS1, and CBS expanding pickleball programming.
- Prize money in pro tournaments has increased, attracting top-tier athletes from other sports.

## Facility & Court Development

- Court availability is expanding, but the supply still struggles to meet demand, leading to long wait times in major urban areas.
- Tennis-to-pickleball conversions in public parks and country clubs are accelerating.
- The pay-to-play model is rapidly growing, with club investments projected to exceed **\$500M in 2025**, with over \$160 million coming from The Picklr franchisees in 2025.
- Court Reserve (900 clubs) and PBP (421 clubs) dominate the club management space, shaping the evolution of structured play and reservations. With a **combined \$8+ million ARR, they control the marketplace.**
- Franchise/Corporate-based pickleball entertainment venues like Chicken N' Pickle and Pickle & Social are scaling aggressively, capitalizing on themed social play models.

## Retail & Equipment Market Innovations

- Paddle technology is advancing, with carbon fiber and thermoformed paddles dominating the high-performance segment.
- Smart paddles and AI coaching tools are revolutionizing training for both casual and competitive players.
- Pickleball-specific apparel is rising, with brands like Lululemon, Nike, and Fila launching dedicated lines.
- Pickleball equipment turnover is accelerating, with carbon fiber paddles needing replacement every 3-6 months.
- Subscription-based paddle models and high-performance tech paddles are gaining traction.
- Women's apparel demand is surging, driven by 45% female participation.

## Corporate & Celebrity Investment Surge

- Major corporate investors and private equity firms are entering pickleball, funding leagues, media rights, and club expansions.
- Celebrity-backed teams and ownership stakes (e.g., LeBron James, Tom Brady, Mark Cuban) have driven mainstream interest.
- Sponsorship revenue and endorsements are increasing as brands recognize pickleball's marketing potential.

## International Expansion & Olympic Aspirations

- Pickleball is expanding globally, with investments in Canada, Europe, and Asia.
- Olympic inclusion discussions are ongoing, with potential entry into the 2032 or 2036 Olympic Games.
- Annual World Cup events, such as Lima, Peru, October 2024, with 32 countries represented for a world championship.
- National governing bodies and international federations are strengthening their structures to support worldwide competition.

## Health & Wellness Integration

- Pickleball is embraced in corporate wellness programs, senior fitness initiatives, and school athletic curricula.
- The sport's blend of social and fitness benefits is a key factor driving participation among older adults and health-conscious consumers.
- Rehabilitation and adaptive pickleball programs for injured athletes and disabled players are gaining support.

## Conclusion

The pickleball market is undergoing a significant economic and cultural transformation, shifting from a recreational pastime to a fully professionalized, multi-billion-dollar industry. With double-digit growth projections, increasing corporate investments, and an expanding international presence, pickleball is poised to rival traditional sports like tennis and golf in participation and revenue.

Early investors in pickleball facilities, equipment innovation, professional leagues, and digital coaching solutions will be positioned to capitalize on the sport's explosive expansion. Whether through media rights, retail distribution, or franchise opportunities, **pickleball will be firmly established as a leading global sport and business opportunity in the next two decades.**

# MARKET SIZING & PROJECTIONS

Pickleball originated as a backyard family game in 1965 on Bainbridge Island, Washington. Combining elements of tennis, badminton, and ping-pong, it quickly grew in popularity due to its accessibility, low cost, and appeal across age groups. Initially favored by older adults for its low-impact exercise benefits, the sport has since transcended generational boundaries, becoming a staple in schools, fitness centers, and recreational facilities.

Over the years, investments in professional leagues like the Professional Pickleball Association (PPA) and Major League Pickleball (MLP) have elevated pickleball from a recreational pastime to a competitive sport. The rapid construction of dedicated courts and the integration of pickleball into community planning have further solidified its standing as a mainstream sport.

## Key Market Drivers

**Rising Participation:** With over 48.3 million (APP, 2024) active players plus millions more casual players in the U.S. as of 2024, pickleball has become the fastest-growing sport in the country. Players range from youth to retirees, emphasizing the sport's broad demographic appeal.

**Professional Leagues and Media Coverage:** Establishing competitive leagues and high-profile sponsorships by celebrities like Tom Brady and LeBron James has increased visibility and legitimacy.

**Infrastructure Growth:** A surge in dedicated facilities and multipurpose sports centers, such as Lifetime Fitness and Chicken N' Pickle, has addressed increasing demand.

**Corporate and Celebrity Investments:** Celebrity-backed teams and corporate sponsorships have added financial momentum, driving further growth.

**Olympic Recognition Potential:** Discussions around including pickleball in the Olympics amplify global interest and adoption.

**Health and Wellness Trends:** Pickleball aligns with broader health trends, offering physical exercise and social engagement. (Statista, 2024).



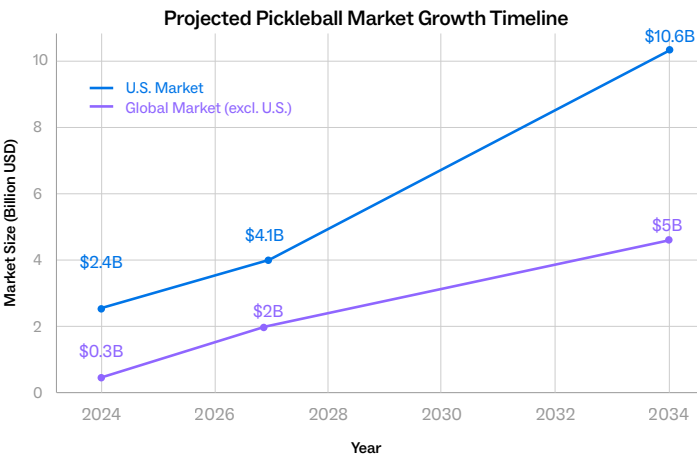
MARKET PROJECTIONS (2024-2034)

Market Growth & Valuation Projection

- **2024:** The U.S. pickleball market is valued at \$2.37 billion, with the global market valued at \$200-300 million.
- **2027:** Increased court and facility construction, pay-to-play and membership clubs, professional leagues, and the equipment/apparel/footwear market will push the U.S. market to \$4 billion.
- **2034:** Mainstream adoption, innovative paddle technology, and Olympic recognition potential will drive the U.S. pickleball market past \$10.6 billion.
- **2034 (excluding U.S.):** The non-U.S. market is projected to grow to \$4-5 billion, ensuring a balanced growth distribution between U.S. and international markets.

Pay-to-Play/Membership & Facility Expansion

- **2024:** The U.S. has 1,800 pay-to-play/membership/entertainment clubs, generating \$650 million in revenue from memberships and court fees. Construction in 2024 exceeded \$300 million.
- **2028:** The number of pay-to-play/membership/entertainment clubs will nearly double to 3,500, increasing revenue to \$1.4-1.5 billion. Construction will be \$500-700 million per year.
- **2034:** With widespread urban integration and corporate-backed leagues, pay-to-play revenue could exceed \$3-3.5 billion, driven by subscription-based models and luxury pickleball experiences. Construction will hold steady at \$500 million a year.
  - **Note:** In 2024, the Picklr franchisee spent \$60 million on clubs, and in 2025, they will spend \$160 million on club construction, increasing to \$200-225 million per year in the following three years.



Equipment, Apparel, Footwear & Tech Evolution

- **2024-2027:** Major sports brands (Nike, Lululemon, Adidas) expand their pickleball lines, driving apparel and footwear growth. The dominant players like Joola, Selkirk, Paddletek, Gearbox, Franklin Sports, and Vulcan will continue to grow rapidly. The combined market generated US sales of \$1.4 billion (Grandview Research, Meticulous Research, Pickleball Central, and Openpr.com, 2024)
- **2028:** The rise of AI-integrated smart paddles, AR training, and biometric tracking will create and add a \$500 million+ tech-driven pickleball equipment market.
- **By 2034,** the US e-commerce and direct-to-consumer sales and retail will generate \$5.7-6 billion.

The global pickleball equipment and apparel market will continue to grow substantially, reflecting a Compound Annual Growth Rate (CAGR) of 15.1% from 2024 to 2030. [grandviewresearch.com](https://www.grandviewresearch.com)

Market Breakdown:

- **Equipment Segment:** Valued at \$1.4 billion in 2024, this segment is expected to reach \$3.1 billion by 2032, growing at a CAGR of 10.3% between 2025 and 2032. [meticulousresearch.com](https://www.meticulousresearch.com)
- **Apparel Segment:** It is estimated to be worth \$570.1 million in 2024 and is forecast to grow to \$1,090.2 million by 2031, at a CAGR of 9.7% from 2024 to 2031. [openpr.com](https://www.openpr.com)

Pickleball's Path to Mainstream Dominance

- Professional leagues will solidify the sport as a global phenomenon, with Olympic inclusion potential by 2032 or 2036.
- Pickleball tourism will become a significant revenue stream, like golf, with destination tournaments generating over \$1 billion annually.
- Investment in club franchises, tech innovations, and media rights will yield high returns, making pickleball a mainstream professional sport by 2034.

METRIC	VALUE
U.S. Players (2024)	48.3M
Global Players (Est.)	60M+
U.S. Market Size (2024)	\$2.37B
Global Market Size (2034)	\$4-\$5B
Annual Growth Rate (CAGR)	11.3%-15.3%
Dedicated Facilities (U.S.)	10,000+
Court Shortage (U.S.)	25,000+

MARKET SIZE & GROWTH PROJECTIONS:  
A COMPREHENSIVE ANALYSIS

Overview of the U.S. Pickleball Market

Pickleball has evolved from a niche sport into a mainstream phenomenon in the U.S., reaching 48.3 million players as of 2024 (Association of Pickleball Players). While initially popular among retirees, the sport now attracts a broad demographic, including millennials and Gen Z, fueling long-term expansion.

What Makes Pickleball’s Growth Unique?

- **Fastest-Growing Sport in the U.S.:** With an annual growth rate exceeding 15%, pickleball outpaces other emerging fitness trends like padel and indoor cycling.
- **Multi-Demographic Appeal:** Unlike tennis and golf, which struggle with declining youth participation, pickleball engages young, middle-aged, and senior players at unprecedented rates.
- **Blending Recreation & Competition:** The sport thrives in casual and highly competitive tournaments, making it more adaptable in community and professional settings.
- **Alignment with Social & Fitness Trends:** Pickleball integrates fitness benefits, social engagement, and accessibility, making it attractive to health-conscious consumers.

U.S. Pickleball Market Size & Growth Projections

The U.S. pickleball industry is projected to reach **\$10.6 billion by 2034**, powered by growth across equipment/apparel/footwear, membership sales, facilities, media rights, and sponsorships.

Key Market Drivers

- **Professionalization of the Sport:** The rise of PPA, MLP, and APP Tours has significantly increased sponsorships, media coverage, and merchandise sales.
- **Infrastructure Investments:** The number of dedicated pickleball courts is expanding by 20% annually, with cities and private developers fueling construction.
- **Retail & Apparel Expansion:** Major brands like Nike, Lululemon, and Adidas aggressively invest in pickleball gear and apparel, driving consumer spending.

Projected Growth in U.S. Pickleball Revenue  
(2024-2034)

Short-Term (2024–2027)

- **Expansion of Pickleball Facilities:** Franchises and corporate locations like Chicken N’ Pickle, Lifetime, and The Picklr are expanding nationwide.
- **Celebrity & Corporate Investments:** Investors like Tom Brady, LeBron James, and Mark Cuban continue to attract media and sponsorship attention.
- **Integration into Schools & Community Programs:** High schools, colleges, and recreational leagues are rapidly adopting pickleball.

Mid-Term (2029–2034)

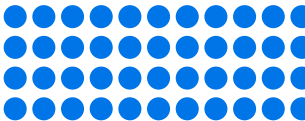
- **Potential Olympic Recognition (2032-2036):** If pickleball is entered into the Olympic Games, it could lead to massive global exposure.
- **Smart Paddle & AI Training Innovations:** AI-powered coaching tools, AR training, and smart paddles will revolutionize player engagement.
- **Corporate Wellness Programs:** Large companies are integrating pickleball into employee wellness initiatives, like corporate-sponsored golf outings.

Global Pickleball Market Breakdown (2024–2034)

While the U.S. remains the dominant market, international expansion is accelerating.

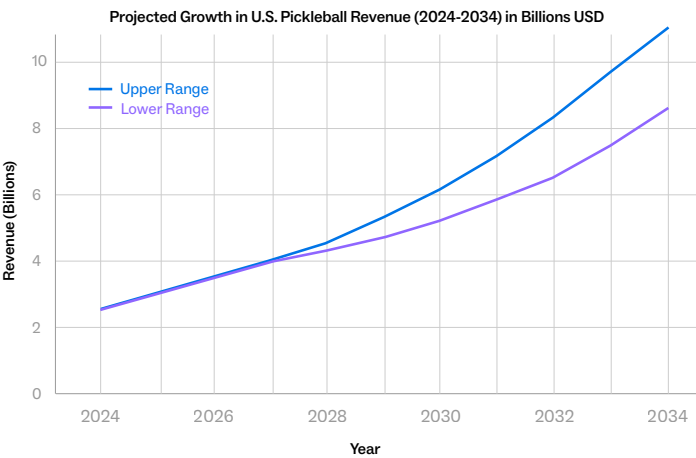
Key Global Growth Markets

- **Canada & Europe:** Investments in pickleball club franchises & tournament hosting are rising.
- **Australia:** A strong tennis-to-pickleball conversion rate is fueling rapid player adoption.
- **Asia (China & India):** Court construction, sponsorship deals, and youth leagues are expanding rapidly.
- **UAE and Saudi Arabia:** Large Indoor club construction, state-backed sponsorship, and tournaments.



Projected Global Market Size (2024–2034)

The global pickleball market (excluding the U.S.) is projected to grow from ~\$320M in 2024 to \$4-5B by 2034.



INVESTMENT & BUSINESS OPPORTUNITIES IN THE U.S. & GLOBAL MARKET

Key Insights for Investors

- **Franchise Club Investments:** Investing in pickleball club franchises could yield 300% ROI by 2030.
- **Smart Paddle & Tech Innovations:** The AI-powered paddle market is expected to reach \$500M by 2034.
- **Media Rights & Streaming:** Digital engagement from social media and streaming services will likely outpace live attendance revenue.

Final Thoughts: The Future of Pickleball in the U.S. & Globally

Pickleball is more than a trend—a multi-billion-dollar sports economy poised to rival golf and tennis. With rising corporate sponsorships, media coverage, and international expansion, the sport is projected to surpass \$12 billion in the U.S. by 2034.

Key Takeaways

- The U.S. dominates pickleball, but global growth is accelerating.
- Infrastructure, leagues, and digital media investors will see the highest returns.
- Emerging technologies, High school, University, and Olympic recognition will push pickleball into a new era.

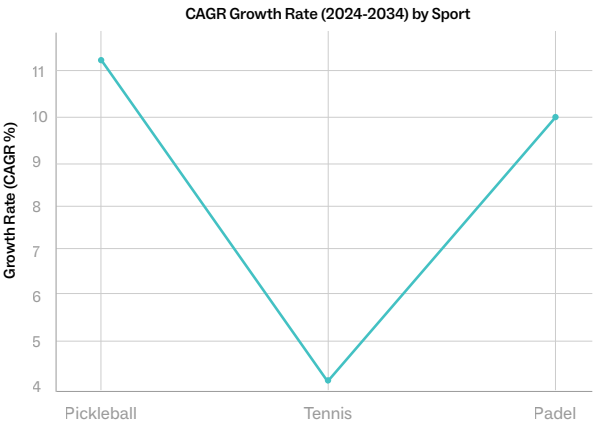
EXPANDING THE COMPETITIVE LANDSCAPE ANALYSIS

Pickleball vs. Tennis vs. Padel: Market Position

Pickleball is emerging as a dominant racket sport, but it faces competition from tennis and padel, which have long-established infrastructures and global audiences. Understanding how pickleball compares to these sports regarding market growth, participation, and investment opportunities is key to assessing its long-term sustainability.

The Padel market was \$290 million in 2024, growing to \$960 million in 2034 (Business Research Insight 2024). Padel has significant growth in Spain, Italy, Sweden, and Latin America, but it has no foothold in Asia.

The Tennis market is massive, with \$34 billion spent on equipment, apparel, and footwear. In addition, \$4.5 billion was paid to play in clubs and over \$1.5 billion in media and sponsorship, but with slow growth of 3.6% CAGR over the next 10 years (Business Research Insight 2024)



Key Takeaways

- Pickleball leads U.S. participation (SFIA, 2024) and court growth but lags tennis in global revenue. (Statista, 2024)
- Padel is expanding rapidly in Europe and Latin America, where pickleball is less established.
- Tennis remains the most significant market but faces declining youth engagement, which benefits pickleball and padel.

Major Pickleball Paddle Brands & Market Share

A few key brands dominate the pickleball equipment market, with Selkirk, Joola, Franklin, and Onix leading the industry.

Brand	Market Share	Competitive Strengths	Avg. Paddle Price Range
Selkirk	22%	High-end paddles, AI integration	\$150-\$250
Joola	18%	Strong pro endorsements (Ben Johns)	\$140-\$220
Franklin	15%	Mass-market affordability, large retail presence	\$60-\$150
Onix	14%	Well-balanced designs, solid mid-tier presence	\$90-\$180
Wilson	10%	Leveraging brand recognition in racket sports	\$100-\$200
Paddletek	8%	Premium control, pro player collaborations	\$130-\$230
CRBN	7%	Thermoformed paddles with carbon fiber tech	\$180-\$250
Other	6%	Niche players & new entrants	\$80-\$200

Key Takeaways

- Selkirk and Joola dominate the premium paddle market, attracting serious and professional players.
- Franklin and Onix focus on affordable and intermediate-level paddles, making them key players for mass adoption.
- Wilson and Paddletek leverage brand credibility from tennis and racket sports.
- Carbon fiber & AI-integrated paddles are emerging as high-tech segments.

Pickleball vs. Tennis Equipment U.S. Market

A comparison of the pickleball and tennis equipment markets reveals key differences in pricing, market penetration, and growth.

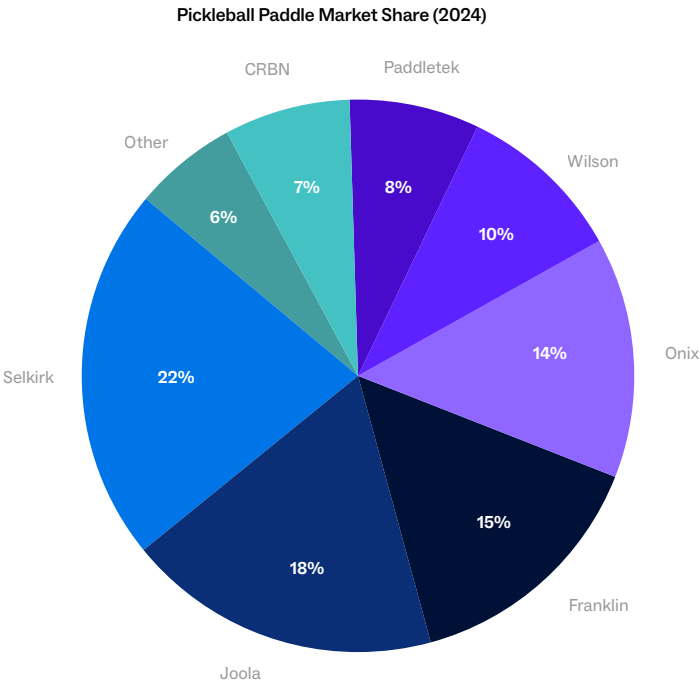
Category	Pickleball	Tennis
Market size (2024)	\$1.2B (Equipment only)	\$2.6B (Equipment only)
Annual Paddle Sales	2.5M paddles sold	4.2M rackets sold
Price Range	\$50-\$250 per paddle	\$60-\$300 per racket
Ball Replacement	3-6 months per pack	1-2 months per pack
Consumer Trends	Increasing demand for high-tech paddles	Shift toward carbon fiber rackets

Key Takeaways

- Pickleball paddle sales are growing at a faster rate than tennis racket sales.
- Pickleball equipment prices are slightly lower, making the sport more affordable for new players.
- Tennis has a more significant global equipment market, but pickleball’s faster adoption rate signals strong long-term growth potential.

Pickleball vs. Other Racket Sports

Sport	Market Size (U.S.)	Annual Growth	U.S. Players
Pickleball	\$2.37B	11.3%-15.3%	48.3M
Tennis	\$14B	3.5%	22M
Padel	\$290M	8.5%	500K
Badminton	\$95M	4.2%	1.3M



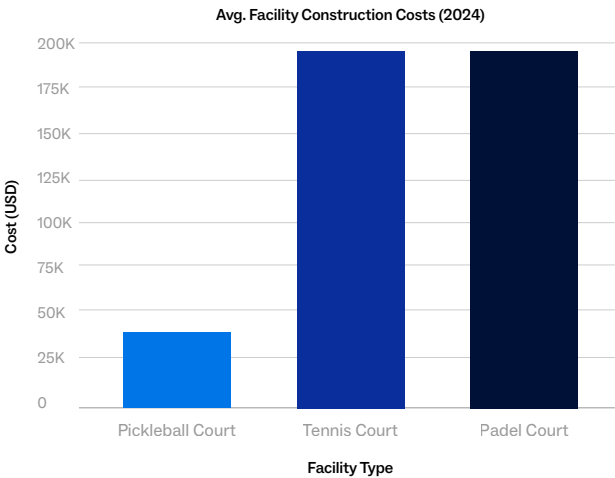
Facility Growth & Infrastructure Investment

One of the most significant advantages of pickleball over tennis and padel is the lower cost and faster court conversion.

Metric	Pickleball	Tennis	Padel
Cost to Build 1 Court	\$10K - \$20K	\$100K - \$300K	\$150K - \$250K
Avg. Court Size	880 sq. ft.	2,808 sq. ft.	2,300 sq. ft.
Conversion Time	2-3 weeks (from tennis)	N/A	6-8 weeks (from other spaces)
Annual Court Growth	20% (U.S.)	1-2% (stagnant)	12% (Europe)

Key Takeaways

- Pickleball courts are significantly cheaper to build than tennis or padel courts.
- Pickleball's small court size allows more courts to fit in existing sports complexes.
- Padel has high infrastructure costs, limiting its growth to premium markets.



Summary: Why Pickleball Leads in Market Expansion

- Highest growth rate among all racket sports (11.3-15.3% CAGR)
- Cheaper & faster to build courts compared to tennis & padel
- Lower equipment costs are making it more accessible
- Strong sponsorship & media traction, leading to professionalization

However, pickleball faces challenges in global adoption, competition from padel in Europe, and court availability issues in some urban areas.



# CONSUMER & PLAYER DEMOGRAPHICS



## THE RETIRED COMPETITOR

<b>Age</b> 55–75	<b>Gender</b> Mostly Male (growing among women)
<b>Income</b> \$50K–\$100K (retired or semi-retired professionals)	<b>Location</b> Suburban & Sunbelt States (Florida, Arizona, Texas, California)

### Habits & Data:

- 40% of core pickleball players are 55+ (PPA & APP reports).
- 70% of courts are built in senior communities (USAP 2023).
- They play 4–5 times per week and prioritize socialization and light competition.

### Spending Habits:

- High spenders on premium paddles (\$150–\$250) and custom grips.
- Frequently purchase court shoes (\$80–\$150) designed for comfort and stability.
- Invest in club memberships (\$300–\$1,200 annually) and league fees.
- Spend on recovery gear like braces, compression wear, and pain relief products.

### Business Strategy:

- Offer senior-friendly clinics, group lessons, and high-end paddle deals.
- Sell pickleball-specific orthotics and wellness products.



## THE CASUAL SOCIAL PLAYER

<b>Age</b> 35–55	<b>Gender</b> 50/50 Split
<b>Income</b> \$60K–\$120K	<b>Location</b> Urban & Suburban Areas

### Habits & Data:

- 42% of new players are 35–54 (SFIA 2023).
- Play 1–3 times per week, primarily for fun and exercise.
- 40% of new court bookings come from social leagues.

### Spending Habits:

- Buy mid-tier paddles (\$80–\$150) and upgrade every 12–18 months.
- Purchase pickleball shoes (\$60–\$120) and stylish activewear.
- Spend on court reservations (\$10–\$30 per session) and casual leagues.
- Buy team apparel (custom shirts, hats, and sweatbands).

### Business Strategy:

- Promote casual leagues & happy hour events.
- Offer subscription-based equipment & apparel bundles.



THE FITNESS ENTHUSIAST	
Age 25–40	Gender 60% Female
Income \$75K+	Location Urban Centers

Habits & Data:

- 23% of new players are millennials & Gen Z (PPA, 2024).
- View pickleball as a fun alternative to the gym.
- 60% of female pickleball players are fitness-conscious (USAP).

Spending Habits:

- Purchase lightweight paddles (\$100–\$180) for maneuverability.
- Buy high-performance athletic wear (\$50–\$200 per outfit).
- Spend on court fees and club memberships (\$40–\$150 monthly).
- Invest in fitness-tracking wearables and hydration supplements.

Business Strategy:

- Market pickleball workout classes (e.g., HIIT + pickleball).
- Sell performance wear, hydration supplements, and fitness-tracking gear.



THE COMPETITIVE TOURNAMENT PLAYER	
Age 18–50	Gender 65% Male
Income \$50K–\$150K	Location Nationwide (traveling for events)

Habits & Data:

- PPA & APP events grew 80% year-over-year (USAP 2024).
- Follow pro players and want gear used by top athletes.
- Travel 3–6 times per year for tournaments.

Spending Habits:

- Invest in top-tier paddles (\$200–\$500) and gear.
- Spend on tournament entry fees (\$50–\$200 per event).
- Pay for private coaching (\$50–\$150 per session).
- Travel expenses include flights, hotels, and gear bags (\$1,000+ annually).

Business Strategy:

- Offer sponsorship opportunities at tournaments.
- Sell exclusive pro-endorsed paddles, training aids, and coaching services.



THE YOUTH & JUNIOR PLAYER	
Age 8-18	Gender 50/50 Split
Income Parents' Income \$75K+	Location Suburbs & School Districts

Habits & Data:

- Youth pickleball participation is up 30% in 2023 (APP 2024).
- Schools are adding pickleball to PE programs and after-school sports.
- 80% of juniors play with family members, making it a multi-generational activity.

Spending Habits:

- Parents buy youth paddles (\$50-\$100) and upgrade yearly.
- Pay for summer camps & training programs (\$150-\$500 per session).
- Purchase pickleball shoes (\$50-\$100) and team uniforms.
- Spend on family club memberships (\$500-\$2,000 annually).

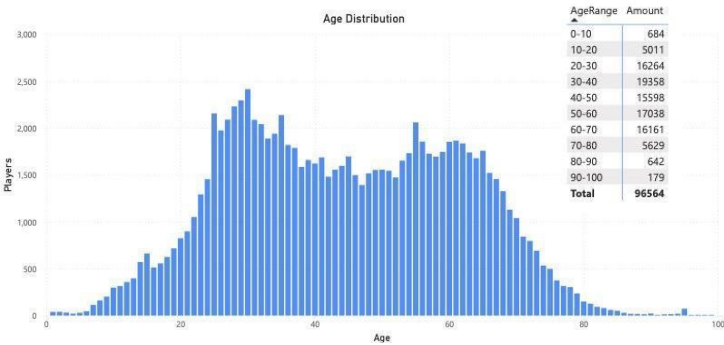
Business Strategy:

- Offer youth clinics & school partnerships.
- Create starter kits (youth paddles, balls, nets, and instructional content).

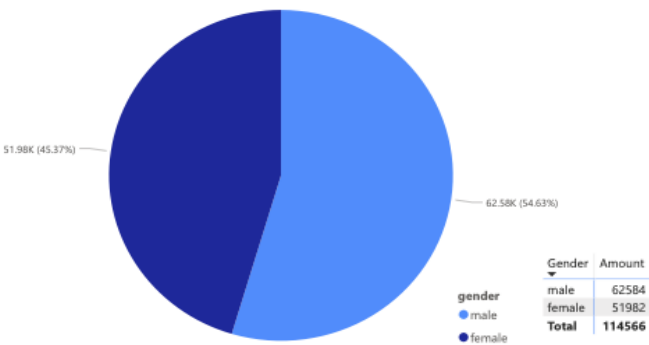
Consumer Persona Matrix

Persona	Age	Income	Frequency	Top Spend
Retired Competitor	55-75	\$50K-\$100K	4-5x per week	Paddles, Clubs
Casual Social Player	35-55	\$60K-\$120K	1-3x per week	Gear, Events
Fitness Enthusiast	25-40	\$75K+	2-4x per week	Wearables, Apparel
Tournament Player	18-50	\$50K-\$150K	Varies w/ tournaments	Travel, Gear
Youth & Junior Player	8-18	Parents' Income: \$75K+	Family & school play	Camps, Kits

Pickleball Players Age Statistics



Pickleball Players Gender Statistics



Regional Breakdown (Playbypoint, 2025)

Region	Count	%	M	F	Average Age
West	17,025	42%	57%	43%	44
South	13,468	33%	55%	45%	43
Midwest	5,829	14%	60%	40%	44
Northeast	4,406	11%	55%	45%	43

Top Cities in Players/Annual Income (Playbypoint, 2025)

City	Avg. Player Annual Income
Los Angeles, CA	\$80,366
Columbus, OH	\$65,327
Atlanta, GA	\$85,880
Portland, OR	\$88,792
Salt Lake City, Utah	\$74,925
Boise, ID	\$104,532
Lexington, KT	\$66,087
Boca Raton, FL	\$159,017
San Diego, CA	\$102,085
Austin, TX	\$91,501
Pasadena, CA	\$103,778
Miami, FL	\$59,390
Dallas, TX	\$74,149
Chandler, AZ	\$133,000
Fort Collins, CO	\$105,035

# COMPETITOR ANALYSIS: PICKLEBALL'S POSITION IN THE SPORTS & EQUIPMENT MARKET

The rapid growth of pickleball has positioned it as a formidable competitor in the broader racket sports industry, challenging long-established games like tennis, padel, and badminton. While pickleball currently dominates U.S. participation growth, it still lags in consumer and player demographics, tennis, and other racket sports regarding global revenue and brand penetration.

## Pickleball vs. Other Racket Sports (2024)

Sport	U.S. Market Size	%	M
Tennis	~\$14 billion	3.5%	22 million players
Pickleball	~\$2.37 billion	11.3-15.3%	48.3 million players
Padel	~\$290 million	8.5%	500,000+ players (U.S.)
Badminton	~\$95 million	4.2%	1.3 million players

### Market Share Takeaway

- Pickleball leads the U.S. in player growth but is still smaller in global revenue than tennis and padel.
- While tennis dominates internationally, pickleball's faster growth rate (11.3-15.3% vs. 3.5%) suggests it could surpass tennis in total market size within a decade.

## Pickleball vs. Other Racket Sports (2024)

The rise of pickleball has led to an explosion of specialized brands competing alongside legacy tennis equipment manufacturers.

### Major Pickleball Brands (Specialized)

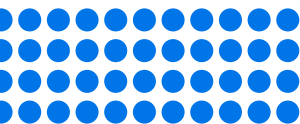
- **Selkirk Sport** is a leader in high-end paddles, and it was the first to introduce AI-powered paddle tech.
- **JOOLA** is backed by world champion Ben Johns, focused on premium carbon fiber paddles.
- **Paddletek** is known for polymer core paddles, a staple for serious players.

### Tennis & Multi-Sport Brands Expanding into Pickleball

- **Wilson:** Major investment in pickleball, now offers signature paddles & footwear.
- **Babolat:** Traditionally a tennis powerhouse, now expanding into padel & pickleball.
- **HEAD:** Cross-brand pickleball with its tennis division to increase awareness.

### Competitive Advantage

- Pickleball-specific brands like Selkirk and JOOLA lead in technology and innovation, while Wilson and HEAD leverage global distribution networks to compete in pickleball and tennis.



## Growth Opportunities & Competitive Risks

### Pickleball's Strengths

- Fastest-growing racket sport in the U.S.
- Lower barrier to entry (affordable & easy to learn).
- Strong retail and e-commerce sales growth in equipment.

### Competitive Risks

- Lack of international expansion compared to padel, which has strong European and Latin American markets.
- Tennis still dominates TV & sponsorships, limiting pickleball's visibility.
- Court space limitations—cities prioritize tennis, leading to tension over facilities.

### Conclusion: Pickleball's Competitive Position

Pickleball has surpassed tennis in U.S. participation but still trails in global revenue and market share. The sport's most significant opportunity lies in international growth, media expansion, and technological innovation. While legacy brands like Wilson and HEAD are pushing into pickleball, specialized brands like Selkirk and JOOLA still dominate high-performance equipment.

As the sport professionalizes and gains global exposure, pickleball will be a major player in the worldwide racket sports market within the next decade.

## Major Industry Players: Leading Brands in Paddles, Apparel, and Accessories

### Paddles

- **Selkirk Sport:** Renowned for high-performance paddles with cutting-edge technology.
- **Onix Pickleball:** Focuses on versatile paddles catering to all skill levels.
- **Franklin Sports:** Offers affordable, high-quality paddles that are popular among beginners and intermediates.
- **Joola Pickleball:** Known for innovative paddle designs, catering to professional players.

### Apparel

- **Nike:** Combines advanced footwear technology with court-specific apparel.
- **Lululemon:** Specializes in premium, stylish activewear for casual and competitive players.
- **Pickleball Bella:** A niche brand offering pickleball-specific apparel focusing on comfort and performance.
- **Alo Yoga:** Attracts younger demographics with athleisure designs adaptable for on-court and casual wear.

### Accessories

- **PPA (Professional Pickleball Association):**
  - Hosts high-profile tournaments, attracting elite players and sponsors.
  - Plays a pivotal role in elevating pickleball's media presence.
- **APP (Association of Pickleball Professionals):**
  - Focuses on nurturing grassroots participation and developing talent through regional and national tournaments.
- **MLP (Major League Pickleball):**
  - Major League Pickleball (MLP) team valuations have surged from under \$1 million at its 2021 inception to between \$10 million and \$15 million as of September 2024. (Crain Currency)
  - Innovates with team-based formats, fostering celebrity and corporate investments.
  - Combines entertainment with professional-level play.
- **USAP (USA Pickleball):**
  - Oversees the growth and regulation of the sport across the U.S.
  - Organizes the National Championships, a key event in the pickleball calendar.

## Market Share Analysis

### Key Brands

- Selkirk and Onix dominate the paddle market, accounting for over 60% of high-performance paddle sales.
- Nike and Lululemon lead the apparel segment with growing competition from pickleball-specific brands like Pickleball Bella.
- Pickleball Central remains the top retailer, with a significant share of online sales.

### Retailers

- E-commerce platforms like Amazon and dedicated stores like Pickleball Central drive most equipment sales.

### Service Providers

- Franchises such as Chicken N' Pickle and The Picklr are emerging as key service providers for facilities and experiences.

## Product & Equipment Analysis

The pickleball equipment market has experienced significant growth in recent years, with various reports providing insights into its valuation and projected expansion. Here is a consolidated overview:

### Market Valuation and Growth Projections

- **2024 Valuation:** The global pickleball equipment market was valued at approximately \$568.4 million in 2024, and is projected to reach \$1.545 billion in 2034. (Verified Market Research)

### Distribution Channels

- **Online Sales:** In 2024, online channels accounted for approximately 63.6% of pickleball equipment sales, indicating a strong consumer preference for e-commerce platforms. (gmnsights.com)
- **Offline Sales:** Conversely, offline channels held about 51.8% of the market share, underscoring the continued importance of physical retail outlets. (news.market.us)

## Regional Insights

- **North America:** The U.S. pickleball equipment market is projected to grow at a CAGR of over 10.2% through 2034, driven by increasing participation rates and demand for customizable equipment. (Maximize Market Research)
- **Global Expansion:** Countries like China, India, and Vietnam are experiencing growth rates of 15.3%, fueled by investments in advanced materials and technology to enhance equipment performance. (Market US)

## Market Dynamics

- **Participation Rates:** Pickleball has seen a surge in popularity, with participation growing by 51.8% from 2022 to 2023, and an impressive 223.5% over the past three years. (sfia.org)
- **Demographic Shifts:** The sport appeals to a wide age range, with the 25–34 age group comprising the largest segment, totaling 2.3 million participants. (sfia.org)

## Trends in Paddles, Balls, Apparel, and Accessories

- **Paddles:** The market is shifting towards carbon fiber and thermoformed paddles for enhanced durability and control. Brands like Selkirk, Joola, and CRBN lead the innovation with paddles priced between \$200 and \$300.
- **Balls:** Outdoor balls are evolving with weather-resistant materials, while low-noise indoor balls are gaining traction due to community noise restrictions.

- **Apparel:** Major brands like Nike, Lululemon, and Fila are designing pickleball-specific shoes and performance wear to cater to the rising demand.
- **Accessories:** Smart grips, vibration-dampening wristbands, and high-performance grip tapes are becoming popular among competitive and recreational players.

## Emerging Technologies

- **AI-Integrated Smart Paddles:** Companies like Babolat and Selkirk experimented with AI-based tracking sensors to monitor shot accuracy and player performance.
- **Wearable Tech:** Fitness tracking devices are integrating with pickleball apps to analyze player endurance and agility.
- **Augmented Reality (AR) Training:** Virtual reality (VR) coaching programs are gaining traction, providing real-time feedback to beginners and competitive players.

## Retail vs. E-Commerce Dynamics

- **Retail Stores:** Sporting goods retailers (e.g., Dick's Sporting Goods, Academy Sports) are expanding in-store pickleball demo areas to enhance customer experience.
- **E-Commerce Growth:** Online sales through platforms like Amazon, Pickleball Central, and direct-to-consumer brand websites now make up over 60% of paddle and accessory sales.
- **Subscription Models:** Monthly pickleball gear subscriptions offering paddle rentals, ball deliveries, and apparel swaps are emerging as a profitable trend.

## Facility & Infrastructure Development

### Growth of Pickleball Facilities:

- The U.S. has over 10,000 public and private pickleball courts, with new dedicated clubs opening monthly.
- Franchise models like The Picklr, Chicken N Pickle, and Pickle & Social are scaling aggressively, expanding into urban and suburban markets.
- Public parks and recreation departments are repurposing underutilized tennis courts to accommodate rising demand.

### Business Models (Membership vs. Pay-to-Play):

- **Membership-Based Clubs:** Facilities like LifeTime Pickleball and The Picklr offer monthly memberships (\$50–\$200/month), which provide unlimited court access, coaching, and social leagues.
- **Pay-to-Play Facilities:** Indoor pickleball centers charge hourly rates (\$10–\$30 per session/player) or monthly memberships, catering to casual and social players.

- **Hybrid Models:** Clubs are integrating tiered memberships, allowing flexible access to casual and competitive players.

#### **Business Models (Membership vs. Pay-to-Play):**

- New pickleball court installations cost between \$20K and \$50K per court, depending on the surface material and lighting.
- Cities are experiencing economic benefits from tournaments, with significant events like the US Open Pickleball Championships in Naples, FL, generating over \$10M in local revenue from tourism and hospitality.

### **Media, Sponsorship, & Marketing Opportunities**

#### **Growth in Professional Pickleball Viewership:**

- Viewership of professional events (PPA Tour, APP Tour, MLP) grew by 80% in 2024.
- ESPN, FS1, CBS Sports, and Amazon Prime Video have expanded pickleball broadcast rights, increasing audience reach.
- YouTube live streaming and social media clips drive engagement, attracting younger audiences.

#### **Social Media and Influencer Marketing:**

- Influencers like Ben Johns and Anna Leigh Waters have leveraged Instagram, YouTube, and TikTok to build personal brands and endorse products.
- User-generated content (UGC) is a powerful marketing tool, with brands encouraging everyday players to share game clips.
- Pickleball content creators are launching online coaching programs, monetizing their expertise.

#### **Corporate Sponsorship and Branding Opportunities:**

- Major sports brands (Nike, Adidas, Wilson, Joola) invest heavily in sponsorship deals with top pickleball professionals.
- Corporate events and wellness programs are incorporating pickleball into employee fitness initiatives.
- Tournaments and leagues offer branding opportunities for beverage, apparel, and health supplement companies.

### **Challenges & Barriers to Growth**

#### **Corporate Sponsorship and Branding Opportunities:**

- Public court shortages are causing long wait times, leading to friction between the pickleball and tennis communities.

- Noise complaints from residential areas have resulted in zoning restrictions and soundproofing mandates.
- Limited indoor facilities in colder regions restrict year-round play.

#### **Equipment Pricing and Accessibility**

- High-end paddles (\$200–\$500) may be inaccessible for casual players.
- Entry-level gear availability is improving, but there is a need for more affordable paddle bundles for beginners.
- Resale markets and paddle rental services are emerging to combat pricing barriers.

#### **Competitive Pressures from Other Sports**

- Pickleball competes with tennis, padel, and squash for court space and sponsorship dollars.
- Some tennis purists resist pickleball's expansion, limiting collaborations between governing bodies.
- Fitness-conscious millennials and Gen Z may be drawn to newer racket sports or hybrid fitness activities.

### **Opportunities & Strategic Recommendations**

#### **Emerging Trends**

- Youth programs are expanding, with over 80% of junior players introduced to pickleball through family participation.
- High school and college programs are integrating pickleball into athletic curricula.
- Technology integration (AI coaching, AR training, smart paddles) revolutionizes player development.

#### **New Revenue Streams**

- Pickleball travel and tourism are booming, with destination events drawing international players.
- Subscription-based coaching apps are growing, offering personalized drills and progress tracking.
- Luxury pickleball experiences, including resort-based training camps, are attracting high-income demographics.

#### **Strategic Advice for Stakeholders**

- Invest in indoor facilities to address seasonality challenges and expand year-round play.
- Expand beginner-friendly programs to sustain long-term player growth.
- Leverage influencer marketing and digital engagement to attract younger players.
- Develop pickleball-friendly apparel and tech-driven paddles to align with health-conscious trends.

# SWOT ANALYSIS

## STRENGTHS

- Fast-growing player base across all demographics.
- Significant corporate sponsorship and celebrity endorsements.
- Expanding professional leagues with growing media visibility.

## WEAKNESSES

- Limited availability of courts in certain regions.
- High equipment costs may deter casual players.
- Dependence on celebrity & pro endorsements for brand growth.

## OPPORTUNITIES

- Global expansion, particularly in Europe and Asia.
- Introduction of advanced technologies like smart paddles and AI coaching.
- Growth in pickleball tourism and destination events.

## THREATS

- Increasing competition from traditional racket sports like tennis and squash.
- Noise complaints and zoning issues are affecting court construction.
- Risk of market saturation with oversupply of facilities and equipment.

# IS PICKLEBALL HERE TO STAY?

The rapid rise of pickleball has led some skeptics to question whether it is merely a passing trend. However, an analysis of sustained participation growth, infrastructure investment, demographic diversification, commercial viability, and global expansion strongly indicates that pickleball is not a fad, but a long-term, scalable market opportunity for sustained growth.

## Sustained Growth Metrics

Unlike short-lived fitness trends, pickleball has demonstrated consistent, exponential growth in participation.

- 48.3 million Americans played pickleball at least once in 2024.
- The sport has maintained a 39.3% compound annual growth rate (CAGR) from 2019 to 2024, a sustained trajectory unseen in traditional sports.
- Core players (those playing 8+ times per month) increased by 21% in 2024, reaching 8.5 million people, reinforcing long-term retention.

## Facility Development & Infrastructure Investment

One of the strongest indicators of pickleball's permanence is the expansion of dedicated facilities and investment by real estate developers..

- By the end of 2023, over 10,000–11,000 (sources vary) dedicated pickleball facilities were operating, up from 9,167 in 2022.
- One hundred fifty-eight new courts are built monthly across the U.S., outpacing growth in traditional racket sports.
- Major real estate developers such as LifeTime are converting 50-60% of their indoor tennis courts to accommodate demand.

## Why This Matters

Fads typically do not trigger mass infrastructure investments. The surge in dedicated courts and real estate conversions demonstrates confidence in long-term player engagement.

## Corporate Sponsorship and Branding Opportunities:

- Major sports brands (Nike, Adidas, Wilson, Joola) invest heavily in sponsorship deals with top pickleball professionals.
- Corporate events and wellness programs are incorporating pickleball into employee fitness initiatives.
- Tournaments and leagues offer branding opportunities for beverage, apparel, and health supplement companies.

## Demographics Support Long-Term Viability

### Age Distribution Shows Broad Appeal

Unlike fitness fads that cater to a narrow audience, pickleball has multi-generational adoption.

- 52% of players are under 35, contradicting the myth that pickleball is only for older adults.
- The fastest-growing segment is 18–34-year-olds, highlighting appeal beyond early adopters.
- The average player age has dropped from 55 (2019) to 34.8 (2024), demonstrating continued youth adoption.

### Income Demographics Indicate Commercial Potential

- 69% of core players have household incomes above \$100,000, a crucial factor for equipment, club memberships, and sponsorship viability.
- High disposable income means sustained spending on premium paddles, apparel, coaching, and facility access.

## Why This Matters

A sport's longevity depends on a broad, financially capable audience. Pickleball's demographic evolution suggests long-term market expansion, not short-term hype.

Commercial & Investment Indicators

Professional Circuit Growth

Pickleball is no longer just a recreational activity—it has developed a structured professional ecosystem.

- Major League Pickleball (MLP) teams are valued at \$5-15 million.
- Prize money has increased 600% from 2021 to 2024, a sign of growing legitimacy.
- Broadcasting deals with CBS Sports, ESPN, and Tennis Channel indicate mainstream acceptance.

Equipment Market Expansion

The pickleball equipment industry has become a high-growth segment in sports retail.

- The pickleball equipment market reached \$568 million in 2024.
- Projected to grow at 12.4% CAGR through 2027, far exceeding inflation-adjusted growth in other racket sports.
- Major sporting goods brands like Wilson, Head, and Franklin have dedicated pickleball divisions, showing long-term commitment.

Corporate & Venture Capital Investment

- \$100+ million in venture capital was invested in pickleball startups in 2024.
- Anheuser-Busch, State Farm, and major beverage brands have become strategic sponsors.
- Real estate firms are developing pickleball entertainment complexes as a long-term revenue model.

Why This Matters

Sustained corporate investment is a hallmark of sports that survive long-term market shifts. If pickleball were a fad, major brands would not be launching full-scale divisions dedicated to it.

Infrastructure Development Models Reinforce Longevity

Public Investment

- Cities across the U.S. are allocating funds for public pickleball courts, recognizing high demand and positive economic impact.
- Municipal parks report 85–90% utilization rates for pickleball courts, often exceeding tennis demand.
- Public-private partnerships are emerging to support facility development.

Commercial Venue Expansion

- Pickleball-focused entertainment chains like Chicken N’ Pickle and The Picklr are expanding nationally.
- Pickleball facilities generate 32% more revenue per square foot than traditional gyms.
- High-end private clubs report 65% higher retention rates after integrating pickleball amenities.

Why This Matters

Purely recreational and trend-driven sports do not receive municipal funding, corporate backing, or sustainable real estate investments.

Comparative Analysis: How Pickleball Outpaces Other Sports

Pickleball vs. Tennis & Padel & Badminton (2024)

Sport	U.S. Market Size	Annual Growth Rate (CAGR)	U.S. Participation
Tennis	~\$14 billion	3.5%	22 million players
Pickleball	~\$2.37 billion	11.3-15.3%	48.3 million players
Padel	~\$290 million	8.5%	500,000+ players (U.S.)
Badminton	~\$95 million	4.2%	1.3 million players

Key Takeaways

- Pickleball has more U.S. participants than tennis and a higher global growth rate than padel.
- Tennis took 30 years to reach the current U.S. pickleball participation levels.
- Social media engagement in pickleball outpaces tennis & padel by 3x, driving continued growth.

Commercial Venue Expansion

- Lower barrier to entry (\$50–\$100 for equipment vs. \$300+ for tennis and golf).
- Smaller court sizes allow operators to generate higher revenue per square foot.
- Diverse revenue streams (leagues, lessons, tournaments, F&B, memberships) create sustainable business models.

Why This Matters

Pickleball is not just growing faster—it is structured to be more financially sustainable than other racket sports.

## Social & Cultural Factors Drive Adoption

### Community Engagement

- 78% of players report playing with friends or family, reinforcing social stickiness.
- League participation is growing 55% YoY, ensuring retention.
- Only Sport to encompass such an extensive age range from 8–85 years old
- Pickleball is easy to learn and play competitively, yet hard to master
- Corporate wellness programs increasingly include pickleball.

### Media & Celebrity Influence

- 312% increase in media coverage from 2021 to 2024.
- Celebrity involvement (Leonardo DiCaprio, George Clooney, Kim Kardashian) drives mainstream awareness.
- 400% growth in social media hashtag usage in 2024.

### Quotes & Testimonials

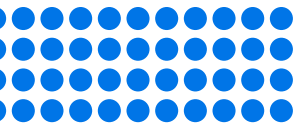
- **Tom Brady** joined forces with tennis legend Kim Clijsters to invest in Major League Pickleball. Clijsters highlighted her motivation: *“I am thrilled to help showcase professional pickleball and make an impact on the sport.”*
- **LeBron James, Draymond Green, and Kevin Love** have also invested in Major League Pickleball, recognizing the sport’s rapid growth and potential.
- **Kevin Durant** and his business partner, **Rich Kleiman**, purchased a Major League Pickleball expansion team. Kleiman explained their interest, noting, *“Once I started playing and loving the sport... I saw this as the right business opportunity.”*

- **Steve Kuhn**, founder of Major League Pickleball, emphasized the sport’s growth trajectory: *“This investment and the platform that this group provides will significantly help us with our goal to reach 40 million pickleball players by 2030.”*
- **Thomas Dundon**, owner of the Carolina Hurricanes and chairman of Pickleball.com, has made significant investments in the sport, including acquiring Pickleball Central and merging professional leagues to unify and grow the sport.
- **Vince Vaughn**, actor and entrepreneur, became the majority stakeholder of the Coachella Valley Scorpions, a National Pickleball League team. Vaughn expressed his enthusiasm for the sport and aims to enhance the team’s brand in Southern California.
- **Stefi Graf**, Retired Professional Tennis Player, *“You can see progress much quicker than in tennis, and the fun factor is immediate.”*

### Why This Matters

Sports that integrate into social and professional lifestyles—like golf and tennis—become sustainable long-term markets.





## CONCLUSION: WHY PICKLEBALL IS HERE TO STAY

Pickleball has transcended “fad” status, proving itself as a sustainable sport with high commercial viability.

### Key Indicators of Longevity:

- Year-over-year growth across multiple metrics (participation, facilities, revenue).
- Diverse demographics, including youth and high-income players.
- Substantial corporate investment from brands, real estate, and professional leagues.
- The public and private sectors support infrastructure and facility expansion.
- Multiple revenue streams ensure long-term economic sustainability.

**Final Verdict: Pickleball is not just a sport—it is a cultural and economic movement that is here to stay.**



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# THE PICKLR

**GROWTH, PROJECTIONS & INVESTMENT OPPORTUNITIES**

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