

MVRK SPORT & ENTERTAINMENT

INDUSTRY ANALYSIS • 2022

PADEL vs PICKLEBALL

North American Market Analysis & Go-to-Market Strategy

Prepared by MVRK Sport & Entertainment Inc. | Confidential

EXECUTIVE SUMMARY

The State of Racquet Sports in North America

TL
DR

Padel has not grown in North America as it has in Europe and other regions. Pickleball — a similar sport — has seen massive adoption and is the **fastest growing sport in North America**. Long term, Pickleball presents a larger commercial opportunity. E-Commerce strategies via Amazon and Walmart Marketplace will yield faster results and broader reach than Brick & Mortar alone. Strategic digital marketing can align sales with the growth trajectory of both sports.

10,000	4.8M	65+	10,320
Padel Players in the USA	Pickleball Players in the USA	Padel Courts in the USA	Pickleball Courts in the USA

Source: USPA (United States Padel Association); USA Pickleball; Pickleheads, 2022

PART ONE

Padel in the USA

Overview

Padel in the USA is growing, but not yet at scale. According to the **USPA (United States Padel Association)**, they currently have **2,500 members** and estimate the total playing population at roughly **10,000 people** across the entire USA. The USPA projects **8 million players by 2030** — an aggressive goal that may be achievable given the low cost of entry and ease of play, but is far from guaranteed in the near term.

Google Search Trends — Padel (USA, Oct 2021–Sep 2022)



Source: Google Trends, United States, Past 12 Months, Web Search — search term: 'Padel'

Padel has seen a **steady upward trend** in Google searches in the US since June 2022. The top states searching for 'Padel' align closely with where clubs are concentrated — predominantly warm-weather markets along the coasts:

#	STATE	NOTE
1	Florida	Year-round warm climate; strong club density
2	New York	Dense urban population; early adopters
3	Nevada	Growing club scene; Las Vegas market
4	District of Columbia	Affluent, health-conscious demographic
5	Virginia	Proximity to DC metro

Source: USPA Club Map & Google Trends geographic data, 2022

Sales Opportunities

Stores selling Padel equipment are very niche — most equipment is sold directly at clubs. In the USA, there are approximately **65 private and public Padel courts/clubs**, mostly along the East Coast, Southern US, and California/Nevada. **Padel equipment is not sold in major sporting goods stores in the USA.**

Go-to-Market: Brick & Mortar

1. Contact each club individually using the US club directory
2. Ask about their equipment sales process (some have e-commerce, some sell in-shop)
3. Send a product sample to get buy-in from the club
4. Work with clubs to distribute equipment through their existing sales channels
5. Start with small quantities to reduce overhead and test demand

PART TWO

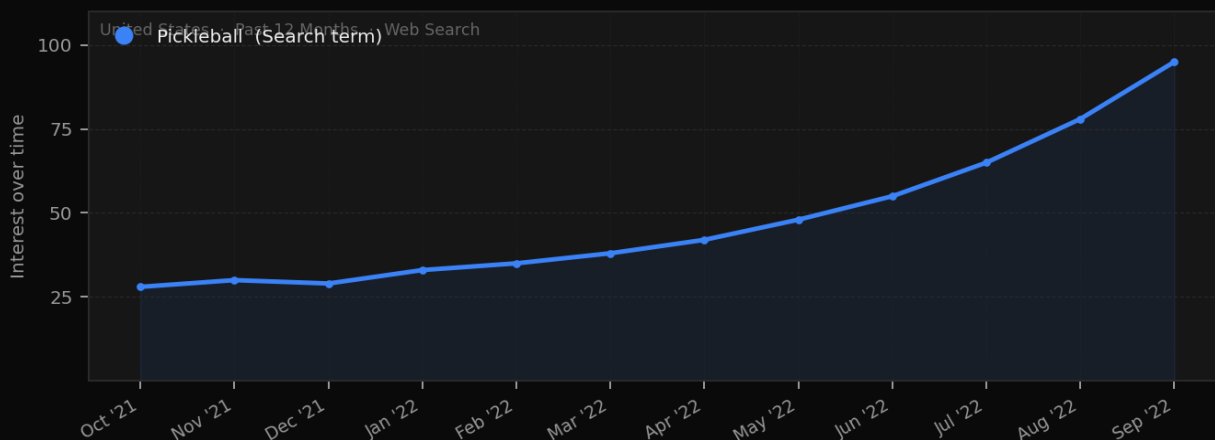
Pickleball in the USA

Overview

Pickleball has been deemed the **fastest growing sport in America** by Forbes. An estimated **4.8 million people** in the USA play Pickleball today, growing by over **40% in the last two years** and averaging 11.5% annual growth over the past five. The sport's appeal spans all ages — its simplicity, low cost of entry, and ease of adapting existing tennis courts have driven explosive grassroots adoption nationwide.

The International Federation of Pickleball (IFP) is actively pursuing Olympic recognition. There are over **700 pickleball clubs and associations** in the USA, compared to just 65+ for Padel. The paddle market alone was valued at **\$152.8 million in 2021** and is forecast to grow at a 7.7% CAGR through 2028.

Google Search Trends — Pickleball (USA, Oct 2021–Sep 2022)



Source: Google Trends, United States, Past 12 Months, Web Search — search term: 'Pickleball'

Search interest in Pickleball shows a **consistent, strong upward trend** with a sharp spike in September 2022 — driven in part by major investor announcements and league expansion news. Unlike Padel, Pickleball interest spans both warm and cold-weather states, due to the abundance of adaptable indoor tennis courts:

#	STATE (TOP SEARCH)	TOP STATES (MOST LOCATIONS)	LOCATIONS
1	Utah	California	794
2	Arizona	Florida	770
3	Hawaii	Texas	519
4	Minnesota	North Carolina	421
5	Colorado	New York	400

Source: Google Trends geographic data; Pickleheads location database, 2022

Cold-weather states (Utah, Minnesota, Colorado) rank high in searches because indoor tennis courts can be easily converted to Pickleball courts, dramatically lowering the barrier to venue access.

Key Pickleball Stats (2022)

4.8M	40%+	700+	\$152.8M
Current Players in the USA	Growth in Last 2 Years	Clubs & Associations	Paddle Market Size (2021)

Source: Pickleheads, Sports & Fitness Industry Association (SFIA), USA Pickleball, 2022

Major League Pickleball (MLP)

The MLP was formed in 2021 and has quickly become one of the fastest-growing pro sports leagues in North America. In 2023, the league expanded from **8 to 16 teams** and attracted high-profile investors including **LeBron James, Draymond Green, Kevin Love, Tom Brady, and Kim Clijsters**. This level of star power will drive significant increases in viewership, media coverage, and mainstream equipment demand.

Source: Front Office Sports, Oct 2022: 'LeBron James, NBA Stars Buy Pickleball Team'; 'Tom Brady, Kim Clijsters Buy Major League Pickleball Team'

COMPARISON

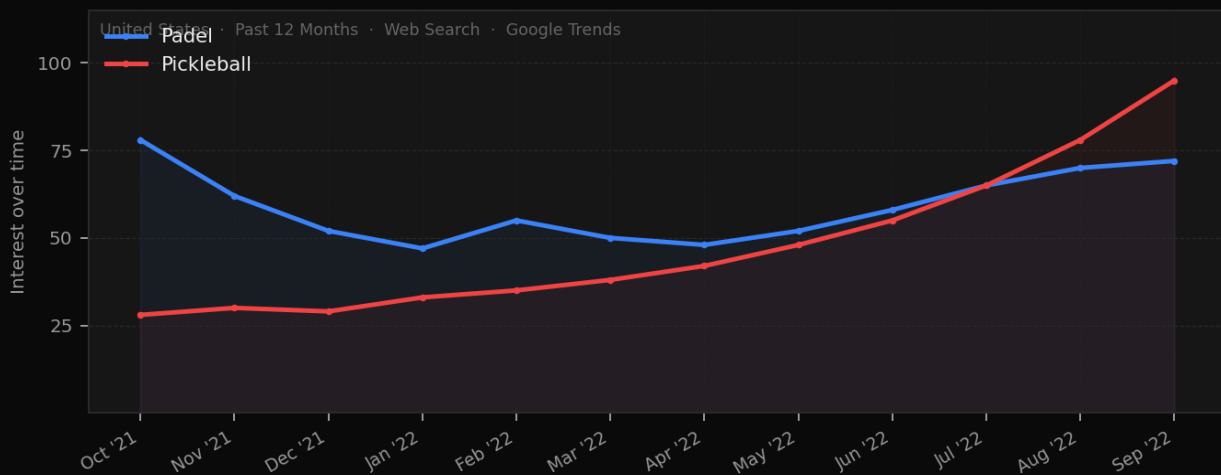
Padel vs Pickleball — Head to Head

The data makes the picture clear: Pickleball dominates Padel across every key metric in North America. The growth Padel has seen in Spain and Europe mirrors how Pickleball is growing in the USA — Pickleball simply arrived first and built deeper infrastructure.

	PADEL	PICKLEBALL
Number of Players	~10,000	4.8 Million
Number of Clubs	65+	700+
Number of Courts	65+	10,320
Pro League	No	Yes (MLP)
Fastest Growing Sport	—	Yes (#1 in USA)
E-Commerce Opportunity	Limited	High

Source: USPA; USA Pickleball; Pickleheads; Sports & Fitness Industry Association (SFIA), 2022

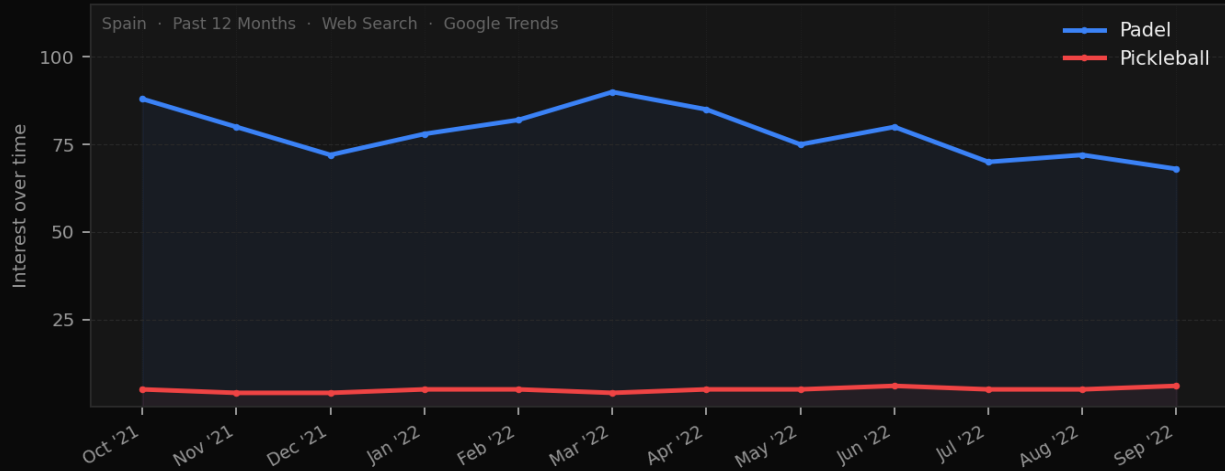
Google Search Interest — Padel vs Pickleball (USA)



Source: Google Trends, United States, Oct 2021–Sep 2022, Web Search — search terms: 'Padel', 'Pickleball'

Pickleball far outpaces Padel in search interest across the USA. While Padel holds modest, relatively flat interest, Pickleball shows a clear upward trajectory with accelerating momentum heading into 2023.

Google Search Interest — Padel vs Pickleball (Spain)



Source: Google Trends, Spain, Oct 2021–Sep 2022, Web Search — search terms: 'Padel', 'Pickleball'

The growth Padel has seen in Spain is analogous to how Pickleball is growing in the USA. In Spain, Padel dominates and Pickleball barely registers — the inverse of the North American picture. This comparison reinforces why Pickleball must be the commercial priority for the North American market.

RECOMMENDATIONS

Strategic Go-to-Market Priorities

Lead with Pickleball	Pickleball is at a defining inflection point in North America. The next 18 months will cement market leaders. Prioritize Pickleball product development and sales activation immediately.
E-Commerce First	Launch on Amazon Marketplace and Walmart Marketplace to reduce risk, achieve higher margins, and reach buyers nationally without geographic restriction. Brick & Mortar is a secondary channel to be built once online momentum is established.
Develop a Pickleball Racquet	Developing a Pickleball racquet represents a significantly larger opportunity than Padel equipment alone. Pickleball paddles sell at accessible price points — a key advantage as consumer spending tightens.
Build Both, Hedge Wisely	Do not abandon Padel entirely — choosing Padel only would severely limit USA growth. Develop both product lines with resources weighted heavily toward Pickleball.
Leverage MLP for Marketing	Align marketing and content strategy around the MLP season and athlete investment news. Cultural momentum from LeBron James and Tom Brady's involvement will lift equipment demand.
Club Outreach for Distribution	Connect with local clubs to get product into club shops and websites. For Pickleball, explore school district bulk purchasing for Physical Education programs — a unique B2B channel.

This report was prepared by MVRK Sport & Entertainment Inc. Data sourced from: USPA, USA Pickleball, Sports & Fitness Industry Association (SFIA), Pickleheads, Google Trends, and Front Office Sports (2022). Property of MVRK Sport & Entertainment Inc. — Confidential.