

RACQUET SPORTS

# State of Play 2026

Tennis, Padel and Pickleball: Participation Data, Numbers and Trajectories

*Global data on 2024–25 participation levels in the Racquet Sports category show shifting player priorities and motivations. Player crossover is real, with the numbers showing it may no longer be effective to consider the three core sports in isolation.*

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**106m**

Global tennis players (ITF, 2024)

**35m**

Global padel players (FIP, 2025)

**24.3m**

US pickleball players (SFIA, 2025)

## Introduction

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Racquet sports are in an era of structural growth – but the picture is more complex than headline participation numbers suggest. Tennis remains the world's dominant racquet sport by every measurable standard: more than 106 million players globally, a broadcasting footprint that reached close to two billion viewers across the 2024 Grand Slams, and an infrastructure base unmatched by any other racquet code.

Yet its primacy is being tested on two fronts: by padel, which has transformed from a Mediterranean lifestyle sport into a global commercial category in under a decade, and by pickleball, whose accessibility and social format have made it the fastest-growing sport in the US for three consecutive years.

The three sports are not developing in isolation. Facility crossover, player migration and investment flows increasingly connect them. Across Europe, the majority of padel courts are built within or adjacent to tennis venues. In the US, the majority of professional pickleball players are former tennis players. And across Asia, an addressable audience in the hundreds of millions is being activated through state investment in tennis infrastructure in China, mobile-first court-booking platforms for padel, and a deep culture of table tennis and badminton that creates a natural pipeline for pickleball.

For brands, retailers and investors in sporting goods, the question is no longer which racquet sport is growing. It is how these three categories are simultaneously reshaping infrastructure demand, equipment supply, apparel spend and the commercial media landscape.

### 01 · Tennis

## Still life in one of the world's oldest racquet sports

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Tennis is the traditional foundational pillar of the racquet sports industry, largely due to its longstanding history and high awareness rates around the world. Alongside badminton and table tennis, it is one of three racquet sports featured in the Olympics and has an annual, year-round roster of tournaments that achieve high viewing figures.

The 2024 Grand Slam tournaments – the Australian Open, Roland-Garros, Wimbledon and the US Open – achieved a combined viewership of almost 2 billion people in more than 200 countries. In 2025, the US Open became the most viewed tennis telecast of the year on ESPN. In all analyses, tennis is the most watched racquet sport in the world.

Tennis is also the sport that brings male and female viewers together. Sky Sports reports a viewership that is 58 percent female, compared with an overall sports audience that is 30 percent female. In the 2024 season, the WTA Tour (Women's Tennis Association) alone achieved a record global audience of over one billion views – a 10 percent increase on 2023. Interestingly for brands, WTA fans show greater engagement with sponsor brands: 59 percent say they take notice of who sponsors the events they watch, versus 47 percent for sports fans in general.

## Asia is home to most of the world's tennis players

As of 2024, tennis has a total global playing population of 106 million – a rise of 21.6 million, or 25.6 percent, from 2019 – according to the ITF (International Tennis Federation) Global Tennis Report 2024. Tennis is played in 199 nations.

USTA (United States Tennis Association) reaffirms this increase, with participation in the US alone increasing by 1.6 million in 2025 to reach a new high of 27.3 million. This is a 54 percent increase since 2019, with America adding nearly 10 million players over six consecutive years of growth. USTA has set a target of 35 million players by 2035.

Region	Total players (2024)	Global share	Context
Asia	35,348,633	33.4%	Largest playing population globally; 24.3% of world's courts; China accounts for 22.9% of world's tennis players.
Europe	29,573,962	27.9%	Mature market; high concentration of tennis coaches (60%) and clubs (31.9%).
North America	28,812,000	27.2%	Leading in infrastructure; 41.8% of global clubs and 36.7% of courts.
South America	8,846,758	8.3%	Participation focused in heritage countries: Argentina, Brazil and Chile.
Oceania	1,849,835	1.7%	Highest regional female tennis coaching population at 32.5%.
Africa	892,032	0.8%	–
Central Am. & Caribbean	664,899	0.6%	–

Source: *Global Tennis Report 2024, ITF*

The rise of Asia as the dominant tennis-playing region is particularly noteworthy. One country is leading the growth of tennis both in Asia and worldwide: China. In 2024, tennis participation in China exceeded 25 million – a 21 percent increase on 2021. China has constructed more than 4,000 tennis courts in four years, according to the General Administration of Sport. That represents 8 percent of global court facilities, and gives China nearly a quarter share of global tennis players.

There are, however, questions over the credibility of the figures from the ITF, particularly those concerning mature markets in North America and Europe. Racquet sports industry blog RacketBusiness.com cites static ball deliveries to the US between 2019–2024 which would contradict such a large growth. It also notes that for certain national federations, registered players now include padel and pickleball players, and in some cases younger age groups not previously counted – giving the illusion that tennis participation is increasing in markets where it may have plateaued.

## Tennis participation in Europe concentrated in 5 nations

In its most recent tri-annual report (2022), Tennis Europe gives a detailed picture of tennis participation across the continent. Participation is once again up, with Tennis Europe presenting a growth figure of 4.6 percent. Although there are players in every European nation, the sport is concentrated in a handful of countries: just five nations – France, Germany, Great Britain, Italy and Spain – account for 75 percent of all European tennis players. France is home to one in every five tennis participants.

More recent 2024 data from the ITF puts Great Britain ahead of Germany and France in terms of total tennis players.

Country	Players (2022)	Trend	Context
France	4.7 million	Steady	Nearly 10,000 indoor courts
Germany	3.5 million	Steady	More than one in five European clubs is in Germany
Great Britain	3.3 million	New high	Up 9.09% in 3 years; highest participation figures in a decade
Italy	3.15 million	Stable	Club members growing
Spain	3.1 million	Steady	100,000 new players 2018–2022
Switzerland	620,000	Stable	7.2% of population plays tennis
Turkey	419,000	Boom	Players up 90.45% in 3 years
Czech Republic	426,100	Consistent growth	Leading performance tennis; only 4 EU nations have more courts
Greece	280,000	Boom	Up 140% in 3 years; driven by professional player success
Norway	90,000	Consistent growth	Up 12.5% in 3 years; upward trend for 15 consecutive years
Ireland	80,000	Steady	Club membership up 34% in 3 years
Denmark	85,000	Consistent growth	Up 6.92% in 3 years
Georgia	1,700	Stable	Player numbers returned to 2009 level

Source: 2022 European Tennis Report, Tennis Europe

## Tennis: A gender-equal sport?

Tennis often declares itself the most gender-equal sport in terms of participation. The Global Tennis Report 2024 lists the gender balance at 40.3 percent female players. This is a dip from 47 percent in 2019, attributed by the ITF to more accurate data collection and an overestimation of female players in the earlier report. The UK's LTA lists a gender ratio of 42 percent adult female in 2024 – representing a 19 percent increase in female participation. In youth tennis, 49 percent of 4–15 year-old players are female.

As we move into 2026 and beyond, tennis may have lost its crown as the most gender-equal racquet sport to one of the newer entrants to the category: padel.

## 02 · Padel

## The architectural and social disruptor

Padel is undeniably the world's fastest-growing racquet sport in 2026. Often described as a strategic hybrid of tennis and squash, played in doubles on an enclosed smaller court where walls are active components of play, padel has moved from a Mediterranean phenomenon to a global commercial powerhouse.

### 35m+

Active padel players globally (FIP, close of 2025)

### +15.2%

Annual increase in court numbers

### 61%

Of global padel players based in Europe

### Padel growing at over 15 percent annually

The International Padel Federation (FIP) reported over 35 million active amateur players globally at the close of 2025. The pace of infrastructure deployment is remarkable: in the 18 months leading into 2025, over 14,000 padel courts were added globally, representing an annual increase of 15.2 percent.

Europe remains the dominant hub, hosting 61 percent of padel players and 66.1 percent of global courts. However, the growth story of 2026 looks set to be concentrated in the Middle East and Southeast Asia. In Asia, the Middle East accounts for 72 percent of padel facilities – down from 89 percent – showing padel participation is becoming more widespread across the continent. Indonesia has emerged as a major growth driver with an estimated 350 courts and 17 percent of Asia's enthusiasts.

Region	Share of global player population	Context
Europe	61.3%	Most clubs and accommodation facilities worldwide (62.3%)
South America	19%	21.5% of clubs and accommodation
Central & North America	7.7%	US in a transition phase from initial growth; Florida has most courts
Asia	6.8%	Saudi Arabia has 1,130 courts
Africa	4.9%	Number of clubs up 5.1% in 18 months; Egypt has 1,500 courts
Oceania	0.3%	Moving from embryonic phase into growth

Source: FIP World Padel Report 2025

### Padel growth driven by Europe

Of the top 15 countries by number of courts, eight are European nations. Italy, Spain and Sweden were previous drivers of European growth – in 2023 research by Monitor Deloitte and Playtomic, both Spain and Sweden had more padel players than tennis players. However, growth in padel participation is now being driven by countries with more moderate but accelerating rates: France, Germany, the Netherlands, Belgium and Denmark. Smaller markets to watch include Switzerland, Greece, Austria, Lithuania, Cyprus and Ireland.

The latest 2025 figures from LTA Padel show 860,000 padel players in the UK – more than double the 2024 levels. The awareness of padel among British adults reached 57 percent of the population (approximately 31 million), and over 10 million Britons expressed a desire to try padel – a rise of 3 million since the end of 2024.

Country	Courts (2025)	Market phase	Notable trends
Spain	17,300	Maturity	Most courts worldwide; often cited as second most popular sport after football
Italy	10,220	Consolidation	Consolidating post-pandemic boom
Argentina	7,000	Heritage	Most courts in South America; accounts for over 40% of the regional fan base
Sweden	4,220	Mature	Market correction phase
France	4,000	Rapid growth	Highest number of courts installed in 2025 (+1,850)
UK	1,000+	Rapid growth	Average annual growth +130% in recent period
Germany	875+	Growing	50% increase in courts and clubs
United States	700+	Initial expansion	Florida holds 41% of courts; Texas and California follow

Source: FIP World Padel Report 2025

## Padel player base still evolving

In 2025, padel had a global player base that was 40 percent female – equaling tennis's most recent figure. However, strong regional variation persists. In Spain, women represented around 36 percent of registered padel players in 2025. In the UK, less than one third (30 percent) of players are women. The US, by contrast, reports around 45 percent female participation.

## Padel has eyes on the Olympics

The professional landscape of padel has been transformed by the launch of the Premier Padel tour, founded by Qatar Sports Investments (QSI) in partnership with the FIP. By 2026, the circuit has expanded to 25 major tournaments worldwide across Platinum, Gold, Silver and Bronze tiers. In March 2026, padel was confirmed as a medal sport at the European Games Istanbul 2027, and will also feature at the Asian Games in 2026. The decision on the 2032 Olympic program is due this year – padel's inclusion at Brisbane 2032 remains a live question.

## Could padel signal the end of the club membership model?

The economic model of padel is increasingly driven by pay-to-play digital platforms, which have systematically replaced the traditional membership structures seen in tennis clubs. Playtomic, the Madrid-based court booking and club management platform, is the dominant player in this space globally. As of September 2025, the platform had transacted over €346 million – a 51 percent year-on-year increase – generating €29 million in net revenue across a network of more than 4.7 million players and 6,000 clubs. Playtomic has raised over €110 million from investors including GP Bullhound, FJ Labs and Bonsai.

According to Playtomic's own data, clubs operating on digital tools outperform non-digital competitors by a factor of 3 to 5 in both revenue and player retention. In mature markets, open matches account for 80 to 90 percent of all bookings – and padel reports a 92 percent return rate after a first session.

## 03 · Pickleball

## From niche to powerhouse

Pickleball has transitioned from a niche North American activity to a global movement. Frequently described as the most accessible racquet sport, its small court size and low barrier to entry have made it a mainstream force, particularly in the US and China.

### 24 million pickleball players in the US alone

Pickleball participation levels are harder to track than tennis and padel, as they are often measured differently and are only beginning to be captured systematically. Global reach is estimated between 80 million and 120 million 'curious' players, according to The Pickle Ball Clinic, who aggregate data from the US, Canada, Australia, England, Spain, India and the Philippines.

There were approximately 24.3 million active participants in the US alone in 2025, according to the SFIA (Sports & Fitness Industry Association). In the US, participation grew by 45.8 percent year-on-year in 2023–2024, and 22.8 percent in 2024–2025 – pickleball's third consecutive year as the fastest-growing sport in America. This represents a 171.8 percent increase over three years. Pickleball is now edging in on tennis as the most popular racquet sport in the US.

### Asia holds pickleball's next expansion

Research from UPA Asia (United Pickleball Association Asia) across 12 territories indicates that roughly 812 million people in Asia have played pickleball at least once in 2025 – a reach facilitated by the region's strong culture of table tennis and badminton. Around 282 million play pickleball each month, representing 60 percent year-on-year growth. India has the highest number of frequent pickleball players (178 million), followed by China (60 million).

Global pickleball ranking system DUPR confirms India has the fastest-growing pickleball scene. Vietnam has the highest percentage of population with pickleball experience (over 37 percent). Malaysia and the Philippines also appear in the top 10 by number of users.

### Who is playing pickleball?

Unlike tennis, pickleball in America has a more unbalanced gender demographic, with the sport still more popular with men. 2024 SFIA figures show a 58.6 percent male player base. The 65-plus age group was traditionally the strongest, but the average age of a pickleball player in America is dropping: those aged 25–34 now represent the biggest segment.

Demographic segment (US)	Share of total players	Context
Age 6–12	11.2%	Largest youth segment; boys outnumber girls
Age 13–17	9.1%	–
Age 18–24	14.2%	18–44 make up nearly half of casual players (48.9%)
Age 25–34	16.0%	Largest single age segment
Age 35–44	12.3%	–
Age 45–54	9.4%	Balanced between core and casual players

Demographic segment (US)	Share of total players	Context
Age 55–64	12.7%	Traditionally the strongest base; average age now dropping
Age 65+	15.1%	Largest segment of core players (8+ times/year)
Male / Female	58.6% / 41.4%	Significant male majority in US; England reverses this trend (55.3% female)

Source: SFIA Pickleball Single Sport Report 2025; Sport England Active Lives 2024

The story in England is strikingly different from the US. The Sport England Active Lives survey (Nov. 2023–2024) reported a 55.3 percent female versus 44.6 percent male split – making pickleball the only racquet sport in England where women outnumber men. Pickleball England, now recognised by Sport England as the National Governing Body, has set a target of one million players by 2030.

## 04 · Racquet Sports Crossover

# Diversify to survive? The data on player migration

The crossover between tennis and padel in terms of facilities is clear, particularly in newer, booming markets. In France and Italy, 70 percent of padel courts are located in tennis venues, according to the LTA, which integrated padel in 2020. Twenty-one Tennis Europe member nations currently govern both tennis and padel.

In mature padel markets such as Spain and Sweden, the picture is different: in Spain, only an estimated 25 percent of padel courts are at tennis venues. Facility crossover does not automatically translate into player crossover.

## Tennis to padel: a more complex relationship than it appears

One snapshot from May 2025 by Ed Shanaphy of BeyondTheBaselines.com racquet and club management consultancy typifies the situation:

**“Padel players at the club rarely play tennis. And the club's tennis members rarely play padel. Padel is drawing a distinct demographic – typically younger and more affluent – which differs markedly from our tennis base.”**

According to UPA Asia, only 25 percent of those who follow tennis also follow pickleball. However, the crossover is higher for padel, reaching 67 percent.

## Tennis to pickleball: the stronger crossover

When playing other racquet sports, US tennis players are likely to play pickleball (39 percent), with only 16 percent playing padel, according to a 2024 survey by racquet sports festival RacquetX and marketing agency LT. Table tennis shows even higher crossover at 50 percent. The relationship is bidirectional: 67 percent of pickleball players also play tennis, whereas only 8 percent reported playing padel.

Forty-three percent of players who plan to play tennis at the same rate or more in the coming year also plan to diversify the racquet sports they play. Women are more likely than men to want to diversify, with 48 percent expressing this intention (versus 36 percent for men). The pickleball professional tour is comprised of 90 percent former tennis players.

## Racquet sport popularity by generation

Sport	Gen Z (18–27)	Millennial (28–43)	Gen X (44–59)	Boomer (60+)
Tennis	77%	86%	74%	77%
Pickleball	48%	47%	49%	42%
Padel	30%	18%	15%	3%

Source: *Who's on the Court? RacquetX and LT Agency, 2024*

## 05 · The Racquet Sports State of Play: 2026 and Beyond

## Four eras, one direction of travel

The ten-year evolution of racquet sports is a narrative of resilience and rapid adaptation. In the pre-pandemic era (2016–2019), tennis and badminton maintained stable, predictable growth, while padel was in its initial phase outside Spain. The pandemic (2020–2022) acted as a primary disruptor, forcing a shift toward individual and outdoor sports.

In the post-pandemic period (2023–2026), the multi-sport racquet facility has become the industry standard. Tennis clubs have integrated pickleball and padel courts to maximize revenue per square foot, recognizing that pickleball can fit multiple courts on a single tennis court.

Era	Key characteristic	Dominant sport trend
Pre-pandemic (2016–19)	Club-centric membership	Stability in tennis and badminton
Pandemic (2020–22)	Outdoor safety surge	Explosion in tennis and pickleball
Post-pandemic (2023–25)	Digital pay-to-play	Rapid padel expansion in US and Asia
Current era (2026)	AI and smart infrastructure	Full tech integration; Olympic focus for squash and padel

### Editor's note

*Tennis is not one global story – it is several regional ones moving at different speeds. Asia is the growth engine, with China's state-backed infrastructure program adding a quarter of the world's players in under a decade. North America is deepening a participation base that has added nearly 10 million players since 2019, with a clear institutional target of 35 million by 2035. Europe, by contrast, is a mature market consolidating around five dominant nations, with meaningful secondary growth concentrated in markets like Turkey, Greece and Ireland. The direction of travel is consistent across all three: upward. Where it gets interesting for brands and investors is in reading which regional trajectories are infrastructure-led, which are culturally driven – and where those two forces are beginning to converge.*

*SGI Europe will be following this space closely – with further reports and on-the-ground coverage at key industry moments, including the World Padel Summit in Barcelona (May 26–28, 2026) at Gran Via.*

## A note on sources and methodology

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Participation figures in this report are drawn primarily from the official publications of international sports federations, national governing bodies and independent research bodies active in each sport. Where third-party or market-sizing research is cited, this is indicated in the text.

Readers should note several structural challenges in racquet sports data. Figures across the three sports are not directly comparable: the ITF counts players at 'some level' of participation; SFIA measures active US participants; FIP figures reflect amateur players registered or tracked via affiliated club and platform systems. Pickleball's global figures carry significant uncertainty – the range of 80 million to 120 million 'curious' players reflects the absence of a unified global measurement framework.

Concerns have also been raised – including by RacketBusiness.com – that some national tennis federations have broadened their definition of registered player to include padel and pickleball participants, and in certain cases younger age groups not previously counted. This may inflate apparent tennis growth in some mature markets.

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