

Pickleball and the future of Racquets

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What happened with Racquets in COVID – 2020?

- Racquet/paddle sports experience participation growth
- Tremendous growth in racquet/paddle and ball sales
- USTA hired Mike Dowse as their new CEO
- USA Pickleball hired Stu Upson as their first CEO
- USAPA changed their name to USA Pickleball
- Two new professional pickleball Tours: APP and PPA
- PPTR (Professional Platform Tennis Registry) formed
- Continued growth in court construction/refurbishment

A five year look back at racquets

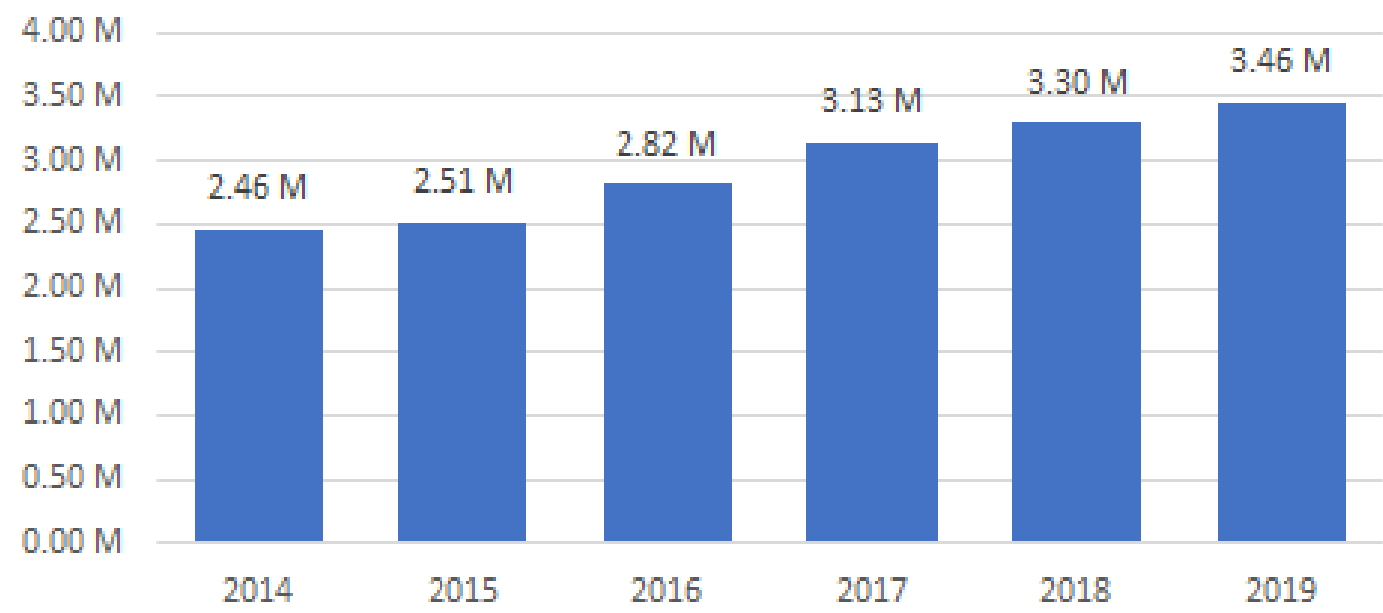
All participation figures are in 000s

Racquet Sports	Definition	2014	2015	2016	2017	2018	2019	1-year change	3-year AAG	5-year AAG
Badminton										
Total participation	1+ times	7,176	7,198	7,354	6,430	6,337	6,095	-3.8%	-5.9%	-3.1%
Casual	1-12 times	5,049	5,032	5,285	4,564	4,555	4,338	-4.8%	-6.2%	-2.8%
CORE	13+ times	2,127	2,166	2,069	1,867	1,782	1,756	-1.4%	-5.3%	-3.7%
Pickleball										
Total participation	1+ times	2,462	2,506	2,815	3,132	3,301	3,460	4.8%	7.2%	7.1%
Casual	1-12 times	1,459	1,458	1,710	1,923	2,011	2,185	8.7%	8.6%	8.6%
CORE	13+ times	1,003	1,048	1,106	1,210	1,290	1,275	-1.1%	5.0%	5.0%
Squash										
Total participation	1+ times	1,596	1,710	1,549	1,492	1,285	1,222	-4.9%	-7.5%	-4.9%
Casual	1-7 times	1,209	1,293	1,111	1,044	796	747	-6.2%	-12.0%	-8.6%
CORE	8+ times	388	417	437	447	489	476	-2.7%	3.0%	4.3%
Tennis										
Total participation	1+ times	17,904	17,963	18,079	17,683	17,841	17,684	-0.9%	-0.7%	-0.2%

AAG- Average Annual Growth



Pickleball - Total Participation Physical Activity Council



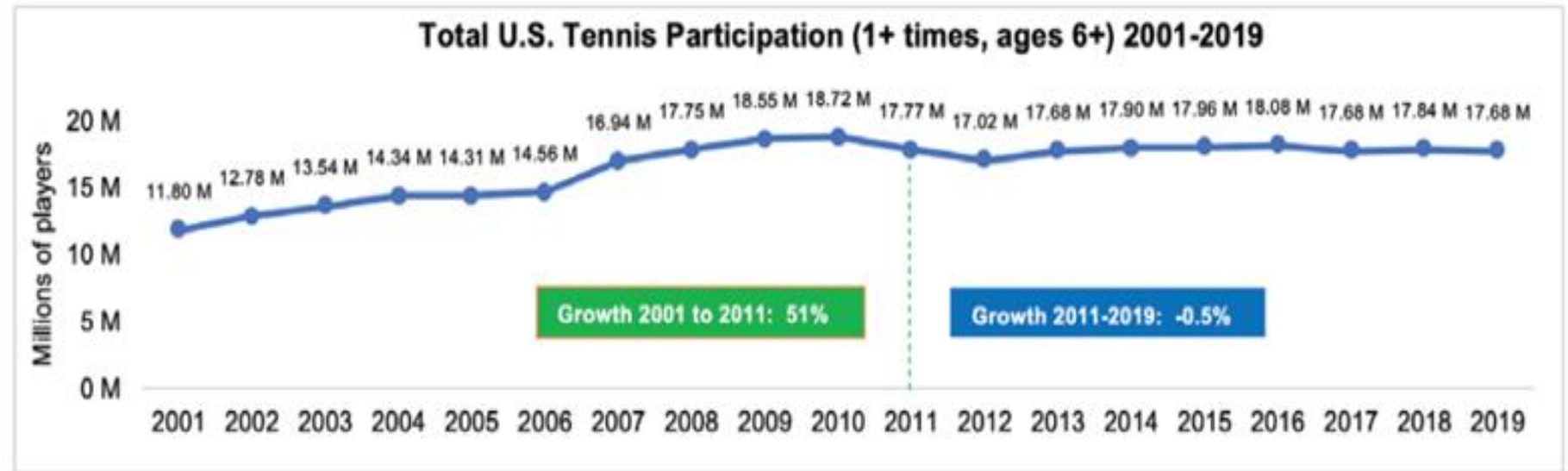
(C) SFIA/Sports Marketing Surveys USA

2020 Pickleball Participation

4.2
million
Players



Tennis Participation 2001- 2019



Total U.S. tennis participation decreased 0.9% in 2019 from 2018 to a total of 17.68 million players ages 6 & older.

The total number of tennis players have remained relatively stable (down 0.5%) since 2011.

2020 . . . a COVID Boom!!!

21.64
million
Players



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SFIA/Sports Marketing Surveys USA

Reasons for growth in Racquet Sports

- Safe – considered COVID friendly
 - Clubs instituted safety protocols
 - Balls do not transmit the COVID virus
 - Outdoors
 - Indoors with high ceilings
 - Distancing
 - Play in your own driveway or street_(non-active)

Reasons for growth in Racquet Sports

- Social activity in an anti-social environment
 - Family friendly
- More disposable time
 - Adults
 - Work at home
 - No commute
 - Kids
 - Remote school
 - No car/bus ride to school





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THINK OUTSIDE

O	O	X
X	X	O
O	X	X

THE BOX

A 3x3 tic-tac-toe grid on a black background. The top row contains an 'O', a circled 'O' with a diagonal slash, and an 'X'. The middle row contains an 'X', an 'X', and a circled 'O' with a diagonal slash. The bottom row contains an 'O', an 'X', and an 'X'. A diagonal line starts from the top-right cell of the grid and extends to a circled 'O' with a diagonal slash located outside the grid to the right.

Combination pickleball/basketball court in a:



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Bank!!!



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What's next for pickleball in 2021



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If you build it, . . .



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What's next for pickleball in 2021



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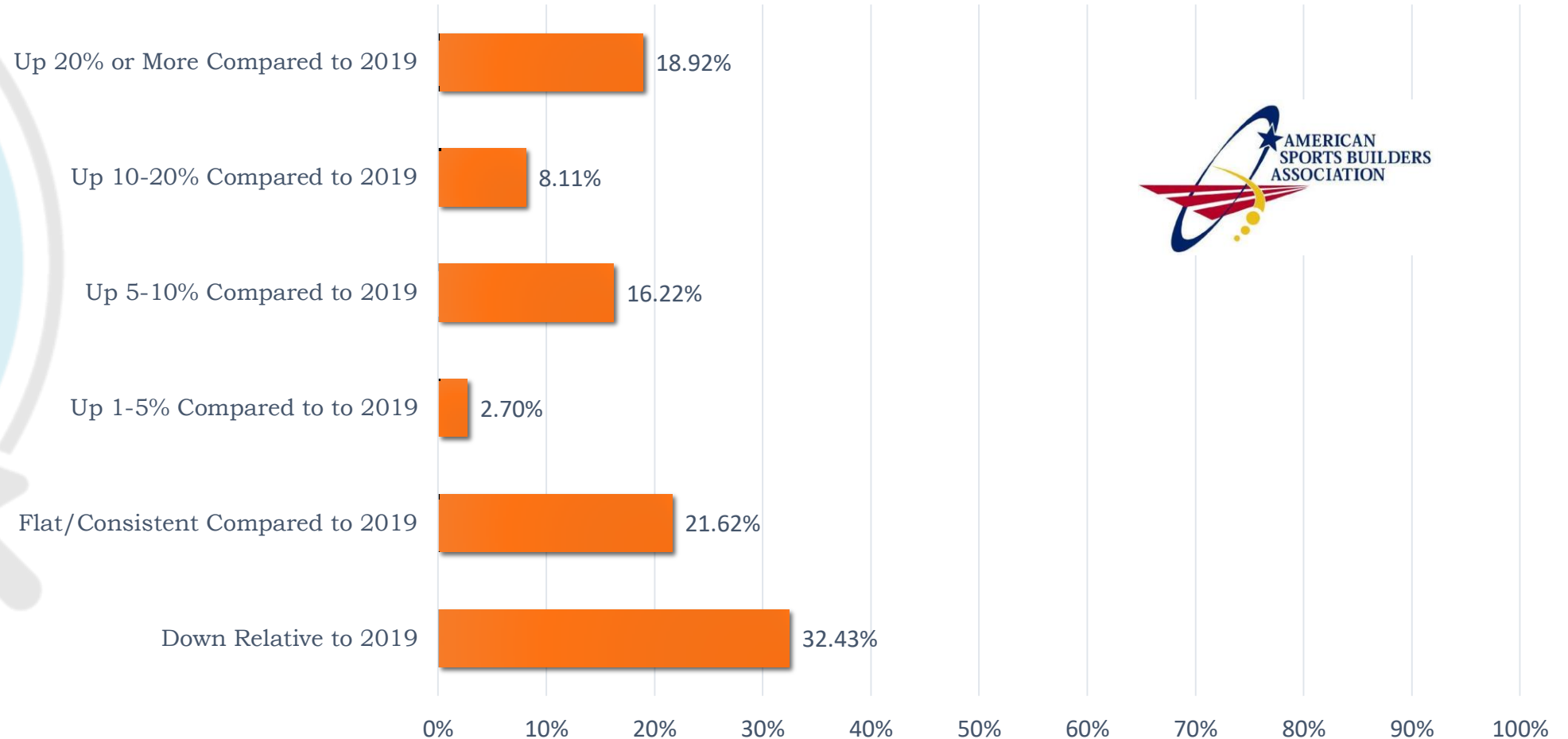


Pickleball Popularity

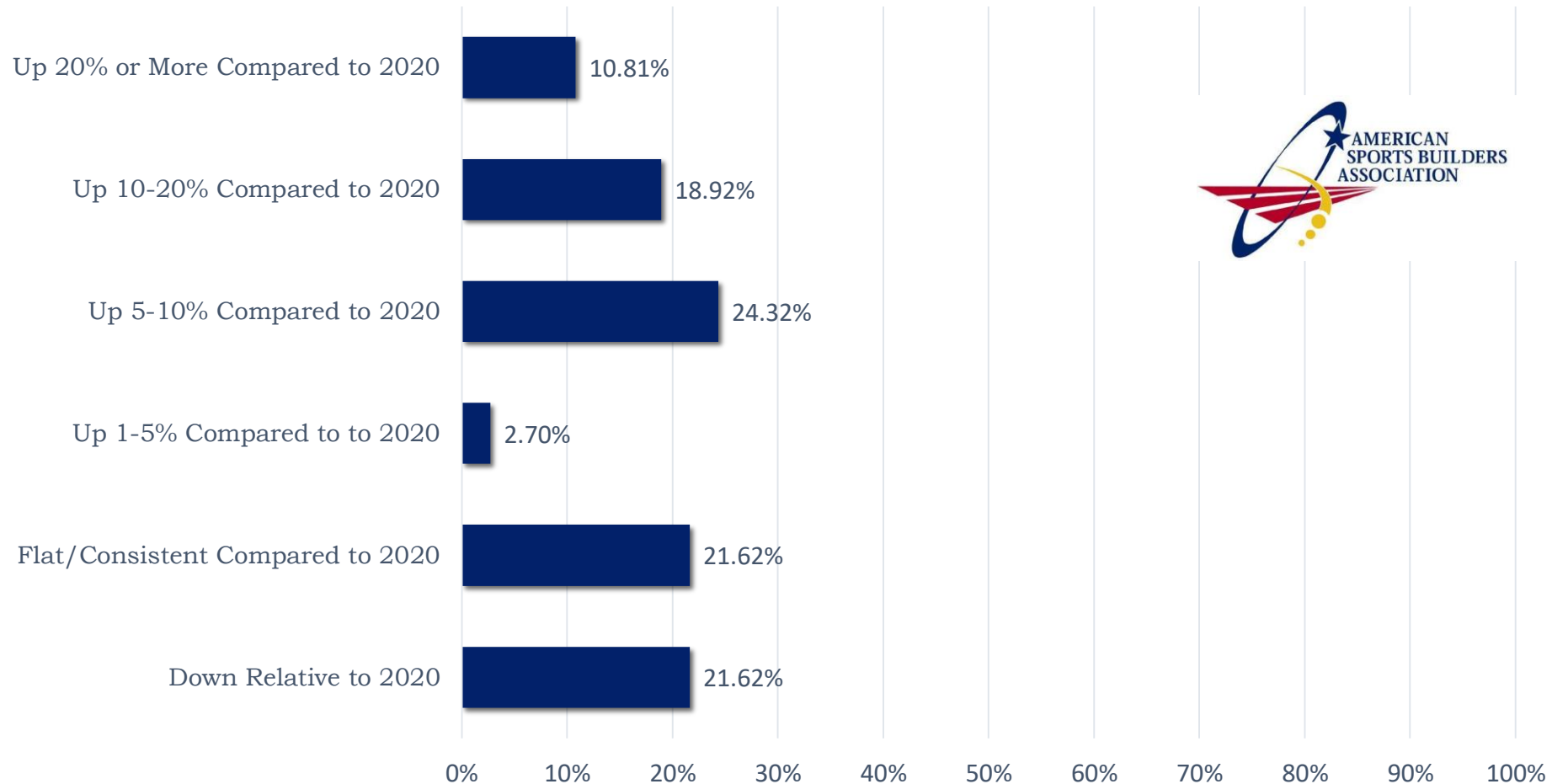
- **New York Times**
- **Southern Living**
- **LPGA Magazine**
- **USA Today**
- **LA Times**
- **Money**
- **Golf**



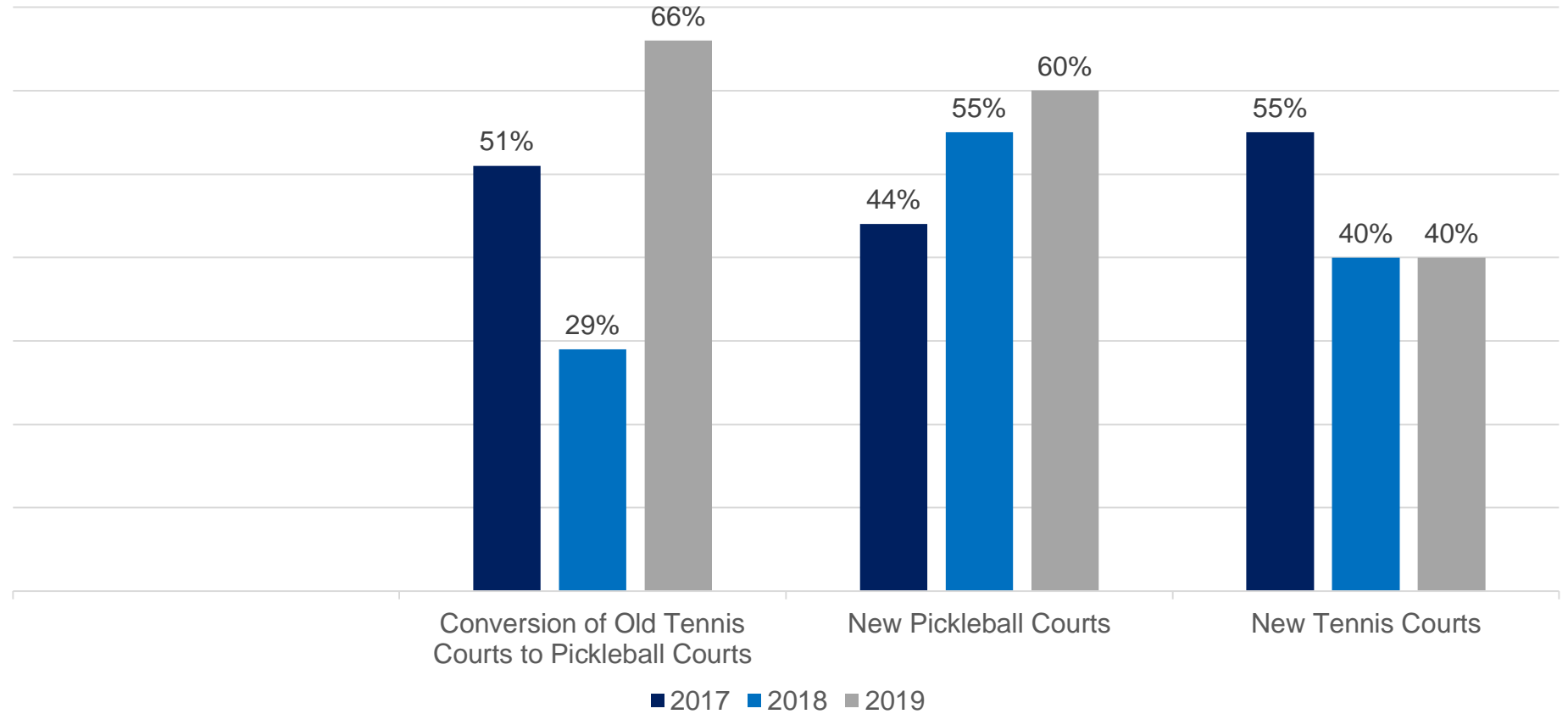
Court Construction - 2020 season:



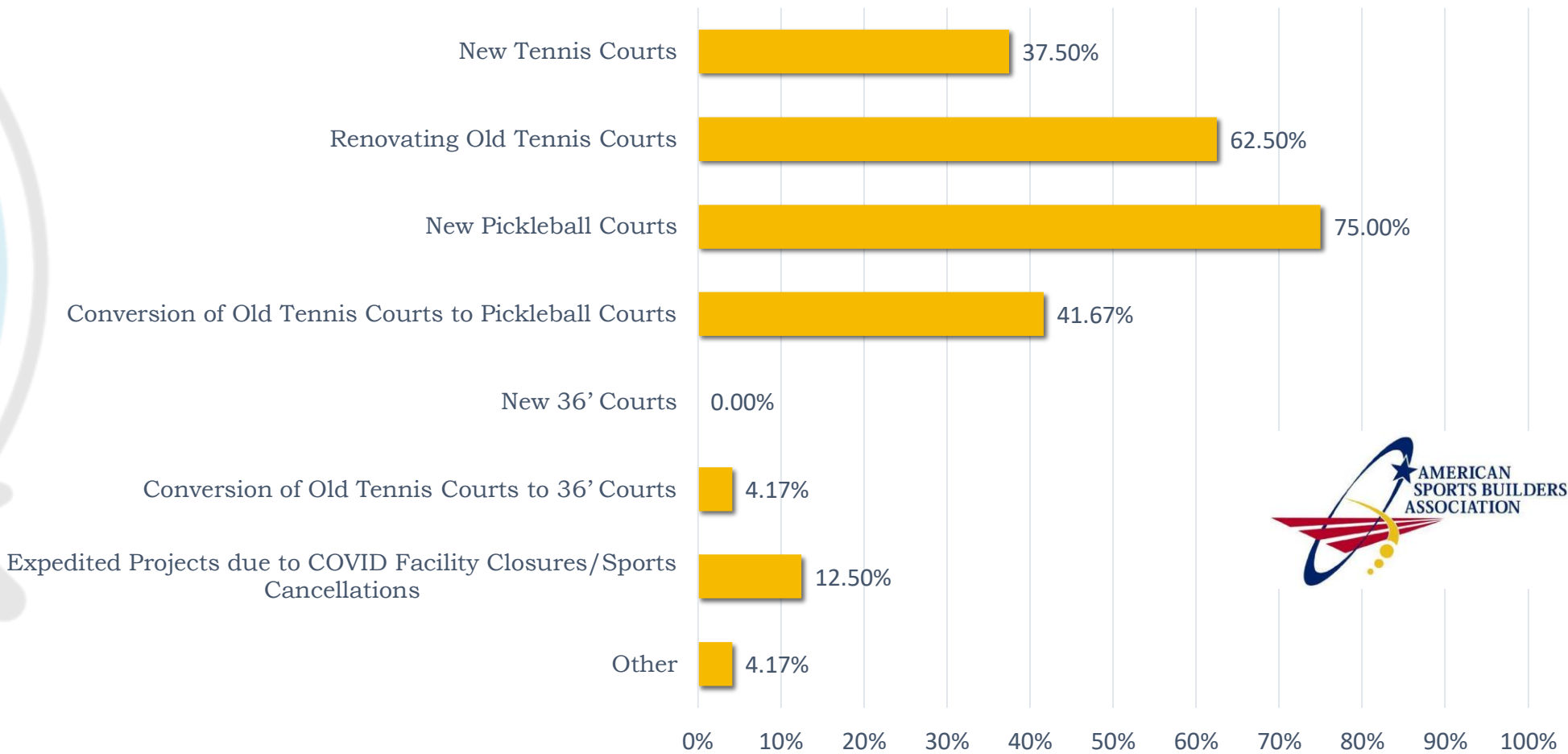
At this point in time, what are your expectations for your company's tennis and pickleball business for 2021?:



3-year trend in court construction



If you have experienced growth in business from 2019 to 2020, to what do you attribute the growth?



What recent trends/requests builders are seeing?

1. **New pickleball court construction continue to rise**
2. **Pickleball court conversions rising**
3. **Calls to put in residential pickleball/basketball courts with fencing and lights**
4. **More residential tennis courts**
5. **Cushioned surfaces and the color gray**



For courts, what's in store for 2021?

1. Use of wooden posts and windscreens instead of green metal fencing and post (“Green” initiative)

2. Portable courts

- Rolldown pickleball courts:
 - on platform tennis courts
 - Unused ballroom space
 - Over worn/cracked hard courts

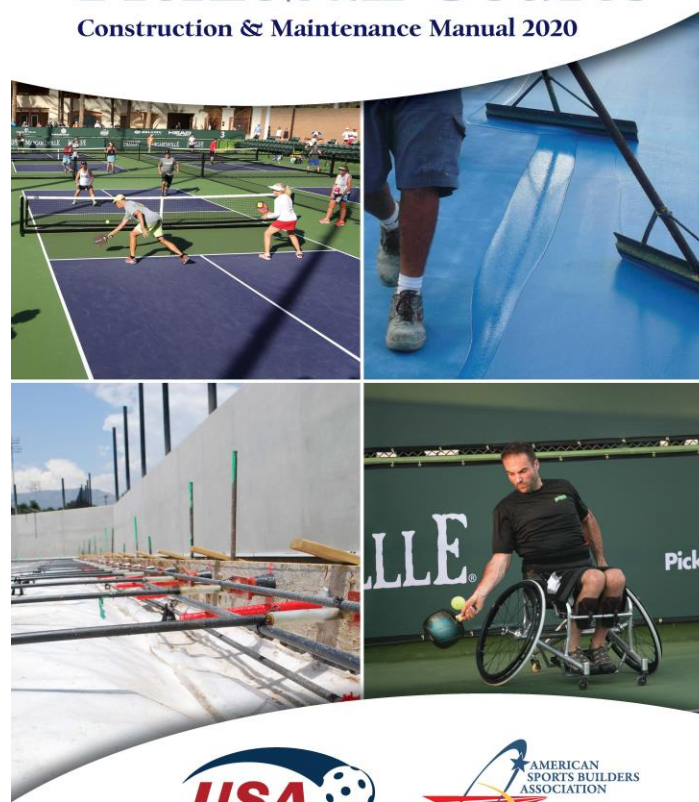
3. Smart courts

- How far you run
- How fast you run
- How many calories do you burn
- Call the lines

This book promotes the quality construction, maintenance and repair of pickleball courts by providing information to facility owners, administrators, coaches, builders, architects and engineers.

Pickleball Courts

Construction & Maintenance Manual 2020



Printed or
Downloaded
Copy

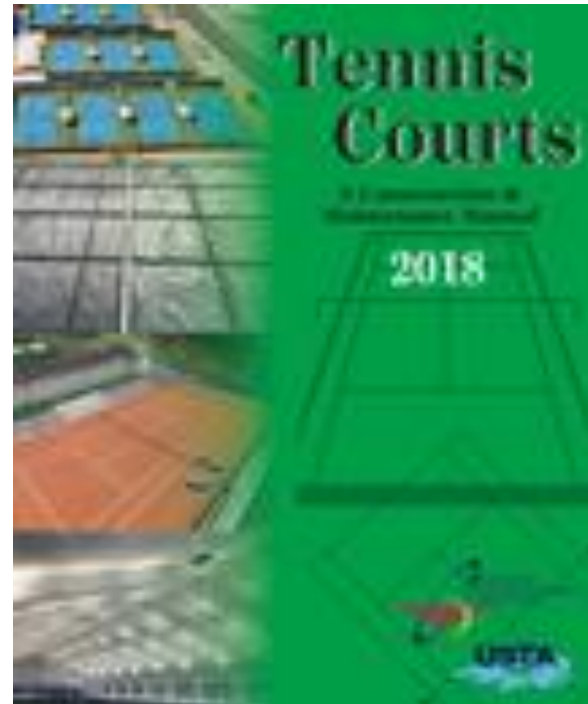
\$34.95

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Tennis Courts: A Construction and Maintenance Manual (2018) — \$44.95

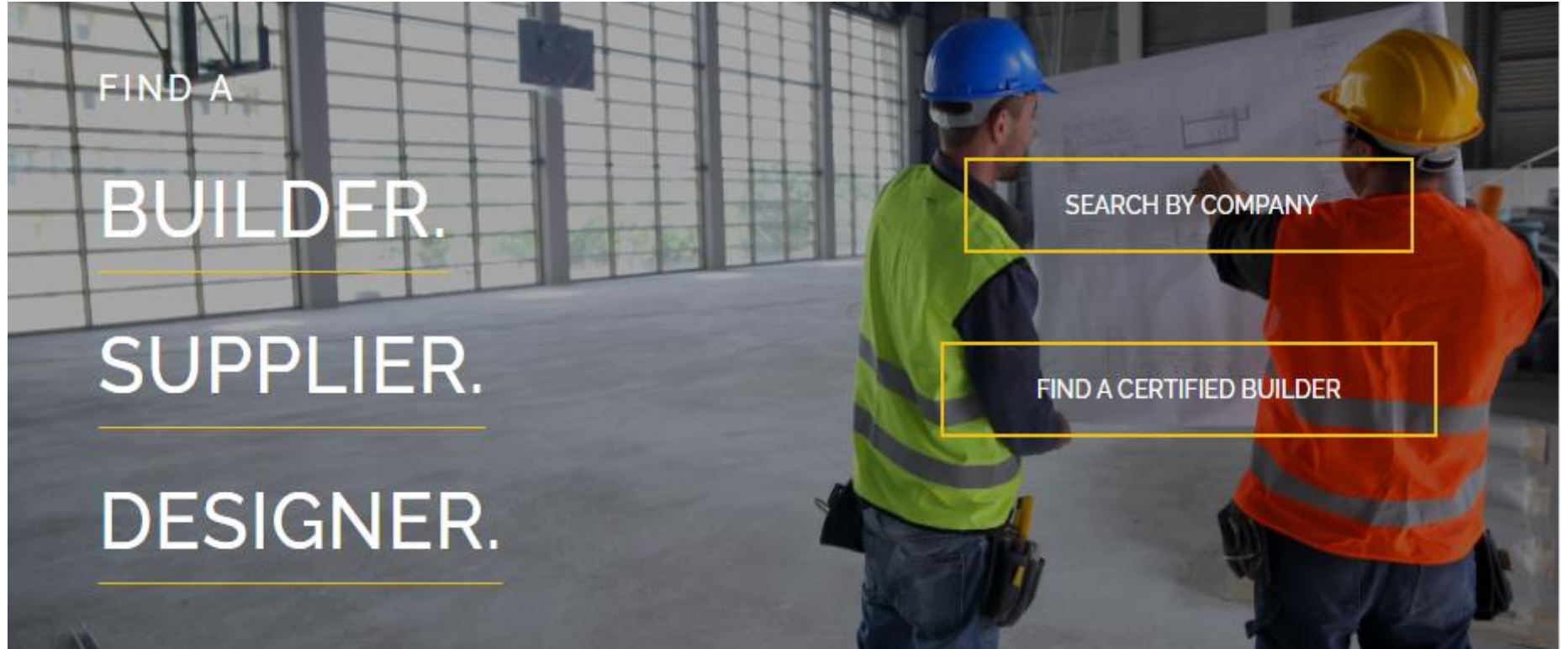
This book promotes the quality construction, maintenance and repair of tennis facilities by providing information to facility owners, managers, pros, builders, architects and engineers.



Expected release for the
new Tennis Court
Construction and
Maintenance Manual
Fall 2021

www.sportsbuilders.org

866-501-ASBA



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Potential pickleball pitfalls

- Injuries
- Lack of courts
- Noise



Potential tennis pitfalls

- Shortage of pros
- Retention of new players in 2020
- Lack of court availability
- Division of tennis and pickleball members
 - Friction between tennis and pickleball purists
 - Pickleball lines on tennis courts
 - Tennis courts transformed into permanent pickleball courts



What's next for pickleball in 2021

1. Continued double digit percentage growth in participation
2. Pickleball goes from an amenity to a “must have” at clubs
3. PPR to introduce rating clinics/camps
4. PPR to offer more Level 1 certification workshop and introduces Level II certification
5. Court construction and refurbishment continues to surge
6. Leagues have a breakout year
7. Pickleball Huts

What's next for tennis in 2021

1. TIU – Tennis Industry United
2. Strong industry push to require tennis pros be certified
3. Tennis views pickleball as a positive, not the enemy
4. USTA National Campus in Orlando adds pickleball courts
5. Tennis needs to focus on retention of 2020 new players
6. Continued participation growth, but not as robust
7. Diversity to be the main focus of participation growth

Key word for 2021 in Tennis

CERTIFICATION



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Key word for 2021 in Platform Tennis

Expansion



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Key word for 2021 in Pickleball

Managed-growth



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Key word for 2021 in Clubs

“Clubcation”



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Key word for 2021 in Clubs

Thank You



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Jarrett Chirico



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