The UK Padel Report, autumn 2026

The state of the fastest-growing padel market in the world: where the courts are, who books them, what players pay, who owns the clubs, and the two things that decide whether a club keeps its players.

The short read

Britain is the fastest-growing padel market in the world. Great Britain had 68 courts at the end of 2019, 350 at the end of 2023 and 1,553 at the end of 2025 (LTA). Another 674 were built in 2026 by early September: one new court every nine hours. The booking platforms list 652 bookable clubs and 2,362 courts; a wider directory that adds David Lloyd, members' clubs and the tennis clubs on the LTA's list reaches 901 venues and 2,870 published courts. More than a million people played in the last year.

The North is the heart of it. The North West has more courts than any other region (484), ahead of the South East and London. Manchester is the country's second padel city and the first with an LTA local padel plan. Add Yorkshire's 255 and the North holds a quarter of the country's courts.

Half of it is indoor now. 51% of the published courts are indoor, 34% outdoor, the rest covered or unlisted, and three quarters of the courts in planning are indoor or covered. A court inside an existing building costs £32,000 to £36,000 to fit out and has to sell every hour of the day to pay for itself.

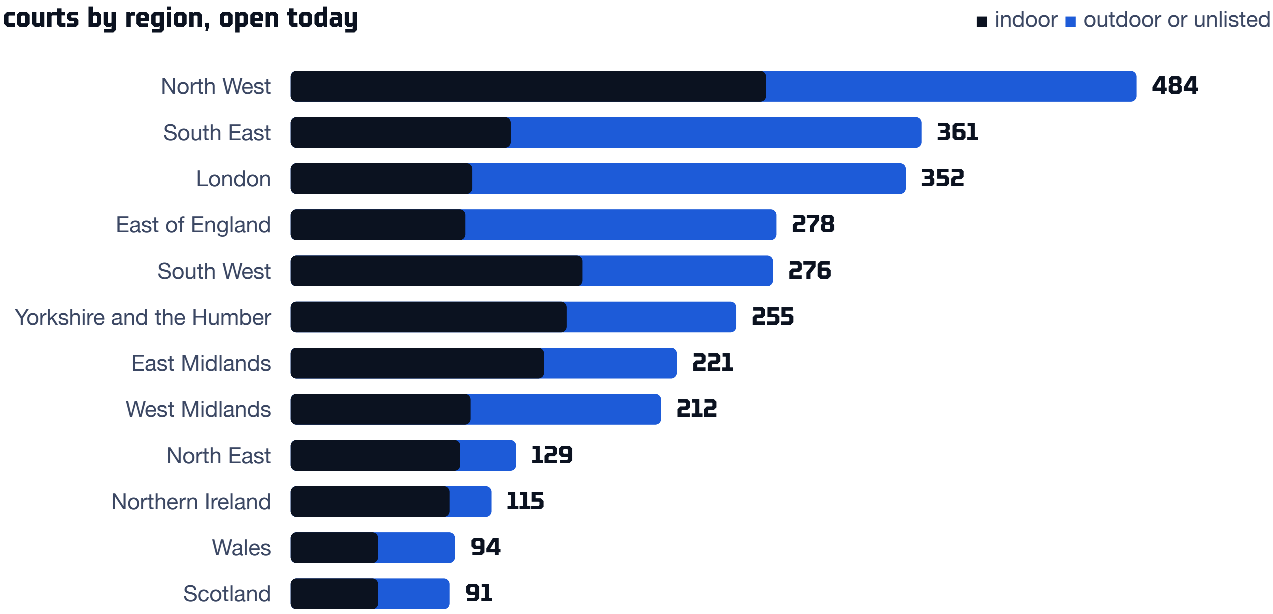
Money is pouring in. £304m a year of court bookings at list price, up 95% on last year. Padel Social Club raised £5.5m, The Padel Club £3m, Smash Padel £1.25m, all in 2026. Chains with two or more sites run 38% of clubs; 62% are single-site independents.

One platform books three quarters of the clubs, and the biggest names are walking away from it. Playtomic books 73% of bookable clubs. Rocket Padel and Padium moved to Padel Mates over the ownership of their customer data and the cost. Big Box Padel built its own app. Soul Padel, Padel Social Club and The Padel Club now run loyalty apps on top of their booking platform to get their own members back. The pattern is the same everywhere: operators want to own the relationship with the player, and the tools they were sold were never built for that.

The warning signs are showing. Manchester's occupancy fell seven points in a month. Some clubs sell off-peak courts at £8 to £15. The advice going round the operator forums is "price for the dip, not the hype". The boom built courts; the next two years decide which clubs keep the players who fill them.

Where the courts are

Padel courts by region, open today



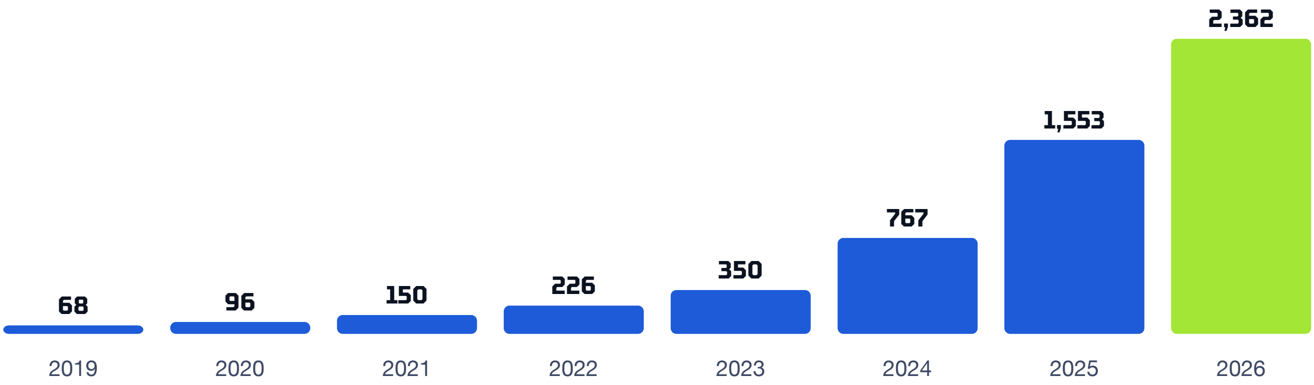
Region	Venues	Courts	Indoor	Outdoor	Typical off-peak court-hour
North West	123	484	272	155	£26
South East	144	361	126	161	£30
London	110	352	104	184	£35
East of England	101	278	100	117	£30
South West	70	276	167	70	£24
Yorkshire and the Humber	78	255	158	75	£24
East Midlands	70	221	145	52	£28
West Midlands	74	212	103	87	£28
North East	36	129	97	21	£24
Northern Ireland	24	115	91	8	£24
Wales	27	94	50	24	£26
Scotland	43	91	50	16	£24

Courts counted from published club pages. About 110 venues, mostly David Lloyd clubs and tennis clubs, do not publish a court count, so the South East and East are understated. Indoor and outdoor do not add up to the total where a venue does not say.

Three things stand out. London has the most expensive courts and the most outdoor ones, which is the reverse of the rest of the country. The North West, the South West, Yorkshire and the North East are indoor markets: the warehouse club is the British model, and it is a model with a mortgage. And the single-court tennis and golf clubs of Scotland and the South East are a market of their own, on the LTA's ClubSpark or on nothing at all.

Padel courts in Great Britain, year end

LTA to 2025 · bookable UK courts to 22 September 2026



Courts in Great Britain, year end: 68 (2019) · 96 (2020) · 150 (2021) · 226 (2022) · 350 (2023) · 767 (2024) · 1,553 (2025) · 2,362 bookable UK courts by 22 September 2026 (LTA to 2025; the booking platforms for 2026, which count differently).

Who books the courts

Venues per booking platform

Platform	Venues	Courts	Notable operators
Playtomic	504	1,984	Pure Padel, PADELHUB, Carbon, The Padel Club, Powerleague, Let's Go Padel, Slazenger, Racketeer
Padel Mates	77	283	Rocket Padel, Padium, Playtime Padel, Advantage Padel
David Lloyd's own app	68	132	David Lloyd Clubs, members only
MATCHi	64	141	Game4Padel, Better leisure centres, part of PadelStars
Own or other systems	48	102	Club-branded apps, PadelOS, Padel4All, MyCourts, club-built sites
ClubSpark (LTA)	36	59	Tennis clubs with padel courts
Nettla	26	83	Smash Padel, Pulse Padel, Padel Shift
Matchpoint	13	48	PadelStars
Not public	65	38	Members' clubs and tennis clubs

What the club pays is rarely published. The market leader charges three layers: a monthly plan for the manager, a contract percentage of every online booking taken before the weekly payout, and a service fee on the player's own payment, kept even when the player cancels. Players can pay a yearly subscription to avoid the fee. Exported member lists come with limits on how the club may contact its own players. The Swedish platforms do not publish their terms either. The one that does, Nettla, charges a flat £89 to £169 a month plus pence per card payment.

Read those terms as a business model and the picture is clear: **every one of these platforms earns when a court is booked. None of them earns when a player comes back.** They are occupancy tools, built to sell the hour, and they are very good at it. Retention was never their job, which is why the operators with the most to lose are building their own apps on top.

Who owns the clubs

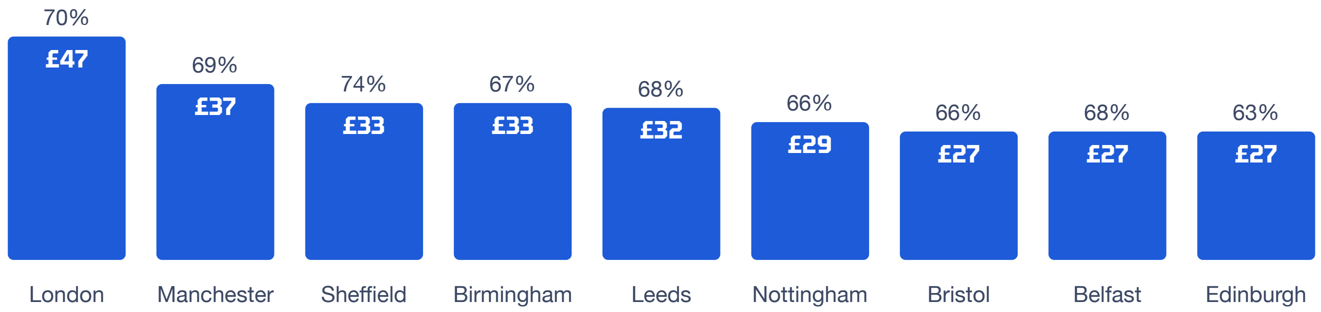
Operator	Footprint (open today)	Platform	2026
David Lloyd Clubs	67 clubs, 129 published courts	Own app, members only	Calls itself the largest UK padel operator; plans 220+ courts
Game4Padel	26 sites, 58 courts	MATCHi	Valued at £27m (January 2025), backed by Andy Murray; rolling out PadelLevels
PadelStars	14 sites, 47 courts	Matchpoint and Nettla	Radlett opening
Let's Go Padel	12 clubs, 70 courts, Northern Ireland	Playtomic	Derry, Lurgan, East Belfast new
Powerleague	12 clubs, 51 courts	Playtomic	Owned by Broadsword since 2025; Gateshead opened in September
PADELHUB	9 clubs, 50 courts	Playtomic (since January 2026)	Cancelled its free-court-time memberships
Pure Padel	9 clubs, 49 courts	Playtomic	Expanding in warehouses
The Padel Club	7 clubs, 45 courts; 8 more sites to 85 courts	Playtomic plus its own "Society" app	£3m from the Northern Powerhouse fund, September 2026
Smash Padel	7 sites going to 20	Nettla	£1.25m, May 2026
Padel Tree	7 sites, 36 courts	Playtomic	Sutton Coldfield and Brentford next
Atmos Padel	6 outdoor clubs	Playtomic	Backed by Arbor Ventures
S3 Padel	5 sites, 39 courts	Playtomic	Derby (12) and Finchley Road (10)
Rocks Lane	5 sites, 25 courts	Playtomic	London's tennis-and-padel centres
Slazenger Padel (Frasers Group)	4 clubs, 38 courts	Playtomic	Leeds South (14) and Norwich next
Rocket Padel	4 clubs, 35 courts	Padel Mates	The UK's top club by bookings at Ilford; White City and Croydon next
Soul Padel	3 clubs	Playtomic plus its own loyalty app	250 courts by 2032
Padel Social Club	3 London clubs	Playtomic plus its own app	£5.5m, May 2026; The O2 and Kentish Town in November
Ignite Padel	3 clubs, 23 courts	Playtomic	Speke growing to 17 courts
Carbon Padel	Manchester (17) and Rochdale (10)	Playtomic	The biggest club in the North
Padium	Canary Wharf, Cardiff Bay	Padel Mates	London's most expensive courts

Twenty-two venues have ten courts or more; the largest are Carbon Manchester (17), Rocket Padel Bristol, Padel Bonito in Yorkshire, Racketeer in London, Advantage Padel Mudeford and Jaxx Padel in Wales.

What players pay

The court-hour by city, with occupancy

average price, £ · occupancy on top



Where	Court-hour	Occupancy
UK average	£34; most courts £30 to £50; off-peak average £27	60%
London	£47 average; Padium £80, Rocks Lane £70, Padel Social Club £68	70%
Manchester	£37; Carbon £36 off-peak, £48 to £60 peak	69%, down seven points in a month
Sheffield	£33	74%, the highest in the country
Leeds	£32	68%
Birmingham	£33	67%
Nottingham	£29	66%
Bristol, Belfast, Edinburgh	£27	63 to 72%

Building a court

What a court costs and earns	The number
Revenue per court per year	£50,600 in the bottom tenth, £107,600 at the median, £195,600 in the top tenth
An open court with lights and base	About £71,000 before VAT; four courts £268,000 (LTA)
A court inside an existing building	£32,000 to £36,000 (LTA)
Planning	About 118 days; noise is the most common reason for refusal
Planning applications pending	622, of which 87% get approved
From application to first booking	About nine months

Opening next

Operator	Where	Courts	When
Panoramic Padel	Speke	13, 11 of them indoor	
Slazenger Padel	Leeds South	14 indoor	
The Padel Club	Eight new sites: Chester, Liverpool, Knutsford, Sheffield, Cardiff, Brighton, Sutton Coldfield	To 85 courts	
Soul Padel	Six consented sites: Ayr, Washington, Warrington, Preston, Wigan, Rochdale		
Padel Tree	Sutton Coldfield and Brentford	8 and 4	
Padel + Play	Burntwood	8	
Padel Social Club	The O2 and Kentish Town	17 between them	November
Rocket Padel	White City and Croydon		
City Padel	Plymouth	8	October
ARDA	Windsor	6	Spring 2027
Smash Padel	Taunton, then on to 20 sites		

The two things that keep a player

The boom has been measured in courts. The next two years will be measured in players who are still playing. Every operator who has run a club through a winter knows the two levers, and neither of them is a court.

The first is coaching. A player who has never had a lesson plays until the first bad month: a run of losses, a partner who moves away, a knee. A player who is coached has a reason to come back that does not depend on winning: the next session in the programme, the level they are working towards, the coach who knows their name and their backhand. Coaching turns a booking into a membership. The clubs with the best retention in the country are, without exception, the clubs with the strongest coaching programmes, and the operators raising money this year all say the same thing in their decks: coaching is the anchor product, the court is the venue for it. Yet coaching sits outside every booking platform in the table above. Lessons are booked by WhatsApp, programmes are run on spreadsheets, a player's level is a number they typed into a quiz, and a coach's judgement, the most valuable piece of data a club owns about a player, is written nowhere.

The second is the app in the player's pocket. For most players the app is the club. It is where they find a match at their level, where they book the lesson, where they hear about Friday's Americano. Whether they come back on a Tuesday in February depends on whether that app gives them a reason: a match with people they can beat and be beaten by, a level that means something, a programme with a next session in it. Today the app in the player's pocket belongs to a platform whose revenue comes from the booking, not the return, whose level is self-declared and gamed, and whose terms decide how the club may speak to its own members. The clubs that noticed this first are the ones building their own apps, and they are right to. What they need is not another way to sell the hour. It is a platform built for retention: coaching, matches and events in one place, on the club's own brand, with a level a coach signed.

There is no such platform in the market today. That is the gap this report was written to describe, and it will be the measure of next year's edition: not how many courts were built, but how many of last year's players are still on them.

The sport's institutions

The LTA has governed padel in Great Britain since 2019; its 2024 to 2029 targets of 1,000 courts and 400,000 players were passed a year early. It runs the British Tour, the National League and Championships, a Facility Loan Scheme (venues must take online bookings from non-members) and a National Padel Operator Forum of 35 to 40 operators. It has no booking-platform partner and no skill rating; its rankings come from tournaments only, and clubs run their own levels. Premier Padel's London P1 at Olympia in August drew 20,000 spectators on a ten-year deal. Tennis Scotland and Tennis Wales run padel in their nations; Northern Ireland sits outside the LTA's figures.