TEKKA

COMPANION ANALYSIS

TEKKA — SWOT Analysis

Prepared: July 2026 · Companion analysis to the TEKKA investor pack

Strengths

1. **Complete, live product across web + native mobile.** Bookings, payments, coaching, tournaments, matchmaking, smart pricing, partner API — already built and deployed. Most seed-stage competitors pitch a roadmap; TEKKA pitches a working platform.
2. **Widest functional surface in the category.** Competitors specialize (Playtomic = booking+social, CourtReserve = club admin, MATCHi = booking network). TEKKA covers club operations **and** the coaching economy (lessons, packages, student journals, coach marketplace) **and** competition (5 tournament formats, live umpire scoring) **and** social matchmaking in one system.
3. **Zero-friction commercial wedge.** 0.6% booking commission, hard-capped at $149/mo (below every direct competitor's entry price), kills the main objection of family-run clubs against $150–500/mo SaaS subscriptions; self-serve onboarding compresses a 6–12-month sales cycle to days.
4. **Multi-region payment infrastructure.** Stripe Connect (EU/US), Xendit (SE Asia), TBC (Caucasus), VietQR, cash-handling workflows — rails already integrated for markets the incumbents underserve.
5. **Localization depth.** 7 languages shipped (EN, HU, DE, CS, RU, JA, IT + KA); most competitors are English/Spanish/Swedish-first.
6. **Capital-efficient engineering.** The entire platform was built by a very small team at low burn — a compelling efficiency story for seed investors.
7. **Data flywheel potential.** Bookings + NTRP skill ratings + match history + lesson attendance feed matchmaking and dynamic pricing that single clubs — or booking-only competitors — cannot replicate.

Weaknesses

1. **No proven club traction yet.** The model, funnel, and unit economics (~$650 CAC, ~5.4-month payback, ~8.9× LTV/CAC) are projections, not observed data. This is the single biggest fundraising obstacle.
2. **Retention is the asset, and it is modeled rather than observed.** Under an access-pricing strategy the installed base *is* the business, so logo churn matters more here than in a normal SaaS plan. It is now modeled explicitly — 20%/yr in the seed window, 12%/yr from Year 3, with the acquisition budget sized on gross signings (173 for a 150-club net base) — but those rates have no cohort behind them. A materially worse early churn rate does not break the runway (the acquisition line is discretionary spend), but it directly attacks the thesis, because a base that does not retain cannot be monetized.
3. **Solo-founder / key-person risk — deliberately taken, not accidental.** The seed-window team is three people and there is no engineering hire, so the founder carries product, engineering, and fundraising with no technical redundancy. Investors will and should probe bus factor and the ability to run engineering + GTM simultaneously. Mitigants: the platform is already in production rather than under construction (the failure mode is delayed features, not a stalled build); the round's 4% reserve is earmarked first for contractor engineering cover; and the first Series A hire is a second

engineer. The upside of the same choice is that people are only 24% of the round, which is why $750k reaches the Series A milestone and why no downside scenario in the cash-flow sensitivity table runs the company out of cash.

4. **The strategy concentrates risk in the expansion layer — by design, which does not make it less real.** The access-pricing model deliberately keeps revenue per club low ($87/mo platform fee; ~$134k core ARR at 100 clubs) to maximize club and player count, so Year-3+ profitability rests on monetizing the installed base (sponsorships, affiliate, directory) rather than on software pricing — 43% of Year-5 revenue. That is the thesis, not an accident, but it means the business is a bet on the base monetizing at all, and the modeled $2.36/player/year has no observed data behind it yet. Mitigants: expansion revenue is excluded from the seed-window runway entirely, so the plan does not *survive* on the unproven layer, only *scales* on it; the $2.52 figure is a small fraction of typical consumer-app ad/commerce ARPU; and the $656M Year-5 GMV run-rate is a second, independent monetization surface the P&L does not yet count.
5. **Two-sided cold-start problem.** Open-to-Play matchmaking and sponsorship inventory only work with player density; player density needs clubs; clubs want players.
6. **Brand awareness = zero** vs. Playtomic (1.5M MAU) and MATCHi in Europe; no federation endorsements yet.
7. **Breadth vs. depth risk.** Covering everything means each module competes with a specialist; club buyers may prefer a best-of-breed tool for their one pain point.

Opportunities

1. **Category tailwind.** Padel: ~25M players, courts +63% since 2020, projected 91,000 courts by 2028; pickleball: 24.3M US players (+171%/3yr); tennis: ~87M players globally. New facilities open weekly and choose software at day one — the cheapest moment to win them.
2. **Underserved geographies.** Incumbents concentrate in Spain/Nordics/US. CEE, the Balkans, the Caucasus (TBC rails live), and Southeast Asia (Xendit rails live) have booming court construction and no dominant platform.
3. **Coach economy is unowned.** No incumbent owns lesson packages, coach discovery, and student retention tools; coaches are also the strongest club-side referral channel.
4. **Ecosystem integration, not zero-sum competition.** Positioning TEKKA as the club-management layer that *complements* player networks (Playtomic) and match-logging apps (Racketo) lowers the barrier to adoption (clubs keep the player apps they have). Its partner API is already built, so integrating with such tools is a realistic future opportunity — but a potential, not a committed plan or an existing feature — and would open partnership/distribution deals rather than only head-to-head displacement.
5. **Investor appetite proven.** $70M (Playtomic), $10M (Epic Padel), $9M (Racquet 360), $15M (Pro Padel League) raised in the last ~15 months; EIC Accelerator offers up to €2.5M non-dilutive for the IoT/CV roadmap.
6. **Switching windows.** Operators do switch platforms (e.g. Rocket Padel moved from Playtomic/MATCHi to Padel Mates in 2024–25) — commission-capped pricing is a credible switch trigger.
7. **IoT & telemetry roadmap.** Staffless-club automation (lighting, access) and wearable/video telemetry deepen the moat and open hardware-margin revenue post-seed.

Threats

1. **Playtomic's scale and capital.** $141M raised, 6,000 clubs, 1.5M players; can outspend on acquisition or clone features. Mitigant: TEKKA competes on the club-management layer (deep coaching, competition, yield) rather than head-on for player liquidity, and treats Playtomic's network as a potential complement/integration partner rather than a target — reducing the surface of direct collision.

2. **Consolidation.** MATCHi is acquiring (Padelboard, Padelgo); a roll-up could lock up club networks and federation deals before TEKKA reaches density.
3. **Race-to-zero pricing.** If commissions become the norm (Playtomic already monetizes via player service fees), the 0.6% wedge loses differentiation and add-on upsell becomes the whole business. The $149 ceiling and the $0-upfront structure — not the headline rate — are what a discounting entrant would have to beat.
4. **Platform dependency.** Stripe/Xendit/TBC policy or pricing changes hit the core payment flow; app-store fee rules affect mobile monetization.
5. **Regulatory friction.** Multi-country payment licensing, marketplace/KYC rules (already a large internal compliance surface), GDPR — each new region adds cost.
6. **Macro funding climate.** Seed bar in 2026 rewards live GMV; a slow pilot ramp directly delays the round.

Strategic implications (what to do about it)

Finding	Action
Traction is the gating weakness	Run the pilot-club sprint **before** institutional outreach (Phase 1 of FUNDRAISING_PLAN.md)
Playtomic collision course	Own the club-management layer (coaching + competition + underserved geographies) and stay open to complementing/integrating with Playtomic/Racketo-style player apps (a potential, not a committed plan) rather than fighting head-on for player liquidity
Cold start	Seed player liquidity club-by-club via coaches and tournaments (TEKKA Tour), not city-wide marketing
Bus factor	The plan deliberately holds at three people with no engineering hire — so name the Q3 marketing/CR candidate *and* a standby engineering contractor (funded from the 4% reserve) in the deck, before investors ask
Breadth-vs-depth doubt	Package the pitch as "the club's revenue OS" with modules activatable independently — land on any single pain point

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