

PADEL DEVELOPMENT PLAN

2020 – 2023

EXECUTIVE SUMMARY

The LTA's vision ***"Tennis Opened Up"*** is about making tennis more accessible. It's about breaking barriers to entry and growing the game of tennis. One of the LTA's key strategies is to find new ways to grow participation, and padel is an innovative format of tennis that's fun, flexible and easy to play.

Integrating padel into the LTA has provided an immediate platform to facilitate the organic growth of the sport, with tennis venues throughout Great Britain already exploring the potential opportunities it can bring to a facility.

Growing a minority sport from scratch in a country that loves its mainstream sports is a challenging task. This development plan has identified 6 growth enablers – the essential ingredients that collectively will ensure the sport is able to scale up over the next 4 years:

1. **Places** – increasing the number of courts
2. **People** – building a coach and activator workforce
3. **Programmes** – making it easy to learn how to play the sport
4. **Pathway** – providing the environment to help players reach their potential
5. **Partnerships** – working with partners to accelerate growth
6. **Promotion** – raising the visibility of the sport to attract players & fans

Spain is by far the most dominant country for padel in the world with over 20,000 padel courts and an estimated 4 million players. Evidence from Spain indicates that padel is the perfect solution for tennis clubs with structural challenges, as pay-and-play revenue enables a venue to grow and retain members.

Padel in Europe is expected to follow similar growth to that of Spain, and there are now **21 tennis federations in Europe** that have integrated padel, including the likes of France, Italy, Belgium and Netherlands.

Since integrating padel 5-years ago, **France and Italy** have grown the number of padel courts from less than 100 to over 1,000 courts, respectively. **Developments have occurred organically whereby tennis venues have proactively installed padel courts.**

"This has resulted in an overwhelming 70% of total padel courts being in tennis venues."



Tom Murray
LTA Head of Padel

DEVELOPMENT TIMELINE

The Padel Development Plan presents a 4-year strategy to integrate, build, accelerate, and scale the sport of padel in Great Britain.

2020

INTEGRATE THE GAME

The initial phase of the development plan is to fully integrate padel into the LTA. Aligning membership, competitions, and the coaching pathway.

2021

BUILD THE GAME

A primary focus to develop the overall infrastructure of the sport, i.e. the amount of padel courts, a workforce, products, and a structured player pathway.

2022

ACCELERATE THE GAME

We can then implement marketing initiatives, develop partnerships, to enhance the overall awareness and visibility of the game and continue to increase overall participation.

2023

SCALE THE GAME

With the number of courts increasing, the workforce and a player pathway bedded in, the foundations will be in place to rapidly grow the sport.

FACTS & FIGURES

ANNUAL PADEL REPORT & SURVEY (2019)



TOTAL PADEL COURTS
IN GREAT BRITAIN

68

(34 total clubs)

CURRENT PARTICIPATION

4,439

active players +39%

154,000 people in
Britain have played
Padel (0.2%)

Where GB Padel players have played



28%



55%



17%

68% of tennis players
would also consider
playing Padel

PADEL TRENDS IN EUROPE



Padel in Europe is expected to follow similar growth to that in Spain, where there is an estimated 20,000 padel courts and 6 million players.

21 tennis federations in Europe have now integrated padel

Andorra (17 courts)

Armenia

Austria (20 courts)

Belarus

Belgium (390 courts)

Bulgaria (1 court)

Croatia (8 courts)

Denmark (32 courts)

France (970 courts)

Germany (49 courts)

Great Britain (70 courts)

Greece (41 courts)

Ireland (12 courts)

Israel

Italy (1,280 courts)

Malta

Netherlands (686 courts)

Norway (17 courts)

Romania (10 courts)

San Marino (2 courts)

Turkey

OVER 70% OF PADEL COURTS
ARE LOCATED IN TENNIS VENUES

ESTIMATED GROWTH IN GREAT BRITAIN

"Padel court growth will rely heavily on organic growth trends as seen throughout Europe".

Our primary focus is to **increase infrastructure** i.e. the amount of padel courts.
YOY estimated court growth is as follows:

2020	2021	2022	2023
>100 PADEL COURTS +32	>175 PADEL COURTS +75	>300 PADEL COURTS +125	>500 PADEL COURTS +200

THE SIX P'S OF PADEL

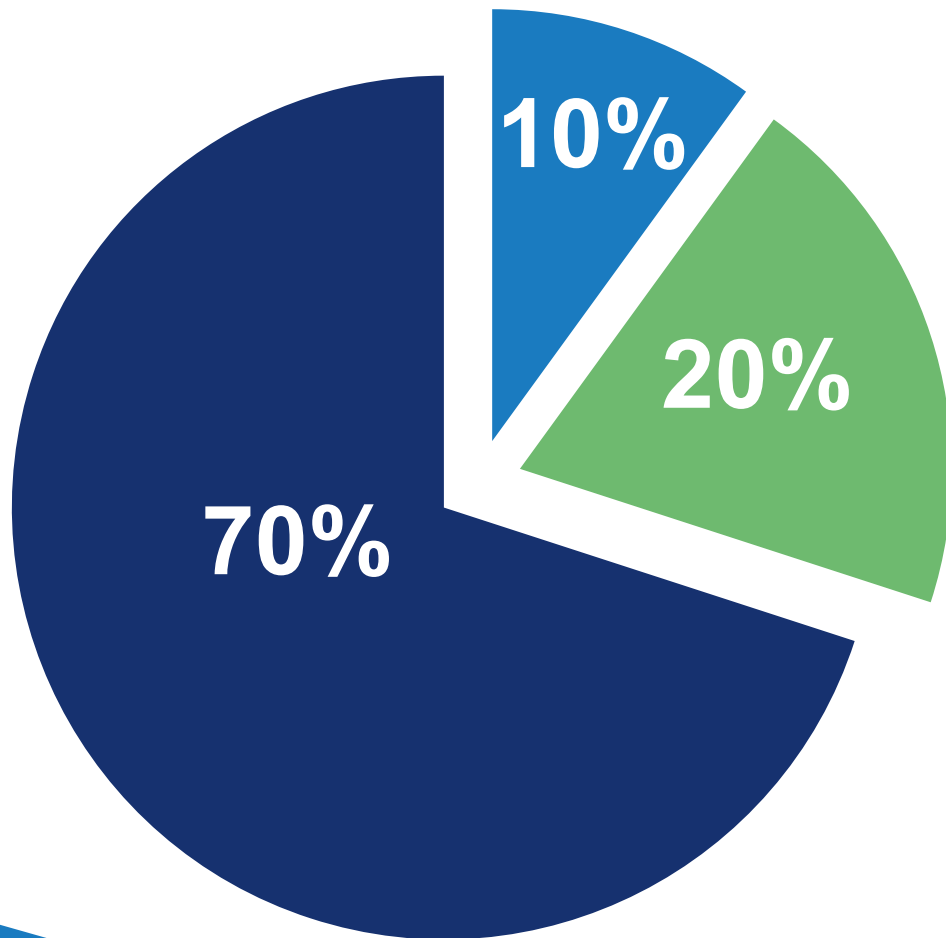
*The **Six P's of Padel** highlight the main pillars to support a sustainable development plan, and framework for a marketing strategy.*



INFRASTRUCTURE



Growth channels have been categorised as follows:



ORGANIC GROWTH (70%)

- ✓ TENNIS CLUBS
- ✓ PARKS & LOCAL AUTHORITIES
- ✓ INDEPENDENT SCHOOLS & UNIVERSITIES

PARTNERSHIP GROWTH (10%)

- ✓ LEISURE OPERATORS
- ✓ EXISTING CITC's
- ✓ NEW CITC's

NEW GROWTH (20%)

- ✓ NEW PADEL-ONLY OPERATORS
- ✓ NEW SECTORS: SQUASH, REAL-TENNIS, FOOTBALL, GOLF.

COACHING, EDUCATION, WORKFORCE



The **Padel Coaching Pathway** will fully align to the LTA tennis coaching pathway by the end of **2020**.

The following key functions have been identified to meet the demands of the industry, and to achieve minimum standards for delivery:



PADEL COACH



PADEL INSTRUCTOR



PADEL ACTIVATOR

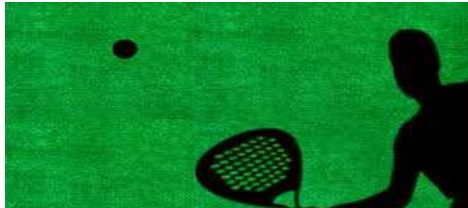
REFEREES

Aligning growth expectations will require a minimum of at least **200 qualified coaches by 2023**, which is roughly one Instructor/Coach for every 2-3 courts.

With the introduction of a certification course, we estimate 1-2 **Padel Activators** for each padel court, resulting in **500-1000** Activators by 2023.

We are introducing **Padel Officiating Courses** to attract newly qualified referees, as well as providing new opportunities for existing tennis officials.

PRODUCTS & PROGRAMMES



INTRO TO PADEL

This product is a set of basic drills for beginners. It has been designed for **Certified ACTIVATORS** and will launch at the end of **2020**.



PADEL XPRESS

Padel Xpress will launch alongside the coaching pathway in **2021**. It is a 6-week resource of drills to support qualified Instructors.



LTA YOUTH (PADEL)

Padel for kids will be trialed from the NTC. The product will be integrated into our **LTA Youth** programme towards the end of **2021**.



WHEELCHAIR PADEL

Wheelchair Padel will be trialed from the NTC prior to launch. It is incredibly dynamic, incorporating two bounces and one rebound.

Competition products were rebranded from the previous structure, increased prize money, revised rules & regulation, and supervision from qualified referees at each event.

Players of all levels, male and female can also compete in the National Padel League. Registered venues with padel courts can enrol teams at the beginning of each playing season.



PERFORMANCE PLAYERS

REPRESENTING GREAT BRITAIN



Highlighting opportunities such as representing one's country in a variety of age groups is an important aspect to the player pathway, as it will **encourage progression**.

Supporting venues will play a major part in promoting such opportunities to their local players, and enable us to **identify aspiring players** for selection.

By 2022, as we progress through the development plan, opportunities will be presented for elite players to enter into a **more structured player performance pathway**.



MARKETING APPROACH & TACTICS



2020: Integrate

Establishing foundations:

- **Integration of social channels** & adoption of brilliant basics approach to content, Q2
- **Brand development** (positioning & visual identity), Q3
- **Integration into membership**, Q4

2021: Build

Building the community:

- **Focus on coaches, clubs & venues**
- Build digital following with an enhanced approach to **content planning**
- **Geo targeted comms** to build playing communities
- **Secure a strategic commercial partner**
- Identify **celebrities** for endorsement purposes.

2022: Accelerate

Driving national excitement:

- **Major event in the UK**
- Top class content, including national TV broadcast of tour event
- **National marketing campaign** to drive visibility & increase participation (incl. pop up events)
- Co-created **activity with strategic partner**

2023: Scale

Building momentum:

- **Ongoing campaign activity**, elevated events, **top class content** and **partner activations** to drive **court expansion** and **increase participation**

STRATEGIC PARTNERSHIPS



Strategic partnerships will increase visibility and **awareness of the game**, **fast-tracking overall growth**. Strategically aligning KPIs with commercial partners to maximise resources will contribute to further developing the sport in Great Britain.



Hosting a Major event in 2022 will enable the sport to be showcased at the highest level, creating awareness and enhanced visibility.

It will provide a **value proposition** to support our overall development cycle, media opportunities, broadcasting rights and attract potential commercial partners.



OTHER DOCUMENTS
❖ **VENUE SUPPORT RESOURCE**