



PADEL DEVELOPMENT PLAN

2020 – 2023

FOREWORD

We are incredibly excited about integrating padel into the fabric of tennis in Britain, and the opportunities that presents to grow our sport.

Our vision is to open tennis up, and we want to make it more relevant, accessible, welcoming and enjoyable for anyone who has an interest. .

To achieve this, we need to break down barriers to entry and grow the game by bringing new and different audiences into our sport. Indeed, one of our key strategies is to find new ways to grow participation, and padel is a fantastic example of that. It's an innovative format of tennis that's fun, sociable and easy to play. It can be played in groups of mixed ages and abilities due to it not being power dominant, and so is ideal for friends and families.

Integrating padel into the LTA in 2019 was the first step in what we hope will be a bright future. It 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.

We are now in a position to set out how we take that forward to drive growth of padel in Britain as part of tennis more broadly. The enclosed development plan identifies six growth enablers; the essential ingredients that collectively, will ensure padel is able to scale up over the next four 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

Growing a minority sport from scratch in a country that loves its mainstream sports won't be easy, but there is undoubtedly an opportunity for us to create an exciting future for padel. We will look to grow it sustainably, as a complementary form of tennis that benefits our sport as a whole, and whether as a player, coach, tennis venue or business, we'd love you to join us and be part of it.

Scott Lloyd
LTA Chief Executive

EXECUTIVE SUMMARY

Padel is a form of tennis that originated in Mexico in 1969, grew across South America before making it to Spain. The sport is now rapidly expanding across Europe.

Spain is by far the most dominant country for padel in the world with over 10,000 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.

Popularity is growing in Great Britain too, and with focus placed on increasing infrastructure, we project to have a total of 400 padel courts in place by 2023.



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

CURRENT LANDSCAPE*:



TOTAL PADEL COURTS
IN GREAT BRITAIN

87 (46 total clubs)

CURRENT PARTICIPATION

6,000
active players

*figures correct as of December 2020

ANNUAL PADEL REPORT & SURVEY (2019)

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







(Oct 2020) - Padel has been recognised as an official discipline of tennis by the home country sports councils. The LTA has been recognised as the national governing body.

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 (87 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
>90 PADEL COURTS +22	>150 PADEL COURTS +60	>250 PADEL COURTS +100	>400 PADEL COURTS +150

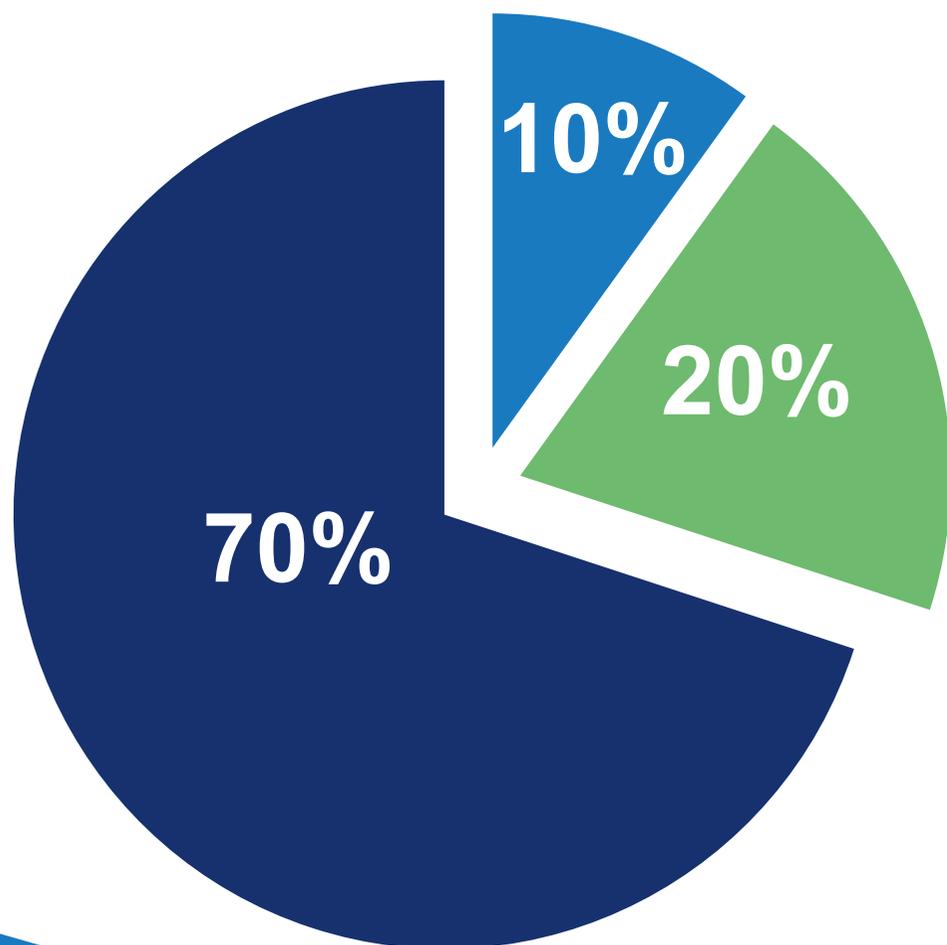
THE SIX Ps OF PADEL



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%)

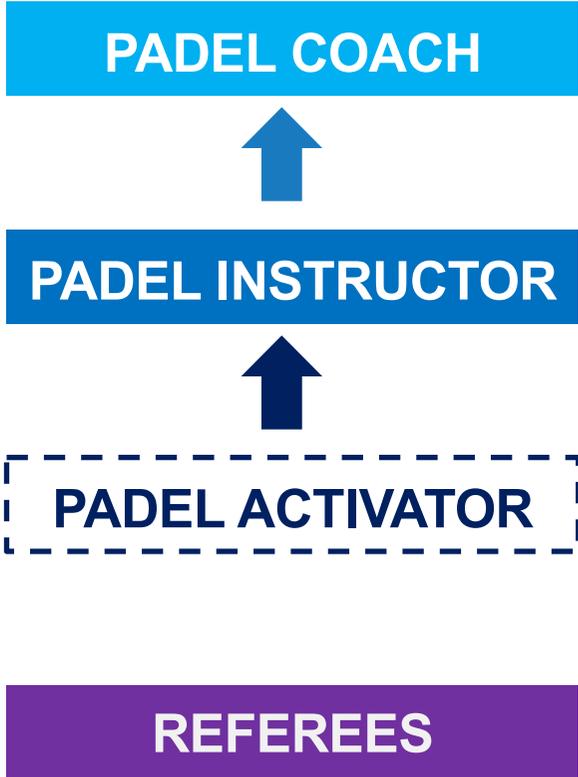
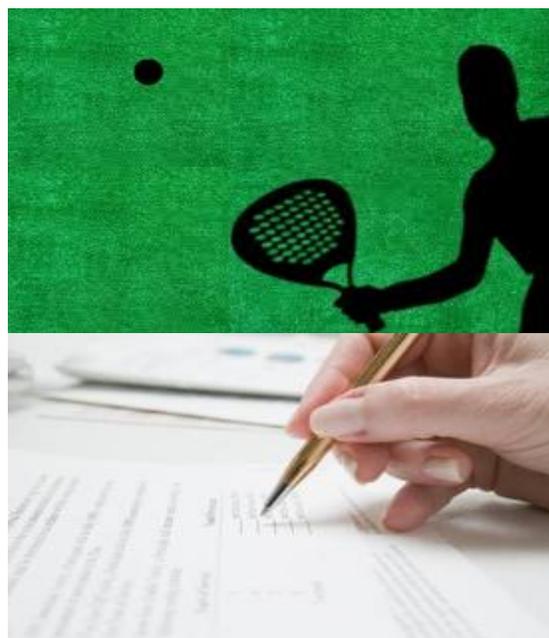
- ✓ NEW PADEL-ONLY OPERATORS
- ✓ NEW SECTORS: SQUASH, REAL-TENNIS, FOOTBALL, GOLF.

COACHING, EDUCATION, WORKFORCE



Our padel qualifications are a key strand within a broader coach qualification pathway for tennis

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



Aligning growth expectations will require a minimum of at least 200 qualified instructors/coaches by 2023.

With the introduction of a training course, we estimate 1-2 **Padel Activators** for each padel court, resulting in **500-1000** Activators by 2023. Padel Activators & Instructors will have a basic understanding of the sport and will introduce new people to it, as well as showing players how to improve their game via skills and drills.

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.



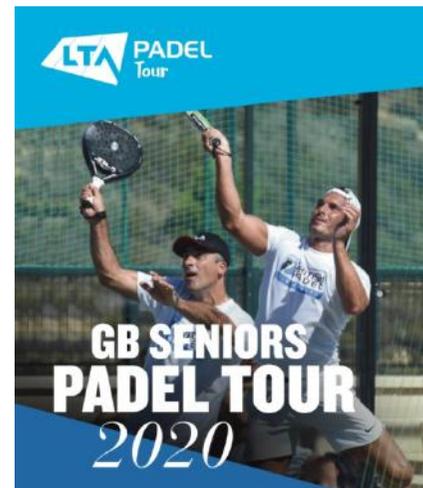
WHEELCHAIR PADEL

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

Competition products have been refreshed to align with the LTA's competition structure, with all padel competitions (32 currently) now fully integrated into the LTA's grading system.

All padel competitions must also be run by an LTA licensed official, as per LTA competition regulations.

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.

There is currently a GB National team for padel and a junior team, who compete at World and European Championships, but **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**.



PROMOTING THE SPORT



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 commercial partner to increase visibility and awareness.**
- Build endorsement via advocates of the game.

2022: Accelerate

Driving national excitement:

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

2023: Scale

Building momentum:

- **Ongoing campaign activity**, elevated events, **content creation** 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.



LTA PADEL