



PADEL x TIA

April 2024



TOM MURRAY

LTA HEAD OF PADEL



SOPHIE CURTHOYS

LTA INVESTMENT MANAGER



SINCE 2019



£6M CIRCA

LTA INVESTMENT OVER 4-YEAR PERIOD
INCL £4.5m VIA QUICK-ACCESS LOANS



400

PADEL COURTS

Padel courts in Britain have grown by 600%



200

LTA COMPETITIONS

Competition delivery has grown by 500%



150

REGISTERED VENUES

AVERAGE NO. COURTS PER VENUES = 2.68

52% | 26% | 22%

OUTDOOR COURTS | INDOOR COURTS | COVERED COURTS

41%

TENNIS CLUBS,
SCHOOLS & PARKS

13%

SPORTS & LEISURE
FACILITIES

45%

NEW SECTORS
GOLF, FOOTBALL,
SQUASH, PADEL*

*Dedicated padel only venues = 34%

DEVELOPMENT TIMELINE

2020

2021

2022

2023

2024

2025

2026

PADEL DEVELOPMENT PLAN

PHASE 2

100
COURTS

150
COURTS

220
COURTS

350
COURTS

500
COURTS

700
COURTS

1000
COURTS

+25

+50

+70

+130

+150

+200

+300

PARTICIPATION DATA

150K PEOPLE PLAYING
PADEL IN BRITAIN
PER YEAR

C. 139K ADULT PARTICIPATION
11K JUNIOR PARTICIPATION

32%

FEMALE PLAYERS
VS. 41% IN TENNIS

31%

PLAYERS AGED 55+
VS. 10% IN TENNIS

3%

WITH A DISABILITY
VS. 17% IN TENNIS

LTA VENUES & OPPORTUNITIES



Opportunities for tennis venues

1. Retention of existing membership base
2. Attract new audiences
3. New potential revenue stream

Opportunities for tennis coaches & officials

1. Upskill & branch out into padel
2. Job opportunities & new potential revenue stream.

Facilities

Quick-access interest-free loans to facilitate the installation of padel courts at LTA registered venues.

Competition

Recreational competition, including LTA graded competition (grades 1-6), tournaments and leagues, available for registered venues.

Coaching

Our introductory **training** offers cost c.£60 (Intro to padel & Coaching kids padel). These are one day CPDs that upskill already competent tennis coaches, to branch out into Padel.

Officiating

Padel officiating course for new officials entering this space, as well an online course for existing tennis officials to upskill.

PADEL STRATEGY

2024 – 2026



MISSION

To drive visibility, participation and overall growth of padel across Great Britain.

OBJECTIVES

1. Increase the visibility of padel in Britain and boost participation levels.
2. Ensure the sport grows the overall player base across all venues.
3. Grow number of padel coaches with incentives to diversify overall workforce.
4. Explore new commercial partnerships to grow the sport.
5. Diversify our event space and shift the focus away from the grass court season.
6. Build a structured pathway that will identify, develop, and support GB's best padel players.



STRATEGIES



INVEST

Invest in the visibility of padel and its infrastructure to increase padel awareness.



DIVERSIFY

Through padel there's opportunity to diversify our event space and focus on commercial partnerships.



GROW

Grow the player base by making programmes and the competition landscape more accessible.



PERFORM

Build a pathway that supports current players and paves the way for the next generation.



ENGAGE

Engage and motivate the padel workforce to attract and retain them in padel.



LEAD

Lead padel in Britain to the highest standards to ensure it is safe, inclusive and sustainable.

LTA CAPITAL INVESTMENT IN PADEL

CASE STUDIES

CHALLENGES IN DEVELOPMENT



LTA TF INVESTMENT INTO PADEL

- Interest free loan funding available
- Up to 60% of the project cost
- 71 padel courts funded by the LTATF through QAL (28 covered)



EAST GLOS CLUB

- 3 Floodlit Padel courts, with gate access and online booking.
- Project Cost - £250k. Funded by the club and £120k LTA Loan.
- Since padel courts opened (2021) membership has grown by over 400.
- Padel court utilisation is over 75% year round.
- Club has opened to the community for pay and play as a result of the LTA investment which has had a positive impact on the club.
- Looking to extend padel provision by adding a further 3 covered padel courts.



SUNDRIDGE PARK

- 2 floodlit padel courts initially
- Due to huge success adding a further court, as well as extending year-round tennis court offer.
- 40% increase in club membership in the last 2 years.
- Extensive pay and play offer.
- Community engagement including programme with Bromley Mencap.
- Courts at capacity.
- Enhanced the sporting and social elements of the club.
- Broadened the demographic of the club.



CHALLENGES IN DEVELOPMENT

- Securing planning permission
- Impact on existing tennis provision



ANY QUESTIONS ?





The Evolution & Growth of Pickleball in the U.S.

Tracy Lynch

Vice President of Sales & Marketing

Har-Tru, LLC

The Evolution of the game

- Pickleball was invented in 1965 on Bainbridge Island, near Seattle. Three dad's bored with traditional summertime activities.
- Joel Pritchard, Bill Bell, & Barney McCallum.
- 2005 USA Pickleball formed to promote the sport.
- 2023 marked 58th anniversary.



Pickleball Participation

13.6 million players in the US.

51.8% growth in players from 2022 to 2023.

Participation has grown on average 223.5% since 2020.

Currently the fastest growing sport in the US.

Currently 78,766 USA Pickleball members.

Increase of 15% over 2023.

11,885 known locations to play.

Over 1,000 new locations were added in 2023.

50,003 registered courts in the US.

2,144 USA Pickleball Ambassadors.

Impact on tennis participation

- 2020 – 21.64 million players
- 2021 – 22.62 million players
- 2022 – 23.6 million players
 - 22% increase in participation
- 2023 – 23.84 million players
 - 1% increase in participation



Places to play in the us

*All 50 states is US has pickleball venues

State	Places	Indoor	Outdoor	Total Courts
Alabama	98	152	258	410
Alaska	38	99	70	169
Arizona	291	222	1441	1663
Arkansas	80	174	162	336
California	741	709	2880	3589
Colorado	247	451	641	1092
Connecticut	135	250	277	527
Delaware	32	61	101	162
District of Columbia	38	50	68	118
Florida	622	646	2208	2854



League play & Tournaments

- 2009: 1st national tournament, 400 players in all Bainbridge divisions.
- 2023: 3,500 registered players at national tournament.
 - 50,000 attendees
 - Peak day 9,500 fans attended.
- 2.6 million tv viewers.
- Networks included ESPN, Tennis Channel, & Pickleball TV.
- 2023 there were 195 sanctioned tournaments.



The Greencroft club Pickleball & profitability

- Converted 4 tennis courts to pickleball courts.
- Added 200 new memberships in three months.
- Membership fee \$250 per month
- F&B minimum \$50
- \$720,000 in new revenue annually
- Additional revenue: lessons, parties, clinics, etc

Questions?





Developing a supportive competitive
environment and the advent of
Henry's Barmy Army



Henry

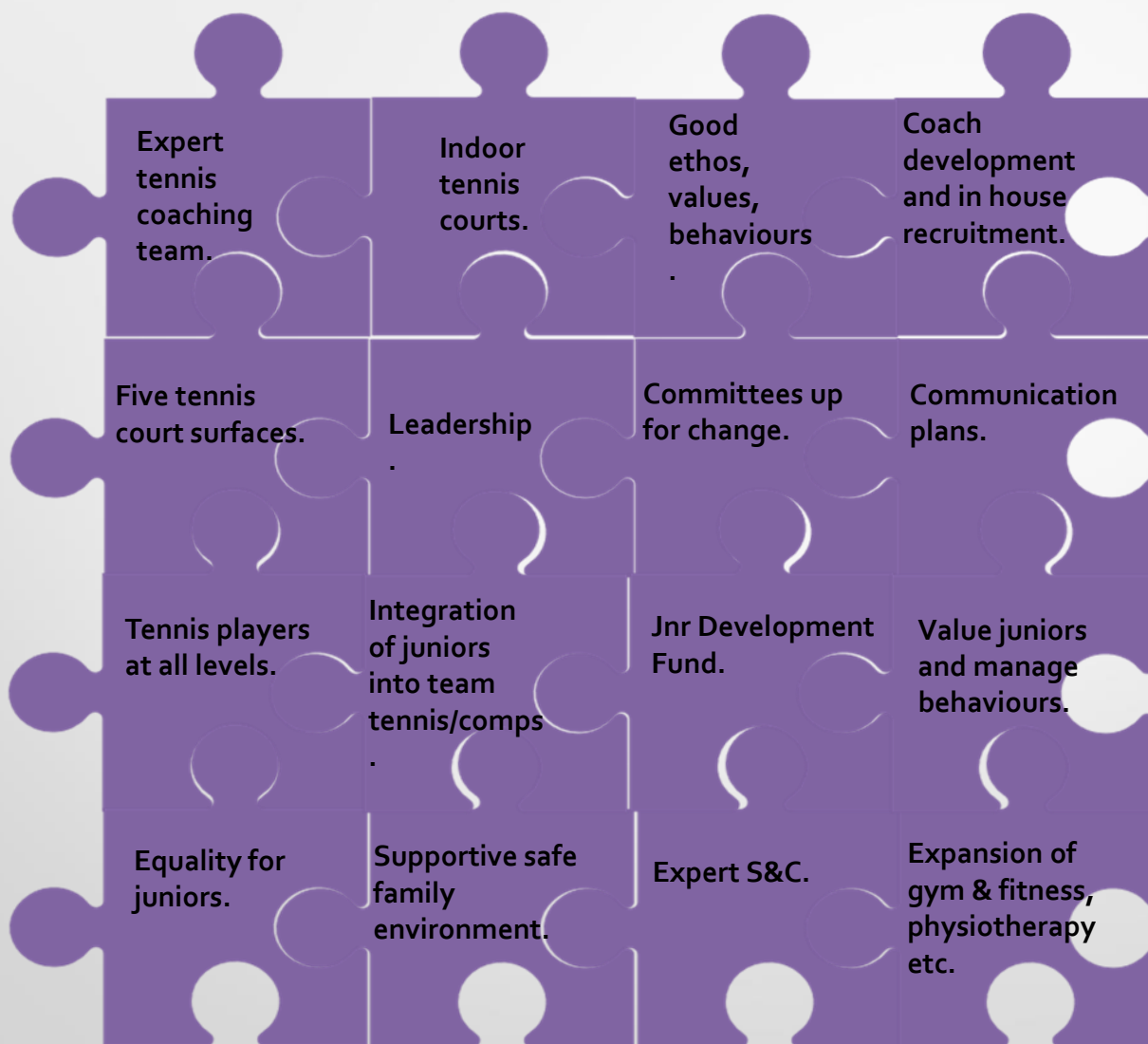


What is Henry's Barmy Army?

The Club in 2011

- 100 juniors
- Exclusive image
- Very Tennis focused
- Tired facilities
- Tettenhall's Best Kept Secret

Keep Healthy, Play Sport, Make Friends.



Keep Healthy, Play Sport, Make Friends.

The Club Now

- 250 juniors
- Inclusive image
- Racket Sports, Fitness and Social focused
- Excellent facilities
- A very busy and welcoming club

Keep Healthy, Play Sport, Make Friends.

COMPETITION *Fun* LEARN **WIN** *Racketball* CHAMPIONS *Health*
 PASSION INSPIRE
 MOTIVATING *Squash* SUPPORT FRIENDSHIPS **TEAM** *Fitness*
 LAUGHTER *Welcoming* COMMUNITY IMPROVE
Achieve CARING *Teamwork* WORKOUT *Excel* FAMILY
 INCLUSIVE *Succeed* **HAPPINESS** *Social* NURTURING *Tennis*



Thank You

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