

Padel / Wales Golf



Padel Tennis across GB, Wales and Europe

120
GB

3
CYMRU

220
GB

5
CYMRU

Registered Padel venues
(Sep 23)

Total Padel courts
(Sep 23)

Padel tennis has been growing annually across Great Britain with the infrastructure to play Padel increasing across the country. Growth has been seen across all English regions, Scotland and Wales. By comparison to other European nations, there is a significant opportunity to grow further.

Total Padel courts (Europe)

Spain	40,000 courts
Italy	4,600 courts
Sweden	2,800 courts
France	1,150 courts
Netherlands	650 courts



TIMELINE

In collaboration with the LTA, we have identified three growth phases for Padel tennis in Wales. These phases will focus on integration & building, accelerating and scaling Padel.

2022 INTEGRATE & BUILD

We'll integrate Padel tennis into our day to day activities, programmes and funding as the Governing Body.

We'll build our relationship with the emerging Padel community of players, potential partners and investors.

2023 ACCELERATE

We'll accelerate our work to invest into marketing of Padel opportunities with the public.

We'll accelerate the development of Padel tennis courts across Wales in a proactive manner and develop commercial partnerships to invest into the sport in Wales.

2024 SCALE

We'll scale Padel tennis across the country.

We'll scale leagues, competitions and tournaments as well as performance pathways for adults and juniors.



SITE COSTINGS

- Guide costs of installation of padel courts
- Location and site conditions will determine final costs
- Includes installation, ex VAT

Number of Courts	1	2	3	4
Courts with Lights	32,000	60,000	88,000	100,000
Ring Beam, court base & drainage	30,000	58,000	84,000	100,000
Total	62,000	118,000	172,000	200,000



OPERATIONAL CONSIDERATIONS

- Majority of padel courts are operated on a pay and play basis 1.5 hour bookings
- Think thoroughly about your court rates for members / non members / peak / off peak / lit and unlit; and coaching
- Gate access system with clubspark (Other CRM Systems) to manage bookings remotely and enable access
- Running costs for LED lights are approx. £1 per hour per court (Dependant on configuration and type of lamp)
- Recommended sinking fund for a Padel court is ~£1,400 per court per year to cover court surface, lamp and columns replacements
- Replacement panel – 1 per court
- Need to obtain property and contents insurance for glass replacement



FINANCIAL RETURNS

1. Diversifies your offer and helps attract new users
2. Revenue stream
3. Pricing for 4 players (Always played in doubles)

Venue	2 x Covered padel court
Model	Pay and Play (Annual)
Pricing	£20 off peak / £28 peak
Membership	Optional
Assumptions	
Bookings	2 x off peak + 2 x peak /per day
Forecast	
Revenue	8 booking per day £192/day (57.6k per annum at 300/days)



INVESTMENT OPPORTUNITIES - PARTNERSHIPS

In collaboration with the tennis Wales, we have partners and operators who are actively looking for key locations to introduce Padel to existing use base, key demographics and footfall.

Partners key turn packages include:

1: Investment – install high spec courts, floodlights as well as building the canopy structure or covered structure if applicable.

2: Planning and construction – They will work collaboratively to undertake the planning application and construction process from design to build

3: Booking and management – They install a court booking, payment and access system that can be integrated into your website with remote floodlights controls, enabling play when no staff are on site

4: Maintenance – They cover carpet replacement, annual maintenance, software licence fees for booking platforms and any other associated utilities

5: Activation, sponsorship and events – They provide local court marketing activation to introduce the game to local communities alongside dedicated events and competitions. They introduce their partners to locations and highlight the impact of padel and sport in the local community.

6: Coaching – Resident coaches will be available and upskilled in the local area to activate padel.

7: Revenue stream – partners pay rental fees or profit share facilities, alongside bespoke secondary spend deals.



SITE LOCATIONS

Site Details	4+Courts & F+B 14,000 sq.. ft	2 or 3 courts 6'500 sq.. ft	1 court Min. 2,500 sq. ft
Lease length	5-15 year sub leased at commercial rate with option to extend		
M&E	Mains powered connection, water, parking&local access during court opening hours (7am-10pm)		
Commercial options	Revenue share with phased repayments for repayment of capital investment in site Rental fees annually/monthly		
Capex Guide	£1-1.5m	£350-500k	£30-50k
Target Sites	Light industrial, retail, large multi sports sites	Hotels, country clubs, leisure facilities	Anywhere...



NEXT STEPS

1: Consult Board/Committee in next Steps

Potential to arrange Padel site visit / Introductory call – Contact TW for support

2. Measure site

3. Build Business Plan – How you will market, operational procedure, sustainable model

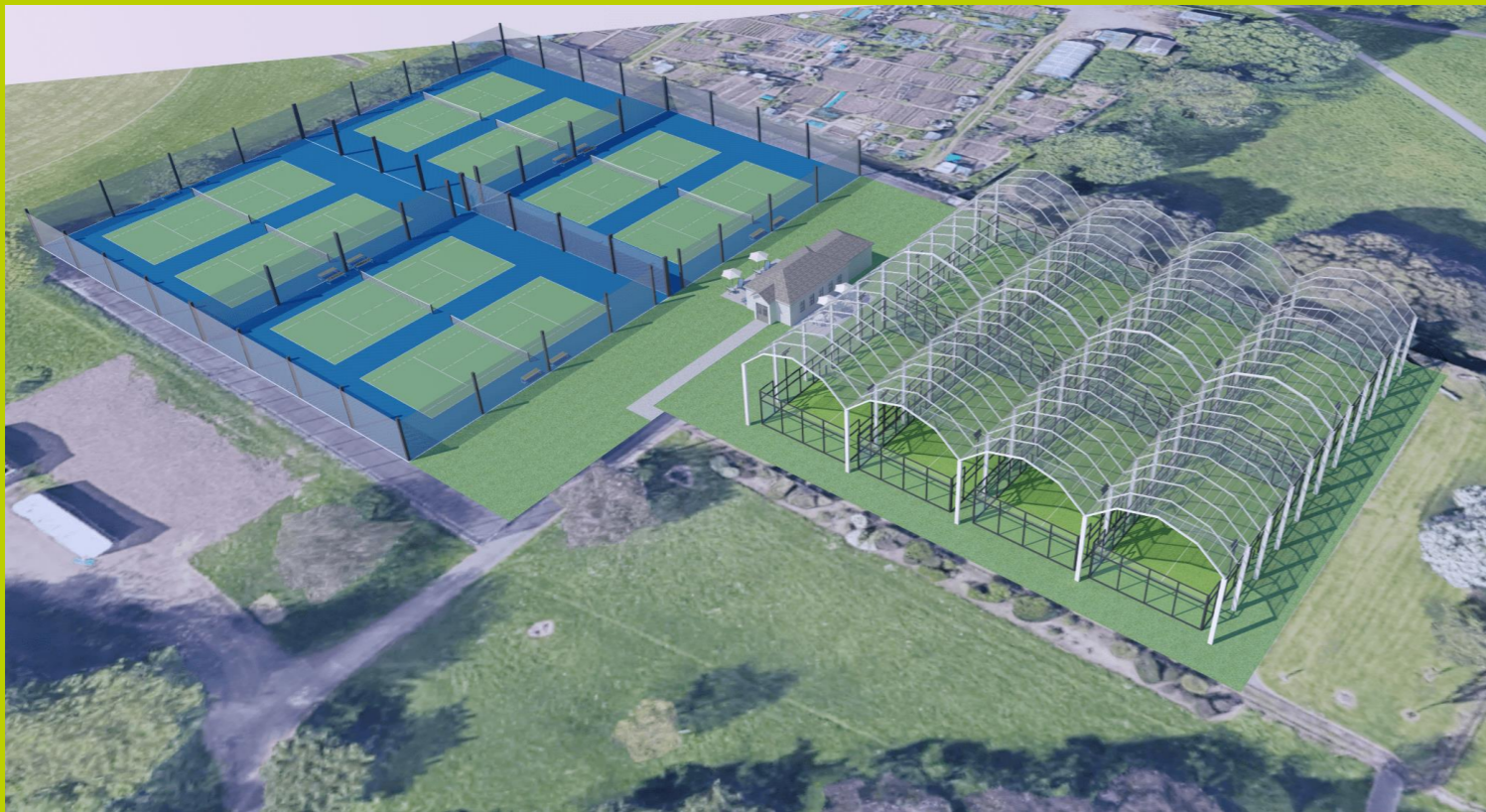
4. Develop facility budget – Cost plan, cashflow plan

5. Engage consultants/contractor to help codesign facility

6. Begin project timeline



DIOLCH



* Llandaff Field – Cardiff – Padel Tastic Project 2023

