

Padel Investment Program





Padel Overview

Padel is one of the fastest-growing sports globally, now played by more than 30 million participants across 130 countries and supported by approximately 50,000 operational courts worldwide. The global padel industry has an estimated current value of \$4.2 Billion AUD and is forecast to expand at a compound annual growth rate of 4.5% through to 2031. The sport's success is driven by its accessibility, rapid skill acquisition and social format, enabling players of varying ages and abilities to enjoy meaningful play from their very first involvement. This results in sustained engagement, strong repeat visitation and high utilisation, positioning padel as an attractive option for sports clubs.

In Australia, padel is now formally recognised by the Australian Sports Commission and is rapidly embedding itself within club and community sporting environments.

Domestic growth reflects global momentum:

- 40%+ year-on-year growth in courts over the past three years
- 85%+ average occupancy during peak hours
- \$75+ average peak-hour court-hire yield
- 30,000+ casual players nationally in the past two years

The evidenced growth in padel court development and participation is validating the opportunity that now presents to existing clubs, leveraging padel's popularity as a vehicle to diversity revenue and attract new participant demographics.



Padel at Your Club

In the right venue with the right operating model, padel can enhance venue utilisation, drive participation growth and broaden community reach without displacing existing sport infrastructure.

Padel's accessible format attracts adult social players, returning racquet-sport participants, and youth cohorts, generating a sustainable pipeline of members and casual users.

All clubs are encouraged to regularly complete a comprehensive health assessment to identify opportunities for improved vibrancy and sustainability. When considering the integration of padel, clubs should first undertake a range of consultative and assessment steps.

Key Strategic Considerations

Why would we explore this?

1 Define Objectives

- Clarify why padel is being introduced, i.e. growing participation, diversifying revenue, activating unused space, or strengthening the venue's multi-sport offering.

2 Assess Readiness

- Ensure the club committee, staff, and systems can support padel without disrupting well utilised existing infrastructure.
- Confirm operational capacity and identify internal owners to guide implementation.

3 Understand Demand

- Consult members, the wider community, and review local market conditions to confirm interest and determine the right scale and type of padel offering.

4 Align Governance

- Ensure constitutions, membership structures, and decision-making processes appropriately cover padel and support effective oversight and delivery.

5 Consider Third-Party Delivery

- Discuss whether engaging a specialist padel operator could enhance financial viability, reduce operational burden, or accelerate activation while ensuring alignment with the club's strategic objectives.

6 Venue Sustainability

- Confirm the venue has suitable space and underpinning foundations for padel courts.
- Evaluate wind, noise, heat, drainage, and weather exposure (particularly important for outdoor padel courts where playing conditions can be impacted)



What is the Padel Investment Program?

The Padel Investment Program provides the upfront capital to cover the related infrastructure costs, so clubs do not need to outlay or borrow the required funds (on average a Padel court cost \$80,000AUD).

A tailored revenue share model of court booking fees is then developed to suit each venue's scale and operational context. The model ensures clubs benefit directly from increased participation and utilisation through a low-risk pathway.

Beyond the fully funded padel courts, Padel Australia and its development partner (Mindspring Padel) further support through:

- Feasibility and utilisation modelling
- Council and landholder engagement support
- Operational readiness and launch as



Delivery Stages, Roles & Responsibilities

STAGE	KEY ACTIVITIES	Club/Operator	Padel Aus / Mindspring
Initial Assessment	Site suitability review including land availability, operating models, demographics and proximity to existing venues	Venue/club operator to provide local insights	Apply first principle insights in relation to site suitability
Feasibility & Utilisation Modelling	Demand forecasting, financial modelling, utilisation projections and commercial testing	Provide Business Plan to inform commercial modeling including quote for court manufacturing & construction	Undertake commercial modelling simulation for review
Council / Landholder Engagement	Development proposal presentation, lease negotiation and alignment of planning pathways	Engage landowner / council	Provide supporting materials and attend meetings as required
Investment Allocation + Revenue Share Model	Courts and foundations; venue-specific revenue share framework developed collaboratively	Review Partnership Agreement based on agreed terms	Draft Partnership Agreement based on agreed terms

STAGE	KEY ACTIVITIES	Club/Operator	Padel Aus / Mindspring
Planning & Approval Pathways	Planning documentation, environmental and noise assessments, and council development applications	Club/venue to lead Planning/Development approval process	Provide guidance and advice
Construction & Installation	Court structure installation, turf, glass, lighting, access and supporting infrastructure	Club/ Venue Operator, Council to manage construction and installation	Provide guidance and advice
Launch, Programming & Operations	Coaching delivery, competitions, social play, membership integration and marketing activation	Club/venue operator	Provide guidance and advice



Capital Works Responsibility Clarification

Planning, procurement, design, engineering and construction delivery remain the responsibility of the Club, Operator and associated Local Government Authority (LGA) or Landowner.

Padel Australia and Mindspring provide advisory guidance only — neither manages nor delivers capital works.

Clubs can now experience the positive participation, utilisation and revenue benefits of padel through the Padel Investment Program:

- Zero capital investment required in padel infrastructure (i.e, courts & slabs)
- Court-booking revenue share arrangement over partnership term
- Club retain 100% of all non-booking revenues (equipment hire/sales, F&B, sponsorship, merchandise, events)





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