



ADVICECUBE

Bahrain

***Padel Clubs  
Market Study***

Sept 2022





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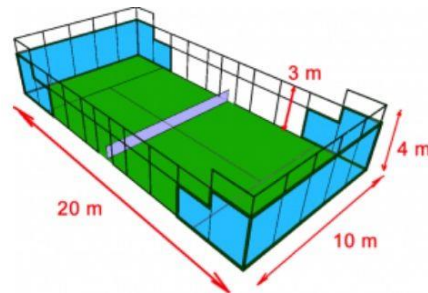
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## What is Padel?

Padel, a form of tennis is a new sport that was formed in 1969 in Mexico by a Mexican Businessman known as Enrique Corcera<sup>1</sup>. Moreover, it is considered to be a combination of tennis and squash, with a hint of table tennis involved. Additionally, the courts' dimensions are smaller than tennis, typically featuring dimensions (in m); **10x20**, with glass surrounding each end, if not all of the sides.<sup>2</sup>

**Figure 1:** Typical dimensions of a Padel Court | **Source:** LTA – Tennis for Britain



Padel's popularity has mainly emerged due to factors such as.

- **Beginner Friendly:** The sport is considered to have rules similar to tennis and an average player doesn't need to have a lot of technical skills to play the game and enjoy it. Speeds of serves aren't as rapid as in tennis, which has rackets manufactured for intense serving.
- **Extremely Social:** Padel is primarily played in doubles, implying an increase in communication, and enhanced chances of meeting new people.<sup>3</sup>

**Figure 2:** A Doubles Match played in Spain | **Source:** AFC Fitness



<sup>1</sup> **Source:** Padel69

<sup>2</sup> **Source:** The National

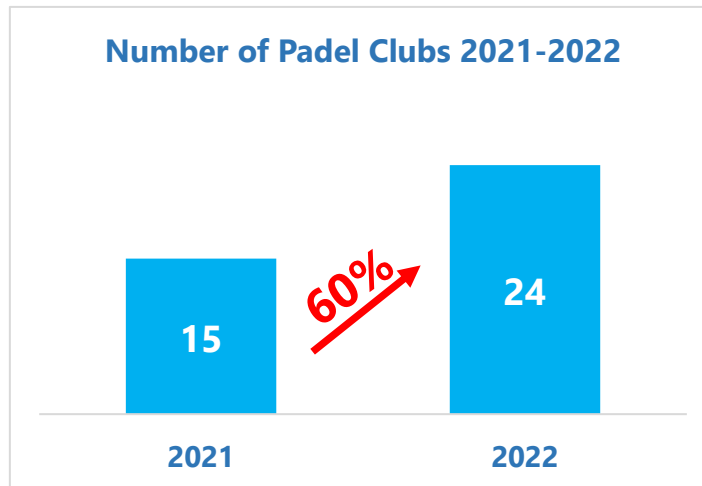
<sup>3</sup> **Source:** EverythingPadel

## Padel's popularity in Bahrain

The number of Private Padel Clubs has risen significantly since the beginning of 2022, with a total of 39 clubs opened in the Kingdom and the launch of 24 clubs only this year by September. We have identified a growth of **60%** in Padel Courts in Bahrain from the end of 2021 to Q3 2022.

A significant increase in padel clubs is linked to the shift in consumer preference, in addition to the popularity of the sport through social media networks, and business owners recognizing the potential profits of launching a padel club.

**Figure 3:** Number of Padel Clubs in Bahrain from 2021 – Q3 2022



**Sources:** Malaeb and Arena – Online Booking Applications, Google Maps, and Instagram

## Market Leaders

Club	Location	Launched	Features	Price*
Pink Padel	Riffa – <i>Southern Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Indoor</li> <li>• 5 courts</li> <li>• Ladies' sessions only</li> </ul>	<b>Playing:</b> 6 BD/hour <b>Racket:</b> 2 BD
Padel Park	Zallaq – <i>Southern Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Outdoor</li> <li>• 2 courts</li> </ul>	<b>Playing:</b> 6 bd / hour <b>Racket:</b> 2 BD
Let's Padel	Seef – <i>Capital Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Indoor</li> <li>• 8 courts</li> </ul>	<b>Playing:</b> 5 bd / hour <b>Racket:</b> 2 BD
Padel Bahrain	Juffair – <i>Capital Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Outdoor</li> <li>• 3 courts</li> </ul>	<b>Playing:</b> 6 bd / hour <b>Racket:</b> 2 BD
Padel Club	Dilmunia – <i>Muharraq Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Outdoor</li> <li>• 5 courts</li> </ul>	<b>Playing:</b> 3.75 bd / hour <b>Racket:</b> 2 BD
Padel in Center	Riffa – <i>Southern Governorate</i>	2021	<ul style="list-style-type: none"> <li>• Outdoor</li> <li>• 2 courts</li> <li>• Training Sessions</li> </ul>	<b>Playing:</b> 5 bd / hour <b>Racket:</b> 2 BD

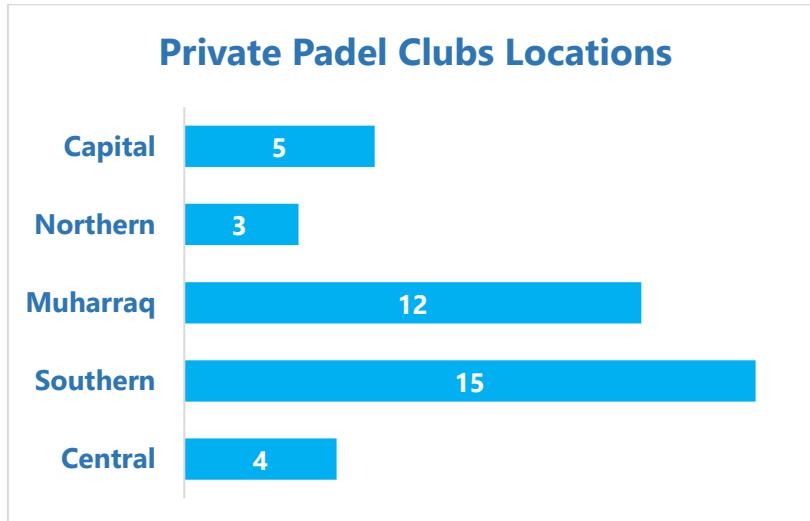
**Source:** Malaeb – Online Booking Application and Instagram

**Note:**

- Padel Club's Prominence was identified through several reviews found on google map and Malaeb due to limitations of gathering data
- \*Prices for playing are displayed per person

## Padel Club Statistics

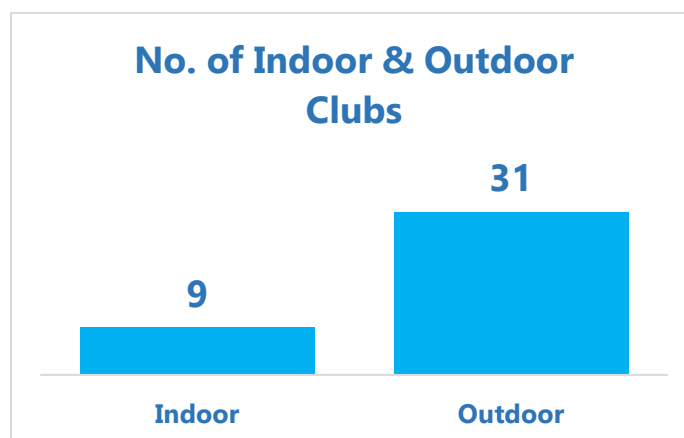
**Figure 4:** Private Padel Club Locations in Bahrain 2021-2022 – Governorate Wise



The Southern and Muharraq Governorates have attained the majority of the share of Padel clubs with 15 and 12 clubs respectively. The southern region remains the largest governorate of Bahrain by area, with Riffa comprising the most Padel Clubs with 6 clubs.

Our research has identified Muharraq Governorate comprises the most clubs launched this year with 10 clubs, followed by the Southern Governorate with 7 Padel Clubs. New Developments of Padel Clubs across Central, Northern, and Capital Governorates have remained muted compared to Muharraq and Southern Governorates.

**Figure 5:** Indoor Padel Clubs v Outdoor Padel Clubs



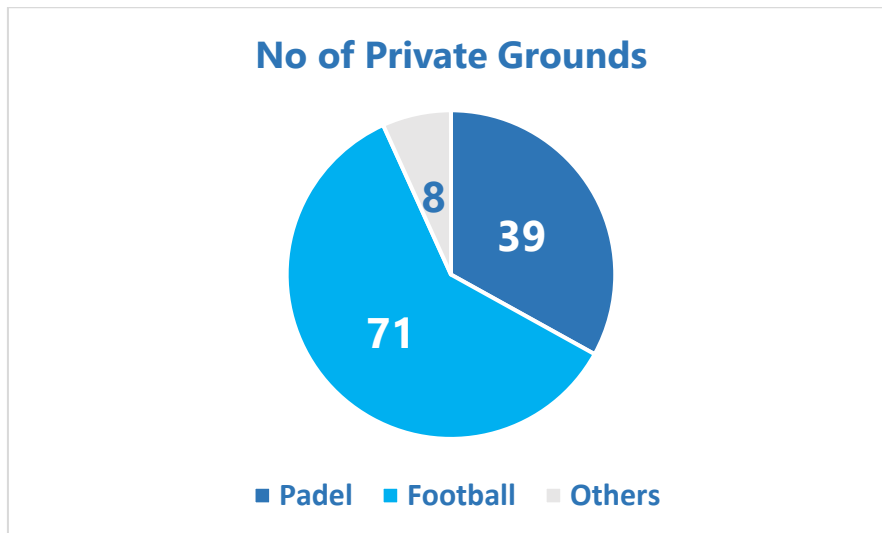
**Note:** “Pro Padel” has recently converted a couple of their outdoor pitches to indoor alongside their outdoor facility.

Moreover, the outdoor clubs outweigh the indoor clubs by a significant margin. The lack of indoor courts is likely due to the costs which have to be paid upfront, which is higher than the contraction of an outdoor Padel Court.

Moreover, an indoor facility can involve cost-saving techniques as thinner glass can be used, which does not matter much due to not needing to withstand heat. Additionally, an indoor facility suits better Bahrain, as the weather remains warm for the majority of the year and could provide a business with a competitive edge. <sup>4</sup>

### Comparison vs other sports

**Figure 6:** Number of Private Grounds – Sports Wise

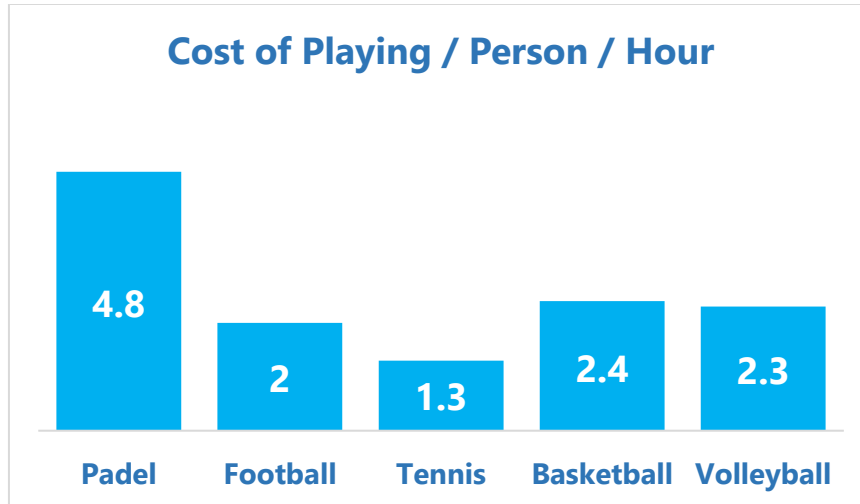


**Source:** Malaeb – Online Booking Application

As observed above, we have identified football to be the most played and the biggest sport in Bahrain with 71 grounds, followed by Padel with 39 grounds. “Others” comprises Tennis, Basketball and Volleyball Grounds, which remain to be minuscule compared to Padel and Football in Bahrain.

<sup>4</sup> Source: Padel 1969

**Figure 7: Cost of Playing Padel v Other Sports (/ Person / Hour)**



**Source:** Malaeb Application

**Note:**

- A sample size of 10 clubs was taken for Padel and Football Respectively.
- Racket price is not considered as it’s a fixed cost

From the figure above, it is observed despite being the most expensive to play out of the sports available to play, Padel has enjoyed the greatest endorsement over the past two years. The sample size for Basketball, Volleyball, and Tennis remains minute with each of the three sports comprising less than 6 courts.

**Endorsement of Padel**

Padel’s overnight success has led the sport to become one of Bahrain’s National Sports. The Bahrain Padel Federation was formed in January 2022 to develop the sport after acknowledging its popularity within the Kingdom. Since then, the BPF has organized several tournaments for men and women, which feature prize money. The most notable tournament is the **“Seef Properties first Padel Ranking Tournament”** organized by the TARTEEB for events and marketing, alongside Bahrain Padel Federation in Late June 2022<sup>5</sup>. The tournament was sponsored by Seef Properties Co., Bahrain Kuwait Insurance Company, Diyar Al Muharraq and Kanoo Travels, and Lets Padel.

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<sup>5</sup> **Source:** The National





**Figure 8:** Tarteeb and Bahrain Padel Federation Representatives ahead of the initiation of the National Padel Tournament **(left)**



**Figure 9:** Snapshot of a match at the tournament **(right)**

**Sources:** The National News and Lets Padel Instagram

The tournament was held at Lets Padel, Seef District, the home to the largest indoor padel club in Bahrain, featuring 8 courts.

## Investment Opportunity

Despite being the costliest sport to play in the Kingdom, Padel clubs have increased by 60% from December 2021 to September 2022. With the enormous increase, Bahrain's Government immediately acknowledged the sport as one of its national sports. Moreover, Bahrain has identified that the sport has a ton of room to develop and can compete internationally through Padel, alongside Football, where the Kingdom is ranked 85<sup>th</sup> and 86<sup>th</sup> in Men's and Women's Teams respectively.<sup>6</sup>

Moreover, there's a scarcity of Padel Clubs in the Northern, Capital, and Central Governorates respectively. According to the Government's Open Data Portal, the Capital and Central Governorate's <sup>7</sup> population includes 70% of expatriates, that earn a monthly average salary of BD 250, which reflects the lack of Padel Clubs as it's considered the most expensive to play per person and is not a viable option to play regularly.<sup>8</sup>

Whereas an opportunity arises in the Northern Governorate which has a massive local population of 284,978 citizens, of which **72%** are Bahrainis, who earn an average

<sup>6</sup> **Source:** <https://www.fifa.com/fifa-world-ranking/bhr>

<sup>7</sup> **Note:** Capital and Central Governorate figures provided by the Government are merged into one.

<sup>8</sup> **Source:** Information and E-Government Authority (data is as of 2021)



salary of BD 879, as per the latest data by the Information and E-Government Authority.<sup>9</sup>

Furthermore, the Southern Governorate, which is the biggest governorate in Bahrain by area, and the most padel clubs, consists of around 43% of Bahrainis. Whereas in Muharraq Governorate, 53% of the population is held by Bahrainis, which reflects the soaring number of padel clubs in those respective governorates.

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<sup>9</sup> **Source:** Information and E-Government Authority (data is as of 2021)

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