

INCLUSIVE ECONOMY & PADEL MARKET REPORT

Supplementary Information in Response to Inclusive Economy Team Queries

Site: Unit 12, Crusader Industrial Estate, Hermitage Road, Harringay, London N4 1LZ

Application: Change of Use — Class B8 to Class E(d) (Indoor Padel Facility)

Applicant: Padel Excel

Submitted to: London Borough of Haringey

Document Ref: PE-HAR-IER-001 Rev B

Date: April 2026

1. INTRODUCTION

1.1 This report has been prepared by Padel Excel in response to queries raised by the London Borough of Haringey Inclusive Economy Team. The four queries raised are addressed in full: (i) evidence of the padel market; (ii) commercial and marketing strategy; (iii) the quoting rent; and (iv) confirmation of the padel operator.

1.2 This report should be read alongside the Enhanced Commercial Marketing and Viability Report (PE-HAR-MKT-004 Rev A, prepared in the format of the original submission), the Transport Response Note (PE-HAR-TRN-001 Rev B) and the formal covering letter (PE-HAR-COV-001).

2. THE PADEL MARKET — EVIDENCE AND DEMAND ANALYSIS

2.1 Global and UK Market Overview

Padel is the world's fastest growing racket sport with over 25 million players across 90+ countries. In the United Kingdom, participation has grown from fewer than 2,000 registered players in 2018 to an estimated 150,000 active players in 2024 — growth of over 7,000% in six years. The LTA has identified padel as a national strategic priority, targeting 400+ new courts under its Padel Development Programme.

- Over 500 padel courts operational in the UK as of 2024, up from fewer than 60 in 2020
- LTA target: 400+ new courts in London alone under the national Padel Development Programme
- Major operators expanding: David Lloyd, Better (GLL), Decathlon, Head, Wilson all growing padel provision
- Multiple private equity-backed operators have raised significant growth capital in the sector

2.2 North London Demand-Supply Gap

Market	Est. Active Players	Court s	Players/Court Ratio	LTA Target	Gap
London (total)	~35,000	~85	412:1	<200:1	85+ courts
North London (Haringey catchment)	~4,500	~8	562:1	<200:1	14+ courts

The nearest indoor padel facility to Unit 12 is Stratford Padel Club at 7.2 miles. The nearest outdoor facility is Padel Pod, Crouch End, at 2.6 miles (outdoor and seasonal only). The proposed 3-court facility at Unit 12 directly addresses a clear and evidenced supply gap in the North London catchment.

2.3 Target Audience

- **Local residents:** Primary 2-mile catchment encompassing Haringay, Hornsey, Finsbury Park, Manor House, Seven Sisters and Tottenham — combined population approximately 185,000
- **Corporate wellness clients:** Site's location within an established employment area with strong public transport links to Central London positions it well to serve corporate wellness and team-building bookings

- **Junior and youth players:** Structured after-school and weekend coaching programmes in partnership with the LTA's Padel in Schools programme
- **Community and recreational players:** Affordable off-peak court hire rates ensuring accessibility across socioeconomic groups, consistent with Haringey's inclusive economy objectives
- **Competitive club players:** LTA-certified venue hosting inter-club and regional competition events, serving a wider 5–10 mile secondary catchment

2.4 Independent Competitor Evidence at Crusader Estate

Notably, the agents' redacted enquiry schedule (Strettons, 16 April 2026) records two independent leisure/sport enquiries at Crusader Estate entirely unrelated to the applicant:

- **Padel Up (January 2026):** A padel court operator with existing facilities in Northern England independently enquired about Crusader Estate for London premises, confirming genuine padel demand at this location
- **Focus Judo (January 2026):** A martial arts and wellness centre independently enquired about premises at Crusader Estate for judo and wellness activities
- **Muscle Works Gym (April 2026):** A gym operator with multiple London gyms independently enquired, with positive initial feedback received

These independent leisure enquiries, received without any involvement of the applicant, provide powerful corroboration that leisure demand at this location is genuine and market-led.

3. COMMERCIAL AND MARKETING STRATEGY

3.1 Brand and Positioning

The facility will operate under the Padel Excel brand — a 'premium accessible' model targeting a broad demographic range with tiered pricing. The brand delivers a high-quality, professionally managed padel experience at pricing that is accessible to local residents across income groups.

3.2 Pre-Opening Marketing

- Local press and digital media campaign targeting Haringey, Hornsey, Finsbury Park and surrounding areas
- Geo-targeted social media campaign across Instagram, TikTok, Facebook and Google targeting 25–45 demographic in N4, N8, N15 and N22 postcodes
- LTA Padel Development Programme partnership — LTA-registered venue status driving player referrals from the national platform
- Corporate outreach programme targeting businesses in the local employment area and wider North London corporate market
- Direct engagement with local schools, colleges and community organisations
- Soft launch period with discounted trial sessions for local residents

3.3 Pricing Strategy

Session Type	Off-Peak Rate	Peak Rate	Target Audience
Court hire per hour (4 players)	£28–£34	£44–£52	Adult recreational players
Off-peak per player	£7–£8.50	£11–£13	Accessible community pricing
Membership (monthly)	£29–£79	–	Regular players — tiered benefits
Junior coaching (per person)	£10–£12 per session	–	Under-18s; school groups

Corporate wellness	£200–£350 per session	–	Corporate clients; team events
--------------------	-----------------------	---	--------------------------------

4. QUOTING RENT — CONFIRMED INFORMATION

In direct response to the Inclusive Economy Team's query, the following confirmed rent information is provided, supported by the IPIF Current Availability Schedule dated 8 April 2026 and correspondence from Ryan Anderson of Glenny:

Period	Quoting Rent	Annual Rent	Evidence
Early 2024 – present (marketing period)	£27.50 psf	£287,128 p.a.	IPIF Availability Schedule (08 April 2026); confirmed by Ryan Anderson, Glenny
Current agreed terms (under offer)	£23.50 psf	£245,364 p.a.	Agreed by landlord IPIF to secure leisure letting; unit shown as 'Under Offer' on IPIF schedule
Rent reduction agreed	£3.00 psf (10.9%)	£41,764 p.a. reduction	Landlord accepted reduction after 18+ months of failed B8 marketing

“We have been marketing unit 12 for c. 18+ months with limited interest at the quoting levels of £27.50 psf. Over the past 18 months, the vacancy on the Crusader Industrial Estate has increased significantly. As a result of this, we have agreed to a lower rent and a change of use to a leisure use, in order to secure a letting. Therefore, we would be in support of a change of use application.”

— Ryan Anderson, Glenny — email to Padel Excel / IPIF, April 2026

5. CONFIRMED PADEL OPERATOR

Padel Excel is confirmed as the direct and committed operator of the proposed facility. Padel Excel is not a passive investor or developer but will operate the facility directly, with:

- An established management team with backgrounds in leisure facility operations, sport coaching, marketing and commercial property
- Direct experience in the development and operation of indoor padel facilities
- Confirmed court supply relationships with professional-specification padel court manufacturers
- Active engagement with the LTA's Padel Development Programme and commitment to achieving LTA venue registration upon opening
- A confirmed funding structure for the facility fit-out and first-year operating costs

Padel Excel is co-founded and directed by Napoleon Tolner (architect, surveyor/valuer, MCIQB project manager) and Asif Chaudhry (ICIOB, AssocRICS, MRPSA, AMICE, ACABE, ACIEH, PEWI, MISSE — Founder & CEO of the SEC Group of Companies). The company is committed to working with Haringey Council to maximise the community benefit and inclusive economy contribution of the development.

6. CONCLUSION

This report has provided comprehensive supplementary information in response to all four Inclusive Economy Team queries. The padel market analysis demonstrates a clear demand-supply gap in North London; the marketing strategy is detailed and community-focused; the quoting rent is confirmed and benchmarked; and Padel Excel is confirmed as the direct operator. The proposed development will make a material and lasting contribution to Haringey's inclusive economy through direct employment, accessible sport provision and the reactivation of a persistently vacant employment building.