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The Padel paradox: disruptive discourses and innovative practices in sport and leisure

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ABSTRACT

Through the theoretical lens of disruptive innovation, this study explores the expansion of Padel in England. It examines the paradoxical situation whereby despite heightened popularity and unprecedented growth, the sport faces significant barriers which threaten to restrict future development. Using a qualitative approach, data were collected from participants through semi-structured interviews with both regular and 'new' participants from the Padel community in the South of England. Thematic analysis identified three main themes: (i) Barriers to Entry, (ii) Exposure and Expansion, and (iii) Governance and the role of the Lawn Tennis Association (LTA). Barriers to entry included financial barriers, infrastructural and geographical limitations, and issues surrounding accessibility and inclusivity. Broader findings revealed equipment costs and court hire presented obstacles for participating, whilst disparities between urban and rural regions exacerbated accessibility issues. Infrastructure limitations, notably court scarcity outside major conurbations coupled with limited indoor facilities, negatively impacted Padel participation. Concerns were raised amongst participants regarding governance issues and Padel's perceived associations with exclusivity, mirroring challenges faced by traditional racquet sports, notably tennis. Recommendations to better support Padel development are proposed.

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Disruption; innovation; padel; sport development; sport ecosystems

Introduction

The *Padel Paradox*, underpinning this study, highlights the contradictory situation whereby Padel tennis, more often referred to as Padel, one of the fastest growing sports in the world (Lawn Tennis Association, 2025; Sport England, 2025), faces significant barriers to participation in England. The aim of this study is to explore the barriers and challenges facing Padel development in England. There is a relative paucity of studies on the emergence of new racquet sports like Padel and the innovative practices that can support sport development and overcome barriers hindering participation. This innovative sojourn (Shipway et al., 2023) partially fills this research gap and contributes towards better understanding the intricacies of Padel. The research objectives are to (i) investigate

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the current challenges and barriers threatening to inhibit future growth in England, and (ii) highlight disruptive discourses and innovative practices within the Padel communities which might help address participation and accessibility issues.

Padel, combines elements of tennis and squash and is usually played in doubles on an enclosed court, one-third the size of a tennis court, surrounded by glass and metal mesh walls, to ensure the ball stays in play after rebounds (International Padel Federation [FIP], 2025). In England Padel is experiencing unprecedented popularity (Sport England, 2025). Data from the Lawn Tennis Association (LTA) show the number of courts has risen from just 68 in 2019, to over 1000 by July 2025 (Lawn Tennis Association Padel (LTA Padel) [LTA], 2025). According to Sandhar (2025), this growth far exceeds original projections. However, numbers are lower than other European countries such as Spain, home to over 16,000 Padel courts (Playtomic, 2024). Globally, the world governing body of Padel, FIP, estimates that as of July 2025, there were 87 affiliated federations and the sport was played in over 140 countries, by over 30 million amateur players, of all abilities. By 2026, the LTA aims to increase certified coaches from 40 to 700 in England (Lawn Tennis Association [LTA], 2023). These initiatives, detailed in the LTA's 'Padel Opened Up' strategy, were designed to create robust infrastructure to support both grassroots participation and elite performance. In England, local authorities are important providers and partners to help support Padel development to not only ensure accessible and inclusive facilities but also provide suitable land for court construction. Such collaborations have facilitated investment aimed at integrating Padel into community sport (LTA, 2023).

Through semi-structured interviews and participant observation, this study examines how disruption and innovation have shaped, and continues to influence, Padel development in England, and explore opportunities for further innovative practices in the racquet sports ecosystem.

An overview of the literature

Innovation management for sport and leisure

Innovation is a process that starts with an idea, proceeds with the development of an invention and results in the development of enhancement of products, processes, services or technological advancement as part of organisational/industry innovativeness (Kearney, 2022). Tidd and Bessant (2009) differentiate into four types of innovation, and the evolution of Padel closely aligns with the category of 'Product Innovation'. Padel began with a new concept that led to the development of a racquet sport-related product that provided added customer value, experiences, and addressed unmet needs.

Innovation in the sport and leisure sectors has become a vital component for organisations seeking to gain competitive advantage (Shipway et al., 2023). They argue that whilst innovation is fundamental to organisational success in sport and leisure, it is one of the most difficult aspects of activity to manage and plan effectively. Similarly, Mosey et al. (2022) identify the term 'innovation' is an overused word in sport and leisure, either when being used to promote the latest wearable fitness technology device or included within the mission statements of quango sporting organisations or national governing bodies. Mosey et al. also propose that in some sections of sport and leisure industries,

innovation has often been viewed with suspicion by those who fear or are resistant to change.

There is confusion and disagreement with regards to definitions of innovation (Mosey et al., 2017), with the frequent use of differing interchangeable terminology, such as *invention, innovation, creativity* and *design*. In the leisure context, we define innovation as '*the successful exploitation of new ideas that can create new value and are new to a leisure organisation*'. This is aligned with the dual perspectives of both Mosey et al. (2022) and Shipway et al. (2023) who argue that leisure innovation is founded on the principle of action and bringing value or doing things differently. They both caveat this perspective by noting that novelty for the sake of it, which does not bring value or not actually doing anything differently is simply not innovation.

Disruption theory

The utilisation of Disruption Theory is largely absent from sport and leisure studies (Mosey et al., 2022). In the leisure context, '*disruption*' outlines a process where a sport or leisure organisation business, club or federation, with limited resources, can successfully challenge established and incumbent sport or leisure organisations (Shipway et al., 2023). New entrants to the market, in this case Padel within the racquets sports sector, proved disruptive by targeting both current and potentially new participants and obtaining a market foothold. Incumbents in the racquets market (such as tennis, squash or badminton) did not initially respond aggressively, and the new entrant, Padel, developed a market and level of performance that both existing and new racquet club members found desirable, whilst preserving its early success (Mosey et al., 2017). Disruptive innovations might initially be considered inferior by an incumbent racquet sport member, and members will not automatically switch but rather wait until the quality rises or is proven sufficiently high to satisfy their sport or leisure needs. At this stage, when original mainstream tennis, squash or badminton members began adopting the Padel offerings, then disruption had occurred (Mosey et al., 2017). What proved more interesting is the reach of Padel beyond the traditional racquet sport communities and attracting new participants, developing new sporting communities, and expanding the existing racquet sport ecosystem.

In their foundational study, Christensen et al. (2015) identified some key considerations in disruptive innovation. Firstly, they noted that disruption is a process that takes time, and because of this many incumbents will overlook disrupters. Almost every innovation, disruptive or not, will begin as a small-scale experiment before success allows them to move from the fringes and start eroding the more traditional mainstream market; in this instance, racquet sports. Secondly, disrupters often build organisations that are very different from those of incumbents. Consider Parkrun, which changed the business model of organised exercise (Chakrabortty, 2018). Parkrun events saw citizen innovators disrupting the paradigm of running, building a sense of community, and positioning social interaction above the more traditional receipt of pay business model, as an example of 'pioneering social innovation' (Mosey et al., 2022, p. 24). Thirdly, not all disruptive innovations will succeed, and not every path will be fruitful, so it would be wrong to focus on results and claim that a sport or leisure organisation is disruptive by virtue of its success (Christensen et al., 2015).

Likewise, successful sport and leisure organisations do not need to respond to disruption, overreact, and dismantle their business if it is successful. Shipway et al. (2023) argue that their focus should be strengthening relationships with members within leisure communities and ecosystems and creating new opportunities that might arise from disruption in the leisure sector. Mosey et al. (2022) suggest that when disruption occurs, members may shift from core traditional sport or leisure activities, but leisure leaders and managers should not try to solve problems before they become a problem (Mosey et al., 2017).

Innovation for leisure cultures

The sport and leisure sectors, whilst not unique, do possess distinct characteristics of comprising significant experiential components (Shipway & Jones, 2008), and as Ratten (2020, p. 79) highlights, sport and leisure activities incorporate aspects of passion associated with 'heart, mind, body and soul'. The global pandemic highlighted the leisure sector was increasingly receptive to new opportunities and adopting aspects of an innovative culture, as demands and consumption patterns changed during 2020 and 2021 (Mosey et al., 2022). Boden and Shipway (2023) detailed how tennis participants, fans and other racquet sport stakeholders interpreted their social world, and how leisure culture is an important mechanism to understand the role that sport can play in shaping innovative practices. Ratten (2018) also suggested that some more formal sports (for example, tennis) might have more rigid rules that potentially lead to less innovation than other sports, such as lifestyle sports, which have more informal cultures that could better enable innovation.

Leisure organisations, including racquet sports, face the inhibiting effect of rules, regulations, policies and bureaucracy (Mosey et al., 2022), and too often these rules perversely constrain the adoption of new innovative practices. Shipway et al. (2023) argue that within leisure organisations both tacit and explicit rules need to change to allow for the adoption of new innovative approaches and tacit rules are often the most challenging to address, as could be the case for Padel. Shipway et al identified that in many sports traditions become embedded within sporting organisations and they continue with limited thought as to why they are in place.

Change can often be perceived as risky and disruptive. In many leisure organisations, including racquet sport federations and clubs it often becomes hard to challenge the 'status quo' of 'the way things are done around here' (Mosey et al., 2017, p. 55), and the organisation can develop deep-rooted cognitive behaviours and routines. Often where inertia has been established, change is no longer the norm, and sports participants and management seek stability, and complacency can creep in. Mosey et al. (2022) describe the concept of 'sport and leisure organisational blindness', where sport organisation and federations become almost blind to observing what is coming over the horizon in the form of new technologies, competition or products/services; or in this case, the growth of Padel. The pandemic, despite being challenging, was an opportunity to reform and change aspects of racquet sports (Boden & Shipway, 2023). Unfortunately, in England some sport organisations and federations became more risk averse and doubled down, sinking under the weight of bureaucracy, processes and procedures. This stifled

innovative practices and failed to understand the value of Padel and the 'new ways of doing things' within racquet sport communities.

Access and barriers for Padel participation

According to the Lawn Tennis Association (LTA), infrastructure investment and the introduction of new competitive structures, performance support, and coaching development programmes have aided the growth of Padel (Lawn Tennis Association, 2024). The rise of Padel exemplified this trend, as advancements in equipment and facility design played a central role in expansion. Globalisation in sport whilst providing opportunities can also present certain challenges, including delays in sports reaching new audiences, which will cause disparities in competition levels. This highlights the difficulty of establishing Padel globally, notably in regions where infrastructure and competitive frameworks are still emerging (FIP, 2025).

Advances in materials and technology have enhanced safety, increased popularity, and improved accessibility in sport (Derriks et al., 2023). Innovative Padel equipment is often crafted from carbon, resulting in lighter and more durable rackets (Coninck, 2021). Cork Padel, a brand using Cork to manufacture rackets, incorporates anti-vibration technology for enhanced control during play (Cork Padel, 2021). Additionally, the concentration of economic and cultural activities in urban areas has played a role in the development of Padel in England. The LTA's guide to locating Padel courts highlights that Padel clubs are predominantly located in major cities (Lawn Tennis Association, 2025). Sandhar (2025) tracked court location and found that most were in the wealthiest areas of England, with the highest numbers in South England. Urban innovation in Padel is reflected through initiatives such as rooftop Padel courts on top of existing urban infrastructure, a strategy designed to minimise space usage while providing a unique and appealing Padel experience (Rocket Padel, 2025). While Hallmann et al. (2012), discussed how space was a common difficulty faced during urban planning and sports infrastructure, Padel's adaptability to urban environments could be a key factor in its long-term success.

Whilst sport offers physical, mental, and social benefits (Widdop et al., 2019), notable barriers prevent participation including cost, time, social factors, and lack of facilities. Steenhuis et al. (2009) found that individuals from low-income households identified cost as a key barrier for sport participation, and those with higher incomes have greater financial resources to participate. Similarly, Ward et al. (2017) suggested that expense will impact how participants perceive and value facilities and affect motivation to participate in physical activity. In England, the average cost of renting a Padel court is around £33 per hour (Playtomic, 2024), a price often deemed high, and potentially reducing participation levels. However, this cost is usually split between four players, amounting to £8.25 per player per hour. Sandhar (2025) noted that whilst average court hire was 'around' £30, peak time prices reached £80 at some venues. In contrast, many towns and cities in England can access local authority facilities for an annual fee of £45 for unlimited access to tennis courts in their area (Lawn Tennis Association, 2025). Therefore, for many, Padel is not perceived as an accessible activity.

Another potential barrier to entry into sport is lack of facilities. Padel exemplifies this due to its unique four-wall court and specific dimensions. The geographical spread of Padel courts remains uneven, with limited availability in many regions,

making access difficult. This uneven distribution presents challenges for those in rural areas, limiting participation (LTA, 2025). Addressing this disparity requires investment in infrastructure and strategic planning to enhance accessibility to Padel facilities. In a poll by Sandhar (2025), all local councils in the United Kingdom were asked if they had invested funds towards Padel facilities, and of the 330 councils that responded, only three confirmed they had invested funding. Playtomic (2024) argues that Padel can be played by most, regardless of their socio-economic status. However, Padel's similarities to tennis, a sport where socioeconomic status influences levels of participation (Widdop et al., 2019), raises questions about this assertion.

The racquet sports ecosystem

Audretsch and Belitski (2017), 1033, cited in Mosey et al., 2022) define an entrepreneurial ecosystem as 'a dynamic community of independent actors (entrepreneurs, suppliers, buyers, government, etc.) and systems level institutional, informational and socioeconomic context'. In sport and leisure there will also be institutionally embedded actors (Ratten, 2018) that form part of an ecosystem. Ratten (2020) identified that some organisations may remain resistant to change, and suggested that perceptions about innovation opportunities, in this case within the racquet sport ecosystem, will depend on the ability to mobilise information and knowledge across the networks of the ecosystem.

Mosey et al. (2022) proposed that future of sport and leisure innovation is about experiences and ensuring club members and stakeholders are the centre of that experience within their unique sporting communities. They advocated true value for members and stakeholders would only be realised when the offering of sport or leisure organisation, including its content and experiences, formed part of what they termed a '*Sport and Leisure Ecosystem'*. In England, Padel is currently located as part of a broader racquet sport ecosystem. Shipway et al. (2023) expanded on these challenges identifying that in traditional racquet sports like tennis, badminton or squash, the governing bodies and organisations that set the rules are also those that can resist any attempts to innovate. With this type of ecosystem, it is helpful to differentiate between who identifies the innovation challenges and who leads the innovation challenges.

In traditional sports, challenges are felt most keenly by the grassroots organisations as they lose members to alternative activities. In broader racquet sports communities, some perhaps fear the emergence of 'new' sports like Padel. However, they may be unable to lead a change in their own sport as the rules are set by the national and/or international ruling federations. This does not solve the original innovation challenges as the pace of change within a racquet sport ecosystem will always lag the changing values and demands of racquet sport club members within their unique sporting communities (Boden & Shipway, 2023).

In England, Padel flourished during the pandemic, addressing challenges in the leisure industry during unprecedented covid times (Shipway et al., 2023). Whilst innovative sports like Padel further evolved because of a crisis, innovation itself will also stem from opportunities that emerge rather than just crisis, and often opportunities are the driving force behind change (Mosey et al., 2017). The pandemic prompted situations in which staying the same was not an option for most sport and leisure organisations, and that

there is a role for both crisis and opportunity when fostering innovation (Shipway et al., 2023). One sport's crisis is another's opportunity.

Research methods

Using qualitative research methods for data collection in Padel

The focus of this study is on innovation in leisure and exploring the barriers facing the expansion of Padel in England. To clarify the scope of this study, the Lawn Tennis Association (LTA) governs England, Wales, Scotland, the Channel Islands and the Isle of Man, whilst Tennis Ireland is the National Governing Body (NGB) for both Northern Ireland and the Republic of Ireland. However, this study covers only the South of England within the context of the United Kingdom, which is acknowledged as a partial limitation.

Data was obtained primarily through semi-structured interviews and participant observation in Padel settings, to help develop a deeper understanding of the relational context in which sports like Padel occur, and how sub-cultural aspects are both embodied and represented (Shipway & Jones, 2008). This approach allowed a detailed exploration of Padel participants' perspectives and lived experiences. The lead researcher, an experienced racquet sports player, actively participated in the natural Padel settings of the participants interviewed, at both Padel sessions and social events. Due to the positionality of the lead researcher, access to participants within the Padel community was comfortable to facilitate. There were ten participants of varying age, experience and gender (Table 1). Targeted sampling provided access to those with experiences in Padel and existing knowledge of the sport being explored. This narrow sample is recognised as a potential limitation. However, as Jones and Gratton (2015) acknowledge, a large sample size in qualitative data collection may be detrimental, and this relatively small sample size allowed for the collection of richer data.

All participants were members of the Padel community, ranging from frequent racquet sport members to 'newbies', who were more recent converts to Padel. Pseudonyms were used to ensure anonymity, and the principles of voluntary informed consent and confidentiality were adhered to (Daymon & Holloway, 2010), and assurances were given that participants could withdraw from the study at any time. The study proposal was approved by the university ethics committee (ID:62250).

Table 1. Padel participant profile.

Participant (Pseudonym)	Age	Gender	Geographical Area	Participant Padel Background
Amelie	24	Female	Greater London	Intermittent Padel Player
Beth	54	Female	Bournemouth Region	Frequent Padel Player
Chloe	56	Female	Hertfordshire Region	Frequent Padel Player
Dale	22	Male	Bournemouth Region	New Padel Player
Emma	61	Female	Hertfordshire Region	Frequent Padel Player
Fred	56	Male	Hertfordshire Region	Frequent Padel Player
Greg	31	Male	South London Region	New/prospective Padel Player
Harry	48	Male	Hertfordshire Region	Frequent Padel Player
Ian	54	Male	Bournemouth Region	New/prospective Padel Player
Jess	22	Female	North London Region	Frequent Padel Player

Each participant received a participant information sheet, outlining project details and a participant consent form, to sign and confirm their involvement. As is customary with qualitative approaches, during the interviews all participants expressed themselves in their own words and at their own pace (Daymon & Holloway, 2010), and the interviews elicited the participant experiences and the way they perceived and interpreted them (Jones, 2022).

Data analysis

A systematic examination and interpretation of the data took place during the analysis stage, and ongoing thematic analysis was carried out (Guest et al., 2012). The interviews were transcribed and organised, and fieldnotes were ordered by importance. Each main data section was given a label, a code, as the data were initially categorised, and the codes that related to each other were reduced and collated to a broader theme. Fieldnotes and research diaries were also analysed in this way. During the analysis and as an outcome of these procedures, major themes were developed, and a common pattern was developed (Braun & Clarke, 2019).

To ensure a more reflexive approach, we engaged with our own positionality and potential influence on the research process (Jones, 2022). This included reflection on our contrasting relationship to padel tennis and the study participants, and recognising how our own experiences and assumptions might influence and shape both the data collection and subsequent interpretation. As previously highlighted, the lead researcher kept a journal and detailed field notes to document ongoing reflections and to address any emerging biases (Sparkes & Smith, 2013). Participants were also asked to reflect on the data themselves and to provide views on what they had said. This occurred after the data had been collected, to ensure our interpretations represented their perspectives and lived experiences (Daymon & Holloway, 2010).

This process of collaborative analysis by the researchers and peer debriefing with participants further enhanced reflexivity by allowing multiple perspectives to inform data interpretation (Skinner et al., 2020). Transparency was also maintained through the inclusion of participant quotations to demonstrate the link between data and analysis. Credibility was supported through both prolonged engagement by the lead researcher with participants and the triangulation of the data sources including diaries, research journals, interviews and participant observations (Jones, 2022). Together, these multiple approaches supported the methodological rigour of the study and ensured that the participants' interpretations of padel tennis were both authentic and contextually grounded (Sparkes & Smith, 2013).

Results and discussions

An integrated results and discussion approach was favoured in order to create a more connected flow and avoid disruption and confusion (Braun & Clarke, 2019). The three main themes emerging from the data were (i) Barriers to Entry, (ii) Exposure and Expansion, and (iii) Governance and the role of the Lawn Tennis Association (LTA). Disruption is a process (Mosey et al., 2022), and this process takes time, which helps explain why other racquet sports (the incumbents) frequently overlook disrupters (Padel), and why these barriers still exist.

Barriers to entry

Financial barriers

Financial barriers to entry revolved around three main issues: (i) equipment costs, (ii) membership and court fees, and (iii) the disparity of court prices. Participants reported mixed experiences with the affordability and quality of equipment, especially rackets (the universally accepted terminology for the Padel bat). Chloe recognised significant upfront cost for a premium product noting *'your biggest outlay is your Racket. Mine was almost £200'*, and similarly Fred observed *'my first proper racket was £300'*. Whilst other participants purchased rackets starting at £70. Steenhuis et al. (2009) found that price was a barrier to participation. Greg noted Padel rackets were more expensive than other racquet sports, however Rivett (2024) established entry level tennis rackets are generally under £50. Harry was '*shocked at the price of a Padel racket, for a starter, compared to other sports'*.

In contrast, Ian felt equipment was affordable noting '*the equipment is fairly cheap'* and Emma observed 'y*ou can buy a racket, probably from £30, but if you pay about £60 or £70, it's a reasonable racket'*. These disparate responses suggest limited awareness of cheaper options amongst some participants, and reinforce the perspective from some of Padel as an exclusive, expensive leisure activity. Anecdotally, at the time of writing, a quick online search indicated numerous cheaper starting options (Decathlon, 2025). Dale paid more for his racket, worried that '*cheap rackets break easily*', reinforcing findings from Mosey et al. (2017) that consumers buy cheaper products initially, to save money, but ultimately make repeat purchases due to low product quality.

Participants provided mixed responses to membership prices and court fees associated with Padel, erring towards expensive, but varying based on location. Greg reflected on his experience of full membership at Padel facilities as an expensive cost, explaining the 'pay and play' option would better suit many players, observing '*it's a big payment to make up front and then you've got to make yourself commit to it, which is something that I probably wouldn't do'*. Sport England found that 61% of non-customers who gave responses identified the high price of sports facility memberships as a participation barrier (Sport England, 2025). The theory of disruption (Christensen et al., 2015) predicts that when an entrant (Padel) confronts incumbents (Tennis) head on, the incumbents will accelerate their innovations to defend their market. However, with the LTA and stakeholders in the racquet sport ecosystem, this does not appear to be the case. Similarly, another paradoxical situation is that Padel is typically more expensive than tennis but has no price advantage.

Ian further eluded to the full memberships costs at racquets clubs in London, noting '*you're looking at a minimum of £150 a month'*. This raises issues on affordability of membership at one facility. For example, Padel clubs in London offer multi-purpose facilities that include both Padel and Gym facilities. However, the most basic membership option at central London Padel venues starts at £145 per month with only limited available membership (Rocket Padel, 2025). It should also be acknowledged that leisure costs in London remain significantly higher than in the rest of England (Deloitte, 2025).

Several participants highlighted these price disparities between different geographical locations, with financial barriers prevalent in certain areas. There were frustrations surrounding 'London prices' where despite similar facilities to

elsewhere in England, prices were different. Emma commented 'Padel *courts are the same. It's just in a different location and attached to a different club, but it seems strange that some of them are triple the price of others'*. Chloe noted '*I went to play with friends in London and that's just not affordable at all'*. Ward et al. (2017) indicated that the cost of accessing facilities will influence participation in physical activity, and higher prices in certain locations are likely to deter Padel participation. The challenge facing Padel is that consumers have already switched from other racquet sports, and new consumers (potential padel participants) have continued adopting the sport as the quality continues to rise (Christensen et al., 2015), but paradoxically, this disruption within the racquet sport ecosystem has yet to drive down market prices.

Accessibility and inclusivity barriers

Accessibility and inclusivity barriers focused upon three areas of concern, which were (i) general accessibility to Padel, (ii) debates surrounding inclusivity and exclusivity, and (iii) the social nature of Padel. Accessibility to Padel was widely reported as positive, and available to all demographic groups. Dale commented on his introduction to Padel, with limited racquet sport experience '*it was just really easy to get going and have a rally with people who equally weren't massive racquet sport people'*. In contrast, some participants had transitioned from other racquet sports (tennis, squash, or badminton) and felt Padel was more physically accessible, as Chloe noted '*it's not as physically demanding as tennis because the court is smaller and you play doubles'*. Jess added '*I think it's quite easy to play in comparison with tennis or squash. It's an easy sport to pick up'*.

These perspectives were reiterated in the Playtomic Global Padel Report which referred to Padel's ability to offer something for everyone (Playtomic, 2024). These participant observations appear encouraging for Padel development, providing an alternative for participants less comfortable or able to engage in more physically demanding leisure activities. Additionally, Emma noted players from her local club spanned a variety of demographics, commenting '*most players are 30, 40, 50, 60 and even 70. I'd say 40 is the average, although I've not seen many young people play'*. Several participants noted intensity levels of Padel vary based on age, ability and other factors, and that each player can engage with Padel, based on their level. Fred summarised '*It's a brilliant sport because according to your level of ability, you can still play'*. As such, we are currently observing Padel's 'upmarket march' (Raynor, 2011), and the journey into what Raynor describes as the 'white space' which currently exists within the racquet sport ecosystem.

Participant perspectives varied on the Inclusive v Exclusive nature of Padel. Beth highlighted high levels of demand and low number of courts in many areas as an explanation for perceptions of an exclusive environment, suggesting '*the higher demand makes something more exclusive'*. Generally, scarcity of products and services increases the perceptions of value and therefore increases the exclusive nature (Mosey et al., 2017). Padel requires construction and installation of additional facilities to prevent the perception of 'exclusivity' being the early legacy of Padel development in England.

Greg suggested that due to Padel's emergence, it is *'not yet facing deep rooted discrimination like other sports'*, like tennis or golf which are generally viewed as exclusive due to their historic evolution, explaining:

> Padel is so new, and that's probably why there are no stereotypes yet. So it hasn't got a history of people gatekeeping. For me, Padel's at a critical point, where it risks being viewed as mainly played by the upper classes.

Multiple participants suggested Padel was already a sport for the privileged, or as Harry observed '*for those with disposable income, grown up kids, and who are looking for a new hobby*'. Jess, from London, referred to her experiences at her local racquets club with a lack of inclusion and diversity due to the court location explaining '*our club is not inclusive only because of the demographics of the area that we live in*', whilst elaborating on issues also linked to travel constraints noting '*families from lower socio economic backgrounds simply can't drive here to play, for a variety of obvious reasons*'. Kim and Jeong (2024) argued that transportation is a key support structure required to aid participation amongst certain socio-economic groups. In contrast, some participants suggested Padel was an inclusive leisure activity, which has been the key factor in its appeal and rapid expansion, as argued by Playtomic (2024). Additionally, future studies should critique our dichotomous perception of 'inclusivity verses exclusivity' and consider whether this notion oversimplifies some of the current challenges and power relationships facing Padel development in England.

Two participants mentioned inclusivity from a disability perspective, with Emma noting '*I've never seen anyone with a disability playing*', with Harry commenting '*I hope Padel goes down the same route as tennis and football, and is not limited only to able bodied people*'. Although wheelchair Padel (Adapted Padel) is present (Godfrey, 2023), development is behind sports like tennis, where elite high-performance wheelchair athletes participate in global tournaments, for significant prize money (Lawn Tennis Association, 2024).

Several participants discussed the inclusive and accessible social nature of Padel and how it factored into their participation. Sport provides means of social interaction and often reinforces individuals' values and identities (Shipway & Jones, 2008), and it was apparent Padel is no exception. Ian noted '*the padel environment is better (than other sports), because you're (usually) outside and you can play with more people*'. Harry reinforced this *'I'm doing it for the social side too. I love playing it. It's very sociable and friendly*'. Shipway and Jones argued that sport fosters a sense of belonging and strengthens interpersonal relationships. Amelie felt the 'doubles' format of Padel supported the social dynamic, explaining '*you can easily strike up a conversation with the person you're playing with, or against, because of the smaller court*', a point advocated by Playtomic (2024) who propose that Padel allows players to connect with existing friends and also form new relationships.

Geographical and infrastructural barriers

Participant discussion on geographical and infrastructural barriers centred upon (i) the lack of available courts, (ii) their geographical concentration, and (iii) frustrations surrounding existing infrastructure. The most dominant issue permeating this study was the perceived lack of Padel courts in England, with demand outweighing availability. This was raised by most participants as a significant barrier and limiting factor in the development of Padel. Beth felt '*there should be an awful lot more Padel courts now – not waiting for the next 8 to 10 years*'. There is an apparent large disparity between the

amount of people wanting to play, the frequency of demand from current players, and the limited courts available to satisfy this demand. As Kim and Jeong (2024) identified, those with access to facilities are more inclined to participate and therefore it is an urgent requirement to address this challenge nationwide.

Frustrations were expressed on the geographical concentration of Padel courts across England, with a proliferation in major cities, such as London, which was inconsistent with limited availability in rural areas. Amelie commented '*the number of Padel courts is probably more (in London) than in the whole of the South of England*'. The geographical disparity of Padel courts suggests that if Padel is primarily available in large cities and urban regions, it is inaccessible to wider regions of England. This imbalance is a barrier which will discourage participation, notably amongst those facing increased travel times, transportation costs, or logistical barriers to reaching centralised facilities (Wicker et al., 2012).

Participants expressed frustration with existing infrastructure in Padel. Unsurprisingly, in England, a commonly recurring theme was that weather significantly affected participation, and highlighted the need for more indoor courts or covered outdoor facilities to ensure year-round play. Fred explained *'we get multiple games cancelled due to the weather. Wind alone doesn't cause cancellations, but wind and rain does, and we get floods and puddles too'* . Hallmann et al. (2012) identified that infrastructure can play a more critical role in some sports than others, as many activities are not feasible without the necessary facilities. For Padel, there is an increased focus on implementing suitable measures for Padel to be played in all weather conditions. In contrast, Emma observed the cost of participation rises when facilities offered indoor courts, and some participants selected outdoor courts due to the higher cost of playing indoors. She noted '*if it's indoor, then the price increases. It's that extra bit. So we just play outside*'.

Numerous barriers still exist, which are restricting Padel growth in England. Padel, as a relatively new sporting activity, is a disruptive innovator in the leisure sector, as it not only appeals to racquet sport enthusiasts, but has reached unserved sport consumers and new-market footholds, before migrating into the mainstream racquet sport ecosystem and beyond (Mosey et al., 2022). The infrastructure development is taking time to catch up. Padel has challenged the more established incumbent racquet sports and improved the products and services within the racquet sport ecosystem by delivering the performance that the incumbent mainstream participants (or consumers) of tennis, squash, or badminton require (Christensen et al., 2015). In reality, disruption is a theory of competitive response (Denning, 2016). As such, competing racquet sports must adapt and change the game being played, and realise that innovation is a necessity, not an option.

Expansion and exposure to Padel

The participants' experiences of their introduction to Padel were prominent and varied. The racquet sport ecosystem has been shaken up, and the disrupter, Padel, has changed patterns of consumption (Christensen et al., 2015). Dale explained *'I'd seen it on social media, and it looked fun'*. In contrast, Harry was introduced through a family member, observing *'I heard about it from my brother-in-law who had started*

playing'. It is suggested that tailored exposure strategies towards different demographics that consider age, gender, culture, and lifestyle can increase participation rates and enhance public perceptions of sport (Wicker et al., 2012). Aligning with disruption theory (Christensen et al., 2015), new market disruptions from leisure activities like Padel have now taken hold in a new value network and appeal to many customers (sport enthusiasts) who have previously gone without the Padel product. This resonates with the findings of Denning (2016) who described the ongoing disruption that emerges from the battle between the incumbent (Tennis and other Racquet Sports) and the challenger (Padel).

Participants discussed factors that could help shape exposing Padel throughout England and help increase participation. An additional sub theme was the potential inclusion of Padel at the 2032 Brisbane Olympic and Paralympic Games (Olympics, 2024). Beth commented '*Inclusion as an Olympic Sport would be huge. Yeah, absolutely'*. It is a highly contentious debate on the ability of mega sports events to enhance participation (Frawley et al., 2013), but potentially greater social media exposure might support increases in grassroots participation in certain sports which are highlighted during the Olympic and Paralympic Games. However, Greg expressed concern about a potential seven year wait for Padel as either an Olympic or Paralympic sport, proposing '*they should get it in for 2028, not 2032 – they are missing a trick there'*.

The second key issue discussed amongst participants relating to exposure was the absence of Padel within schools and the education sector. Harry suggested *'by introducing Padel into schools you can find new audiences and then branch off to other people that they will know, and then more kids and adults are talking about the sport'*. Widdop et al. (2019) proposed that early exposure can lead to long-term engagement in physical activity, which highlights the potential benefits of introducing Padel into schools. Participants discussed additional opportunities to enhance the exposure of Padel, with social media being a key focus, and the apparent lack of role models for younger generations. Dale explained:

> There's not enough exposure to Padel. Kids are not sitting there, looking at it. They'll watch Messi and Ronaldo on various platforms and be in awe of their skills because of the massive exposure that Football has. You just don't get that with Padel.

Payne et al. (2003) established that when individuals identify with role models, they are more likely to perceive sport as achievable and worthwhile and increase the likelihood of participation. The lack of Padel role models could be addressed by profiling leading players or by exposing potential new players to the significant number of celebrities and influencers on social media who are active Padel players. Singer and songwriter Stormzy is just one of many high-profile celebrity players. Social media influencers engage directly with fans and followers and can create a sense of connection and relatability (Pegoraro, 2010). On a note of caution, Jess suggested exposure to only high-performance elite padel social media or YouTube clips could prove counterproductive for those who have not previously played Padel noting '*anyone who's never picked up a Padel racket would look at the professionals and just think . . . . I can't do that'*.

On another note of caution, one could question whether new entrants like Padel constitute a special kind of disruption (Shipway et al., 2023), when it is tempting to simply categorise the sport as disruptive when its foothold appears to

still be located in the high end of the racquet sport ecosystem with many participants willing to pay high prices, and this segment is not uninteresting to incumbents.

Governance: the LTA's (Lawn Tennis Association) role in Padel development

The third main theme of the findings surrounded governance and the role of the LTA (Lawn Tennis Association), the National Governing Body (NGB) for Padel, in supporting the growth, future development, and increased participation. The primacy of the data findings is grounded within participant perspectives, and we acknowledge they may diverge from the perspectives of the Lawn Tennis Association (LTA) on many of the structural and infrastructure issues facing Padel.

The Regulation of Padel was discussed by Amelie, who had an awareness of the commercial aspects of Padel. She observed that Padel can serve as an investment opportunity, where significant revenue can be generated, and that '*commercial Padel clubs are businesses in and of themselves, whereas it should be for the enjoyment of the sport. So, I think good governance is very important*'. With private investment in the Padel market, there is limited regulation on the pricing of Padel, which can often restrict accessibility in some areas. Effective governance practices would help promote transparency, accountability, and strategic decision-making, which in turn can build public trust and encourage sustained investment (Shilbury & Ferkins, 2019). This is particularly relevant for Padel, which as a relatively new sport, has yet to firmly establish trust with the sporting public. As additional caution when exploring future growth and development, the disrupters, in this case, Padel, will often build business models that are very different from those of incumbents, such as established sports like tennis, which will prove increasingly challenging for governing bodies to regulate and govern.

Beth discussed the LTA's role relating to investment into elite Padel, comparing it to tennis when she mentioned her negative perceptions of the LTA in terms of financial support, questioning '*there's not been many poor tennis players. They often come from affluent backgrounds, and it'll be a shame if it's exactly the same for Padel – that you've got to have money to get into Padel*'. Several participants discussed the LTA's Padel Strategy and how the governing body should support equal opportunities throughout different socio-economic groups and implement strategies to grow the sport. The introduction of Padel into schools to reach new and broader demographics was regularly discussed. Harry observed '*they (the LTA) can absolutely drive this into schools and colleges and any sort of educational environment*'. This view was expressed by several participants with children on the effectiveness of Padel in education settings, as a pathway to increasing access and participation.

Multiple participants alluded to the conflicting interests of the LTA when it came to Tennis and Padel. They identified complications and conflicts with the LTA being the national governing body for two sports which appear to be competing for the same participants. Fred advocated change from the LTA to better support Padel's growth, questioning '*I wonder whether the LTA sees Padel as an entry route or pathway into tennis? Whereas I'm sure the public probably see it more as the other way around*'. The former perspective from the LTA could prove detrimental to Padel's growth for various reasons, most notably as Amelie observed '*Padel isn't taken as*

seriously as tennis in terms of investment, and it will always be a lower priority than tennis. That will continue for as long as the LTA remains as the governing body for Padel'.

In terms of future disruptive discourses and innovative practices, one challenge for Padel participants and policy makers is to establish how much of their specific racquet sport ecosystem Padel can influence and control, and the extent to which the disruptor will prevail (Raynor, 2011). A further challenge for Padel stakeholders will be building trust within the broader racquet sport ecosystem, serving unique Padel experiences, and to extract value through their ecosystem (Mosey et al., 2022). If innovation is linked to adding customer value, then in the context of Padel development, the challenge is to add customer value to the racquet sport ecosystem by leveraging an understanding of the larger, bigger picture and by ensuring that new innovative practices for Padel complement other parts of the racquet sport 'jigsaw' (Shipway et al., 2023).

Implications, limitations and areas for padel development

Although Padel is often promoted as an accessible, social, and inclusive sport (Playtomic, 2024), these findings evidence a mixed picture. Figure 1 proposes a framework for better understanding barriers for Padel development in England.

While many players value the sport's social aspects and physical accessibility across age, gender, ethnicity and ability levels, major financial, infrastructural, and geographical barriers persist. More specifically, whilst issues surrounding areas including ethnicity were not directly raised by participants, we acknowledge this could be partially due to the limited diversity of our sample, and it remains an area requiring further scrutiny. One significant barrier to participation was the financial cost associated with playing Padel. Although some participants found equipment and court hire prices manageable, the broader picture highlighted the high upfront costs of purchasing quality Padel rackets, and disparity in court rental prices between London and other regions. These financial barriers prove prohibitive for low-income groups (Steenhuis et al., 2009) and contradict the notion of Padel being accessible. Economic inequality in sport participation is extensively documented, with access often skewed by socio-economic status (Widdop et al., 2019), and Padel currently faces a similar situation.

Geographical and infrastructural limitations were highlighted as significant barriers. The uneven distribution of Padel courts, with a heavy concentration in London and major cities, limited participation opportunities for those in rural or underserved areas. This aligns with findings by Sport England (2025), who reported disparities in facility access between urban and rural regions. Furthermore, the lack of covered or indoor courts creates weather-related participation barriers and reduces Padel's year-round appeal.

From a socio-cultural perspective, participant perspectives on Padel accessibility were mixed. Some players praised the sport's inclusive environment across gender and ethnic grounds, but concerns remained about exclusivity linked to club membership costs and court scarcity. This replicates past accusations of elitism observed in tennis (Lake, 2016). The lack of visible role models, particularly for children and young people and diverse communities, was highlighted as a missing link for supporting broader community engagement.

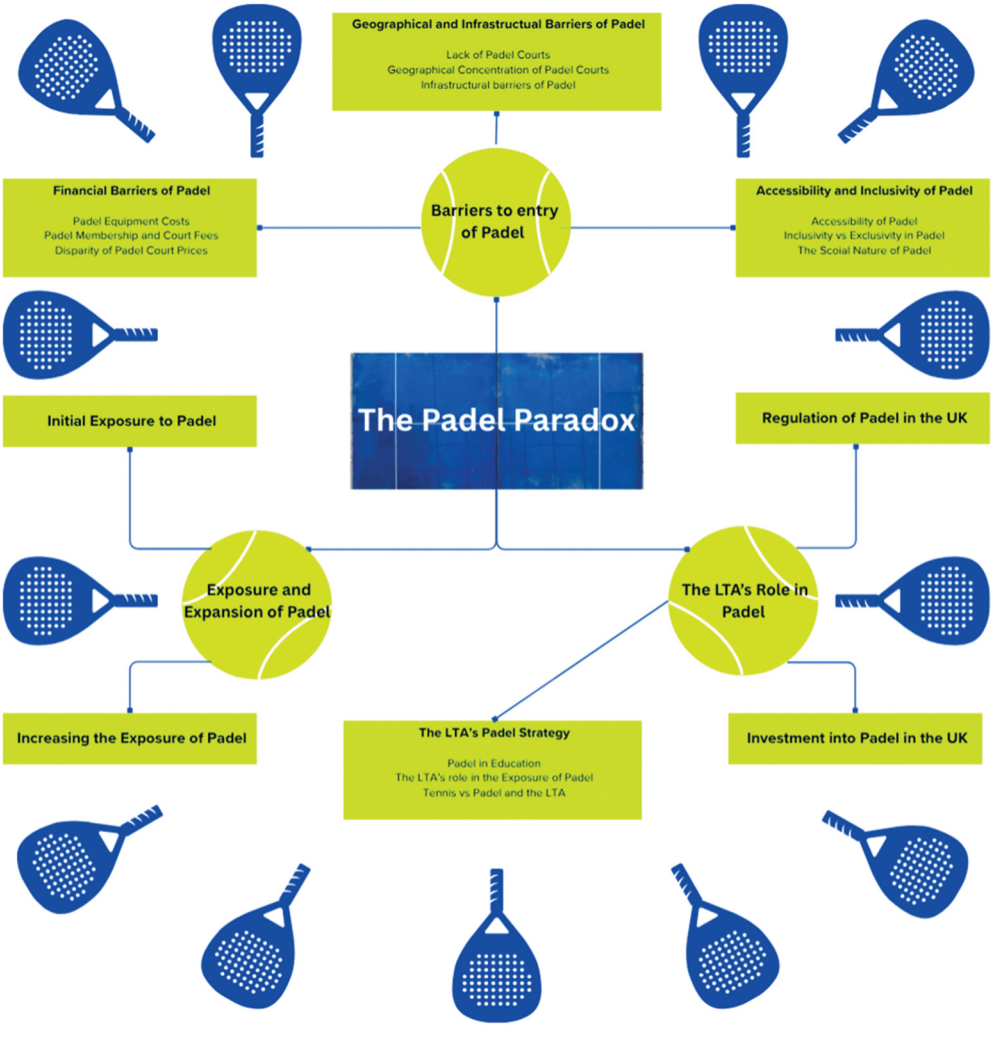


Figure 1. A framework for better understanding barriers for padel development in England.

The LTA's role emerged as both a strength and a weakness. Whilst investment in Padel accelerated the sport's infrastructure development (LTA, 2023), concerns remain about the perceived prioritisation of tennis over Padel and the need for clearer and fairer governance (Shilbury & Ferkins, 2019). Moreover, the lack of visible grassroots campaigns and school-level integration of Padel highlights missed opportunities for sustainable growth. The current structure of national governing bodies, private investors, and public sports policy questions whether current institutional frameworks are effectively supporting Padel development.

This study has two limitations. First, the data collected is limited to the South of England and is not fully reflective of either England or the UK. Second, the sample participants are Padel players, and the findings do not incorporate the views and perspectives of the wider ecosystem of Padel clubs, federations, coaches, or administrators. These two areas merit further scrutiny. There are additional areas that merit

further research. First, an exploration into adapted Padel for disabled participants, as despite Padel's growing profile current awareness and provision is limited. Second, as new courts are constructed, longitudinal studies tracking the impact of these developments on participation levels will help determine whether infrastructure alone is sufficient to drive sustained engagement. Third, deeper investigations into governance structures and pricing regulation would help ensure that Padel's growth is both equitable and accessible and can avoid the replication of exclusivity patterns often seen in more established sports. Fourth, given the prominence of social media visibility, further studies should explore how social media marketing and athlete role models influence perceptions of Padel among younger demographics. Padel would also benefit from investigating whether grassroots-level promotional social media strategies are more effective than elite-focused media content, providing valuable guidance for future marketing campaigns.

Fifth, international comparative studies examining how countries with more developed Padel ecosystems successfully integrate into mainstream culture would offer vital lessons for emerging Padel nations. Understanding global best practices in facility management, pricing strategies, and grassroots Padel development would inform a more strategic approach to overcoming the current challenges facing the sport. This recommendation echoes requests from Sandhar (2025) for more grassroots investment in state schools, ethnic minority areas and public parks across England to make Padel more accessible. Comparative studies investigating the barriers and enablers of growth in these contexts would provide valuable insights for local, national, regional and international Padel development strategies. Finally, key elements of disruption theory have previously been tested and validated through studies of many industries, including retail, computers, printing, motorcycles, cars, semiconductors, cardiovascular surgery, management education, financial services, management consulting, cameras, and communications (Christensen et al., 2015). However, there remains a paucity of studies on disruption theory in the context of sport and leisure organisations. This is an area ripe for further scrutiny.

Conclusion

The findings provide insight into complex and interconnected barriers that restrict the growth and accessibility of Padel in England. Using disruption theory in sport and leisure contexts allows more accurate predictions of which fledgling sports, like Padel, might succeed and provides a better understanding of what helps sports innovate successfully (Shipway et al., 2023).

Despite exciting growth and promising characteristics, Padel in England is still navigating a '*Padel Paradox*' where its portrayed image as an inclusive and accessible sport is not aligned with the reality for existing and prospective participants. Financial costs and limited geographical reach, infrastructural shortcomings, and a lack of grassroots and educational integration must be addressed if Padel is to achieve its full potential across the spectrum of demographics. The findings illustrate that disruption theory does not, and never will, fully explain innovations in sport or leisure organisations (Christensen et al., 2015; Mosey et al., 2022). According to Shipway et al. (2023), there are simply too many other factors and considerations

within the complexity and diversity of Padel development, which still merit further scrutiny to ensure that Padel in England develops into a truly accessible and sustainable sport for all.

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