



06/08/2025

# REPORT

**Courtside Cool: Why Padel's Having a Moment**



# AUDIENCE

## Demographics

United Kingdom, Age 18 to 45

## Custom Screening

How do you usually like to spend your free time?

**Qualified:** Staying active or exercising

**Unqualified:** Watching TV or relaxing at home, Meeting up with friends or socialising, Reading or listening to music, Playing video or mobile games, spending time on social media

## Custom Screening 2

Which of these activities have you played or done most recently...even just once in the past 3 months?

**Qualified:** Padel

**Unqualified:** Tennis or squash, Football, Gym, group fitness, running, Basketball



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## OBJECTIVE

To uncover the emotional, social, and lifestyle dynamics driving the rapid adoption of padel in the UK, identifying opportunities for brands across sectors to authentically engage with this vibrant, community-focused audience through culturally resonant strategies and offerings.

## BURNING QUESTION

How can brands ride the padel wave to create experiences, products, or partnerships that feel organic and exciting to this fast-growing movement?



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## CHAT GUIDE

1. What's your padel origin story? How did you first come across it?
2. So what was the moment you thought: 'Alright, I'm trying this padel thing'?
3. After playing it, how would you describe padel in three words to someone who's never heard of it?
4. Do you consider padel part of your fitness routine, social life or both?
5. How do you normally book your games...do you plan in advance or play spontaneously?
6. If padel were a person, what kind of personality would it have? Please rank these feelings in terms of how padel makes you feel.

Choices: Competitive, Energised, Part of something, Stylish or cool, Relaxed

7. How does playing padel make you feel, physically or emotionally?
8. What's the ideal padel session like for you? (Where, who with, before/after rituals?)
9. How does it compare to other sports you've played or tried?
10. Have you noticed any specific "types" of people or groups getting into it?



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## CHAT GUIDE

11. If padel had an “aesthetic” or style, what would it be?

12. Have you seen padel mentioned on social media, brand campaigns or pop culture recently?

13. Which brand do you think should claim padel before someone else does? For instance, Nike owns running. Who should own padel?

14. What kind of branded experiences or giveaways would actually excite you at a padel club? Could you please rank these potential brand tie-ins by what interests you most.

Choices: Branded padel fashion collabs, Limited-edition energy drinks / sports snacks, Fitness tracking tech that connects to padel games, Community tournaments sponsored by lifestyle brands, Locker room perks (free samples, merch drops)

15. Would you rather win...

Answers: A free year of padel coaching with your stats tracked by AI, A limited-edition smart paddle that logs every move, VIP access to global padel tournaments, sponsored by a lifestyle brand, A full padel style makeover, including kit, shoes, accessories and a photoshoot

16. If Airbnb launched a “Padel Getaway,” where should it be and what should it include?

17. Where do you see padel going next? Is it just a trend or here to stay?



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## AI SUMMARY

To organically ride the padel wave, brands must tap into the sport's three core pillars: community, style, and performance. Padel's meteoric rise is fueled by its potent blend of accessible, high-energy exercise and a deeply social, "chill" atmosphere. Brands can create exciting experiences by focusing on fostering this community spirit through sponsored local tournaments, which players feel "brings the game to the people." The social ritual extends beyond the court, with post-match food and drinks being integral to the experience, creating a natural space for hospitality and lifestyle brand partnerships. A dream "Padel Getaway" isn't just about courts; it's a complete social package in a desirable, sunny location like Spain or California, including accommodation and spaces to relax and socialize.

Stylistically, padel is carving out a "cool," "bold," and "trendy" identity, distinct from the perceived stuffiness of traditional racket sports. It's described as having a "Californian surfer dude vibe" or a "streetwear trendy vibe but chill," an aesthetic that makes it highly photogenic for social media. This presents a massive opportunity for fashion collaborations, as players express a strong desire to "look the part" and have unique padel-specific attire from brands like New Balance, Lululemon, or even unexpected lifestyle brands like Hollister. Finally, while fun is paramount, a significant segment is driven by self-improvement. Brands can connect authentically by providing performance-oriented technology. Fitness tracking that syncs with games is a highly-rated concept, and prizes like a "smart paddle" that logs moves or a year of AI-tracked coaching are often preferred over VIP event access, underscoring a desire for tangible tools that help players improve their game.



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## KEY INSIGHTS

### The 'Social Sweat': Padel Is the Workout Disguised as a Hangout

- Padel's appeal lies in its seamless blend of physical activity and social connection. Participants describe it as a 'social life which has fitness benefits' (P4) and a workout that 'doesn't feel like exercise' (P6) because the focus is on fun and camaraderie. The low-pressure, 'chill' atmosphere (P6) makes the intense physical exertion feel like a welcome byproduct of a good time.
- The experience extends far beyond the court. Post-match rituals like grabbing food or drinks are consistently cited as an integral part of the session (P1, P6, P8, P9), transforming a simple game into a full-blown social event. This makes padel a powerful tool for social bonding, especially for those with busy lives (P5), solidifying friendships and creating a sense of shared experience.

### Quotes:

"More social which has fitness benefits"

Age 37, Male

"The fact that it doesn't feel like exercise so you are just having fun and the competitive nature of it"

Age 31, Female

"So, he has a young family, he's got three kids. So, he doesn't actually get to have much of a social life. So, his weekends consists of doing things with the kids so I never get to see him then. So, this was an evening in the week where his partner was able to watch the kids and he could have a bit of him time because he deserves it. So, I suppose the best part of it was getting to spend time with him outside of work when he doesn't really get that option."

Age 30, Male

"With my friends, at our local courts, we always met up before and go in together and then after usually get something to eat or a drink"

Age 31, Female





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## KEY INSIGHTS

### The 'Just-Try-It' Effect: Accessibility Is Padel's Superpower for Growth

- A key driver of padel's rapid adoption is its exceptionally low barrier to entry. It's consistently described as 'easy to pick up' (P1), 'not as hard as actual tennis' (P2), and 'care free with not many rules' (P7). This perceived simplicity removes the intimidation factor associated with other racket sports, making it easy for players to invite new friends and grow their playing circles organically.
- This accessibility fosters a more inclusive and diverse community. Players note seeing 'a mix of people' (P7) and feel it's a sport 'anyone any age can play' (P10). This contrasts with the more traditional, and sometimes exclusionary, vibes of sports like tennis or golf, making padel a welcoming space for beginners and casual players to thrive.

### Quotes:

"I feel like it blends competition and creativity. It also feels easy to pick up"

Age 19, Male

"Yes not as hard as actual tennis"

Age 26, Male

"The game is care free with not many rules therefore it is extremely fun"

Age 21, Female

"I think Padel is just as fun if not more fun than any other sport because anyone any age can play and enjoy and have fun being active"

Age 23, Female



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## KEY INSIGHTS

### The Padel Persona: It's Not Just a Sport, It's a Style Statement

- Padel is successfully cultivating a distinct aesthetic identity that participants describe as 'trendy' (P1), 'bold' (P1), and 'much trendier than tennis which is dated' (P4). This visual identity is a core part of its appeal, with the sleek, glass-enclosed courts themselves being part of the 'bold aesthetic' (P1).
- This identity translates directly into player style, with many expressing a desire to 'look the part' (P4). The aesthetic is a hybrid of performance and casual cool, described as 'streetwear trendy vibe but chill' (P6) and even having a 'Californian surfer dude vibe' (P5). This has created a clear demand for branded fashion collabs (a top choice for P2, P7, P9, P10), signaling a major opportunity for lifestyle and apparel brands to define the look of this growing movement.

### Quotes:

"I think the enclosed glass court and that it's trendy makes it bold"

Age 19, Male

"Yes I think it looks like a cool sport to play / much trendier than tennis which is dated"

Age 37, Male

"I think it's quiet causal, maybe street wear trendy vibe but chill"

Age 31, Female

"It's all about the image for me and you have to look the part whilst playing"

Age 37, Male



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## KEY INSIGHTS

### Beyond the Game: Players Crave Deeper, Identity-Building Engagement

- Enthusiasts are looking for more than just a place to play; they want experiences and tools that deepen their connection to the sport and help shape their identity as 'padel players'. Their interest in brand partnerships goes beyond simple giveaways, focusing on things that offer tangible value in performance, style, or community.
- This is demonstrated by a strong preference for three types of engagement: performance-enhancing tech like fitness trackers and smart paddles (a top choice for P3, P5, P6), identity-affirming fashion collaborations (P2, P7, P9), and community-building events like local tournaments (P1, P8). Brands that can provide experiences or products that help players improve their game, express their style, or connect with others will be the most successful in authentically 'riding the padel wave'.

### Quotes:

"Fitness tracking tech is key to sporting actives as it allows you to track your progress"

Age 30, Male

"I think that padel players should have there own attire and be able to buy new padel fashion"

Age 23, Female

"Community tournaments brings the game to the people and can really generate excitement"

Age 19, Male

"It would mean that I could compete and make a name for myself"

Age 25, Male





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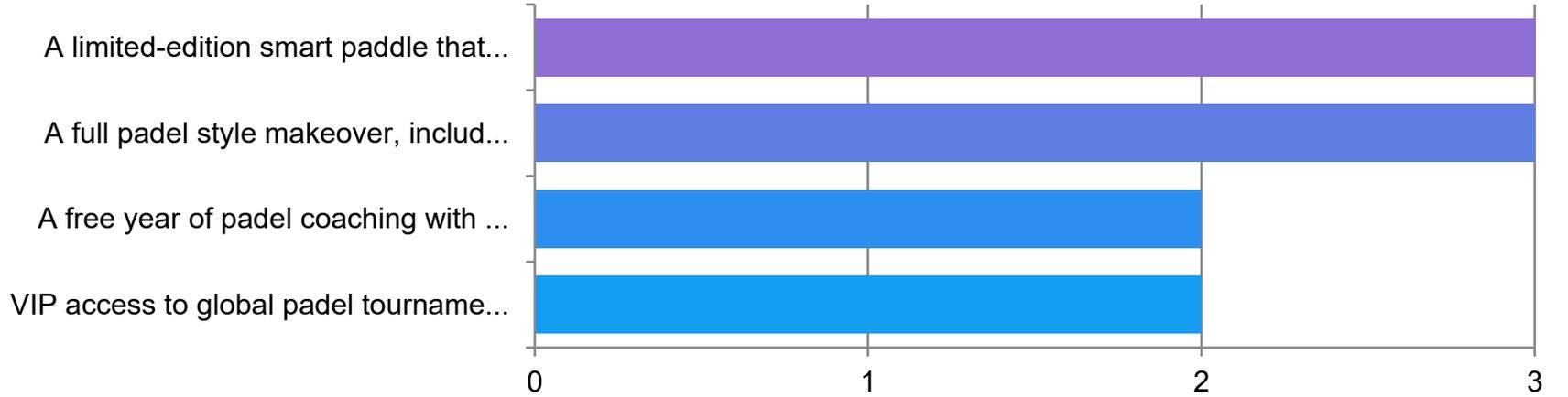
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## METRICS

Would you rather win...





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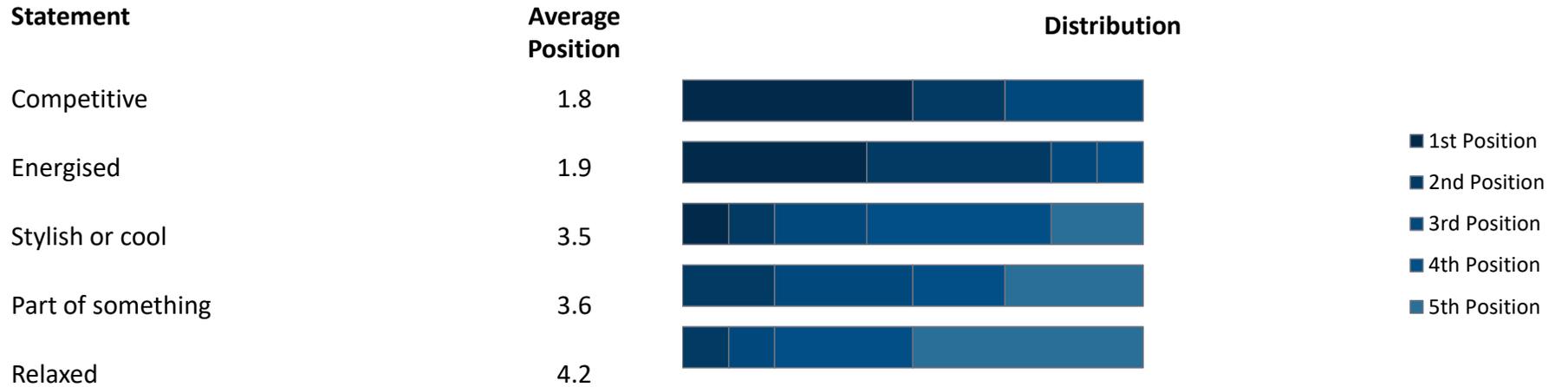
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## METRICS

If padel were a person, what kind of personality would it have? Please rank these feelings in terms of how padel makes you feel.





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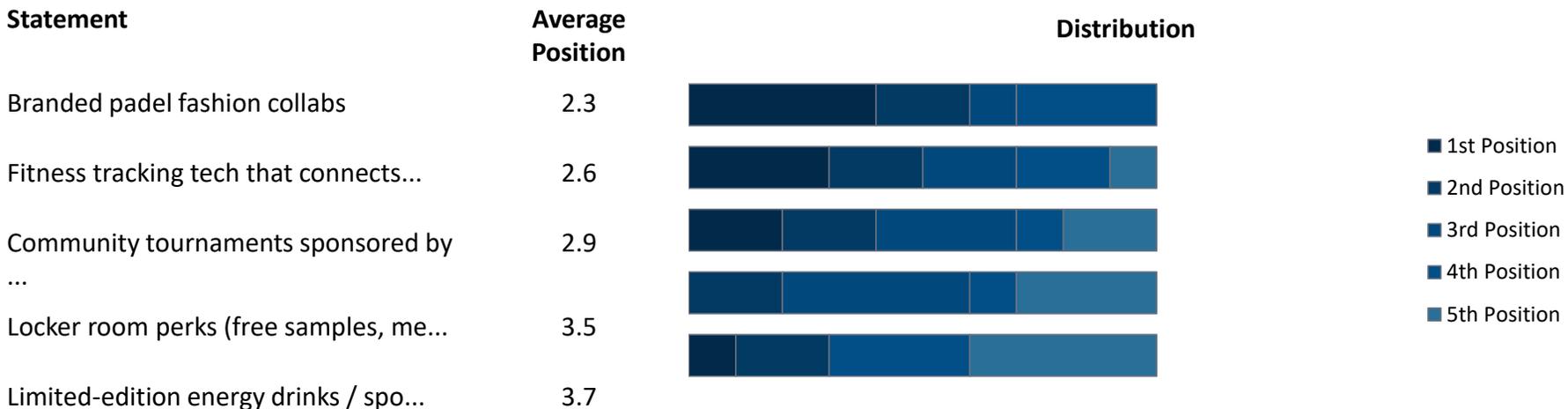
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## METRICS

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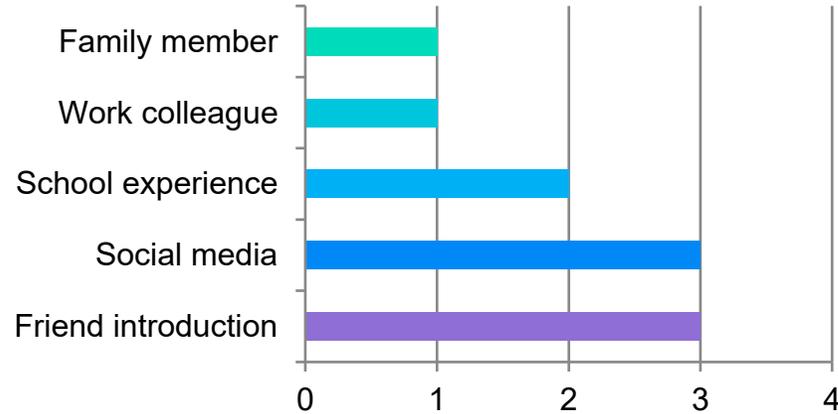
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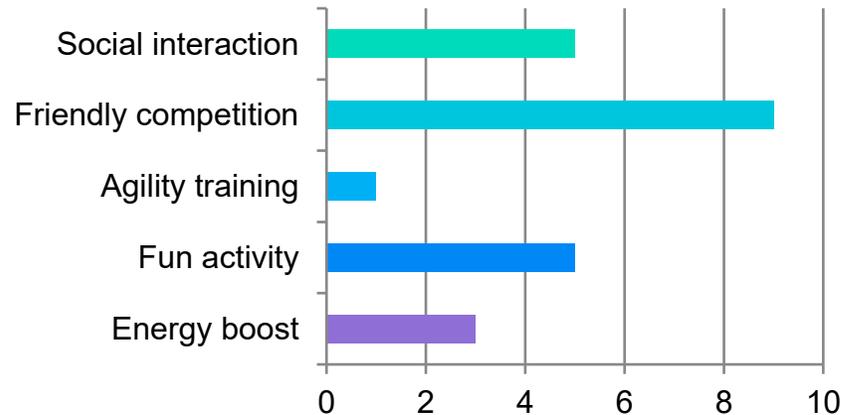
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## TOPICS

What's your padel origin story? How did you first come across it?



If padel were a person, what kind of personality would it have? Please rank these feelings in terms of how padel makes you feel.



# PERSONAS

## AUDIENCE

### Demographics

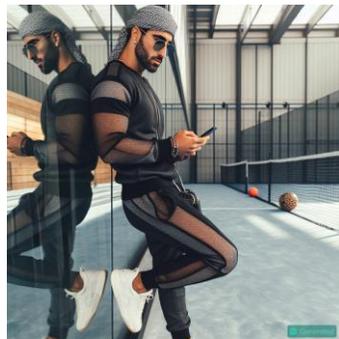
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## The Social Connector

### Description:

- This persona sees padel as a social event with a fitness bonus. The primary motivation is to connect with friends and family in a fun, active, and low-pressure environment. For them, the experience extends beyond the court; the post-game drink or meal is a crucial and cherished part of the ritual, making the activity a full-fledged social outing.
- They are drawn to padel's accessibility and 'carefree' nature. The simple rules and doubles format make it easy to get a game going and include friends of varying skill levels, ensuring the vibe remains 'chill' and fun rather than intensely competitive. They value the shared experience and the community atmosphere of the club over individual achievement.

## The Performance Maximiser

### Description:

- Typically aged 25-45, they plan games in advance to coordinate with the busy schedules of their friends and family. They describe the game as 'fun', 'social', and a way to be 'part of something', seeking connection and a healthy way to spend quality time together.
- Driven by competition and self-improvement, this persona approaches padel as a new athletic challenge to master. They are drawn to the game's intensity, speed, and the physical test of power, reflexes, and endurance. Winning matters, but the ultimate goal is measurable progress.
- They are tech-savvy and data-oriented, expressing strong interest in fitness tracking, smart paddles that log stats, and AI-powered coaching to analyse and improve their performance. Every session is an opportunity to get fitter, faster, and more skilled, and they see padel as an effective way to improve their general fitness and abilities in other sports.

## The Style-Driven Trendsetter

### Description:

- Aged 18-35, this individual is motivated by personal achievement. They describe padel as 'competitive', 'intense', and 'dynamic', and would choose a prize that offers in-depth performance analysis over a social experience of food and gear. This persona is attracted to padel's modern aesthetic. They see it as a 'cool', 'stylish', and 'trendy' activity that is more current and visually appealing than traditional racket sports. Their journey into the sport was likely sparked by social media, influencers, or seeing athletes play.
- For them, looking the part is integral to the experience. They are highly interested in branded fashion collaborations, style makeovers, and the overall 'vibe' of the sport, which they describe with words like 'bold', 'high octane', or even a 'Californian surfer dude vibe'. They are conscious of the brands associated with the sport and believe the right gear enhances

### Insights:

- The 'third space' is key: The experience doesn't end on the court. The café, bar, or restaurant nearby is integral to the social value of padel. Brands in the food and beverage sector have a major opportunity to partner with clubs to own this post-game moment.
- Inclusivity drives adoption: Unlike more technically demanding sports, padel's low barrier to entry makes it the perfect social glue. Marketing that highlights the ease of starting and the fun of group play will resonate strongly with this audience.
- Community over competition: While they enjoy the game, the real prize is the shared memory. Brands can tap into this by facilitating group experiences, sponsoring casual 'social' tournaments, or offering group booking perks, reinforcing the communal aspect.

### Insights:

- Data is a powerful motivator: There is a clear demand for technology that provides tangible feedback on performance. Brands that can integrate fitness tracking, shot analysis, or gamified progress metrics into the padel experience will capture this persona's loyalty.
- Skill development is a key currency: This group is hungry for resources that will help them get better. Coaching, specialised training camps (like an 'Airbnb Padel Getaway' focused on improvement), and content that breaks down high-level techniques are valuable offerings.
- Competition is the hook: While they may play with friends, the core driver is the competitive challenge. Brands can engage this persona through tiered tournaments, leaderboards, and partnerships that position their products as tools for gaining a competitive edge.

### Insights:

- Aesthetics matter: Padel is not just a sport; it's a style. There's a significant opportunity for fashion and lifestyle brands to define and 'own' the padel look, creating collections that are both functional and fashionable.
- Social media is the new court: This persona discovers, validates, and shares their padel experience online. Brands that create visually compelling content, partner with relevant influencers, and understand the social currency of the sport will thrive.
- Authentic collabs beat generic sponsorship: They are more excited by unexpected and cool brand tie-ins (Lululemon, Lacoste, New Balance) than by traditional sports drink



**REACH OUT TO US IF YOU HAVE  
FURTHER QUESTIONS ABOUT THIS  
REPORT**

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