

A Work Project, presented as part of the requirements for the Award of a Master's degree in
Management from the Nova School of Business and Economics.

SOCIAL AND ECONOMIC IMPACT OF PADEL IN PORTUGAL – THE SOCIAL IMPACT OF PADEL

Pedro Gonalo de Almeida Gomes Teixeira

Work project carried out under the supervision of:

Inês Caetano

17/12/2024

Abstract: This thesis investigates the social and economic impact of padel in Portugal in 2023, examining key metrics such as participation rates, consumer spending, employment, infrastructure investments, and media presence. The findings reveal padel's role as a catalyst for social inclusion, community cohesion, and individual well-being, while contributing an estimated €479 million to the national economy through direct and indirect channels. A sensitivity analysis was conducted, highlighting a potential economic impact range of €431 million to €527 million, depending on variations in growth factors. Highlighting its integration into Portugal's cultural and economic landscape, the study underscores padel's potential for sustainable growth. Recommendations for the Portuguese Padel Federation include leveraging initiatives like *Cidade do Padel* to amplify the sport's influence and ensure its continued expansion.

Keywords: Portuguese Padel Federation, Padel, Social Impact, Economic Impact, *Cidade do Padel*, Strategy.

This work used infrastructure and resources funded by Fundação para a Ciência e a Tecnologia (UID/ECO/00124/2013, UID/ECO/00124/2019 and Social Sciences DataLab, Project 22209), POR Lisboa (LISBOA-01-0145-FEDER-007722 and Social Sciences DataLab, Project 22209) and POR Norte (Social Sciences DataLab, Project 22209).

Nomenclature

Abbreviations

<i>AFEP</i>	Spanish Women's Padel Association (in Spanish: <i>Asociación Femenina Española de Pádel</i>)
<i>AJPP</i>	Professional Padel Players Association (in Spanish: <i>Asociación de Jugadores Profesionales de Pádel</i>)
<i>CML</i>	<i>Câmara Municipal de Lisboa</i>
CP	Casual Player
CR7	C stands for Cristiano, R stands for Ronaldo, and 7 represents his shirt number.
<i>CSD</i>	Superior Sports Council (in Spanish: <i>Consejo Superior de Deportes</i>)
ESPN	Entertainment and Sports Programming Network
F&B	Food and Beverages
<i>FEP</i>	Spanish Padel Federation (in Spanish: <i>Federación Española de Pádel</i>)
<i>FIP</i>	International Padel Federation (in Portuguese: <i>Federação Internacional de Pádel</i>)
<i>FPF</i>	Portuguese Football Federation (in Portuguese: <i>Federação Portuguesa de Futebol</i>)
<i>FPP</i>	Portuguese Padel Federation (in Portuguese: <i>Federação Portuguesa de Pádel</i>)
<i>FPT</i>	Portuguese Tennis Federation (in Portuguese: <i>Federação Portuguesa de Ténis</i>)
GDP	Gross Domestic Product
<i>INE</i>	Nacional Institute of Statistics (in Portuguese: <i>Instituto Nacional de Estatística</i>)
<i>IPDJ</i>	Institute of Sport and Youth (in Portuguese: <i>Instituto Português do Desporto e Juventude</i>)
LTA	Lawn Tennis Association
PP	Professional Player
PWC	PricewaterhouseCoopers International Limited
QR	Quick Response
RNA	Rafa Nadal Academy
<i>RTP</i>	Radio and Television of Portugal (in Portuguese: <i>Rádio e Televisão de Portugal</i>)
<i>RTVE</i>	Radio and Television of Spain (In Spanish: <i>Radiotelevisión Española</i>)
USA	United States of America
USPTA	United States Paddle Tennis Association
WHO	World Health Organization
WPT	World Padel Tour

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1. Historical and Structural Context of Padel

1.1 Origins and Development of Padel

1.1.1 Historical Evolution of Padel

Padel is now among the world's most rapidly expanding sports, with distinctive characteristics contributing to its continuous appeal to millions of players across different continents. Although padel is a relatively new sport, has a strong influence from various racket sports in its history dating back several centuries. From its prehistoric origins to its present global popularity, the development of padel presents a fascinating journey.

Early Influences in Modern Padel

Padel's origins trace back to the 13th-century French game *Jeu de Paume*, where players initially hit a ball with their hands before transitioning to rackets (Appendix 1). The indoor version (*courte paume*) resembled modern padel, requiring less space and enclosed areas (Gillmeister, 2008; Ferreira, 2004).

By the 19th century, paddle-games emerged in England, including a version played by sailors using oars to hit balls against ship walls, showcasing early ball games in confined spaces (Gillmeister, 2008; Sánchez-Alcaraz Martínez, 2013). Paddle tennis later shaped padel's evolution. In 1898, Reverend Frank Beal designed a smaller tennis variant with foam rubber balls and wooden paddles, ideal for urban areas like New York. The first tournament was held in 1922, and the following year saw the establishment of the USPTA. The sport spread widely, reaching over 500 USA cities by 1922 and becoming part of school curriculums (Almonacid-Cruz, 2011; Sánchez-Alcaraz Martínez, 2013).

Platform tennis was another relevant precursor that appeared in 1928. Fresedden Blanchardy and James Cogswell developed elevated courts with wire mesh fences, allowing winter play and introducing gameplay elements like bouncing balls off walls (Hernández-Vázquez, 1998; Sánchez-Alcaraz Martínez, 2013).

Modern Padel and Padel's Global Expansion

Modern padel was originated in 1969 in Acapulco, Mexico, when Enrique Corcuera modified a squash court, adding walls, a central net, and outdoor areas, laying the foundation for today's padel (Almonacid, 2011; Castellote, 2012). The sport spread to Spain through Prince Alfonso de Hohenlohe, who built Europe's first courts in Marbella in 1974, using wire fencing instead of solid walls. By 1987, the *FEP* was established, and the sport rapidly grew in regions like Andalusia, Madrid, and Barcelona during the 1990s (Castaño, 2009; Hernández-Vázquez, 1998; Lasaga, 2010).

In the mid-1970s, padel reached Argentina, amassing over 10,000 courts and 4 million players before expanding to Uruguay, Brazil, and Chile (Almonacid, 2011). In 1991, the *FIP* was founded in Madrid, formalizing rules and fostering international competition (Almonacid, 2011). By the 1990s, padel spread across Europe, including Italy, France, and Portugal, supported by local federations. Today, global organizations like *AJPP* and *AFEP* oversee professional tours featuring top players (Castaño, 2009; Hernández-Vázquez, 1998).

1.1.2 Introduction and Growth of Padel in Portugal

Padel was introduced to Portugal in the 1990s by the Spanish company All Padel, which established the first court at the Lisboa Racket Center and hosted the inaugural international tournaments. Initially, the sport remained niche, mainly played by the Spanish community in Lisbon (*FPP*, 2024). The late 1990s marked a turning point for padel in Portugal, beginning with the construction of two courts at the Vila Real de Santo António Tennis Club, followed by three courts at Quinta da Marinha, leading to the establishment of an association dedicated to promoting the sport and organizing tournaments. During this period, Portugal also began participating in the European and World Championships (*FPP*, 2024).

The opening of three additional courts at the Estoril Tennis Club was crucial in 2008, as the leading padel company at the time, Gesrackets, successfully organized a European Padel

Championship in Portugal. This event marked Portugal's best-ever finish in the championship, securing a commendable third place (FPP, 2024). This event catalyzed the rapid growth of padel courts nationwide, with facilities established in Oporto, Guimarães, Alentejo, Madeira, the Azores, Aveiro, and Vilamoura, leading Portugal to stand in the top 15 countries with the highest number of courts (FIP, 2024).

Portugal's international achievements include the women's team winning the 2015 European Championship and both men's and women's teams securing vice-champion titles at the 2017 European Championship in Estoril. The 2018 World Championship in Paraguay saw the women's team finish third, and the men's team fifth (FPP, 2024). In the WPT, Ana Catarina Nogueira became the first Portuguese player to win an event in 2018 at the Arroyo de la *Encomienda Challenger*. That year, Miguel Oliveira reached the semifinals of the *Cabrera del Mar Challenger*, achieving his best result (FPP, 2024).

1.1.3 The Padel Ecosystem: Stakeholders and Growth Drivers

The padel ecosystem comprises various entities and individuals driving its exponential growth into a multi-billion-dollar industry by 2022, highlighting its global financial impact (Playtomic and Deloitte, 2023). At the top of this ecosystem is the International Padel Federation, which promotes global expansion, accessibility for all, and unites federations, clubs, players, coaches, and industry partners (FIP, 2024). On a national level, the Portuguese Padel Federation manages and supervises padel competitions in Portugal. It not only sets the sport's regulations but also fosters its development. The FPP also aspires to be an international benchmark, bringing together everyone who plays, wishes to play, or simply wants to learn more about this remarkable sport, embodying the motto: "Padel for everyone, by everyone!" (FPP, 2024).

Padel clubs play a key role in this ecosystem, with organizations like Lisboa Racket Center, Star Padel Coimbra, and Padel Athletic Club being prime examples, among an ecosystem that encompasses 250 clubs in 2023 (Appendix 2; FPP, 2023). These are generally for-profit

organizations that own multiple padel courts, offering enthusiasts the chance to play in exchange for a fee. Beyond court rentals, these clubs may also provide other services such as tennis and squash courts, bar services with food and beverages, lounge areas, locker rooms, padel lessons, and even equipment sales (PwC, 2024).

Court manufacturers, such as Padel 1969, Padel Galis, All For Padel, and PadelCreations, contribute by focusing on the construction, installation, and maintenance of padel courts. These companies play a key role in expanding the infrastructure needed for the sport's growth.

Similarly, equipment retailers, including brands like Nox, Bullpadel, Babolat, and Cork, play a crucial role in the ecosystem by producing the main padel equipment. These companies manufacture everything from rackets and balls to accessories, specialized footwear, and clothing designed for padel players.

Professional players, such as Sofia Araújo and Miguel Deus, represent Portugal in global competitions, while casual players enjoy padel for recreation and fitness. High-profile celebrities like Cristiano Ronaldo and Roger Federer further popularize the sport through their influence. Coaches like Gervásio del Bono and José Pires da Silva nurture talent, guiding beginners and professionals alike (FPP, 2024).

Events such as the Cupra *FIP* Tour, Premier Padel, and *FIP* Promises further strengthen the ecosystem. These competitive events, organized by federations and clubs, bring together players and fans, showcasing the sport at its highest level (FIP, 2024).

Commercial brands and sponsors, including Cupra, Tie Sports, Adidas, and Decathlon, are crucial for the financial sustainability of the padel ecosystem. These entities provide financial or non-monetary support/compensation in exchange for commercial opportunities, driving investment in the sport and turning it into a profitable, promising and rapidly growing industry.

The role of media and broadcasting cannot be overlooked. Networks like ESPN, *RTVE*, Record, and Padel World Press play an essential part in spreading information, entertainment, and news

about padel (Playtomic and Deloitte, 2023). By securing broadcasting rights, these platforms ensure that padel reaches a broad audience, increasing the sport's visibility on both national and international stages. In addition, the government contributes by setting policies that regulate sports in the country and supporting the public administration of sports activities, indirectly influencing the growth of padel.

Finally, at the heart of the padel ecosystem are the fans. These devoted supporters embody the spirit of the sport, forming strong and enduring connections with it. Fans are essential to the vitality and continued success of padel, fuelling its growth and popularity.

1.1.4 Role and Impact of the Portuguese Padel Federation

The *FPP*, founded on April 26, 2012, is a non-profit public utility association operating as a private legal entity. It holds the exclusive mandate to regulate, oversee, and organise padel activities within Portugal. Its primary goals are to represent Portuguese padel both domestically and internationally, manage and supervise competitions, coordinate events at local, regional, and national levels, and promote the growth and awareness of padel across the country (*FPP*, 2024). *FPP* oversees over 250 clubs that hold active licences, and organizes 16 annual tournaments, in youth, veterans, social and absolute categories, while overseeing an additional 119 tournaments as part of its official calendar. Portugal boasts 13 thousand active license padel players, from a total of 27 thousand (*FPP*, 2023).

The *FPP* aims to establish padel as a leading sport in Portugal, while making padel accessible to everyone, from amateurs to professionals. There are currently 20 professional padel players in Portugal, according to *FPP*. The federation envisions to enhance Portugal's standing in the international landscape by boosting talent and hosting major international competitions, through its collaboration with International Padel Federation and gradually position Portuguese padel as driving reference in global padel (*FPP*, 2024).

2. The Growing Social and Economic Impact of Padel

2.1 Global Expansion and Impact of Padel

Sports provide benefits in four main areas: they promote health and quality of life, provide physical and mental education, promote social inclusion of the younger generation by creating role models, and promote economic and social development as an important global industry as the process of professionalization transforms sports from a game into an economically viable sector (Orunbayev, 2023).

The padel industry has grown substantially in the last decade, with its estimated annual market value nearing €2 billion in 2023. A significant portion of this market, approximately €1.4 billion, was concentrated in the hands of club operators, court construction companies and apparel and equipment manufacturers. Current forecasts indicate that strategic growth in the United States, United Kingdom, Germany, Middle East and Australia markets will propel the market's expansion to €6 billion by 2026 (Playtomic & Deloitte, 2023). Even while the post-pandemic era saw remarkable expansion, future trends indicate that growth will stabilize at a robust annual rate of 17%, marginally lower than the astounding figures observed in the immediate aftermath of COVID-19 (Appendix 3).

From 2016 to 2022, padel clubs surged by 249%, while padel courts expanded by 269%. In 2022, almost €200 million was allocated globally to establish new padel courts (Playtomic & Deloitte, 2023). During 2023, more than 2,500 new padel clubs were founded worldwide, averaging 51 new clubs each week (Appendix 4). Furthermore, nearly 6,000 extra courts were established globally during the same year, equating to approximately 111 new courts per week (Appendix 5), with 670 courts built in the Middle East and 274 added in the USA. By 2026, the global count of padel courts is anticipated to reach 70,000, primarily attributed to the regions where padel is still emerging (Appendix 3). There is excellent potential for growth in the United

States since, if padel becomes as present as Spain in the future, there would be around 63,000 courts, applying the ratio of courts per inhabitant (Crespo, 2023).

The growing global popularity of padel has considerably boosted the racket market, with over 4.5 million rackets sold in 2023 alone (Playtomic & Strategy&, 2024). The sports equipment has become a rapidly growing multinational industry (Orunbayev, 2023). Despite the global market size of padel equipment – rackets, balls, accessories and clothing – still being significantly smaller than tennis – estimated at less than one-third in 2022 – padel’s equipment market is projected to experience substantial growth in the coming years (Statista, 2022).

In 2023, The *FIP*’s influence grew considerably, setting records by hosting 163 tournaments across events like the Premier Padel, the Cupra *FIP* Tour, and the *FIP* Championships in 30 nations. Apart from competitive tournaments, the growing prevalence of padel-related events, including the French Tour Padel in Nice and the Padel Trend Expo in Milan, highlights the sport’s capacity to generate networking prospects and drive tourism-related expenditure in host cities (Playtomic & Strategy&, 2024). Direct spending by sports tourists at host facilities, accommodations, restaurants and entertainment venues stimulates the local economies (Grobelna & Skrzyszewska, 2019).

Spain demonstrated its leadership in the global padel landscape in 2023, with almost 16,000 operational courts representing the most extensive infrastructure of its kind worldwide, a growth further reflected in the participation of over 5.5 million amateur players consistently engaging in the sport throughout the year (*FIP*, 2024). The increasing popularity of padel is evident not only in the surge of recreational players but also in the escalating number of federative licenses issued across various player categories: veterans, adults (absolutes), and youth (minors). Since 2012, official padel licenses have more than doubled, rising from nearly 39,652 to 101,326 in 2023 (Appendix 6). Key advantages for individuals federated through the *FEP* include access to official competitions, medical insurance and the opportunity to appear

in official national, regional, and provincial rankings (*FEP*, 2024). By the close of 2023, padel had surpassed tennis with 10,292 more licenses, marking the fifth consecutive year it outpaced tennis in licensed players. This trend underscores the sport's sustained growth in a country where tennis has traditionally held a prestigious status (*CSD*, 2024).

In the period spanning 2009 through 2016, the Andalusian Padel Federation – the third in federative affiliates in Spain, following Catalonia and Madrid – underwent substantial economic growth driven by an increase in income from federative licenses across various player categories: veterans, adults (absolutes), and youth (minors). During this seven-year period, the number of licenses increased from 7,086 in 2009 to 9,773 in 2016. The economic contributions from these categories reflected their respective levels of participation: minors contributed €228,632 (8.52%), absolutes €692,102 (25.80%), and veterans €1,762,092 (65.68%). Notably, although minors generated the least revenue, their category exhibited the highest growth rate at 361.68% (Gómez-Chacón et al., 2018).

Several European nations have adopted padel alongside Spain, acknowledging its capacity to draw new participants and promote community involvement. In Great Britain, 25 tennis federations have embraced padel as a strategic initiative to expand their audience, reduce entry barriers, and increase involvement in both tennis and padel. Since 2021, the LTA has invested over €7 million to enhance facilities, increasing courts from 50 to 250 in 2023, representing a 400% growth. The objective is to increase the number of courts to 1,000 by 2026, elevate the annual player count from 129,000 to 400,000, and augment the padel coach and activator workforce from 40 to 7,000. (LTA, 2024).

Sweden is a logical case study because it has one of the highest numbers of padel players and courts per capita. From 40 courts in 2015 to 4,200 in 2023, padel's growth rate is unprecedented and has led to increased social engagement through inclusive events like “Americano” tournaments, where players are placed in different teams for each match and play with various

partners. Unlike traditional tournaments, players continue participating regardless of match outcomes, and cumulative points determine the winner. Some padel centres, such as Hede Padel, promote sustainability by incorporating eco-friendly systems like solar panels, energy-efficient construction, sustainable construction materials and repressurized balls, blending social and environmental initiatives (Carlsson, 2023).

Italy is another noteworthy case study, as it ranks second in the number of padel courts globally, following Spain (Appendix 7). Premier Padel said its Italian Open in Rome in July 2023 attracted 25,000 paid fans over nine days, bringing in gate receipts of €1.2 million, a 44% increase on the previous year. This edition of the BNL Italy Major also achieved great success online and on social media. The *FIP* website recorded 719,000 page views with 78,000 unique visitors during the tournament and the Instagram page reached 1.5 million impressions. Lastly, more than 700 articles were published in the national and international press (*FIP*, 2023).

For 2024, it is projected that more than 600,000 players would be formally registered with federations worldwide, encompassing 71 national federations. The worldwide player base is projected to exceed 30 million, with approximately 40% being female players (*FIP*, 2024). The social role of sports, including padel, is increasingly recognized by industry leaders. A global report revealed that 80% of sports executives see a growing societal role for sports as a driving market force. More than ever, stakeholders – ranging from fans to sponsors and governments – expect sports organizations to address societal issues such as diversity, inclusion, environmental sustainability, and community engagement. (PwC, 2021).

Engaging in physical activity programs centered around racket sports like padel seems to enhance aerobic fitness, decrease body fat percentage, promote a healthier lipid profile, lower the likelihood of developing cardiovascular diseases, and strengthen bone health (Pluim et al., 2007). Neuropsychological studies indicate that padel may generate higher levels of dopamine and endorphins than other sports, hence increasing player satisfaction and motivation

(Playtomic & Deloitte, 2023). As players increase their participation in padel, they experience more favourable emotional states, as measured by the Profile of Mood States, demonstrating a positive correlation between padel participation and subjective well-being (Villena-Serrano et al., 2020).

A study involving 60 adult women (aged 35 to 55) from Extremadura, Spain, revealed notable physical fitness and body composition enhancement because of consistent padel practice. The health advantages of padel indicate its beneficial effects on physical fitness, especially in middle-aged women. Women who engaged in padel exhibited superior physical fitness compared to their sedentary counterparts, showing better balance, explosive power, abdominal endurance and cardiovascular capacity (Courel-Ibáñez et al., 2020).

2.2 Padel's Economic and Social Impact in Portugal

Padel's growth is driven by several key levers, which include substantial investment, the absence of stringent legal barriers, a high rate of tennis penetration, significant contributions from private sector initiatives, a socially active population with a strong interest in sports, the impulse provided by public figures, and the organization of competitions that foster community engagement and service development (Playtomic & Deloitte, 2024).

In Portugal, padel courts are designated as removable installations, thereby obviating the requirement for extensive permits and licenses while enabling most padel facilities to operate as for-profit businesses, which fosters significant investment and development. This approach differs from the scenario in countries like Germany, where the prevalence of non-profit sports clubs and the classification of padel infrastructures as buildings complicates development (Playtomic & Deloitte, 2024). Moreover, Portugal's advantageous climatic circumstances provide a significant availability of outdoor padel facilities. In 2021, 31% of the nation's padel infrastructure comprised outdoor facilities (Playtomic & Deloitte, 2022). Consequently,

investing and establishing padel infrastructure in Portugal is attainable, as seen by the significant increase of padel clubs, which rose from 18 in 2013 to 250 in 2023 (Appendix 2).

This expansion in infrastructure has catalysed a considerable rise in player participation, with estimates for 2023 indicating that over 3% of the Portuguese population was actively engaging in the sport (*FPP*, 2024). High tennis penetration has provided a natural entry point for padel, allowing tennis players and enthusiasts to transition into the sport quickly. By 2021, approximately 200,000 individuals in Portugal were already playing padel recreationally, thus surpassing the estimated 175,000 tennis participants in the same period (Playtomic & Deloitte, 2022). Despite this rapid growth, the broader adoption of padel as a recreational sport has outpaced its formal professionalization as a disparity remains in the number of federated players between the two sports. In 2023, the *FPT* reported 27,578 registered practitioners, compared to just 11,554 in the padel federation (*IPDJ*, 2024).

The economic influence of padel in Portugal is demonstrated by the remarkable expansion of private local enterprises within the industry. The Portuguese premium brand Volt reported approximately €665,000 in revenue in 2021 (Appendix 8), marking a threefold increase from the previous year. This company offers a diverse range of products, including six models of rackets and intricately designed backpacks developed in collaboration with product engineering specialists. Volt projects an ambitious profit target of €10 million by 2027 (Forbes Portugal, 2021). The brand Quad, which owns the first Portuguese factory for carbon padel rackets, initially began producing rackets in a facility located in Spain. In 2021, seven months after launching the business, Quad started receiving a growing number of orders, making production in the neighbouring country unsustainable. It was then that the company decided to take a significant step forward by opening the Quad Factory, its own production unit in Braga, ensuring product quality control and efficient deliveries. In 2024, their goal is to reach close to €2 million in revenue (Forbes Portugal, 2024).

In Portugal, not only is padel growing, but the sports industry is expanding significantly as well. The average gross monthly earnings per employee in the sports sector for 2023 in Portugal was €1,461, reflecting an increase of 6.9% compared to 2022. The activities of sports clubs stood out with the highest average gross monthly remuneration per worker with €2,713. Additionally, the number of employed individuals in the sports sector has steadily risen. In 2023, employment was estimated at 45,600, a 5.6% increase from the previous year (*INE, 2023*).

Portugal has emerged as a leader in the growth and popularity of padel, ranking as the second-highest growth country in 2023, surpassed only by Denmark (*Playtomic & Strategy&, 2024*). This rise is supported by strong public interest in sports and the socially active Portuguese population, which resonates with as padel is a team sport, people who are more sociable are more likely to show interest in the sport. Furthermore, Portugal is projected to surpass Denmark in 2024 as it ranks second globally in demonstrating the highest level of interest in padel over the past 12 months, based on search activity on Google (*Appendix 9*).

Portugal stands out as one of the countries that has hosted the highest number of WPT tournaments, a global competition that allows new people to get to know padel and become interested (*FPP, 2024*).

Portuguese padel market is expected to continue its growth trajectory in the coming years until it reaches maturity. Significant untapped potential remains in numerous countries of international significance, with Portugal being one of them. The ongoing rise in investment and the continued boost from the private sector will sustain this expansion until the market stabilizes in the maturity phase (*Appendix 10*).

3. Measuring Social and Economic Impact in Sports

In recent years, sports, particularly high-performance disciplines, have increasingly been viewed as products designed to maximize profitability. In modern economies, sports contribute directly to economic activities and can act as catalysts for broader social and economic

initiatives. They not only stimulate local economies but also serve as powerful motivators for individuals and communities, fostering engagement in both economic and social contexts.

The economic impact of sports primarily arises from spending that would not have occurred otherwise. According to Hodur and Leistriz (2006), this spending originates from three principal sources. First, facility construction, which represents a one-time expense but generates long-term benefits, especially in the case of mega-events. Although the costs of such infrastructure can be substantial, particularly for local taxpayers, as Matheson (2012) highlights in his evaluation of emerging economies, the social and economic gains can also be significant, extending far beyond the events themselves (PIT Journal, 2012). The second major source of spending relates to facility and event operations, which include routine expenses such as maintenance, supplies, advertising, and other operational needs (Hodur & Leistriz, 2006). These are relatively straightforward to measure and are often incorporated into economic impact assessments. A third crucial component involves attendee spending, which encompasses expenditures by participants such as athletes, coaches, media representatives, spectators, and sponsors. Their spending on transportation, accommodation, food, and other local services contributes significantly to the economy, particularly during major events (Smeral, 2003; Hodur & Leistriz, 2006).

Beyond economic considerations, the social impacts of sports are vast and extend well beyond the widely reported benefits to physical health. For instance, participation in sports has been linked to improvements in mental health, such as the reduction of symptoms associated with anxiety and depression, along with enhanced self-confidence, social skills, and overall well-being (Eime et al., 2013). Moreover, sports contribute to economic growth by generating employment, boosting tourism, and increasing productivity, all of which enhance the Gross Domestic Product (ABS, 2013; Ahlert, 2006).

From a community perspective, sports can play a significant role in social inclusion and the prevention of antisocial behaviour. They foster community development through volunteering and encourage a sense of belonging within the local population (Sandford, Duncombe, & Armour, 2008; Davies, 2004). Nonetheless, it is also important to recognize the potential negative effects of sports, which include risks of physical and mental harm, such as injury, overuse, and the development of issues related to body image and mental health. Moreover, the exposure to harmful marketing – such as alcohol, junk food, and gambling sponsorships – can have detrimental effects on participants and audiences alike. Antisocial behaviour, including violence and excessive drinking, also occasionally accompanies major sporting events.

3.1 Methods for Measuring the Social and Economic Impact of Padel

We employed a mixed-methods approach, incorporating both qualitative and quantitative research into our project. This dual approach was designed to maximize the relevance and scope of the data collected, aiming to deliver a realistic estimation of the sport's impact within the country. First, we conducted qualitative research by organizing interviews aimed at gaining in-depth insights into the current landscape of padel. This phase focused on gathering perspectives and beliefs from people and entities within the padel ecosystem. After completing the qualitative phase, we proceeded to the quantitative research by conducting a questionnaire targeted at a more specific layer of this ecosystem, primarily aimed at players, who are among the most relevant stakeholders in the sport, and also developed a structured sample, based on survey's results. The questionnaire was only developed after the interviews were conducted, as its content was structured based on the interview findings to ensure the survey's focus and the feasibility of its results. We also conducted a representative sample that included a 10% selection of padel clubs across various regions, as well as financial data from the four major padel companies in Portugal, sourced from balance sheets and profit-and-loss statements available on the Orbis platform. Moreover, it is worth noting that all the interviews conducted,

as well as the questionnaire developed, were carried out in Portuguese due to the participants' nationality. However, the subsequent analysis of both was entirely conducted in English.

3.1.1 Qualitative Research

The qualitative research was conducted to obtain a deeper understanding of the views and opinions of those deeply involved in the national padel scene, with the goal of comprehend the current status of the sport in Portugal, the key drivers behind its growth, and the main tangible and intangible impacts that padel has brought to the country. This process involved conducting semi-structured, one-on-one interviews that provided essential insights from individuals connected to Portuguese padel in different ways. Five initial interview guides were designed, each organized into sections focusing on the main potential areas of analysis (Appendix 11). The templates were tailored to five major groups of stakeholders: padel clubs, padel companies, coaches, casual players, and professional players. Each template began with a brief warm-up to explain the study's purpose and the potential value it could bring to the *FPP*. This introduction was followed by a set of filter questions, including consent for recording the interview for further analysis. Afterward, a padel perception section was design, which was common to all stakeholder groups. However, after this section, each template included customized sections for the five types of stakeholders. For casual players, this was followed by sections on Practicing the Sport and Equipment; for professional players, it was followed by Practising the Sport; for coaches, it was followed by Practicing the Sport, Lessons Related, and Equipment; for padel clubs, it was followed by a Padel Club Business; and for padel companies it was followed by a Company Business section. All interview guides concluded with sociodemographic questions and a brief wrap-up, allowing interviewees to add any topics they deemed relevant.

The templates served as flexible guidelines, allowing the interview flow to adapt to the interviewee's background and responses. The interviews were therefore not required to follow a rigid order, nor were all questions mandatory. This flexibility allowed us to tailor each

interview to the specific expertise and context of the interviewee. Initially, we planned to interview five casual players, three professional players, three coaches, twelve padel clubs, and three padel companies. The sample sizes were determined based on the relative representation and influence of each stakeholder group within the padel ecosystem, as well as their relevance to the subsequent survey phase. Specifically, the decision to include more players than coaches reflects the significantly larger population of players compared to coaches in the sport, ensuring the player perspectives are adequately captured. Similarly, while this proportionality might imply interviewing more players than clubs, we prioritized club interviews for several reasons. Clubs were not included in the survey phase, making their representation critical to achieving a comprehensive understanding of the sport's infrastructure and organizational dynamics. Additionally, their insights provide valuable context for interpreting the experiences and behaviours of other stakeholders, such as players and coaches. By selecting these sample sizes, we sought to balance the need for representativeness with practical considerations such as accessibility and the diversity of perspectives, ensuring a robust foundation for the study's qualitative analysis. The inclusion criterion for interviewees was belonging to one of the five main stakeholder groups mentioned above, possessing knowledge of and active involvement in the Portuguese padel scene in any capacity, with convenience also playing a role in participant selection. Additionally, for players and coaches, geographic, gender, and age distribution were considered to enhance the representativeness of the responses. In the selection of padel clubs, geographic distribution was prioritized, given the varying regional contexts across the country. Regarding padel companies, the main criterion to consider was the significant magnitude and impact of the brands in the Portuguese market. Despite challenges and unforeseen obstacles, data collection was successful, achieving most of the expected number of interviews. Most interviews were conducted online and recorded solely for the purpose of accurate transcription (Appendix 12), each lasting approximately 30 to 45 minutes.

Alongside these interviews, we also held several informal meetings with the *FPP*, whose representatives provided valuable insights that supported our research. These meetings also facilitated access to essential data and contacts, such as selecting and connecting with padel clubs. Leveraging the federation's expertise in identifying key stakeholders across the country helped mitigate the potential bias inherent in the convenience component of the sampling method mentioned above.

Upon completing data collection, we conducted a thematic analysis to identify patterns and generate hypotheses within the qualitative dataset, examining the occurrence of key terms. To support this analysis, we employed an analysis grid, which enabled us to compare and categorize the collected data (Appendix 13). This approach allowed us to detect response patterns, establish certain parameters, identify underlying relationships within the data, and draw conclusions from the interviews.

3.1.2 Quantitative Research

Our quantitative research aimed to obtain concrete data and responses on topics explored during the interviews, with the added goal of expanding the sample size to include a significantly larger group of respondents. This broader sample allows us to work with a substantial range of data and perspectives, enabling us to generalize findings to a national level. This approach helps reduce the risk of underrepresentation and minimizes potential response bias, as the sample size is large enough to ensure diverse input.

To achieve this, we developed a survey targeting the Portuguese population at large with a primary focus on padel players of all ages and genders, with different levels of experience and varying playing frequency. The survey also includes a brief section for non-players, allowing them to respond with minimal time investment. For non-players, our aim is to identify the main reasons they have not yet tried padel, as well as to gauge their interest in trying the sport. This

information will help us pinpoint areas for potential improvement and identify strategies to attract more players and padel enthusiasts.

For padel players, the survey's main objective is to obtain data on what initially attracted them to the sport and what motivates them to continue. We seek to understand the social and health benefits they experience and the specific ways in which padel has impacted their lives. Additionally, the survey aims to gather data on the financial aspects of padel participation, allowing us to estimate the economic impact from player spending. This includes expenditures on equipment, tournament fees, lessons, and other padel related activities.

As with the interview phase, the survey begins with a brief introduction to contextualize respondents and concludes with a short wrap-up. To maximize outreach, the survey was distributed via various social media channels and padel groups to ensure the highest possible number of responses and achieve broad representation. To encourage completion, we designed the survey primarily with multiple choice questions and kept it concise, aiming for a completion time of 3 to 5 minutes to reduce drop-off rates. Despite its brevity, all relevant questions were included to capture the essential data for this study (Appendix 8).

The survey achieved a total of 526 responses, encompassing a diverse range of individuals. The majority of respondents were social players accounting 411 participants (78.14%), while 1.33%, 7 participants, identified as professional players. Non-players accounted for 108 participants (20.53%). In terms of gender, 65.59% of respondents were male, 33.65% were female, and a small number (0.76%) selected other or preferred not to disclose their gender. Regarding age distribution, the largest group of respondents fell into the Generation X category (ages 44-59), representing 39.16%. Generation Z (ages 15-27) followed with 30.23%, while Millennials (ages 28-43) accounted for 25.48%. Baby Boomers (ages 69 and older) comprised 5.13% (27 participants), and no respondents were under the age of 14. The geographic distribution of respondents was also broad, with significant representation from key regions

such as Lisbon (32.70%), Coimbra (23.76%), and Setúbal (24.90%). Smaller numbers of responses were collected from regions such as Porto, Madeira, Aveiro, and others, reflecting a diverse and geographically varied dataset.

The quantitative analysis of the economic impact of padel in Portugal utilized financial data, from padel clubs and companies, from the Orbis platform which provides verified and comprehensive information on companies and organizations worldwide. This ensured the accuracy and reliability of the data used in this research. The financial documents analysed included balance sheets, profit-and-loss statements, and global financial ratios, which are essential for assessing metrics such as revenue generation, and employment impact. To ensure representativeness, a 10% random sample of padel clubs was selected, encompassing 25 clubs out of 250 registered nationwide (FPP, 2023). The sample included clubs from diverse regions: North, Center, South, Greater Lisbon, Greater Porto, and the Islands. By analyzing their financial and employment data for the years 2019 to 2023, the broader economic footprint of padel clubs in Portugal was estimated, and average values were derived to provide a robust representation of the sector's employment and economic landscape. For padel companies, four major players – Cork, Globo Padel, Volt Padel, and Quad – were selected due to their significant roles in the market. The methodology also accounted for regional disparities by stratifying the sample geographically, ensuring a balanced analysis of the sector's dynamics across Portugal. Financial records from these companies, covering the years 2019 to 2023, were analysed. This analysis forms the foundation for evaluating the economic impact of padel, with a focus on revenue generation, and employment contributions. Financial and employment data were cross-referenced and validated to maintain consistency and reliability. Additional details, including a breakdown of the sample and supplementary analyses, are provided in Appendix 8.

Through this approach, we aim to address our main research question: “*What is the actual social and economic impact of padel in Portugal?*”. In this way, the following sections will focus on

answering: “*What is the social impact of padel in Portugal?*” (section 5), “*What is the economic impact of padel in Portugal?*” (section 6), and “*How might a project with the scale of Cidade do Padel impact the future of the sport and the country itself?*” (section 7). By integrating both types of methods presented, the perspectives and insights of the various stakeholders consulted, and by addressing the aforementioned questions, it will be possible to achieve a holistic understanding of the current impact of padel in Portugal across its various dimensions, both economic and social. Furthermore, we aim to assess and measure the consequences and impact of *Cidade do Padel*, a project currently under development, on the dynamics of the sport, its positioning in the country, and its potential to drive the sport’s progress in Portugal. Ultimately, this study will provide insights into the financial flows generated and circulating around padel, as well as how the sport has revolutionized, people’s lives, physically, mentally, and socially, and how it is expected to continue positively influencing the national landscape.

4. Interview Findings

After conducting the interviews, it was possible to draw several conclusions about the perception of the current state of padel in Portugal, as well as establish some patterns regarding its evolution and the impact of the main stakeholders in the sport, namely clubs, padel companies, coaches, and players, both casual and professional.

Considering the section common to all stakeholders, regarding the phase in which padel is currently situated, it was found that the sport is in a phase of significant growth, maintaining enormous potential for expansion in the coming years as demand continues to exceed supply (“It continues to grow, there is still more demand than supply [...]” – Padel Club 04). However, the biggest boom is believed to have occurred during the pandemic (“[...] had a big boom during the pandemic [...]” – Coach 01). The main drivers behind padel’s popularity and growth were identified as its ease of learning, strong social component, accessibility/inclusivity, being a sport for all ages, genders, and skill levels, its trendy status, and its addictive nature (“[...] the

sport itself is very social and extremely easy to play [...] It's trendy [...]" – Padel Club 07; "[...] this is very well thought out for all levels: good, average, bad, and very bad." – Padel Club 02). While several opportunities for the sport were identified, such as investing in younger generations ("To engage younger generations and have them play from an early age [...]" – CP 02), organizing more tournaments, particularly international ones to place Portugal back on the map and attract the world's best players ("Portugal also has significant potential to attract more international events and tournaments [...] – CP 05), and the sport's potential inclusion in the Olympic Games ("The main opportunity is for padel to become an Olympic sport." – Padel Club 08), several challenges and weaknesses were also noted. These include a lack of investment in the training of coaches and young athletes, as the sport has primarily focused on adults ("[...] the biggest challenge is immediately making a strong investment in coaching training so that we can have a good generation of young players [...]" – PP 01), its high cost ("[...] it is a sport that is not cheap, it's expensive [...]" – CP 03), which may limit access for certain populations, and the lack of infrastructure in some regions of the country, leading to disparities in access and player levels ("[...] another challenge is trying to reach more rural areas of the country [...]" – CP 05). When asked about the countries leading the growth of padel, Portugal was not frequently mentioned, as it still needs to invest more in training and quality and cannot compete in terms of quantity, given the country's size and limited tradition in racket sports culture ("Portugal is still at a much lower level." – Padel Club 06; "Our fight cannot be for quantity, because we have limited capacity, so it has to be for the quality of the work." – Padel Club 05).

Thus, it falls to the *FPP* to invest in the development of younger generations through school sports and training programs, enhance coach training ("[...] they need to invest in staff training, in the technical development of their coaches, and in strategies to get more children playing padel." – Padel Club 08), create the necessary conditions for professional players to evolve in

Portugal, and improve padel's communication and marketing to reach more people and businesses ("The communication of padel in Portugal is still very scarce." – CP 05). However, achieving this requires greater professionalization and an expansion of its structure ("[...] needs a more professional federation [...] more people are needed [...]" – Padel Club 03).

Regarding the main brands associated with padel, there was a tendency to mention padel equipment brands such as Bullpadel, Head, and Adidas, which sponsor the best players in the world, as well as a Portuguese brand, Cork ("Then, the big global brands like Wilson, Babolat, Head, Bullpadel, Adidas. Not to mention Portuguese brands like Cork [...]" – Coach 02).

Regarding *Cidade do Padel*, the project was perceived as a great opportunity for the sport's growth, as it aims to address many of the identified gaps by centralizing the necessary resources to train players, bring major international tournaments back to the country, and thus professionalize padel ("[...] create a center of excellence, with the capacity to have gyms, courts, coaches [...]; [...] it will allow for international competitions to take place [...]" – CP 03).

In this context, based on the responses from the clubs, it was observed that they offer all types of services related to padel, including court rentals, lessons, and equipment sales. Additionally, they often provide complementary services such as gyms, physiotherapy, health areas, and bars ("We offer padel from court rentals, lessons, and academy to a shop, bar area, physiotherapy, massages, advanced aesthetics, and a wellness area [...]" – Padel Club 03). Many clubs end up offering similar services for tennis and, in some cases, other racket sports such as pickleball, but on a smaller scale ("We also have pickleball, we already have 3 courts [...]" ; "Then we have the padel school, the tennis school" – Padel Club 05). To sustain this structure, clubs were found to employ teams ranging from 9 to 50 people, depending on the size of the club and the services offered. A significant portion of workers are usually allocated to the bar/restaurant area ("We have about 40 employees." ; "[...] about half of the staff is assigned to the restaurant." – Padel Club 05), as this often represents a large percentage of the club's revenue, sometimes reaching

up to 50% (“[...] at least 50% of the revenue comes from the bar.” – Padel Club 06). Another revenue stream being explored by clubs is the organization of events through partnerships with companies (“We organize team building events, where companies hire a package [...]” – Padel Club 01). However, the most sought-after sport in clubs is undoubtedly padel, which is also the most profitable (“Five years ago, padel surpassed tennis, both in demand and profitability.” – Padel Club 05).

The average prices for court rentals vary depending on the time of day and region, ranging from €4 to €12 for an hour and a half (“We also have a price difference depending on the time of day [...] it’s €6 for an hour and a half.” – Padel Club 02). Clubs report an average court occupancy rate of 50% to 70%, identifying the main challenge as filling courts before 5:00 PM (“We have an occupancy rate of around 60/70% on average daily. The biggest challenge for padel clubs [...] it’s from 8:00 AM to 6:00 PM.” – Padel Club 03). However, during peak hours, many clubs are fully booked, leading most clubs to plan to increase profitability by expanding their infrastructure, building more courts, and maximizing revenue during off-peak hours through partnerships (“The main idea is to increase the number of courts [...]” – Padel Club 07; “We try to create partnerships with companies, institutes, or other entities that allow us to fill the club during less busy hours.” – Padel Club 06). Finally, it was also found that clubs usually organize tournaments, both social and federation, hosting at least 3 to 6 social tournaments and typically one federation tournament per year (“Yes, we have about 5 to 6 social tournaments per year. Sometimes one or two from the federation [...]” – Padel Club 01). Although tournaments are profitable, the main goal for clubs is to increase visibility, attract players, strengthen their position in the region, and promote the dissemination of padel (“It’s also about trying to establish our position in padel in Coimbra [...]” – Padel Club 06).

Additionally, interviews conducted with padel companies revealed that the sport has generated and is expected to continue generating a significant economic impact by creating jobs and

supporting the growth of local businesses, especially in smaller regions (“[...] there is investment from various companies and sectors, which creates jobs.”; “In smaller cities [...] it helps to stimulate local businesses a bit [...]” – Padel Company 02), but above all, a substantial social impact, contributing to a more active lifestyle for a larger number of people, as padel has no age or physical barriers (“Mainly, this impact of reaching a population that previously didn’t have the means to engage in sports or maintain a more active routine.” – Padel Company 03). Regarding tourism, padel has had a notable impact, though primarily on local tourism, without yet having a significant impact on international tourism (“[...] I don’t think there are any foreign participants yet, but locally, I have no doubt.”; “[...] they’ve been organizing some tournaments that have attracted people for tourism [...]” – Padel Company 03). However, it is expected that with the return of international events to Portugal, this aspect can be further explored.

Regarding the equipment market, it was observed to be clearly expanding, with rackets being the most sought-after and profitable product for companies (“It has grown a lot, fortunately.”; “The most profitable are indeed the rackets.” – Padel Company 01). However, given the saturation beginning to be felt in this market, it is suggested that brands need to differentiate themselves to remain competitive (“The challenge is really to find a range of products that tries to enter a very specific space, because the offer right now is vast, but it’s kind of all the same” – Padel Company 03). Companies have seen considerable sales increases, exceeding 20% annually, reflecting their strong financial health (“I think this year we will grow by almost 50%.” – Padel Company 01). In this regard, although direct-to-consumer sales offer higher margins, sales through distributors account for the majority of revenue due to their volume (“The most profitable way to sell, logically, is through direct sales. [...] In absolute terms, our main revenue channel is distribution.” – Padel Company 02). Simultaneously, another factor contributing to brands’ positioning, credibility, visibility, and growth is partnerships and sponsorships (“It’s essential.” – Padel Company 03). In the future, brands intend to continue

their expansion, increasing production volumes, strengthening distribution channels, maintaining or relocating production to Portugal, continuing to invest in partnerships and sponsorships, and entering other racket sports markets, while keeping padel as their main focus (“[...] work on the efficiency and effectiveness of our distribution network.”; “[...] our ambition would be to nearly double the sales we have today.”; “[...] invest in visibility, partnerships, and sponsorships.”; “Another business sector we are starting to enter [...] is other racket sports [...]” – Padel Company 02).

Interviews with coaches revealed that, generally, they all started coaching less than 10 years ago, indicating that they do not have extensive experience and that padel in Portugal is a relatively recent development (“I started in 2021, more or less.” – Coach 03). The main reasons cited for becoming coaches were a passion for the sport, a love of teaching, maintaining their enthusiasm for the sport, and the associated financial compensation (“First, because I really enjoy it. Secondly, to be honest, it was for the money [...]”; “[...] I enjoy teaching.” – Coach 03). It is also noteworthy that most coaches have a background in tennis, highlighting a clear transition (“I played tennis for 17 years [...]” – Coach 02). Despite being coaches, they continue to play casually, usually between 2 and 4 times per week, at the clubs where they teach (“[...] I play about 3 or 4 times a week [...]”; “[...] generally either at my club or at the club where I have worked before [...]” – Coach 01), and they regularly participate in tournaments, averaging 12 per year (“[...] I participated in 12 tournaments [...]” – Coach 02). Regarding lessons, it was found that they typically teach between 10 and 30 lessons per week, depending on whether they are full-time or part-time coaches (“[...] I give about 10 to 15 classes per week.” – Coach 01). Both individual and group lessons are offered, with group lessons being the most in demand (“[...] group lessons are much more frequent.” – Coach 03). Generally, individual lessons cost between €27.50 and €50, while group lessons are more affordable, averaging around €11 (“[...]

4 individual lessons cost €110, and group lessons are around €40 for 4 people [...]” – Coach 02).

Regarding the casual players interviewed, it was noted that most are not federated players because they do not yet see a significant reason to do so (“No, because I see padel as just a hobby.” – CP 04), indicating a substantial opportunity for player federation. Additionally, it was found that most began playing around 5 years ago (“[...] around November or December 2019.” – CP 01), highlighting the exponential growth of the sport in recent years. The main reasons for taking up padel included the sport’s popularity, influence from friends and family, and prior experience with other racket sports (“Because I had previously played tennis [...] it was trending, and I decided to give it a try.” – CP 05). What keeps them engaged in padel is the sport’s strong social component and its dual purpose, allowing them to use padel for both socializing and competition (“[...] the social aspect, I can have more competitive games or just play socially for fun.” – CP 03). In this context, it was observed that after games, players tend to extend their time at the club to socialize and have drinks with friends (“[...] after the game there’s always that moment of socializing with the group, we have a beer [...] – CP 05), a significant differentiator compared to other sports. Generally, casual players tend to play padel at least once a week (“I play 2 times a week, including my weekly lesson.” – CP 01), with a trend toward increased frequency, paying between €6 and €12 for an hour and a half court rental (“I usually pay €10/12 per hour and a half.” – CP 03). Most players, though not members of any club, tend to play at clubs, alternating locations mainly due to court availability (“I always try to play at the same place, but when I play later in the day, it’s not always easy to book at the club I want.” – CP 05). Regarding tournaments, many casual players do not yet participate (“No, I’ve never participated, unfortunately.” – CP 04), presenting an area for growth. However, those who do participate tend to compete in about 10 tournaments annually (“About 10, it depends.” – CP 05). Finally, regarding equipment, all players have their own (“I have my

own equipment.” – CP 02). Players tend to replace their rackets about once a year spending between €150 and €250 (“Once a year [...]”; “Around €150.” – CP 01). Regarding balls, most players do not usually purchase them, as they use those provided by clubs (“Normally, I use the ones available at the courts where I play.” – CP 04). However, it was noted that ball prices average around €5/6 (“Between €5/6.” – CP 03). Additionally, players tend to buy shoes and clothing specifically for padel, replacing them annually (“Yes, clothing, shoes [...]”; “Once a year, more or less.” – CP 01).

Lastly, analysing the interviews with professional players, it was found that they both have strong tennis backgrounds, indicating a clear transition from tennis to padel (“I played high level tennis [...]” – PP 01). This transition is often motivated by dissatisfaction with tennis and the perception that tennis was not a viable option (“[...] I was starting to get fed up. I trained a lot, but the results didn’t follow.” – PP 02), finding new opportunities in padel. Both athletes remain in professional padel due to their passion for the sport, competitive nature, and growing ambition (“[...] it’s due to the passion I have for sports and competition.” – PP 01). It was observed that professional players typically train padel daily, sometimes twice a day, along with physical preparation (“I train almost every day.”; “[...] I do two-a-day sessions 2 or 3 times a week for padel. I also do physical training every day.” – PP 02). Regarding tournaments, they follow demanding schedules, participating in 28 to 35 tournaments per year, with one focusing more on the Portuguese circuit and the other on the international circuit (“[...] I played about 20 tournaments in Portugal and 5 tournaments abroad, [...] now I’ll have 3 more.” – PP 01). Regarding sponsorships, both players have multiple sponsors, including padel related brands and brands from unrelated sectors (“[...] the brands that sponsor me are Siux [...] Then I am sponsored by Caravela, which is an insurance company, by the Banco BIG, I am sponsored by Samucar, which is a car dealership [...]” – PP 02), demonstrating the growing investment in

padel. Sponsorships represent a significant portion of players' income, reaching between 50% and 70% of their revenue, underscoring their importance, particularly when competing abroad, where costs are very high (“[...] the main part is the financial aspect, because in the end, it's money that we need [...]”; “[...] I would say it's around 70% [...]” – PP 02). It was noted that being a professional player, especially on the international circuit, requires significant financial investment, estimated at around €30,000 annually (“[...] I would say it's around €30,000 [...]” – PP 02), as players often spend about €1,000 per week when competing abroad (“[...] the tournaments I've played, I don't spend less than €1,000 per week.” – PP 01).

In conclusion, the insights from interviews with various stakeholders in the padel ecosystem in Portugal reveal that the sport is growing rapidly, with a significant social and economic impact, which corroborates the findings from the previous research. Given the country's characteristics, Portugal has a great opportunity to establish itself as a major force in the sport and avoid falling behind, as has happened in most sports. To achieve this, it is essential for clubs, and especially the *FPP*, to professionalize and expand the sport's structure, invest in youth and coach training, create favourable conditions for professional players, organize international tournaments, and improve padel's communication and marketing to reach more people and businesses.

5. The Social Impact of Padel in Portugal

Padel has rapidly grown in popularity and accessibility across Portugal, becoming one of the most prominent emerging sports in recent years. Its expansion is evident in the increasing number of players, clubs, and tournaments and its contributions to local communities. This rise highlights the need to examine how padel impacts the country beyond its sporting sphere, particularly its influence on individual well-being, social cohesion, and broader societal dynamics. This research adopts a multi-dimensional approach, focusing on key metrics like participation rates, accessibility, health and well-being, social inclusion, community engagement, employment, and media visibility to assess padel's social impact.

By analysing these indicators, we aim to construct a comprehensive framework for understanding how padel contributes to Portuguese society. Participation rates and accessibility are foundational to this analysis, reflecting the sport's popularity and regional reach. Metrics will evaluate the availability of open courts, geographic distribution, and trends in casual and organized participation. Health and well-being benefits are another critical dimension. Padel's role in promoting physical activity, improving mental health, and fostering overall wellness is assessed through indicators such as increased physical fitness, stress reduction, and enhanced motor skills.

Employment generated by the padel ecosystem is equally significant. This includes jobs within clubs and companies, with four major players – Cork, Globo Padel, Quad, and Volt Padel – selected to evaluate the industry's economic and social contributions. Roles related to event organization, marketing, and facility maintenance further underscore padel's impact on economic stability. Finally, media visibility plays a crucial role in shaping public awareness and fostering padel's growth as a cultural and social phenomenon. This analysis highlights how padel enriches Portuguese society beyond the courts, demonstrating its importance as a tool for social and community development.

5.1 Participation Rates and Padel Accessibility

The sport of padel has witnessed massive growth in the number of courts and players in the last few years. The increasing availability of padel facilities and accessibility to individuals from various backgrounds have made padel a more approachable sport for everyone.

Increased access to facilities for the public has led to a significant reduction in the population-to-court ratio. By the end of 2016, Portugal had about 265 federated padel courts. By 2023, that number had risen significantly to 1,187, a substantial jump that underscored the sport's increase in infrastructure investment (Appendix 14).

Therefore, the population-to-court ratio has dramatically shrunk from one padel court per 38,891 residents in 2016 to one court per 8,787 inhabitants in 2023 (Appendix 15). This means that in 2023, there was an estimated one padel court for every 8,787 residents in Portugal, reflecting a substantial improvement in the accessibility of padel facilities nationwide. This ratio was calculated by dividing the total number of padel courts in 2023 by the Portuguese population estimated for the same year, which stood at 10,639,726 (INE, 2024).

Padel counted 300,000 amateur players in 2023 in Portugal, representing an increase of 50% since 2021 (Appendix 16). The sport's simplicity has contributed to attracting new participants, from casual players to those looking for professional challenges ("The padel sport is straightforward to learn, and that is why it has such a high retention rate. About 70 to 80% of people who try it end up becoming regular players." –Padel Company 03).

Investment in padel facilities and infrastructure has also helped towards the professionalization of the sport and brought more players to turn into registered players within the *FPP*. In 2023, the number of registered players was 11,564, reflecting a consistent growth since 2021, when the registered players were around 6,621 (Appendix 17). This growth trend suggests that more people are playing padel not only casually but also committing to the sport by participating in organized competitions, which, with time, can further solidify the competitive circuit in Portugal. However, with only 3.85% of total casual players currently federated, the sport still holds significant untapped potential for further professionalization.

Despite all the positive developments, youth engagement still needs to be addressed. A large chunk of padel's proliferation has been from a business perspective and is focused on profitable participants. Hence, it does not focus so much on youth development, as it does not give immediate returns in the short term. *FPP* has identified this challenge and tried to impact youth players by joining efforts with several clubs, 169 clubs included, across over 15 districts out of 18 in Portugal, showcasing a representative geographical distribution across the country and

partnering them with schools. In 2023, youth engagement initiatives involved the participation and exposure of 7,437 students to padel through school programs, 29 events and tournaments were organized and scouting sessions in Braga, Lisbon and Vilamoura took place (FPP, 2024). Maintaining this talent locally will be essential to padel's professionalization and developing a robust and sustainable padel ecosystem. By the end of 2023, the total number of professional padel players in Portugal was 20, reaffirming that there is still much room for the professionalization of the sport to grow and focusing on the younger generations is the way to get professional players in the future (Appendix 8).

The number of padel players is expected to grow, as our survey results demonstrate a high level of interest among those who have yet to try the sport. On a scale of 0 to 10, 62.96% of respondents rated their willingness to start playing padel in the coming months at 6 or above, including 20.37% who gave the highest rating of 10. The survey, which included 108 responses from non-padel players, points to the considerable potential of the sport and highlights its growing appeal. The four main reasons cited for not currently participating were lack of time or availability (34.26%), not having enough people to play with (29.63%), the high cost of the sport (25.93%) and the lack of knowledge about the sport (24.07%) (Appendix 8).

5.2 Health and Well Being Benefits

Padel is not just a sport. It is a vehicle for personal health that offers a holistic approach to well-being, providing a dynamic fusion of physical exercise and mental stimulation. This section will analyse how padel is contributing to health benefits, both physical and psychological and how it is becoming a sport affecting the lifestyle of many individuals across the country. Playing padel has many physical health benefits, including supporting cardio health, muscle endurance, and general physical fitness. The intermittent high-intensity physical activity and continuous neuromuscular stimuli during padel matches have relevant cardiovascular and psychological benefits for padel players (Demeco et al., 2022). In addition to the cardiovascular aspect, padel

forces players to kick several movements simultaneously, which aids in integrating motor skills. The intricate coordination of the arms, legs, and eyes required in padel significantly enhances motor-cognitive abilities and fosters physical and cognitive development. These advantages stem from the sport's distinct fusion of mental and physical abilities, which sets it apart from many other athletic activities (Sánchez-Alcaraz & Courel-Ibáñez, 2022). Our survey results indicate that 60.77% of respondents began playing padel to improve their physical health. Two of the most reported benefits of practicing the sport included improved cardiovascular circulation and physical conditioning (51.44%), as well as enhanced coordination and motor skills (50.72%). Developing skills and improving technique were the primary reasons individuals continued to play padel, with 64.35% of respondents indicating that this was their primary motivation for choosing padel over other sports (Appendix 8).

The WHO guidelines on physical activity and sedentary behaviour recommend that adults undertake 150 to 300 minutes of moderate-intensity or 75 to 150 minutes of vigorous-intensity physical activity per week or an equivalent combination of both to meet their wellness needs (Bull, 2020). Our survey indicates that most padel players play 2 to 3 times per week (44.26%), each session lasting approximately 90 minutes. Additionally, players who reported attending padel lessons take an average of 3.43 individual or 4.05 group lessons per month, demonstrating a structured commitment to skill development and physical activity (Appendix 8). This frequency of play underscores padel's potential to catalyse active lifestyles within the Portuguese community by contributing to the WHO recommendations for regular physical activity, yielding broader advantages for society.

Apart from physical health, padel also offers psychological advantages. The social and enjoyable aspects of the game contribute to stress relief and enhance cognitive abilities. Exercise significantly improves various neurocognitive functions, including learning, focus, memory, inhibitory control, cognitive flexibility, and information processing (Jia et al., 2019).

Furthermore, exercise has proven positive effects in controlling depression and anxiety, alleviating stress, and modulating the perception of pain (Chen et al., 2020).

In the survey, the most reported benefits of practicing the sport included stress relief and relaxation, noted by 77.03% of participants, and 43.54% of respondents chose mental wellness as a justification for continuing to practice the sport (Appendix 8).

5.3 Social Inclusion and Community Engagement

Padel has become a motor of social engagement and community building in Portugal, becoming more than just a sport for the ones who practice padel. Its inclusive nature allowed it to transcend the traditional barriers of gender, age, and socio-economic status to define a homogenous space for individuals from all backgrounds and with different paths by joining in for an active lifestyle.

Padel's inclusivity can be explained by its widespread participation from all demographic groups. It is recognized as a sport with a relatively narrow gender gap, with 60% male and 40% female players (Playtomic & Deloitte, 2022). In the Padel Club 03 interview, the club owner stated that women are a significant percentage of their club members and that they have tailored their offers to meet their needs and retain that group of customers effectively ("We have something important for retention, we have many women playing here at the club."; "[...] we felt the need to provide some services tailored to them."; "We offer padel lessons, an academy, a shop, bar area, physiotherapy, massages, advanced aesthetics, and a wellness area [...]” – Padel Club 03). This gender parity indicates that padel can foster social interaction across different groups. One of padel's most considerable social contributions is that all age groups can interact with the sport ("[...] people really enjoy the social aspect of padel, as they can interact a lot with everyone after games during tournaments [...] then there is also the family aspect, where grandchildren can play with grandparents, grandparents with parents, and parents with children [...] I think the fact that it applies to various genders and ages is something very

important.” – Padel Club 01). Our survey results demonstrated that 30.23% of participants were aged 15-27, 25.48% were aged 28-43, and 39.16% were aged 44-59, showcasing the sport’s reach across different generations (Appendix 8).

Social inclusion is also highlighted by padel’s strong connection with charity and community-oriented events. For instance, most social tournaments at Padel Club 04 always have a charitable aspect, such as donating a portion of the registration fees to institutions. In the last year, the club has contributed to different social causes (“[...] we collect products and food items, which we then deliver to the food bank here in Portimão [...]”; “[...] we organized a tournament with the Portuguese Cardiology Foundation, where all registration fees were donated to this institution.”; “[...] we are talking about amounts close to €10,000 in direct and indirect support.” – Padel Club 04). Another example of a community-oriented event that contributes to and fosters community engagement is the Expo Padel World, held in Lisbon, which counted over 5,000 attendees in its first edition. The event focused on networking and knowledge-sharing, featuring partnerships with renowned brands like Red Bull, Carlsberg and exhibitors such as Slazenger and Benfica, and a second edition will take place in 2025 (Expo Padel World, 2024). The significance of big tournaments like Mimosa Open Porto, held in Porto, and Open Emblezart Padel Tournament, held in Guimarães, has emphasized the social value along with the economic potential that these events can bring to local communities. They have boosted local tourism and enabled residents to watch sports at a highly competitive level, which has lifted community spirit. Catarina Araújo, City Councillor of Youth and Sports, cites the Mimosa Open Porto as an example of a tourism boom across the whole northern region of Portugal, bringing thousands of tourists to Porto (Record, 2024; Agora Porto, 2024). The Open Emblezart Padel Tournament in Guimarães significantly boosted the city’s social engagement and economy (“[...] we had a huge event, a 15,000, which is the biggest tournament so far. It filled the hotels in Guimarães, we brought a court to the city centre, we had over 2,000 people every

day for 5 days, several sponsors were involved, and hotels and restaurants were full, the city was buzzing.” – Padel Club 01). The survey conducted also reiterates padel’s role in social gathering and community engagement, where 79,67% of respondents state that they have already participated in padel tournaments (Appendix 8).

Apart from the large-scale events, smaller initiatives such as *Empresas Corporate Padel League* and the Padel Without Barriers – *Padel Sem Barreiras* – project have also contributed to social inclusion and community building. As an example of how padel connects professional and social networking within the corporate world, *Empresas Corporate Padel League* 2nd edition counted more than 1,100 participants (MEO Corporate Padel League, 2024). The Padel Without Barriers project aims to look towards social integration and enhance the quality of life of disabled people through sport, underscoring padel’s role in fighting discrimination and promoting equal opportunities (Jornal de Negócios, 2024).

The most relevant factor identified by men and women in playing padel is the relationships generated within the sport’s practice, followed by cooperation and teamwork (Rodríguez et al., 2020). The social aspect was cited as one of the biggest reasons to keep playing the sport, as 62.68% of players identify the opportunity to socialize with friends as a key factor in their decision to continue playing padel over other sports. Furthermore, 55.26% of players stated that strengthening relationships and making new friendships are the main benefits of padel (Appendix 8). Padel has proven to be a powerful tool for social engagement and community building in Portugal. Through charity events, large-scale tournaments, and community-focused initiatives, it is not only a sport but also a platform for building lasting friendships and fostering community spirit.

5.4 Development of Local Heroes

Padel’s growth in Portugal has been marked by the community and the involvement of public figures and athletes who are turning into local heroes within the communities they impact. Their

participation brings credibility, media coverage, and community spirit to the sport and pushes the padel's local and national development.

Portuguese football player CR7 invested in Lisboa Racket Center in Alvalade. The deal shows his commitment to the game and his conscious intention to deploy capital in dynamic markets. Lisboa Racket Center, as previously mentioned. Cristiano Ronaldo's investment not only raises the sports' attention of the public eye but makes it more attractive to new participants, both young and old, who are inspired by his influence (Diário de Notícias, 2024).

Diogo Dalot, the Portuguese football player, and Paquito Navarro, the Spanish professional padel player, partnered to invest in a new padel club in Porto. The Padel Athletic Club boasts a multitude of amenities, including 14 high-quality indoor courts, two premium courts with features like those used in professional competitions, a 1,500 m² gym, a unique padel shop, a physiotherapy area, and a lounge bar. It also does other social tournaments and padel talks about health (Público, 2023).

Renato Sanches, an internationally recognized football player, is one of the head players helping to lead padel development in Portugal. The player has bet on Barreiro, a historical industrial city. The project is creating a brand new padel centre that includes excellent courts from concept to completion and a restaurant unit that stimulates local social dynamics among visitors. Through this action, Renato Sanches is consciously advancing padel as a sport, in the same way as he is subconsciously establishing his benefactor's sporting infrastructure, already starting to produce local heroes and role models, therefore leading the next padel generation (O Setubalense, 2024).

Their investments and active involvement have elevated the sport's public image, turning them into local heroes who champion the sport and embody its fitness, community, and healthy living values. The participation of these high-profile athletes is driving padel to become more

mainstream and appealing to regular people. Therefore, this will help drive more people towards playing padel, whether for fun or as aspiring professionals.

5.5 Employment in Padel Sector

Employment is one of the most impactful metrics when discussing the social impact of padel in Portugal since it affects a part of the population's lives. The padel industry contributes to direct and indirect employment, a crucial factor in social and economic well-being over various regions.

Padel-related employment can be categorized as either direct or indirect. Direct employment encompasses individuals directly connected to the daily operations of padel, including club management, coaching, professional players, staff of padel-related-business companies, and *FPP* employees. These quantifiable positions provide a clearer understanding of padel's employment footprint. Indirect employment involves roles not directly linked to padel clubs or companies but supported by activities associated with the sport. For instance, tourism and hospitality services, such as hotels and transportation, benefit from tournaments that bring visitors. F&B services also benefit from the events hosted by padel clubs. Marketing and advertising agencies and medical professionals like physiotherapists also play essential roles in supporting players and promoting events. Furthermore, the construction and maintenance of courts contribute to employment, involving those responsible for building and maintaining padel facilities. Quantifying indirect employment remains challenging due to the various sectors and roles involved. Thus, this analysis will focus on quantifying the direct jobs generated by padel, which has a proven database. The employment analysis in the padel sector utilized data from a 10% sample of padel clubs and key padel companies, as outlined in the methodology. This provides the foundation for evaluating the sector's impact, with detailed results presented in Appendix 8.

In 2023, around 1,376 people worked directly in the Portuguese padel sector in various strategic areas. A padel center typically requires between 5 and 10 staff members to operate efficiently, regarding the people responsible for the management of the clubs (Dojo Business, 2024). The most significant category was the management and operation of padel clubs (“In the club overall, 9 people work here, we have padel coaches, tennis coaches, and then the staff that serves both areas.” – Padel Club 04). This category counted 1,136 individuals across the country, assuming an approximate average number of 5 employees per club, imputed from the sample of 10% and a total of 250 clubs (Appendix 8).

Additionally, another group within the employment sector in padel was integral not only to training professional players but also to encouraging new participants and promoting the sport at the grassroots level. 174 registered coaches trained and developed the game for all levels of players (*FPP*, 2024; Appendix 8).

Another important category of professionals working within the padel sector in 2023 was professional padel players. Portugal had a total of 20 players, including both men’s and women’s divisions, who earned a living by competing in national and international padel tournaments, thereby raising the sport’s profile in Portugal (*FPP*, 2024; Appendix 8).

In terms of direct employment in padel, in 2023, the padel-related-business companies represented a total of 37 people working within these major companies, assuming a total of 4 companies: Cork, Globo Padel, Volt Padel, and Quad, and an average number of employees of 9 individuals per company (Appendix 8).

In 2023, the *FPP* also counted several professionals, who developed and promoted the sport across the country, totalling 8 employees, as documented in its 2023 financial report (*FPP*, 2024; Appendix 8).

The direct employment in the Portuguese padel sector counted an estimated total of 1,376 professionals related to padel in different roles for the year 2023. These jobs illustrate padel’s

contribution to social cohesion and generating local employment. As padel continues to grow year over year, it is expected that this value will increase accordingly, and generate even more opportunities, turning a major community development player in Portugal.

5.6 Media and Public Awareness

The Portuguese media and public awareness are pivotal in the expansion and popularity of padel. The *FPP*, some private companies, professional players, and clubs, have significantly contributed to building a strong digital presence and attracted attention on social media platforms and online searches. This section explores the relevant events and tournaments influences, social media accounts, and public interest trends based on search engine data. It is important to note that the following analysis considers 2024 data, including follower counts and viewership metrics, to provide the most up-to-date depiction of padel's public reach. The analysis for 2023, as conducted in prior sections, could not be completed due to the unavailability of data before 2024.

International and national padel events played a significant role in the sport gaining visibility. Major events such as the *FIP* World Padel Championship in Qatar and the CUPRA *FIP* Rise Oeiras had huge audiences, recording the growing interest in the sport year after year. The men's division got an overall viewership of 446,800, while the women's division recorded even more with 468,000 views. The CUPRA *FIP* Rise Oeiras tournament also reached considerable recognition, with a total of 31,800 viewers (Appendix 8).

The *FPP* has been successfully engaging in social media and gaining more public attention. The federation has its own dedicated Facebook and Instagram pages and uses the social media platforms for the promotion of padel events and player highlights, but also other initiatives supported by the sport. In 2024, the *FPP* has over 22,000 followers on Instagram and 26,000 on Facebook page (Appendix 8).

Padel companies are also helping a lot with padel digital footprint. Cork, Volt Padel, Quad and Globo Padel have an internationalized presence on social media. On Instagram pages, these 4 players have in total 48,910 followers. Specifically, Volt Padel has amassed 19,800 followers, Cork has 14,000, Quad has 13,300, and Globo Padel has 1,810 followers (Appendix 8).

In the social media follower's analysis of Portugal in 2024 for padel clubs was carried out with a random 10% sample of padel clubs, as mentioned in methods' section. Instagram followers were the data source to make a guess about the total digital footprint and engagement of padel community. As of November 2024, the 289 padel clubs in Portugal collectively have over 1,076,758 Instagram followers, averaging 3,726 followers per club (Appendix 8).

The most recent example of the impact of social media awareness and enhance engagement with the public was the Lisboa Racket Center's acquisition by CR7. Since the acquisition the club's social media following has surged by 20,000, reaching a total of 32,800 followers (data retrieved from Path Social platform). This illustrates how influential personalities can enhance engagement, reflecting the potential for sports clubs to gain visibility through strategic partnerships.

The steadily rising public interest in padel is evident in the Google Trends data for the search term "Padel" in Portugal, which shows a consistent increase in search volume over the last five years. This growth was notably accelerated following the COVID-19 outbreak, a time when people were looking for outdoor exercise that was safe and social.

Analysis of the media and public awareness shows that padel in Portugal is growing rapidly in terms of engagement and visibility. The strong presence of followers on social media from the *FPP*, the padel companies, the clubs, and the event viewers combined underscore that the sport is engaging with the community both locally and internationally. The steady growth over the last 5 years on padel interest in Google Search demonstrate its rise in popularity (Appendix 18). Lastly, the total reach of media and public awareness in 2024 was substantial with 1,494,494

followers on different social media platforms suggesting an ongoing expanding digital community that was actively engaged and a total amount of 946,600 fans watched the live streams of padel events and tournaments, demonstrating strong interest on both national and international competitions as well.

5.7 Final Considerations

The social impact of padel in Portugal has been significant, reflected in its rapid growth in accessibility, participation and community integration. The sport has proven to be a powerful force for social inclusion, improving individual well-being, fostering community cohesion and creating local employment opportunities. In addition, padel's media presence and association with public figures has further enhanced its social impact. Through a multi-dimensional analysis, this study highlights how padel has successfully embedded itself into the Portuguese cultural fabric, positively impacting the population beyond the boundaries of the sport.

6. Recommendations

Based on the analyses conducted in this research, a series of strategic recommendations have been developed for the *FPP*. These aim to broaden the sport's reach, enhance its visibility, and ensure sustainable growth over the coming years. While these approaches aim to foster the sport's cultural and social relevance, as well as its economic impact, their implementation require consideration and adaptation to the *FPP*'s strategic priorities and available resources. These recommendations are supported by a proposed implementation timeline, provided in the appendix, which outlines a phased approach for their execution. The timeline offers a structured framework, highlighting short- and mid/long-term priorities to guide the *FPP* in considering these suggestions. While the timeline is not prescriptive, it serves as a tool to help plan and adapt the recommendations effectively (Appendix 22).

Enhancing Visibility and Media Presence: Strengthening the visibility of padel through strategic communication efforts is essential to increasing its popularity. A key step involves

partnering with national free broadcasters, such as *RTP2*, to stream major events like the World and the European Padel Championship. Such broadcasts could leverage the national passion for sports, fostering emotional connections with audiences. Additionally, digital media strategies, including newsletters and podcasts, should be expanded to consistently engage the community and attract new players. Leveraging the involvement of popular personalities like Ronaldo, who is linked to the sport with the acquisition of Lisboa Racket Center, can significantly enhance its visibility and inspire broader participation. Improving the *FPP*'s website could be an effective way to enhance user experience and attract more members. By creating a more user-friendly interface with clear navigation and accessible information, especially on how to join as a member, the *FPP* could facilitate engagement with players, clubs, and fans. Streamlining this process not only supports a key revenue stream but also encourages greater participation and connection with the sport. Moreover, a digital audience tracking system, utilizing QR codes at events, can provide valuable data on attendance and engagement. This not only offers insights for improving events but also strengthens relationships with sponsors and future potential sponsors, demonstrating the sport's growing visibility and potential for expansion.

Promoting Grassroots Development and Youth Engagement: Grassroots development is vital to ensuring the long-term growth of padel in Portugal. Partnerships with schools can introduce the sport to younger audiences, integrating it into physical education programs and making courts accessible through collaborations with local clubs. Furthermore, organizing summer camps at facilities like *Cidade do Padel*, with scholarships for underprivileged children, can foster inclusivity and introduce the sport to a broader demographic.

Strengthening Infrastructure and Centralized Resources: Infrastructure plays a central role in padel's expansion. *Cidade do Padel* should serve as a national hub, consolidating resources and providing state-of-the-art facilities for players and coaches. This venue could host major tournaments, training programs, and community events, creating a focal point for the sport in

Portugal. Additionally, establishing regional associations in other cities like Porto, Coimbra, and Faro would decentralize resources, enabling broader access to the sport. These regional nodes could act as central hubs for organizing tournaments and streamlining operations.

Professionalizing Coaching and Player Development: The professionalization of coaching is critical to maintaining high standards of training and development. Inspired by successful models in Spain, the *FPP* should create a structured coaching academy with sequential training programs. These programs would ensure coherence across clubs, enhancing player performance and retention. Moreover, providing higher grants or sponsorships for Portuguese athletes to compete in international tournaments would raise Portugal's profile in the global padel community, encouraging more investment and recognition for the sport.

Establishing Strategic Partnerships and Host Key International Events: The *FPP* should actively pursue partnerships with private companies to secure sponsorships for events, facilities, and outreach initiatives. Collaborating with local businesses can increase padel's accessibility, namely in underserved regions. Hosting international tournaments, such as those on the Premier Padel Tour, would position Portugal as a premier destination for padel and stimulate local tourism. The influx of spectators and participants would generate significant economic benefits.

Promoting Sustainability: Sustainability must be integrated into the *FPP*'s strategy. Encouraging clubs to adopt eco-friendly practices, such as installing solar panels and using energy-efficient materials, aligns with global environmental trends. Promoting the use of repressurized balls during tournaments also reflects a commitment to reducing the sport's environmental footprint.

7. Work Project Limitations

Recognizing the limitations of our project is essential to contextualize its findings and outline areas for improvement in future research. While this project contributes valuable insights into the economic and social impact of padel in Portugal, several challenges were encountered. A

significant limitation was the difficulty in accessing detailed economic and social data, as reliable statistics and centralized information were often fragmented or unavailable. This restricted the analysis and underscores the need for improved data collection mechanisms within the industry. Another challenge was the lack of academic literature specifically addressing padel, which necessitated reliance on broader sports management studies to fill gaps. Logistical challenges in organizing interviews further impacted the study, particularly in ensuring diverse representation. Despite efforts, clubs from specific regions were overrepresented, and achieving gender balance was difficult. Broader stakeholder interviews, including other sponsors and policymakers, would also enrich findings. By addressing these limitations, future research can build on this project to provide a more comprehensive understanding of padel's role in Portuguese society, supporting stakeholders in making informed decisions to maximize the sport's contributions.

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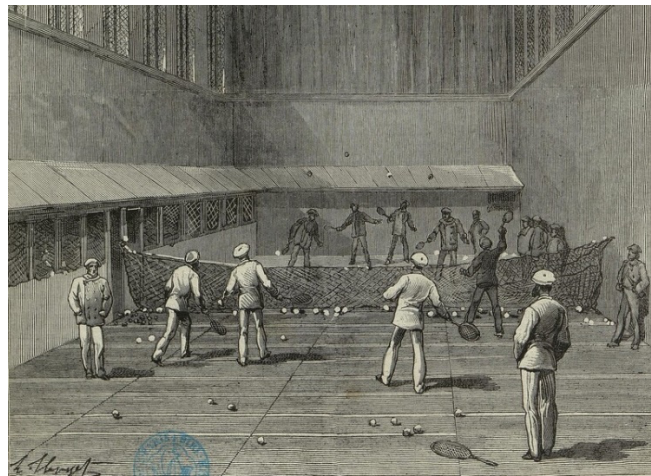
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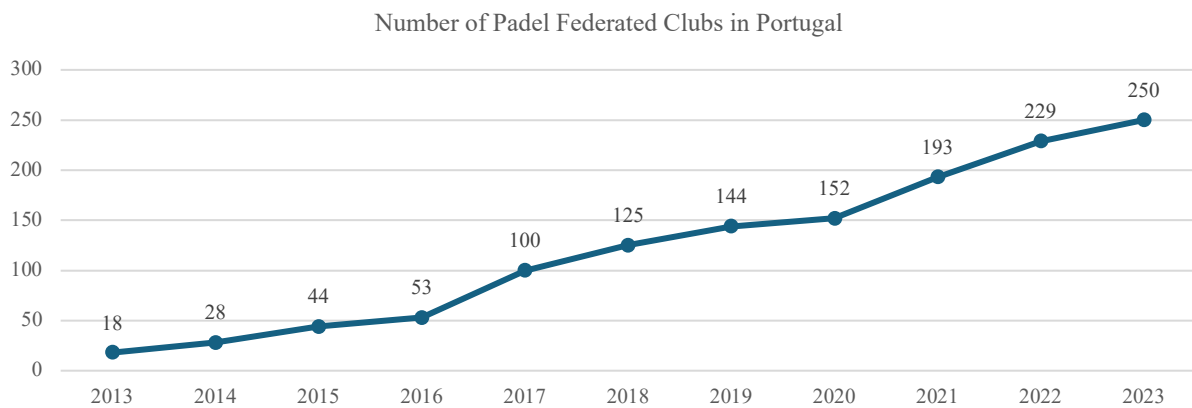
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11. Appendices

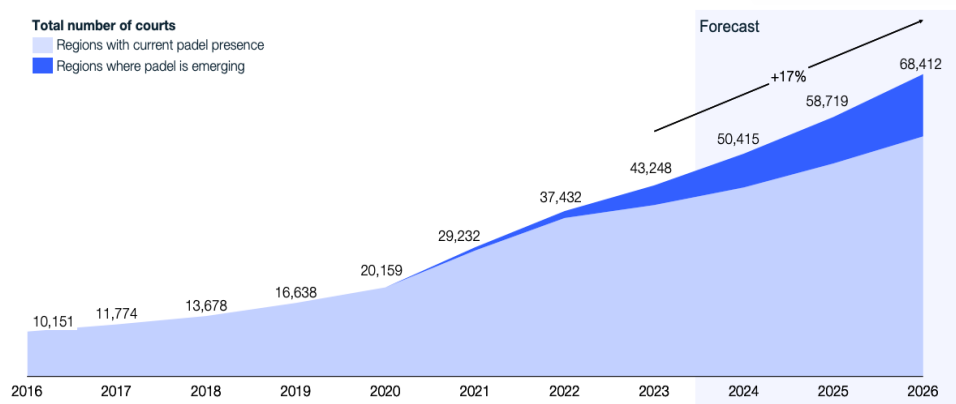
Appendix 1 - La folle histoire du jeu de paume en France (Paris ZigZag 2024)



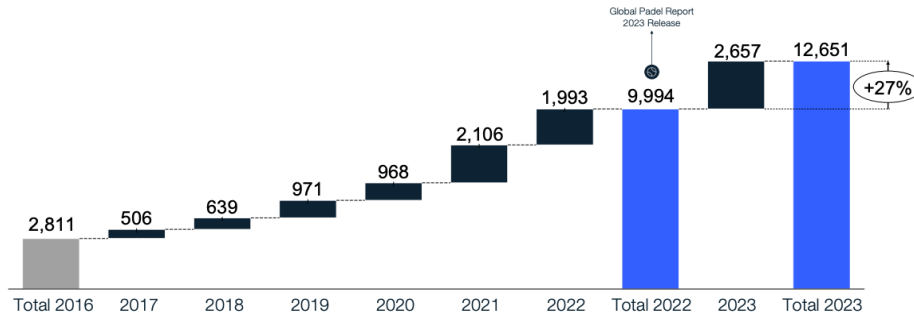
Appendix 2 - Evolution of Padel Federated Clubs in Portugal (data extracted from FPP and Playtomic and Deloitte, Global Padel Report 2022, 2013-2023)



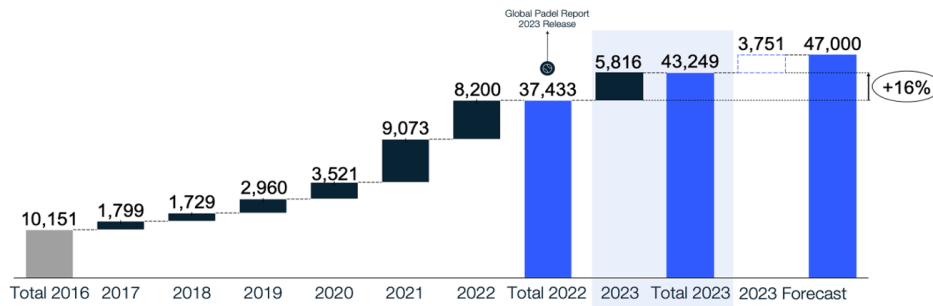
Appendix 3 - Total number of courts forecast until 2026 (data extracted from Playtomic and Strategy&. Global Padel Report 2024, 2016-2026)



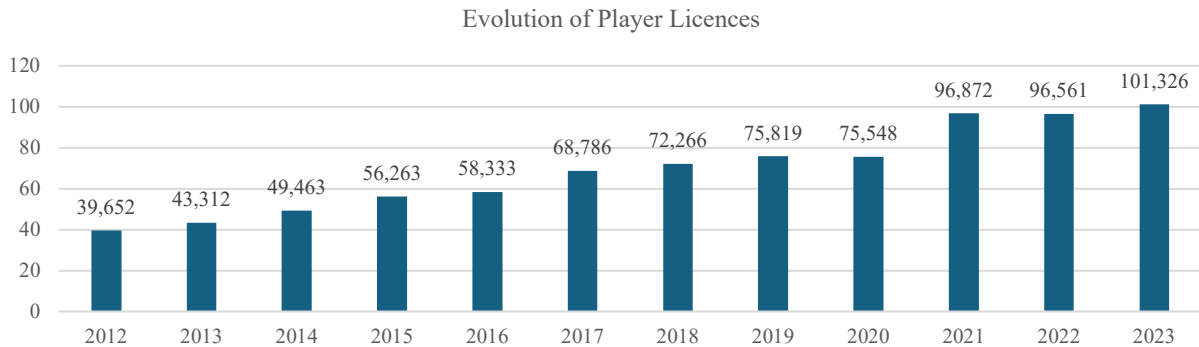
Appendix 4 - Evolution of Padel clubs' growth (data extracted from Playtomic and Strategy&, Global Padel Report 2024, 2016-2023)



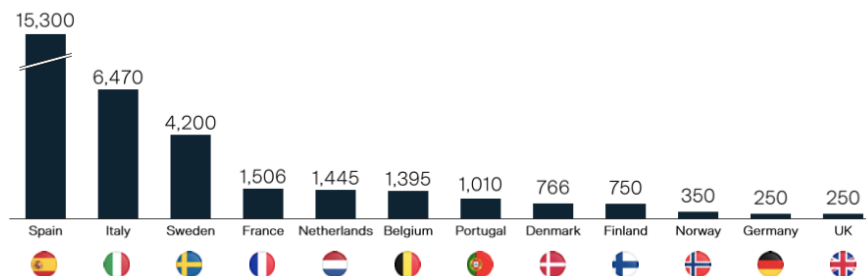
Appendix 5 - Evolution of Padel courts' growth and forecast (data extracted from Playtomic and Strategy&, Global Padel Report, 2016-2023)



Appendix 6 - Evolution of Padel Player Licences in Spain (data extracted from FEP, 2012-2023)



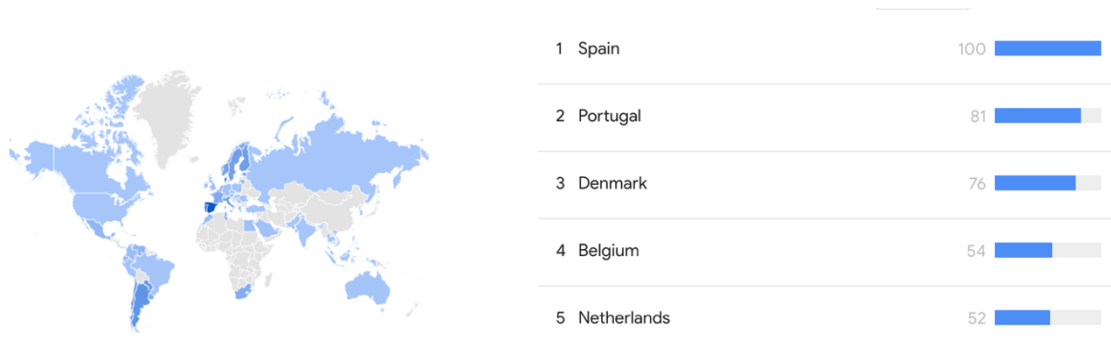
Appendix 7 - Total number of courts per country in 2023 (data extracted from Playtomic and Strategy&, Global Padel Report 2023, 2023)



Appendix 8 – Excel Padel Thesis Impact Analysis

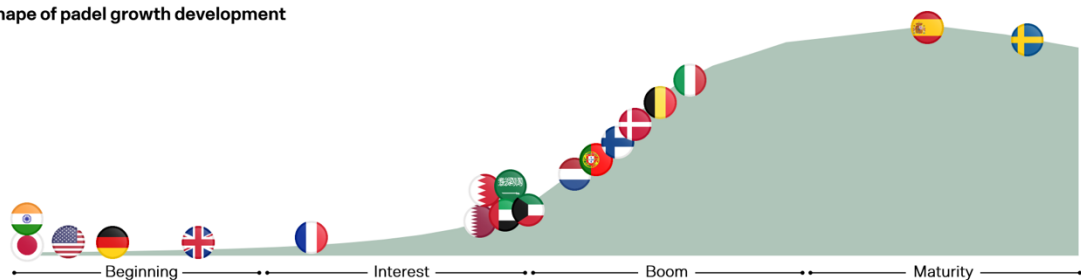
Padel Thesis Impact Analysis.xlsx

Appendix 9 - Interest by Region of Search Term “Padel” Worldwide on Google Trends in the last 12 months (data extracted from Google Trends)



Appendix 10 - Interest by Region of Search Term “Padel” Worldwide on Google Trends in the last 12 months (data extracted from Google Trends, 2023-2024)

Theoretic shape of padel growth development



Appendix 11 – Interview Guides

Casual Players:

Guião Entrevista_Casual Players.docx

Interview Guide_Casual Players.docx

Coaches:

Guião Entrevista_Coaches.docx

Interview Guide_Coaches.docx

Padel Clubs:

Guião Entrevista_Padel Clubs.docx

Interview Guide_Padel Clubs.docx

Padel Companies:

Guião Entrevista_Padel Companies.docx

Interview Guide_Padel Companies.docx

Professional Players:

Guião Entrevista_Professional Players.docx

Interview Guide_Professional Players.docx

Appendix 12 – Interview Transcriptions

Casual Players:

Entrevista_Casual Players_01.docx

Entrevista_Casual Players_02.docx

Entrevista_Casual Players_03.docx

Entrevista_Casual Players_04.docx

Entrevista_Casual Players_05.docx

Coaches:

Entrevista_Coaches_01.docx

Entrevista_Coaches_02.docx

Entrevista_Coaches_03.docx

Padel Clubs:

Entrevista_Padel Clubs_01.docx

Entrevista_Padel Clubs_02.docx

Entrevista_Padel Clubs_03.docx

Entrevista_Padel Clubs_04.docx

Entrevista_Padel Clubs_05.docx

Entrevista_Padel Clubs_06.docx

Entrevista_Padel Clubs_07.docx

Entrevista_Padel Clubs_08.docx

Padel Companies:

Entrevista_Padel Companies_01.docx

Entrevista_Padel Companies_02.docx

Entrevista_Padel Companies_03.docx

Professional Players:

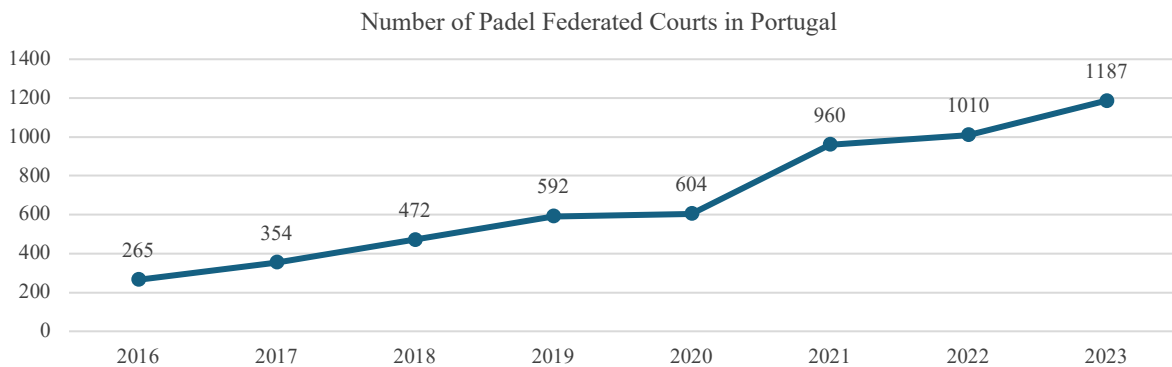
Entrevista_Professional Players_01.docx

Entrevista_Professional Players_02.docx

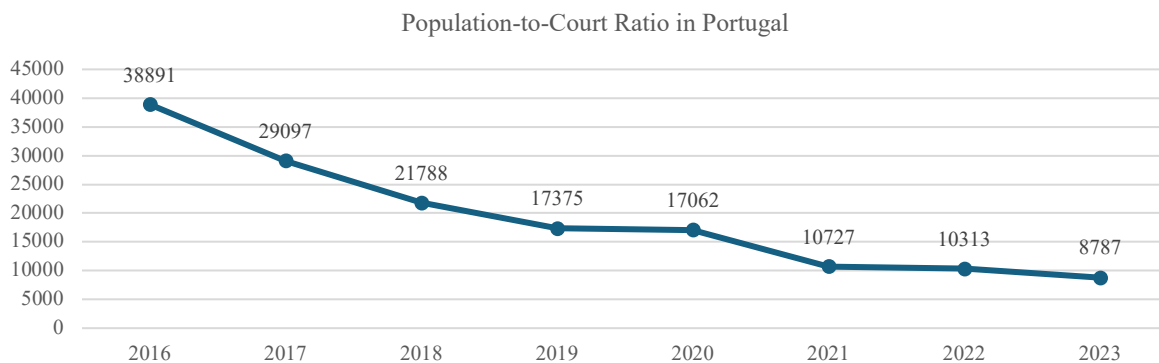
Appendix 13 – Excel Analysis Grid

Analysis Grid.xlsx

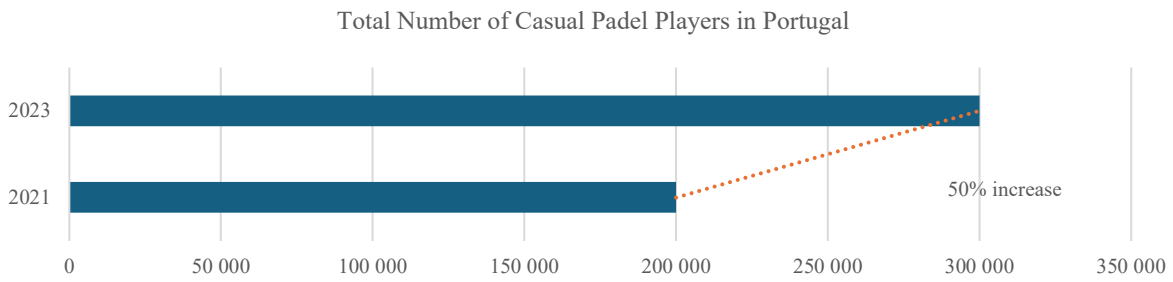
Appendix 14 - Evolution of Padel Federated Courts in Portugal (data extracted from *FPP and Playtomic and Deloitte, Global Padel Report 2022, 2016-2023*)



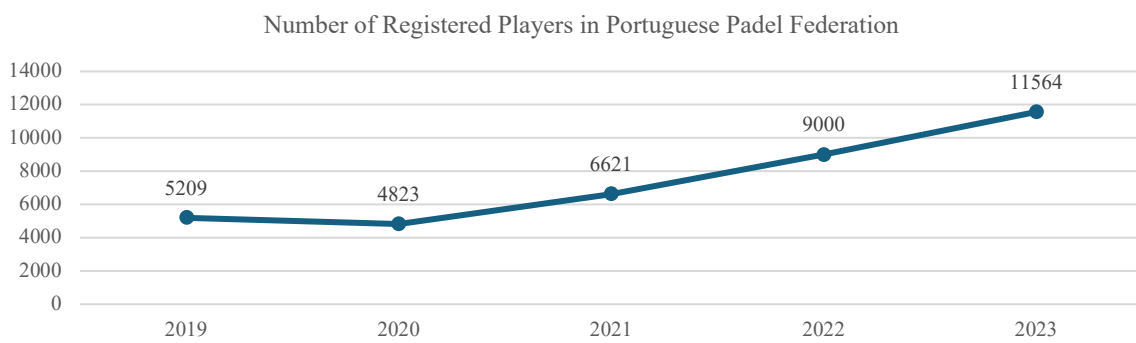
Appendix 15 - Evolution of Population-to-Court Ratio in Portugal (data extracted from *INE, FPP and Playtomic and Deloitte, Global Padel Report 2022, 2016-2023*)



Appendix 16 - Total Number of Casual Padel Players in Portugal (data extracted from FPP, 2021 and 2023)



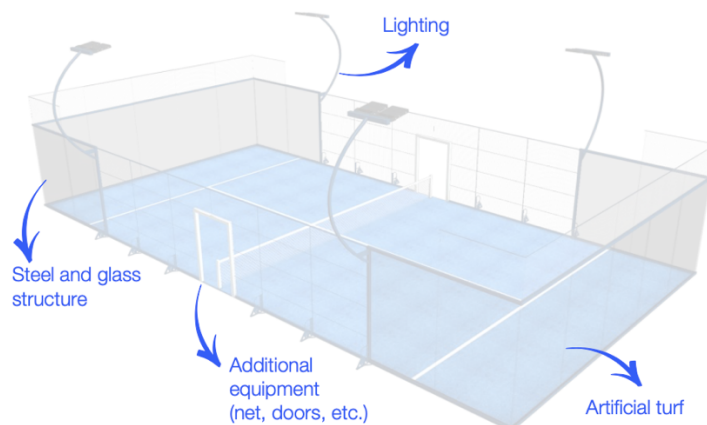
Appendix 17 - Total Number of Registered Players in FPP (data extracted from FPP, 2019-2023)



Appendix 18 - Search Term “Padel” in Portugal on Google Trends in the last 5 years (data extracted from Google Trends, 2019-2024)



Appendix 19 - Infrastructure of a Padel Court Guide (Global Padel Report by Playtomic 2024)



Appendix 20 – Rafa Nadal Academy Interview

Entrevista_Rafa Nadal Academy.docx

Appendix 21 – *Cidade do Padel* Interview

Entrevista_Cidade do Padel.docx

Appendix 22 – Proposed Timeline for Recommendations

Short-Term (6-12 months)

1. Media and Communication

- Partner with broadcasters like *RTP2* to televise major events, including national and international championships.
- Improve the Federation’s digital platforms, including a redesigned website with enhanced UX/UI and a system for digital audience tracking at events.
- Launch community-focused media initiatives, such as newsletters and podcasts, to build engagement.

2. Partnerships and Sponsorships

- Initiate collaborations with private companies to secure sponsorships for tournaments, grassroots programs, and infrastructure development.

3. Community Engagement

- Pilot charity tournaments and exhibition matches to foster community goodwill.
- Organize the first annual “Padel Day” to celebrate the sport and attract public participation.

4. Professionalization of Coaching

- Develop a coaching academy with standardized, sequential training programs aligned with best practices from successful international models.

5. International Presence

- Host a major international tournament, such as a Premier Padel Tour event, to enhance Portugal's visibility in the global Padel ecosystem and attract tourism.

Mid/Long-Term (1-3 years)

1. Youth Development

- Establish partnerships with schools to integrate Padel into physical education curricula.
- Launch summer camps at *Cidade do Padel* with scholarship opportunities to ensure inclusivity.

2. Regional Associations and Club Support

- Create regional associations in cities like Lisbon, Porto, Coimbra, and Faro to decentralize resources and enhance accessibility.
- Promote collaboration and mutual support between clubs to improve resource allocation and organizational efficiency.

3. Infrastructure and Centralization

- Develop *Cidade do Padel* into a national hub with state-of-the-art facilities for training, tournaments, and community events.
- Expand Padel infrastructure across the country based on regional participation data.

4. Sustainability Initiatives

- Promote eco-friendly practices, including solar panels, sustainable construction materials, and repressurized balls, to align with environmental priorities.

5. Evaluation and Adaptation

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- Regularly review the implementation and impact of these initiatives, using feedback and data to refine strategies and maintain alignment with evolving community needs.