The European market potential for religious tourism

The religious tourism market covers a broad range of tourism products, including pilgrimage trips, visiting sacred sites, church tourism, travel for worship and religious missions. While a large part of European residents are Christian, halal tourism has been growing in the last few years, as well as the demand for spiritual tourism. Important target markets in Europe include Germany, the United Kingdom and France. The COVID-19 pandemic has had a great impact on the religious tourism market.

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1. Product description

Religious and spiritual tourism refers to travel for religious or spiritual purposes, such as undertaking a pilgrimage and visiting sacred sites. Also known as sacred or faith tourism, it is one of the oldest forms of tourism. Religious tourism is a niche within the segment of cultural tourism, comprising four specialist niches: pilgrimages, visiting sacred sites, church, mosque and temple tourism, and travel for the purpose of mission or worship.

Table 1: Specialist niches of religious tourism

Specialist niche	Description	Target group	Examples
Pilgrimages	A pilgrimage is a trip to a religious or spiritual place with the aim of experiencing religious or personal enlightenment. Secular pilgrimage, such as visiting nature as a source of spiritual inspiration is not included here	Attracts mostly believers; most European pilgrims travel to the Middle East, whether they are Christian or Muslim	Pilgrimage to the seven saints of Marrakech
Visiting sacred sites	These are trips for the purpose of visiting sacred sites. This includes important sites from ancient religions, like Native-American burial grounds	Attracts mostly non-believers	A tour to Machu Picchu

Church, mosque and temple tourism	Tours with the aim of visiting monuments, such as churches, temples and mosques	Attracts mostly non-believers	Visiting Mosques in Istanbul
Travel for the purpose of mission or worship	These are trips for the purposes of worship, performing holy rituals, spreading faith, being involved in charity, or volunteering from a religious perspective	Attracts mostly believers; closely related to pilgrimage tourism	Meditating in a Buddhist monastery in Bangkok; Mercy Ships organises trips for Christians to volunteer in developing countries

Many tour operators combine various of these specialist niches. For example, Pilgrim Tours offers pilgrimages, naturally, but also trips involving visiting sacred sites and churches.

Travellers who visit religious sites can be divided into two main target groups: believers and non-believers. Both are important target groups, but they require different approaches.

Believers

Believers seek spiritual support or reinforce their religious beliefs. Often, they undertake a pilgrimage for religious reasons or for the purpose of worship. Examples of these kinds of trips include the Hajj to Mecca for Muslims, pilgrimages to Jerusalem or the Vatican for Christians, and traveling to Bodh Gaya for Buddhists. Most religious tourists are very motivated to travel, so they are willing to spend more money than the average traveller. This inherent motivation also makes religious tourism less vulnerable to economic lows. Believers like to travel in groups of like-minded people.

Nonbelievers

Non-believers are attracted to sacred sites, churches, mosques, synagogues and other places of worship, not because of their religious value, but for their cultural significance, architectural importance, aesthetic beauty or historic value. Non-believers may be religious, but religion is not their main purpose for traveling. Some non-believers who seek self-improvement by travelling to religious sites require some form of catering geared to offering a spiritual experience with the destination. Collete’s faith tours are an example of putting this idea to work, offering travel to sites and places of religious significance, supplementing the trip with a spiritual angle related to the place.

For most developing country operators, Europe’s non-believers offer a much bigger market than believers because a very large part of European believer travellers already go to the Middle East.

Religious tourism can be considered a high-quality form of tourism, because of the positive payback for the destination’s culture and society. This form of tourism helps to raise awareness of people’s common heritages, which helps with their preservation, in addition to the financial gains that can eventually be reinvested into conservation of the local culture and religious heritage. Religious tourism is a great source of community empowerment and development as well. The interest of tourists in local values and communities helps in developing a sense of empowerment and pride in the local community, its culture and history. Naturally, religious tourism also contributes to regional economic increase, employment and better quality of life.

Figure 1: Varanasi, a holy city in India that attracts many believers as well as non-believers

Source: TourmyIndia

Tips:

Be aware of the religion aspects in a specific destinations, and make sure to take into account all aspects of its aspects, especially habits and believes. This includes anything from food to the time of certain events, to the music played, to religious calendars. If not all parts of your product are well established and connected, you may lose customers.

Look into tour operators that organise faith trips to see what their needs are: Globus Faith focuses on Christians, Dham Yatra on Hinduists, and Asia Buddhist on Buddhists.

Regularly organise meetings with your local community to make sure that everything is in order. Support from the local community requires full integration and engagement with tourism.

Cooperate with other religious sites, tourism agencies and cultural routes, in order to create a better product aligned to related business. This also provides opportunities for making a product that can be combined with others. Creating a hiking trail, for example, can connect multiple activities and accommodations, such as the kora around Mount Kailash in Tibet.

Contact European churches or Christian missionary organisations to attract Christian missionaries. These purpose of these travellers is to contribute for the sake of religion, but many will also make use of the trip to see your country. Use the websites Missionfinder and Mission Africa to find some missions in your country.

Religious sites and places of worship are important meeting grounds for different kinds of visitors and hosts. Tourism breaks down cultural and religious barriers and builds bridges between people and communities. This results in better cross-cultural understanding, which improves social cohesion. Tourism businesses should appreciate and understand possible conflicting ideologies, underlying deeper meanings and forms of interaction with religious sites, which may conflict with the socioeconomic and political norms of the parties concerned.

In order to maintain religious tourism sustainable, two criteria must be met:

- preservation of the religious sites or monuments
- upholding respect to local traditions and religious practices

The main reason for making a trip can be religious, but visiting a religious site or place of worship can also just be part of another trip, or it can provide additional attractions to a specific destination. The level of religious tourism can be anything from small scale, visiting specific places of worship (temples, altars, etc.), to medium scale, such as visiting Mecca, Jerusalem or the Vatican, and even large scale, such as visiting Israel as a whole.

Tips:

As there are many forms and levels of religious tourism look at what is already available nearby to see if you can add something to it. There doesn't necessarily have to be a religious site nearby to justify a religious tourist attraction. Look, for example, for any artefacts or other historical facts that relate to the place and focus on that. An example of this in England is called 'champing', which means camping in churches. Remember, however, that different religions have different values, rules and standards. It is therefore necessary to acknowledge and respect those differences, as well as give everyone the freedom to think and express what they want.

In order to compete effectively in the religious tourism market, use faith in your product name and other branding, making it easily recognisable with signs and marks. Branding helps to enhance connection with the place, create desired perceptions and generally attract people to the place.

Remember that different tourists require different information and see different things based on their motivations. Try to customise your tour or information guide according to your customers by making it diverse or by having multiple versions.

Be creative about possible streams of revenue. Among the many goods and services related to religious or spiritual tourism, consider souvenir items, religious books, outlets for halal or kosher food, faith-based music, spiritual or faith-based centres in local communities.

2. What makes Europa an interesting market for religious tourism?

The global market for religious tourism is one of the biggest tourism segments. In 2018, an estimated one-third of 1.4 billion international tourist arrivals travelled for religious purposes. This means that approximately 450 million international trips were made for religious purposes. The popularity of faith-based tourism cannot be understated, as even 25% of travellers are interested in this kind of tourism.

For many countries, religious tourism around its historical and religious heritage is a significant part of their total tourism market. Saudi Arabia, for example, received 13 million religious tourists in 2019, and is expected to more than double this number to 30 million visitors by 2030. In the state of Gujarat, in India, almost 36% of all of tourist visits are spiritual tourists. The religious tourism market in Brazil is one the largest tourism segments in the country, estimated at €14 billion generated by 20 million trips.

The COVID-19 pandemic is expected to affect every tourism segment. All markets are expected to decline, since virtually all attractions and accommodations had to be closed at least temporarily. The European overall outbound tourism market is expected to shrink by 39% in 2020, then return to the same level of 2019 in 2021. Of course, these estimates heavily depend on the duration and impact of the pandemic.

In one example of how the pandemic is affecting religious tourism, in the southern governorates of Iraq, this segment is reported as the second-largest source of income after oil. Normally, religious tourism generates billions of dollars and creates thousands jobs in Iraq every year, but in the city of Najaf, which used to host approximately 5,000 visitors a day, 300 out of 350 hotels are closed. The impact of the COVID-19 crisis is already noticeable in Mexico as well, where millions of religious travellers are normally expected, but most religious sites have been sitting empty this year.

Tips:

- Read our study on how to respond to COVID-19 in the tourism sector to learn what you should do if your company is affected by the pandemic.
- Focus on tour operators instead of targeting free independent travellers directly. Due to the COVID-19 pandemic, European tourists will be far more interested in buying from tour operators in the coming years, because they provide a feeling of security.
- In order to keep religious sites accessible, create a virtual visit of your destination. The Vatican, churches, mosques and other religious sites and places of worship already See other examples of virtual tours on the Rome Reports website.
- Improve online visibility by using social media, interactive website and blogs. We also recommend investing in trying to improve your Google ranking, following tips from the website of Neil Patel or Google’s SEO Starter Guide.
- Make sure that sites and routes in your location are easily accessible for people with reduced mobility. Make sure to mention it upfront in case you have any places which might prove difficult for some people to access. The website of the United Nations offers more information and links to resources on how to promote accessibility at your destination.

3. Which European countries offer most opportunities for religious tourism?

Although Christianity is the most prevalent religion in Europe, it is split into different branches and churches, and those also vary among European countries. Table 2 shows demographic data on religion in the most important European source markets for religious tourism: Germany, United Kingdom, France, Italy, Spain, and Netherlands. Most of these source markets offer opportunities for Christian pilgrimage and travel for the purpose of worship, as well as visiting sacred sites and tourism to places of worship for non-believers.

Table 2: Percentage of the population per religious movement

Religious movement (self-declared)	EU	Germany	United Kingdom	France	Italy	Spain	Netherlands
Catholic	41%	30%	13%	41%	78%	56%	17%

Orthodox Christian	10%	2%	7%	2%	2%	4%	2%
Protestant	9%	24%	14%	2%	3%	1%	15%
Other Christian	4%	5%	16%	2%	2%	2%	5%
Jewish	<1%	<1%	<1%	1%	<1%	<1%	<1%
Shia Muslim	0%	1%	1%	1%	0%	0%	0%
Sunni Muslim	1%	2%	3%	2%	1%	0%	<1%
Other Muslim	1%	1%	1%	2%	0%	0%	1%
Sikh	0%	0%	1%	0%	0%	0%	0%
Buddhist	0%	0%	0%	1%	0%	0%	1%
Hindu	0%	0%	1%	0%	1%	0%	0%
Atheist	10%	9%	9%	21%	3%	12%	11%
Non-believer or agnostic	17%	21%	28%	19%	6%	20%	41%
Other	4%	4%	4%	5%	3%	3%	7%
Refused to answer	2%	0%	1%	1%	1%	1%	0%
Don't know	1%	1%	1%	0%	0%	1%	0%

Source: European Union, 2019

Germany

The percentage of Christians in the German population is one of the highest in Europe: approximately 60%, which means that Germans are relatively fast drawn to other religious sites when they are on vacation. The number of Muslims in Germany is relatively high, comprising 4% of the country's population.

With approximately 82 million citizens, Germany has the largest population in the EU. The country also has the largest GDP in the EU, and fourth in the world: €3.3 trillion equivalent to €50 thousand per capita. In addition, Germany also has the largest EU market for outbound travel. Germans spend on average €2,500 on their summer holidays, which is approximately 25% more than the European average. All of this makes Germany a great target market for religious tourists. Due to the COVID-19 pandemic, the German GDP is expected to shrink by 7% in 2020, then grow 5% in 2021.

In 2017, German travellers made 10 million trips to developing countries. According to Europ Assistance, German travellers find discovering new cultures very important, as 37% see exploring new cultures as an interesting aspect of their holiday. Since religious tourism for non-believers and cultural tourism overlap in many ways, destinations in the developing world where local customs have religious origins can benefit from this interest.

Table 3: German travellers long-haul destinations, 2017

Destination	Percentage of long-haul trips
South East Asia	18%
North America	23%
Caribbean	11%
Africa	14%
Latin America	11%
India	8%
Middle East	5%
China	4%
Australia and New Zealand	6%

Source: Reiseanalyse, 2020

When trying to attract German tourists, you need to offer plenty of information. German tourists tend to read a lot before choosing to visit a place. They are, like most Europeans, direct in their communication, and are well known for their tendency towards organisation and punctuality.

Table 4: Key statistics on the attitude of German travellers towards tourism

Most popular type of accommodation	For trips of 13 nights and longer: paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (54%) For trips between 4 and 13 nights: paid commercial accommodation (47%)
Most frequent type of holiday	For trips of 13 nights and longer: Tourist services purchased separately (44%) For trips between 4 and 13 nights: Tourist services purchased separately (44%)

Most popular booking method	Online commercial services, excl. private housing individuals (28%) Through someone I know (26%) Over the counter at a travel agency (27%) Online commercial services – private housing individuals (23%)
Most important reasons to return to the destination	Natural features such as landscape, weather conditions (44%) Quality of accommodation (33%) Cultural and historical attractions (13%)
Most important information sources for decision-making	Recommendations by friends, colleagues, and relatives (44%) Personal experience (39%)
Region of residence	Rural area or village (41%) Small or mid-sized town (40%) Large town or city (18%)

Source: EU, 2016

United Kingdom

The potential religious tourism outbound market of the United Kingdom is significant as well. With a population of 66 million and a gross domestic product of €2.3 trillion, the United Kingdom is it the fifth-largest economy in the world and the second in Europe. With a GDP per capita of €44 thousand per year, the British have less to spend than the Germans. Due to the COVID-19 pandemic, the British GDP is expected to shrink by 6.5% in 2020, then grow 4.7% in 2021. The UK officially left the European Union on 1 February 2020 (Brexit), but the country remains in the EU common market, under the same EU rules, during a transition period that goes until 31 December 2020. At this moment, it is still unclear what will happen afterwards, as the EU and the UK negotiate the post-Brexit terms.

Although the British economy is smaller than Germany’s, British travellers have a higher preference for destinations in developing countries than German travellers. British travellers find discovering new cultures very important, as 52% sees exploring new cultures as an interesting aspect of their holiday, which is an important indicator of interest in religious tourism. British travellers spend on average €2,100 on their summer holidays. Turkey (1.6 million trips), Thailand (1.0 million trips) and India (1 million trips) are the most important developing country destinations for British travellers, who tend to speak only English and no other foreign language.

The United Kingdom is one of the main sources of religious tourism in Uttarakhand, India.

Table 5: Key statistics on the attitude of British travellers towards tourism

Most popular type of accommodation	For trips of 13 nights and longer: paid commercial accommodation, such as hotel, B&B, cruise, youth hostel, etc. (53%) For trips between 4 and 13 nights: paid commercial accommodation (57%)
Most frequent type of holiday	For trips of 13 nights and longer: Tourist services purchased separately (48%) For trips between 4 and 13 nights: Tourist services purchased separately (50%)
Most popular booking method	Online commercial services, such as tour operators and airline companies, excl. private housing individuals (51%)
Most important reasons to return to the destination	Natural features such as landscape, weather conditions (20%) Quality of accommodation (20%) Cultural and historical attractions (14%)
Most important information sources for decision-making	Recommendations by friends, colleagues, and relatives (56%) Websites collecting and presenting comments, reviews and ratings from travellers (37%)

Source: EU, 2016

France

France is the world's fifth-largest outbound tourism market, so it naturally offers good opportunities. Israel is a destination particularly in demand among the French, who are second in the number of visitors to Israel. France has almost 31.5 million Christians, who make up 47% of its population, and are therefore are a great target group for religious travel operators. France also has the largest population of Muslims in Europe at 5.72 million, equivalent to 5% of the total French population.

France has the third-largest population in the EU, with approximately 65 million people. It is also the EU's third-largest economy and the seventh-largest in the world, with a gross domestic product of €2.5 trillion (2019). Due to the COVID-19 pandemic, the French GDP is expected to shrink by 7.2% in 2020, then grow by 4.5% in 2021.

Regardless of the duration, 46% of French travellers favour packages holidays (excluding all-inclusive packages). Most holidays are purchased online in France, via providers such as tour operators and airline companies (33%) or private housing (25%). The French prefer to spend their holidays with friends and relatives (long holidays 27%, short holidays 35%) or in paid accommodation, such as hotel, B&B, cruise or a youth hostel. Friends, colleagues and relatives provide the most important source of information when the French plan for their holidays (57%).

Italy

The GDP of Italy is the fourth largest in Europe at almost €2.1 trillion. The COVID-19 pandemic is expected to shrink Italy's GDP by 9,1% in 2020, but it will then grow again to 4.8% in 2021. Among the 60 million Italians, an overwhelming 85% are Christian. The outbound tourism market of Italy amounts to €30 billion annually. Italian travellers prefer culture over nature and have a relatively high preference for discovering new cultures. According to Europ Assistance, 34% of Italian travellers see it as an interesting activity during holidays, which suggests that Italians are also interested in religious tourism, such as visiting religious sites, churches and other places of worship. Italian travellers do not often plan their trips too far in advance.

Spain

Spain itself has some of the most popular religious sites and places, like Santiago de Compostela. Religious tourism is very popular in Spain, but the country also has a great outbound market worth €24 billion. Spain's population of approximately 47 million makes it a large market to focus on when entering the European market. The country's GDP per capita is €31 thousand. The COVID-19 pandemic is expected to shrink the Spanish GDP by 8% in 2020, but it will then grow with 4.3% in 2021. Spaniards tend to prefer culture over nature: 56% of the Spanish tourists see discovering new cultures as an important aspect of their holiday, which suggests they may also be interested in religious tourism.

Netherlands

The Netherlands has a population of just 17 million, but it has a relatively large GDP of €870 billion, which results in €50 thousand per capita, the seventh largest in Europe. Dutch workers on payroll receive a mandatory holiday pay of at least 8% of their annual salary, which indicates that Dutch travellers have more disposable income to use for travelling. The COVID-19 pandemic is expected to shrink the Dutch GDP by 7.5% in 2020, then grow by 3% in 2021.

Tips:

- Stay up to date on the effects of the COVID-19 pandemic on the countries you want to target. The CBI study on managing the effect of COVID-19 in tourism offers many good country-specific resources.
- Help educate your guests about local customs and cultures, especially the target group of non-believers.

4. Which trends offer opportunities on the European religious tourism market?

Media influence on destinations in Southeast Asia

Influenced by mass media, including Hollywood movies, blogs, books, social media, but also by tourism depictions of particular people and places, South East Asia has seen an increase in the number of spiritual tourists. Combined with the positive effects of spiritual practices, these travellers seek activities that involve meditation, yoga, and other spiritual pursuits. They travel to learn about and practice meditation, such as mindfulness, seeking relaxation, self-knowledge and self-growth. Improvements in tourism infrastructure have increased accessibility to religious sites, boosting popularity, but strategic marketing and development of these sites has helped boost visitor numbers.

Media influence example 1: Eat, Pray, Love

In 2010 the popular movie 'Eat, Pray, Love' was released. This movie is about a woman searching for what meaning in life. She visits Italy to discover food, India to discover prayer and Bali, to discover love. The movie has stimulated and changed tourism to those destinations, as more tourists travel for the purpose of worship.

Figure 2: A poster of the movie 'Eat, Pray, Love'

Source: Flickr

Tips:

Target spiritual tourism travellers offering new and unique activities. These travellers are often more open new experiences and tours than other religious tourists.

Read our study on inner wellness tourism, to find more information about this niche market.

Combine multiple activities into a tour to create a complete spiritual journey. SOTC is an example of a tour operator offering spiritual journeys to India and Bhutan.

Showcase the immersive spiritual experience to strengthen brand value. Branding creates a perception of a desired destination, also helping travellers to keep your location in mind. Word-of-mouth advertising still is the most successful marketing tool.

Search for authenticity

The search for authenticity is a developing trend among travellers searching for more authentic experiences, such as immersing themselves in the spiritual and cultural traditions associated with specific religions and pilgrimage sites. The immersion often includes participation in or in connection with the local community.

An example of this is a visit to the Dani tribe in Indonesia, combined with other religious sites. Although many Dani are Christians nowadays, they still have many rituals and ceremonies dating from their old animist gods. Note that uniqueness is highly appreciated by European travellers, but it also brings risks. For example, a European tour operator offered tours to the Dani tribe, in which visitors could participate in the religious Dani Pig Feast, including cutting open a pig and eating its raw flesh, which may be too far for European tourists.

Halal tourism on the rise

Islam is the fastest growing religious group globally. Muslims are expected to make up to 25% of the world population by 2030, including a growing and thriving middle class, with increasing buying power. It is important for tourism businesses to meet specific religious requirements, such as preparing food under halal rules, adapting meal times during Ramadan, offering prayer facilities, providing separate swimming pools for males and females and offering entertainment catered to Muslims. Halal tourists often travel with their families and stay for about 17 days.

Looking for the unusual

A growing group of people currently seek more unusual holidays, and more diversification on their travels. Travellers are now not just better informed but overinformed through the internet and social media, so this new group of travellers is seeking something different from the regular tourism destinations the know. What they seek is to see and experience something that they and the rest of the world have not done yet.

In the context of religious tourism, which used to involve a lot of sightseeing, like strolling around Jerusalem or visiting religious archaeological sites, unusual experiences have become far more important. One such example, is a trip to Suriname to meet people from different religious backgrounds who live together.

Tips:

Talk with tour operators, destination managers and clients to learn which services are appreciated and which are not. Offering the unusual is often a balancing act that can work but it can also backfire. Offer your clients sufficient information in advance, so they know what to expect.

Read our study on community-based tourism to learn more about offering trips to local communities.

Set up experiences that create added value to a product or service, such as including stories, music, food and other aspects associated with the destination. This trip visiting the Maasai in South Sudan is a good example of an experience that includes local religion, culture, music, and dance. To achieve this kind of product, we recommended that site and destination managers engage a broad range of stakeholders in developing, promoting and managing tourism.

Invite bloggers or social media influencers free of charge to your destination to reach a larger public. Search for popular bloggers or influencers to see what sorts of trips and tourism products they use, as well as who are their audiences, so you find someone who is highly likely to relate to your destination.

Keep your own social media channels up to date. Post daily or several days a week on your social media. For more advice, read our study on how to be a successful company online.

This study has been carried out on behalf of CBI by Molgo and ETFI.