

The European market potential for sports tourism

Sports tourism is a very diverse market. Sports events fans, as well as group and individual participation in sports are important niches. The COVID-19 pandemic has had a major impact on the sports tourism market. Before COVID-19, sports-related tourism was one of the biggest growth segments in tourism. We expect many opportunities to reappear in the coming years, especially for individual participation in sports, which contributes the most to sustainable and stable revenues.

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1. Product description

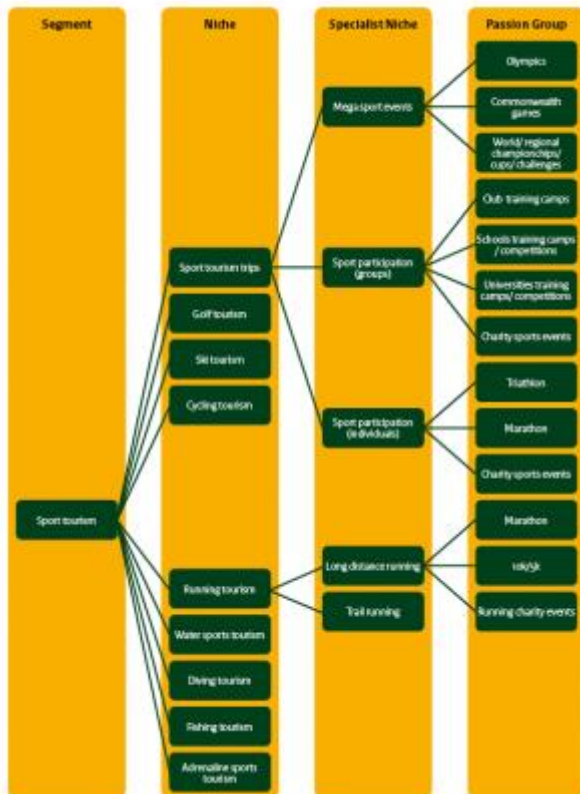
Sports tourism involves travel to watch, practice or compete in a sporting activity or event. It can be segmented into nine niches:

- Sports tourism trips
- Running
- Golf tourism
- Ski tourism
- [Cycling](#)
- Water sports
- [Diving](#)
- Fishing
- Adrenaline sports

Among these, sports tourism trips is the most important niche, because it covers all sports. A sports tourism trip is defined as a holiday for the purpose of watching a major sporting event, such as the Olympic Games, or participating in an organised sporting event or activity, as part of a group or as an individual. The sports tourism trip consists of three specialist niches:

- attenders of mega sports events
- group participation in sports
- individual sports participants

Figure 1: The niches, specialist niches and passion groups of sports tourism



This study provides an overview of sports tourism as mentioned in figure 1, but mainly focuses on sports tourism trips. Some niches, such as [cycling tourism](#), [diving tourism](#) and [physical wellness tourism](#), are covered in separate CBI studies.

2. What makes Europa an interesting market for sport related tourism?

Sports tourism represents about [10% of the global expenditure on tourism](#). Europe was [the largest market in the global sport tourism industry in 2018](#), according to VynZ research, followed by North America. The global sports tourism market was valued at [€1.5 billion](#) in 2018 and was expected to grow to close to €7 billion by 2023, which is an average annual growth rate of 36%, making it the fastest growing tourism market.

However, due to the COVID-19 pandemic, the European outbound tourism market in general [is expected to shrink](#) by 39% in 2020, but recover almost fully in 2021. Of course, these estimates depend on the duration and impact of the pandemic.

The opportunities in outbound sports tourism trips from Europe vary by niche. Individual participation in sports offers the most opportunities for sustainable revenues, but other niches also provide opportunities. In addition to the three main segments, we will also discuss sports heritage and nostalgia.

Fans of mega sports events

Mega sports events make up a substantial part of the sports tourism market. Some of the biggest sports events, such as the FIFA World Cup and the Olympic Games, provide great opportunities. In terms of tourism development, these events can be catalysts of economic opportunities, when there is proper use of destination branding and infrastructure development.

Many mega sports events are highly unsustainable from a tourism perspective. Some lead to [overtourism](#), but only for a very short period of time. Others require a lot of infrastructure that is soon abandoned afterwards.

However, the actual game or event is not always the main reason for travellers visiting mega sports events. Some events which are not mega events, like Wimbledon, also attract a lot of travellers for their heritage and traditional value, while other events, like the Super Bowl, attract people for commercial and business purposes.

Figure 2: Example of a spectator event in South Africa



Source: [Flickr](#)

Group participation in sports

Within group participation in sports, two different target groups can be distinguished: recreational sports teams and semi-professional athletes.

Recreational sports teams are groups that consist of a team, or in some cases an athlete, a coach and family members. The group is usually a team in team sports, like soccer, rugby, basketball, and others. The trips may either be organised by sports clubs, charity sports events or educational institutions, like schools and universities. European sports teams usually have very limited budgets, so they tend to travel domestic or within Europe. When travelling, these sports teams usually make use of their connections to arrange accommodation and transportation. Therefore, recreational sports teams can often be framed in the category of [friends, family and relatives tourism](#). Destination countries where travel costs are low have most opportunity to seize this market. There are also opportunities for cross-selling, as most teams will also be interested in other tourism activities, such as short trips to the main touristic attractions.

Besides sport teams, professional athletes also offer an interesting market. Since these athletes tend to travel with their staff, they normally book as a group. Therefore, even athletes in individual sports, like tennis players, can be included in group participation. Although they are small in number, professional and semi-professional athletes tend to travel a lot for training as well as for competition. They have high demands for locations, as well as for comfort. Some semi-professional athletes also bring their families on their trips. This target group is mostly interested in accommodation, transportation and sporting facilities, but may sometimes they also combine the sports trip with leisure activities and short trips. Because professional athletes travel a lot, they normally only work with a few suppliers to arrange their accommodation.

Individual sport participation

Individual sports participants include recreational participation in individual sports like marathon, triathlon and charity sport events, such as the [Big Five Marathon](#) in South Africa, which combines a marathon with a safari vacation. There are other events that have both professional and amateur athletes competing in the same event, such as the [Kilimanjaro Marathon](#) and [Uganda Marathon](#). Small-scale events create [the most positive social effects](#) for locals and improve the image of host cities. Individual sports participants can also be classified in the [free independent travellers](#) category.

In addition to the ones above, e-sports also have very large fanbases. IN 2020 alone, e-sports are expected to

create a [global revenue of €1.3 billion](#). The fanbases for these sports consists mostly of people who also play electronic games, but on a recreational or sub-competitive level. Fans of e-sports fans vary widely in age, but mostly between the ages of 13 and 40. E-sports are a good target group for pulling in outbound tourists, as more than [70% of the visitors](#) of these events are not local.

A large number of travellers do not see a sports event as a principal reason for traveling, but they still seek involvement in competitive or non-competitive sports while travelling. Those events are most of the time loosely structured, non-competitive and socially connected. Most people within this market are physically active at home and want to continue to be while they are travelling for business or leisure.

Examples of developing country tourism companies focusing on sports include:

- [Hooked Cabarete](#) in the Dominican Republic – This company targets surfers by blogging about surfing on websites visited by the European surfing community. They primarily offer accommodation, but also provide surfing gear and courses in collaboration with other companies. For more information on opportunities in this niche, read [our study on surf tourism](#).
- [Chairn Muay Thai Camp](#) in Thailand – This company offers muay thai training as well as accommodations, but they also sell gear. Another example in the same category is [Viator](#), where a muay thai champion gives lessons to all ages and skills.
- [Aquanaut Diving Club](#) in Egypt – This company offers diving courses and underwater safaris, but also rents diving gear. For more information on opportunities in this niche, read [our study on diving tourism](#).
- [EdwinDoran](#) – This is an international organisation based in the UK and South Africa that offers sports tours to many countries, including Malaysia and South Africa. Besides training facilities, they also offer excursions and accommodation.

Tips:

Write blogs or create vlogs to attract sports tourists. Many European sports tourists are active in online communities, such as [Wikiloc](#), [More Dirt](#) (for mountain bikers), and [Snorkelling Report](#) (for snorkelling). In addition to websites, many apps gather large communities of sports enthusiasts, like [RouteYou](#) (for hiking and cycling, but also for canoeing and other sports).

Focus on the age group between 15 and 39. Europeans in this age category [participate most in sports](#). Although their budgets are generally smaller, students also offer an interesting market, because they [participate most in sports](#), in comparison with other people, and are often open-minded and curious, which makes them a great group of first customers.

Communicate with your target group in a way that appeals to them. Ideally, check your communication with your clients. Active sports participants give value to achievement, stimulation, power, and self-direction. While conformity, tradition, and security resonate more with sports fans and passive participants.

Organise a small-scale sports event in collaboration with other tourism service providers in the area. Even small events can generate substantial revenue for the local community.

Read our studies on specific types of sports tourism, such as [cycling tourism](#), [diving tourism](#), [surfing tourism](#) and [trekking tourism](#), if your company specialises in one of them.

Sports heritage and nostalgia

A rather small but relevant sports tourism niche is sports heritage and nostalgia, which attracts travellers looking for stadium tours, visits to sports museums, halls of fame, historic sport places and sports themed bars. Sports are an expression of a place's heritage and help make tourist destinations unique. Some examples of this

include sumo in Japan, rugby in New Zealand, and football (soccer) in Brazil. In addition to learning about traditional sports, [tourists also want to learn about the local culture](#), which are often deeply intertwined.

Examples of companies offering sports heritage tourism include:

- [Football Museum](#) in Brazil – Located in the Pacaembu Stadium in São Paulo, the tour shows visitors the origin and history of football in Brazil, and why it is so beloved.
- [Fanatic Sports Museum](#) in India. This museum is a collection of rare sport artefacts related to India.

Sports tourism offers a great opportunity for generating revenue in low season, as many tournaments take place at times in which traditional tourism drops. Furthermore, a sports event is a great way of putting on the map a destination that otherwise would not be known to tourists.

Tips:

Make sure that the local community is friendly and kind to tourists. This offers a positive simulant for tourists to be fully immersed in the local sports and traditions.

Turn a sports event into a multi-day festival by organising side events, which may help to extend tip duration and spending. Remember that a large number of visitors for spectator events will not guarantee any visitors in the future. Be creative about tourism activities after the events, for example, offering tours of the stadiums and training facilities.

Add local flavours to the events and provide authentic local experiences to distinguish your destination from others. A tour of the stadiums and training complexes of the 2010 World Cup in South Africa, can also include visits to local communities.

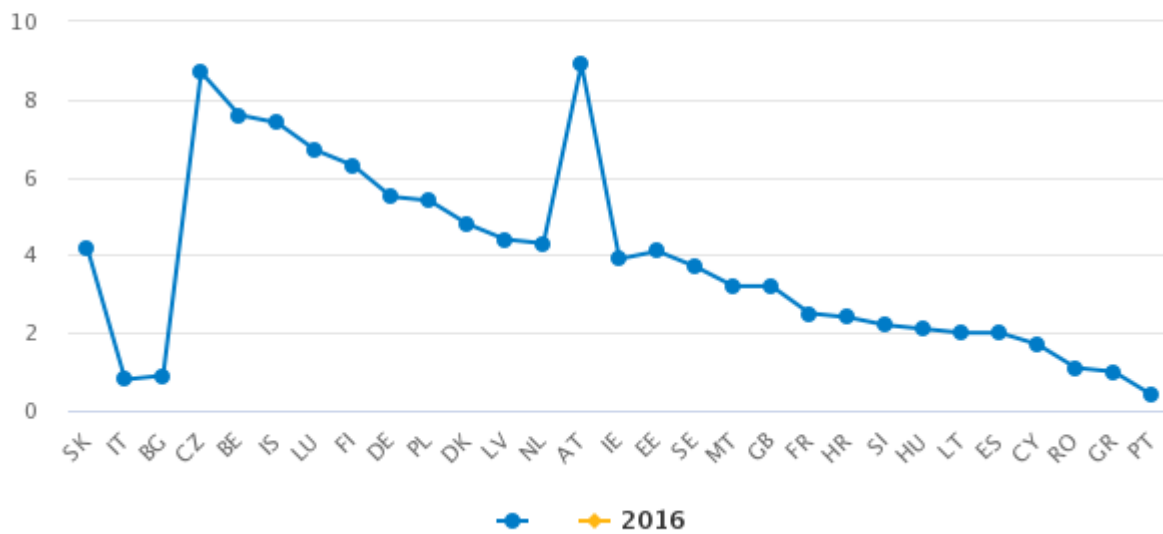
Read our study on [how to respond to COVID-19 in the tourism sector](#) to learn what you should do if your company is affected by the pandemic.

Combine accommodations with sports events, like [Sportihome](#), which has a search tool per sport combined with nearby places to stay.

3. Which European countries offer most opportunities for sport related tourism?

Germany, France, and the United Kingdom offer the most opportunities in Europe, because these are the biggest markets in the EU. Denmark, Finland, and Austria offer smaller markets in size, but their residents do more sports travelling. Scroll over the map below to see the percentage of travellers who mention sports-related activities as their main reason to go on holiday, across different European countries.

Figure 3: Percentage of travellers that cite sports-related activities as the main reason to go on holiday, 2016 per country



Source: Based on Eurobarometer statistics

Germany

Germany offers great opportunities for sports tourism as it has a large population of 83 million and a high GDP of €3.5 trillion and €41 thousand per capita. In Germany, [66% of the population practice sport](#) at least once a week. This is confirmed by research that indicates that two-thirds of German travellers [prefer to engage in sports activities while on vacation](#). Germans [spent an average of €34](#) on sports, wellness and activity-related travel in 2017. In Germany, football (soccer) is the most popular sport, followed by ski jumping and biathlon. Figure 4 offers some data on the most popular sports in Germany.

France

Sports are a big part of the cultural fabric in France. It is the home of the biggest cycling event in the world, the Tour de France, and the French are the current champions of the FIFA World Cup. The population of France is approximately 67 million, the French GDP is €2,4 trillion, which offers a great number of possible tourists and a large market to enter. The possible potential on the French market is showcased in their outbound tourism market: 69% of the population [goes on vacation outside of France](#), the highest percentage in Europe.

In France, football (soccer) is the most important sport to watch, but rugby, tennis and cycling all have large fanbases. Figure 5 provides information into the most popular sports in France.

United Kingdom

The UK has [the second-largest revenue from sports events](#) (behind only the United States). Before COVID-19, UK revenue from sports was expected to reach €627 million in 2020, with 3.2 million visitors. Football, tennis, rugby and other sports are very popular in the UK, so British travellers are likely to also experience these sports in other countries, or even plan a whole trip to play in or attend sports events. According to PXCUM, 25% of the British say they [plan a vacation where they have the opportunity to attend a football game](#). In England alone (not the entire UK), an estimated 4.8 million people [attended group exercise classes every week](#) in 2018, and 11.5 million do it monthly, which suggests how the UK can be an interesting target market.

In the United Kingdom, football (soccer) is the most popular sport: 50.5 million attenders, followed by horse racing (5.9 million) and rugby (4.3 million). Figure 6 provides information about the most popular sports practised in the United Kingdom.

Denmark

Most people in Denmark, a whopping 74%, claim to [participate in sports or other physical activity](#) at least once a week, which is a great indicator of possible interest in doing sports while on vacation. Denmark has a small population of only 5.8 million people, but a very high GDP per capita of €54 thousand. Workers on payroll receive a mandatory holiday allowance of [12.5% of their yearly salary](#), which suggests that they have extra disposable.

Danes participate most in cycling (10.2%), followed by running and jogging (6.5%), swimming (5.7%) and football (soccer) (5.4%). Football (soccer) is the most popular sport in Denmark in terms of club membership: 350,000 members.

Finland

In Finland, 69% of the people [exercise or play sports regularly or with some regularity](#), more than any other country in Europe. Finland has the lowest percentage (13%) of people that never play any sports nor exercise. With a population of 5.5 million and a GDP per capita of €45 thousand, Finland is a small but wealthy target country. Finns participate most in running and jogging (16%), followed by cycling (9.5%), gym and fitness (8.1%), swimming (6.65%) and hiking (3.4%).

Austria

A larger share of Austrians [sees sports activities as a primary reason](#) for going on a holiday than people in other European countries. In addition, 72% of the Austrians [participate in sports or physical activities](#) at least once a week. When on holiday, some may be looking to practise on their own, but many search for other challenging or unique activities like canoeing or scuba diving. [Popular sports in Austria](#) include football and tennis.

Tips:

Stay up to date on the [impact of COVID-19 on the tourism sector](#) on your target country.

Focus on Austria, Finland or Denmark if your aim is maximum efficiency with a limited marketing budget.

Focus on Germany, France or the United Kingdom if your aim is to penetrate the largest European sport markets. Update your knowledge by analysing statistics, for example, about the [German holiday market](#) and the [British holiday market](#).

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

Digitalisation of sport events

Technology advances have made sports information and sports events better available and accessible, facilitating people planning their trips more in advance. As online platforms improve and user knowledge grows, we expect information accessibility to increase further in the coming years.

Tips:

Put tickets and other services like accommodation for sale long before a planned event, so people can learn about it early, then plan and schedule accordingly.

If you organise a regular sport event, promote it on social media and other online resources. Look into marketing companies specialised in sports tourism like [Stir](#) for inspiration on how to do this.

As the COVID-19 pandemic drags on, and live sports games cannot receive fans, it can be profitable to host a stream. Look into different streaming services like [YouTube](#), [Twitch](#) and [Livestream](#) to see what fits best to your needs. Remember that for a stream of good quality you require reliable internet, software and hardware.

Increased demand in highly competitive sub-elite events

Sports events where individual performance matters more than competing against other participants are growing in popularity. These events include triathlons, Ironman races, mountain biking, etc. Many athletes engage in serious training programmes in preparation for their targeted events, but the difference between them and elite athletes, is that they are self-referenced instead of result orientated.

Tips:

Plan your event far in the future, so athletes and visitors have sufficient time to plan. To make an event successful, you must attract enough participants. Sites as [Eventbrite](#) and [Active](#) provide a platform for people to register.

Create spots for spectators, as participants often travel with their families and friends, which also creates extra opportunities of increasing revenue from accommodation, food and beverages services.

Concern for safety

The safety of athletes, teams and spectators remains an issue in the sports industry. Terrorism, which was a previous concern, now has been compounded with the COVID-19 pandemic, increasing security concerns around sports events.

Tips:

Train your employees in emergency procedures. Your employees are partly responsible for the execution of an evacuation plan in case of fire, terrorism, gas leaks and other threats to your guests. Look for [other tips to ensure safety in sports events](#), and read our [tips on how to manage risks in tourism](#).

Stay up to date on your own government's safety regulations and COVID-19 rules.

Experience unique or famous sport places

A growing part of European travellers visit specific locations according to their sports passions, such as experiencing a unique visit to an important venue, visiting a famous sports place or event. In football (soccer), for example, fans often want to attend matches while travelling, such as the [Superclásico](#) in Buenos Aires, when local football rivals Boca Juniors and River Plate meet in one of football's most famous derbies, attracting foreign fans who want to feel the match's atmosphere.

Tips:

Use spectator events to attract visitors. Do not focus on one single event but build rather offer a series of events to have a steadier supply of visitors. For example, organise something around a famous football game, but also for another event a week later, and a third event planned two weeks later.

Offer a variety of activities related to the sport to create an entire experience, which creates an extra dimension for the tourist to be involved in the sport and tradition they have just learned about. An example from New Zealand is combining a rugby heritage tour that includes a live [Haka](#) performance.

This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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