

# Entering the European market for sport tourism

Active holidays are a popular choice among European travellers. Taking part in sporting events while on holiday or taking an entire holiday around sports were very popular before the pandemic. Once travelling restrictions related to COVID-19 have been lifted or adjusted, we expect new opportunities for local tour operators to create exciting sports tourism packages, focusing in sports per se or including cultural and other elements. However, safety standards will be paramount, as European tour operators will be keen to ensure the well-being of their customers.

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## 1. What requirements must sports tourism products comply with to be allowed on the European market?

European tour operators have to comply with strict requirements to ensure the safety of their customers overseas, as well as to protect them financially. These operators expect foreign suppliers to adhere to their own codes of conduct, and terms and conditions. If you will be selling your sports tourism product to them, it is important that you understand these requirements.

### What are the mandatory and additional requirements that buyers have?

The mandatory and voluntary requirements for sports tourism services are common across the sector. Read the CBI's [report on the requirements for tourism services in the European market](#) and familiarise yourself with comprehensive details of legal, non-legal and common requirements, such as:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability insurance and insolvency protection

### Rebuilding sports tourism after COVID-19

The COVID-19 pandemic has caused severe long-term problems for the tourism industry worldwide. At the time of writing this report (August 2020), most European countries advised against any travel outside the EU. While restrictions have been gradually easing, they may be restricted again. Under these circumstances, European travellers are only travelling very cautiously and in fewer numbers than before the pandemic. How you communicate with potential travellers will be key to building relationships. You should not try to market your sports travel projects during this time of crisis, but if you have a website, you can keep it regularly updated so your future customers are kept informed of the situation in your region.

#### Tips:

Study the CBI report on [how to respond to COVID-19 in the tourism sector](#) for more targeted information.

Read the CBI study [Managing Risks in Tourism](#) to learn about measures to deal while this global crisis as it continues to affect tourism worldwide.

## What are the requirements for niche markets?

### Establishing Standards

European tour operators place great importance on safety and best management practices by their partners in sports tourism trips for the purpose of attending or playing sports. The market for sports tourism trips is broad, and people travelling to attend or watch an event will also take part in sports. Likewise, groups travelling to take part in club training and matches, or individuals participating in an event, may also visit a local sporting venue to watch a competitive match.

European tour operators will conduct regular risk assessments on safety procedures, equipment use and maintenance, as well as accommodation, for the sake of their customers safety.

Safety measures and standards are important factors in each niche within the sports tourism segment, including rules that are apply to a specific sport or sports segment, such as:

- Adrenaline sports: Also considered part of adventure tourism. There are two international standards widely used in the adventure tourism segment. One is [ISO 21101:2014](#), which is cheaper to obtain and is issued by the International Organisation for Standardisation (ISO), covers safety management systems and additionally offers [a practical guide for SMEs](#). The alternative standard is [BS8848:2014](#), issued by the British Standards Institution (BSI), which covers adventure activities outside the United Kingdom.
- Kitesurf: Also known as kiteboarding, this is an example of a niche activity within adrenaline sports that requires skill and offer relative risk to participants, so operators must have rigorous safety protocols in place. The new [ISO 21853:2020](#), for example, specifies the minimum standards needed for a safety release system to immediately disconnect the user from the kite.
- Windsurf: Harness safety in sports such as windsurfing is covered by [ISO 12401:2009](#).
- Cycling: the [ISO 4210](#) series covers safety standards for bicycles, while the new [ISO 4210-10:2020](#) safety applies to e-bikes.
- Diving: ISO has developed a number of international standards for scuba-diving, including [ISO 11121:2017](#) for introductory programmes to scuba-diving, and [ISO 24803:2017](#) for recreational diving providers.
- Water sports: ISO has also developed seven individual standards for safety in design, use, stability and load capacity of 'floating leisure articles for use on and in the water' such as stand-up paddleboards and canoes. Check [ISO 25649](#) to consider whether adopting one or more of these standards would benefit your business.

#### Tip:

Consult the CBI's studies for detailed information about opportunities in niche sports tourism activities, including [Cycling Tourism](#), [Diving Tourism](#), [Surf Tourism](#) and [Adventure Tourism](#).

### Provide packaged services

A large number of sports tourists come to a destination specifically to attend sports events, or they travel to take part in a planned sports event as an individual or in a group. See the section [How is the end market segmented](#) below for more information about the European market of sports tourists.

European operators that specialise in sports tourism holidays are looking for reliable partners to provide services to them and their customers. There are opportunities for operators to package a range of services for this large group of sports tourism spectators and participants. You should find out what are the sporting events taking place in your country and consider how you can package them to target participants and spectators from Europe. There are likely to be many other national, regional and international events in your destination that

may be attractive to Europeans if you can market appealing packages to them, such as the ones in the table below.

Table 1: Participatory Events in Developing Countries, 2020/21

Event	Sport	Country	Provisional Date*
Challenge Cancun	Triathlon	Mexico	October 2020
Cape Epic	Cycling	South Africa	March 2021
HotChillee Cape Rouleur	Cycling	South Africa	March 2021
Challenge Cerrado	Triathlon	Brazil	April 2021
Old Mutual Two Oceans Ultra and Half Marathon	Running	South Africa	April 2021
Marathon des Sables	Running	Morocco	April 2021
Tenzing Hillary Everest Marathon	Running	Nepal	May 2021
Comrades Marathon	Running	South Africa	June 2021
Big Five Marathon	Running	South Africa	June 2021
Petra Desert Marathon	Running	Jordan	September 2021
Rainmaker RollerCoaster	Cycling	South Africa	October 2021
Haute Route Mexico	Cycling	Mexico	November 2021
The Great Wall Marathon	Running	China	November 2021
Bagan Temple Marathon	Running	Myanmar	November 2021

Source: Acorn Tourism Consulting

Notes: \*Many of these events were postponed in 2020 because of the COVID-19 pandemic.

Consider whether any of these packages would be suitable to your sports tourism product assortment:

- Think about creating a package that includes entry tickets, accommodation and transportation to a local or regional event. Packages may be set for a number of days or nights, or tailor-made. Food and beverages may or may not be included. The more flexible you can be, the more likely the buyer will want to do business with you.
- Check that your package is competitive by assessing what other local operators offer. Add value to your offer

by including extras, such as a free programme, two nights for the price of one, free transfer to the airport, train or bus station, etc.

- If you have contacts in sports and can arrange a fan meeting with a local sports star, you can create a competitive edge for your product.
- Some sports tourists may be participating in an event to raise funds for a particular charity. Check which charities are operating in your destination and find out if they are interested in bringing groups of supporters to participate.
- Link your sports experience with local cultural activities, for instance host a friendly football match with a local team or school followed by a social activity or meal.
- If you are located near an important sports stadium or sports museum, or even an important monument or attraction in your destination, combine your activity with a sightseeing trip.
- Make sure the guides you employ are well trained and can speak well the languages of your visitors, or at the very least English.
- Pay attention to the quality of the accommodation you offer. For student travellers, dormitory-style accommodation may be suitable but make sure to have separate accommodation for men and women. For groups, be clear about the sizes of the groups you can accommodate. Consider conveniently located apartments and hotels, and always provide bed linen.
- Travellers from Europe usually require private, clean bathroom facilities. Basic sanitary ware is acceptable but doors should be lockable.
- For sports tourists that bring their own equipment, such as bicycles and boards, ensure that you provide secure storage facilities, such as bike racks and storage lockers.
- If you provide transportation, ensure the vehicles you use meet safety standards that are acceptable to European operators. Read the CBI study [Tips for organising your tourism services export to Europe](#) for more information about the relevant liability insurance requirements for European operators.

## **2. Through what channels can you get sports tourism products on the European market?**

### **How is the end-market segmented?**

Europe is a key market for sports tourism trips, particularly the UK, which is the largest sports events market in the world after the United States, Germany and France. Sports tourists can be segmented into two major groups: spectators and participants.

- **Spectators:** This group travels to watch mega sports events, such as the Olympic Games and the FIFA World Cup, but also other professional sports tournaments and competitions, including football, rugby, cricket, as well as staged events, such as cycling events like the Tour de France. Golf and tennis are also major spectator sports. Spectators travelling to watch a match, tournament or event as the primary reason for travel may also play sports during their trip.

Participants in sports tourism can be further segmented by individual participation and group participation.

- **Individual Participation (Sporting Events):** Sports tourists who travel to take part in staged events, such as marathons and triathlons, can be either professional athletes or amateurs. It is important to remember that many of these will be accompanied by family members or friends, who will be spectators, so this group of sports tourist offers additional opportunities.
- **Individual Participants (Holidays):** Sports tourists travelling for the main purpose of sport will be indulging in their sports passion, such as diving, golf and skiing. Other sports tourists may take part in sports during a trip done for other purposes, such as cultural or wellness, meaning that sports tourism is a secondary reason for travel. Typical sports activities for this type of tourist include water sports, golf, cycling and surfing.
- **Group Participation:** Groups that travel on sports tours make up this segment. They are generally school or university groups, or adults who belong to a club. Trips are usually prearranged to either compete against similar teams in other countries or regions, or for training. Trips for groups may also include an excursion to watch a match scheduled during the trip.

Both groups cross all ages and consumer groups, and there is considerable crossover between those who watch

and those who play.

Table 2: European Sports Tourists

Spectators	Individual Participants in Sports Tourism	Group Participants in Sports Tourism
Mega and large events, such as the Olympic Games, and football, cricket, rugby world cups, golf, and tennis championships	Sports events, such as marathons, triathlon	School or university group sports, such as rugby, cricket, football, netball
National sports events	Sports holidays, such as diving, cycling, skiing, golf	Local teams and groups on tour to watch or play a sport, such as golf, cricket, football, rugby, etc.
Regional or local sporting events	Holidays that include sports activities, such as water sports, cycling, surfing	Groups that attend training camps
	People who try a sport while on holiday, such as diving, golf, tennis, muay thai, etc.	

Source: Acorn Tourism Consulting

## Through what channels do sports tourism products end up on the end market?

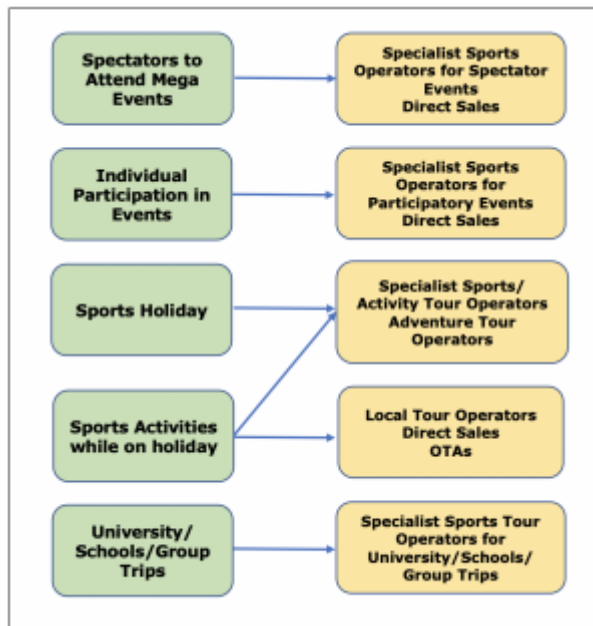
A wide range of European tour operators specialise in the various segments of sports tourism travel. They are the major channels for selling sports tourism products to European sports tourists. Depending on the type of sport and travel style, adventure tour operators also sell sports holidays, usually marketed as activity holidays.

- Spectator Sports: A wide range of specialist operators offer packages to major sporting events, such as [Gullivers Sports Travel](#) and [Venatour](#), which put together comprehensive packages for sports enthusiasts. Many fully independent travellers (FITs) will put together their own sports trips, buying tickets directly from event organisers or ticket agents, and making their own arrangements for accommodation and transport.
- Sports Events: Operators that specialise in events are key choices for professional athletes and non-professional participants, such as [Sports Tours International](#) (UK) and [Tri Travel](#) (Australia).
- Sports Holidays: Sport tourists looking to travel to enjoy their sport of choice may use an operator that specialises in a specific sport, such as [Dive Worldwide](#) and [Freedom Treks](#) (cycle holidays in Europe and Asia), [Ethiocycling Holidays](#), and [Your Golf Travel](#). Other operators offer broad sports holidays or multi-activity holidays, such as [Frosch Sportreisen](#) (Germany) and [TUI](#) (Germany). Sports holidays are also a

popular segment for large holiday portals, such as [On the Beach](#) and [Tour Radar](#).

- Sports activities while on holiday: For travellers on other types of holiday, but who want to take part in sports activities, or find a match or event to attend while on holiday, local tour operators and online tour agents (OTAs) are likely platforms for them. [Viator](#) is one of the largest OTAs in the market today. \
- Group Holidays: [KIJU](#) (Germany), [Sporting Holiday Group](#) (UK) and [Sports Tours Overseas](#) specialise in sports trips overseas for teams and clubs.
- School and University Sports Trips: Sports trips for students is a specialised area on account of the ages of the participants and the need for appropriate safeguarding measures. Examples of operators in this category include [Edwin Doran Sports Tours](#) and [Absolute Sport Travel](#). [I Love Tour](#) specialises in sports tours for university students.

Chart 3: Sales Channels for European Sports Tourism Products



Source: Acorn Tourism Consulting

### Tip:

To find out more about the FIT market, read [the CBI study on opportunities in the European FIT market](#).

## What is the most interesting channel for you?

European tour operators are your key market channel. Depending on what type of sports tourism project you are selling, research the most suitable European partners to approach. Read more in the CBI study [Tips for finding buyers in the European tourism market](#).

If you are a local tour operator targeting the FIT market, research suitable OTAs and consider having an online presence to attract independent travellers. To make sure that you can reach your market effectively, consult the CBI study [How to be a successful tourism company online](#) to help you create a good website or develop a new one.

### **3. What competition do you face on the European sports tourism market?**

#### **Which countries are you competing with?**

##### **Brazil**

Brazil is one of the world's best-known countries for football and beach sports, such as beach volleyball. Brazilians avidly play and follow these sports. Rio de Janeiro and São Paulo are key destinations for sports tourism and the country recently hosted two mega sports events, the 2014 FIFA World Cup, and the 2016 Olympic Games. Participatory sports are also widely practiced in Brazil, including mountain biking, canoeing, scuba-diving and adrenaline sports, like kitesurf.

##### **Egypt**

Egypt's Red Sea region is one of the world's premier diving destinations, also home to a wide range of adrenaline sports including kitesurfing, rock climbing and desert cycling. Egypt is also conveniently located for European sports travellers, and the added attraction of cultural tourism puts the country in a good competitive position.

##### **India**

Sports tourism is reported to be booming in India, increasing at a rate of 10%–12% annually. Cricket is a national passion in India, attracting thousands of spectators from all over the world to stadiums, such as the iconic Eden Gardens in Kolkata, India's oldest, built in 1964. India is also home to the world's largest cricket stadium, the Sardar Patel Stadium, in Gujarat, which can seat 110,000 spectators.

##### **Mexico**

Mexico offers many options for sports tourists, including adrenaline sports. Acapulco is believed to be the birthplace of cliff jumping, and many tourists go watch the La Quebrada Cliff Divers dive in to the sea from as high as 35 metres. Football is Mexico's most popular spectator sport, followed by Lucha Libre, or Mexican wrestling, which has a big fan base. Diving experiences are common sports tourism activities, as Mexico is home to some excellent and challenging scuba-diving sites.

##### **South Africa**

South Africa's long coastline on two oceans and its spectacular mountainous interior have made it a well-known destination for all types of sports tourism. This includes surfing, diving, water sports, cycling and mountain biking, along with a myriad of adrenaline sports, such as abseiling and bungee jumping. South Africa has also hosted many major spectator events, including rugby and cricket world cups, as well as the 2010 FIFA World Cup. Cape Town is a leading destination for school sports trips, such as rugby and netball.

##### **Thailand**

Thailand is well known for active sports holidays, and its diverse and varied landscape ranging from tropical rainforests and white sandy beaches lends itself well to a wide range of different sports activities. Many cities and resorts offer Muay Thai experiences — Muay Thai, which is native to Thailand, can be described as a form of kickboxing. Cycling, water sports, beach volleyball and triathlon activities are also common pursuits for active sports tourists. Combined with wellness activities, such as spa, yoga and Pilates, Thailand has become a popular sports destination for European travellers.

#### **Which companies are you competing with?**

##### **Companies in Brazil**

[Play Sports Brazil](#) offers sports trips that are combined with cultural activities, such as sightseeing and visits to



beaches and major attractions. Trips are typically tailor-made according to the need of the customer, who decides how many games or practice sessions they want, and which excursions to take. Some of the sports they cover include football (soccer), volleyball, basketball and adrenaline sports. This operator has a wide range of positive testimonials on its site, along with images, videos and interviews. They also have a social responsibility policy and encourage interaction between guests and local community projects.

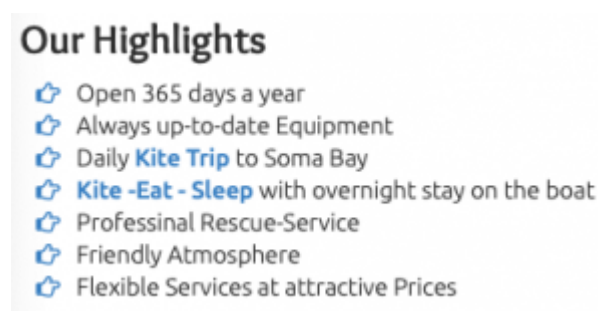
[Rio Mountain Sports](#) offers rock climbing and hiking experiences in Rio de Janeiro via its own website and TripAdvisor. Offer guided climbs along with courses, the owner and manager is an experienced climber. The website uses inspirational images to tease new customers, and the site is available in both English and Portuguese.

## Companies in Egypt

[Egypt Divers](#) offers a range of sports products including surfing, windsurfing, kitesurfing and diving tours and courses. Its website is available in several European languages, including Dutch, German, French, and English. Egypt Divers also uses several social media platforms, such as Facebook and Instagram. While they target divers primarily, they also cater for non-divers, which is an important consideration for local operators.

[Tornado Surf](#) is an independent sports centre located in Safaga, on the Red Sea. It specialises in kitesurfing and windsurfing, and also offers stand-up paddle boarding (SUP) and catamaran experiences. Their website is translated into English, German, and French, to attract foreign customers, plus they have partnered with organisations local hotels and European sports organisations in Germany and France.

Chart 4: Tornado Surf – Operator Highlights



Source: Tornado Surf

OTAs such as [Get your Guide](#) offer a wide range of local experiences run by local tour operators, including sports activities. Some also include cultural activities.

## Companies in India

There are a multitude of local tour operators all over India. Specialist sports tourism operators have begun to emerge, but most operators offer a wide range of tours that include sports experiences. [Five Senses Tours](#) offers a cricket tour in Pune, which includes a visit to a cricket museum and an active cricket session at a leading academy hosted by professional cricketers. [Ashoka Holidays](#) offers a nine-day tour to cricket destinations in Delhi, Agra, and Jaipur, which includes participating in matches against Indian schools or clubs, museum visits and other cultural experiences, including sightseeing visits to major attractions.

## Companies in Mexico

[Cozumel H2O](#) specialises in scuba-diving experiences ranging from day experiences, diving courses and snorkelling. They have partnered with several organisations, including PADI and emergency organisations, such as Emergency First Response and the SSS Recompression Chamber Network. These are good examples of how



to provide reassurance to potential customers.

[Maratones](#) specialises in trips for groups and individuals to participate in marathons around the world, including Mexico and adventure marathons in destinations as diverse as Myanmar and Jordan.

Several local guides operate tours for tourist to see the famous La Quebrada Cliff Divers, attend football matches in Mexico City, as well as Lucha Libre experience. [Viator](#) is a good way of marketing such tours, which include visits to other places and extras, such as dinners and city tours.

## Companies in South Africa

[Cape Town Sports Tours](#) offers trips to visit, compete, train and relax, and operates tours involving cricket, netball, swimming and field hockey through its academies. Depending on the sport, it caters for a wide range of ages, from school children to seniors. Visits include trips to sporting events as spectators, such as cycling and running events, which may also include a trip to climb Table Mountain or visit Robben Island. The operator is a member of Cape Town Tourism and the [South African Tourism Services Association](#).

[Sports Tours](#) promotes value sports travel packages to some of the world's leading sporting events, including Golf championships, such as the Masters, US Open and British Open, motor racing, rugby (Six Nations), cricket, tennis and football. Sports Tours of having organised 327 tours for almost 1,000 travellers in 10 countries, working with multiple service providers to create packages for groups and individual sports fans.

## Companies in Thailand

[Co Van Kessel](#) offers bicycle tours in Bangkok and specialises in taking travellers to off-the-beaten-path places, including visiting local communities to experience real Thai culture. Available in Thai, Dutch, and English, their website is a mix of inspirational photos, animations and graphics, featuring also a blog section, videos, and customers testimonials. Their cycling tours can also be combined with boat tours and walking tours.

## Which products are you competing with?

Adventure tourism travel products and experiences are the key competing products for sports tourism providers. Both markets offer a broad range of possible activities that can be combined in multiple ways. Familiarise yourself with the [opportunities in the European adventure market](#) and download the CBI study.

## 4. What are the prices for sports tourism products on the European market?

The prices for sports tourism experiences vary widely according to type of experience.

Prices for mega and large events are published at the time the event is scheduled, varying according to seating arrangements. [Ticketmaster](#) and [Stubhub](#) are typical sellers of tickets to mega and large events. Specialist operators often work with event organisers to create packages for customers.

The fee for entering events such as marathons and triathlon are set by the organisers.

Trips planned for schools, universities, and groups are usually bespoke and priced according to the needs of the group. Several factors will affect the price, including number of participants, itinerary, excursions, accommodation, numbers of guides or sports coaches, etc.

For individuals looking to try a sport while on vacation, the table below gives an idea of pricing for a variety of short-term sports experiences commonly enjoyed on a holiday.

Table 5: Prices for sports experiences in different countries

Sports Experience	Country	Duration	Price pp (€)
Muay Thai Experience	Thailand	3 hours	21
Lucha Libre (Mexican Wrestling) in Mexico City	Mexico	4 hours	30
Dinner and Cliff Divers Show	Mexico	Half Day	35
Fishing Challenge by Koh Samui	Thailand	8 hours	39
Surf Lesson in Cape Town	South Africa	2 hours	40
Maracanã Stadium Tour – Behind the Scenes Access	Brazil	3 hours	55
Highlights of Mumbai, including the Oval Cricket Ground	India	6 hours	72
Private Day Tour of Kolkata including Eden Gardens Cricket Ground	India	Full day	72
Night Dive on the Red Sea	Egypt	3 hours	90
Historical Running Tour of Cape Town	South Africa	2 hours	92
Hang Gliding and Paragliding Experience in Rio	Brazil	2 hours	159
Kitesurfing Package for Beginners	Egypt	3 days	330

Source: Acorn Tourism Consulting

When deciding to price your sports tourism product, factor in every cost before coming up with a final price. You should also take into account other influencing factors, such as seasonality. The guide [Pricing your tourism business](#) gives you a practical step-by-step guide to setting your prices to boost sales.


### Tip:

For more help on setting prices, consult the CBI study [10 tips for doing business with European tourism buyers](#), especially tip [7. Set a fair price for your services](#).


This study has been carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

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