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RESILIENCE THROUGH DISRUPTION: THE SOCIO-ECONOMIC EVOLUTION AND DIGITAL TRANSFORMATION OF GLOBAL SPORTS TOURISM (2001-2025)

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Abstract

This study critically examines the multifaceted evolution of the global sports tourism industry during the first quarter of the 21st century (2001-2025). Using a rigorous documentary research approach integrated with PESTEL analysis and the theoretical lens of "critical junctures," the research delineates the industry's trajectory into three distinct phases: pre-pandemic expansion, COVID-19 disruption, and post-pandemic transformation. The findings reveal that, while the pre-2019 era was characterized by exponential growth driven by mega-events and economic globalization, the COVID-19 pandemic constituted a profound structural rupture. This crisis forced a paradigm shift toward accelerated digitalization, virtual engagement, and hybrid experiences. In the subsequent recovery phase, the industry has evolved beyond traditional economic metrics to prioritize environmental sustainability, wellness integration, and experiential authenticity. The article concludes by synthesizing these dynamics into strategic policy recommendations, emphasizing the necessity for stakeholders to balance economic capitalization with social inclusivity and environmental stewardship. This comprehensive analysis provides a foundational framework for understanding how sports tourism can navigate future uncertainties while capitalizing on a market projected to reach USD 1.8 trillion by 2030.

Keywords: Sports Tourism Evolution, Critical Juncture Analysis, Digital Transformation, Sustainable Resilience, Experiential Tourism

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Introduction

Sports tourism has emerged as one of the fastest-growing market segments within the global tourism industry over the past two decades. The global market was estimated at approximately USD 589 billion in 2022 and is projected to reach USD 1.8 trillion by 2030, with an average annual growth rate of 17.5% (Nazarov et al., 2023). In 2023, sports tourism accounted for roughly 10% of global tourism expenditures, a share that has steadily increased since the early twenty-first century (Al-Otaibi, 2025). The significance of sports tourism extends beyond economic dimensions to encompass city- and nation-branding, the promotion of cultural exchange, infrastructure development, and the strengthening of social cohesion (Gibson et al., 2012; Higham & Hinch, 2018).

Nevertheless, the landscape of sports tourism underwent profound change during the first quarter of the twenty-first century, most notably due to the COVID-19 pandemic, which began in 2020. Widespread cancellations and postponements of international sporting events—including the Tokyo 2020 Olympic Games—inflicted severe economic damage and permanently altered tourist behaviour (Parnell et al., 2020; Lee Ludvigsen, 2021). In China alone, sports tourism contracted by 52.1% from its pre-pandemic value of CNY 6.63 trillion (Zhang et al., 2024), illustrating the magnitude of the crisis.

This study aims to provide a foundational understanding of the evolution and overall trajectory of sports tourism during the first quarter of the twenty-first century (2001-2025) across multiple dimensions: economic, social, cultural, technological, and sustainability. The analysis is segmented into three key periods—pre-COVID-19 (2001-2019), COVID-19 disruption (2020-2021), and post-COVID-19 recovery/transformation (2022-2025)—to highlight continuity, disruption, and recovery within a changing context.

The scope of the study encompasses several principal dimensions. First, the economic and business dimension, which examines market valuation, investment, local economic multipliers, and revenue generation associated with major sporting events. Second, the typological dimension encompasses participation-based sports tourism (active sports tourism), event/spectator sports tourism, and nostalgia sports tourism (Gammon & Robinson, 2003; Weed & Bull, 2009). Third, the technology and innovation dimension, given its growing role in experience creation and management. Finally, the sustainability dimension has become increasingly salient in the aftermath of the COVID-19 crisis (Du & Zheng, 2023).

Methodologically, the research is documentary. It reviews secondary data from multiple sources—including statistical datasets from international and national agencies, books, research reports, and peer-reviewed journal articles indexed in national (TCI) and international (Scopus, WoS, JSTOR, PubMed) databases, as well as Google Scholar—covering the period 2001-2025. Findings are presented through a descriptive-analytical synthesis that systematically integrates data to identify trends across the specified dimensions.

The analytical framework adopts a holistic perspective, treating sports tourism as a complex socio-economic system. The study applies a PESTEL (Political, Economic, Social, Technological, Environmental, Legal) analytical lens to elucidate the interactions among factors shaping industry development. In addition, the concept of a “critical juncture” is employed to explicate the transformative impact of COVID-19 as a pivotal moment in the history of sports tourism.

This study is expected to yield multiple benefits. Academically, it will provide a comprehensive baseline for the evolution of sports tourism in the first quarter of the century, serving as a point of departure for in-depth future research. From a policy perspective, the findings will inform policymakers in planning and formulating sustainable sports tourism strategies. For industry stakeholders, the study will provide decision-support insights for operators and investors seeking to understand trends and business opportunities. Finally, for educational and research purposes, the work will serve as a reference for students and scholars interested in diverse perspectives on sports tourism.

Sports Tourism: Concepts, Theories, and Analytical Frameworks

Sports tourism is a complex phenomenon that has attracted substantial academic attention since the late twentieth century. Standeven and De Knop (1999) define it as “all forms of physical participation and sporting experiences associated with commercial and non-commercial travel away from home or the workplace,” whereas Gibson (1998) conceptualizes it more broadly as “travel with a primary or secondary purpose of participating in sporting activities, whether competitive or non-competitive.” These definitions underscore the diversity of forms and motivations underpinning sports tourism, encompassing travel for participation, spectating, and visits to sites of sporting historical significance (Higham & Hinch, 2018).

The most influential theoretical framework in sports tourism research is that of Gammon and Robinson (2003), who distinguish two principal types of motivation: Hard Sports Tourism, in which sport is the primary motivator, and Soft Sports Tourism, in which sport constitutes only part of the tourism experience. Weed and Bull (2009) propose a more nuanced framework that treats the relative importance of sport and tourism as intersecting axes, thereby facilitating a finer understanding of the heterogeneity of sports tourism experiences. Another widely used typology classifies sports tourism by mode of engagement into Active Sports Tourism (participatory), Event/Spectator Sports Tourism, and Nostalgia Sports Tourism (visits to historically significant sporting places) (Gibson, 2005). These classifications are instrumental for understanding tourist behavior, designing products, and formulating marketing strategies.

From an economic and business perspective, sports tourism generates value through a complex value chain: upstream activities related to planning and infrastructure development; midstream services including accommodation, transportation, and facilities; and downstream elements concerning visitor experience and satisfaction (Preuss, 2007). Mega-sporting events such as the Olympic Games and the FIFA World Cup produce multilayered economic multipliers—direct impacts from visitor expenditure, indirect impacts through supplier procurement, and induced impacts from subsequent household spending (Li & Jago, 2013). Nevertheless, measuring economic impact remains contested in the literature, as estimates are frequently inflated and often neglect opportunity costs and potential adverse effects (Matheson, 2009).

The social and cultural dimensions of sports tourism are as significant as its economic aspects. International sporting events can engender community pride, facilitate cultural exchange, and strengthen social cohesion (Chalip, 2006). Sports tourism also contributes to public health and the promotion of physical activity, particularly when robust legacy planning is implemented (Weed et al., 2015). Conversely, sports tourism may produce negative local impacts—rising living costs, infrastructure congestion, and “touristification” that alters community character (Füller & Michel, 2014). Thus, meaningful local community participation in planning and decision-making is critical to achieving sustainable outcomes (Pongprasert & Karnjanakit, 2019).

Sustainability has become an increasingly prominent issue in the second decade of the twenty-first century (from 2010 onward), and its salience intensified following the COVID-19 crisis. The sustainability discourse in sports tourism encompasses three core dimensions: economic sustainability, emphasizing durable revenue generation and equitable distribution of benefits; social sustainability, prioritizing community participation and cultural conservation; and environmental sustainability, focusing on ecosystem impact management and efficient resource use (McCullough & Cunningham, 2010). Mega-events frequently generate substantial carbon footprints and large volumes of waste, while winter sports face climate-related challenges that affect snow reliability and venue suitability (Steiger et al., 2019). Consequently, the development of sustainability standards and certification schemes for sports tourism has become an urgent industry imperative.

Sports Tourism in the Pre-COVID-19 Period (2001-2019): A Golden Era of Expansion

The nearly two decades preceding the COVID-19 pandemic were marked by sustained growth and expansion of the global sports tourism industry. The sports tourism market expanded at an average annual rate of 14-17%, increasing in value from billions of US dollars in the early 2000s to hundreds of billions of US dollars by the late 2010s (UNWTO, 2019). This growth was driven by multiple factors, including rising per-capita incomes in developing countries, the expansion of the middle class in Asia, substantial improvements in transportation infrastructure that made travel more affordable and accessible, and lifestyle shifts that placed greater emphasis on health and physical activity (Hudson, 2003; Kaplanidou & Gibson, 2010). Mega-sporting events played a prominent role in propelling sports tourism during this period. The Beijing 2008 Summer Olympics attracted over 800,000 visitors and generated approximately USD 3.6 billion in direct revenue; it also catalyzed major infrastructure upgrades and helped rebrand China as a global power (Preuss, 2004; Zhou & Ap, 2009). Similarly, the London 2012 Olympics produced an estimated economic impact of GBP 9.9 billion and served as a major driver of regeneration in East London (Department for Culture, Media and Sport, 2013). The 2014 FIFA World Cup in Brazil attracted more than 1 million international visitors. It generated approximately USD 13.5 billion, although it was accompanied by widespread debate about the return on investment and local community impacts (Gaffney, 2010). Critical scholarship, however, has cautioned that the economic legacies of mega-events frequently fall short of expectations—particularly in developing countries that incur long-term debts from infrastructure projects that remain underutilized post-event (Müller, 2015).

The emergence of new sports tourism products and formats was another hallmark of the era. Adventure and nature-based sports tourism grew rapidly, with a global market valued at approximately USD 263 billion in 2018 and projected to reach USD 2 trillion by 2032 (Allied Market Research, 2023). Activities such as mountaineering, scuba diving, skiing, mountain biking, and surfing have become mainstream elements of sports tourism, particularly among middle-aged travelers and millennials seeking novel, challenging experiences (Buckley, 2012). Marathon tourism likewise became a significant phenomenon—international marathon events increased by over 300% between 2001 and 2019. Major races such as the Boston, London, and Berlin marathons attracted tens of thousands of runners from around the world, with average per-participant expenditures of USD 3,000-5,000 for travel, accommodation, and registration (Shipway & Jones, 2007).

Technology's role became increasingly salient toward the end of the decade. The proliferation of smartphones and mobile applications has transformed how sports tourists plan, book, and experience travel. Online platforms such as Strava, Zwift, and Endomondo fostered virtual communities of amateur athletes who share experiences and compete digitally (Lupton, 2016). Social media emerged as a powerful marketing tool—Instagram, in particular, enabled sports tourists to share travel imagery and videos, inspiring millions to pursue similar experiences (Munar & Jacobsen, 2014). Wearable devices for health tracking, such as Fitbit and Garmin, have also become embedded in sports tourism culture, enabling visitors to monitor their performance and set personal goals.

Public policy and governmental support were pivotal in promoting sports tourism during this period. Many governments established dedicated agencies or tasked national tourism organizations with developing sports tourism strategies. For example, Sport England and VisitBritain collaborated to develop a comprehensive sports tourism strategy to attract international events and promote participatory tourism (Department for Culture, Media and Sport, 2012). Infrastructure investment was a central policy instrument: countries invested billions in stadiums, training centers, and related facilities. Qatar's investment of over USD 200 billion in sports infrastructure ahead of the 2022 FIFA World Cup exemplifies the country's efforts to transform itself into a regional sports tourism hub (Brannagan & Giulianotti, 2015).

Despite robust growth, several challenges and constraints became increasingly apparent. Sustainability concerns gained traction, particularly regarding environmental impacts from mega-events and tourist travel. Studies have shown that each Olympic Games can generate millions of tonnes of carbon emissions and substantial waste (Collins et al., 2009). Overtourism emerged in popular urban destinations such as Barcelona and Amsterdam, where international sporting events exacerbated short-term pressures on local systems (Milano et al., 2019). Academic discourse also began to highlight gaps between qualitative and quantitative research, a lack of strong theoretical frameworks, and insufficient longitudinal studies on the legacy effects of major sports events (Mollah et al., 2021).

Sports Tourism in the COVID-19 Era and Post-COVID Recovery (2020-2025): Crisis, Adaptation, and Renewal

The COVID-19 pandemic, which emerged in early 2020, inflicted an unprecedented and severe shock on the sports tourism sector. Widespread cancellations and postponements of sporting events occurred globally, beginning with the suspension of professional leagues in March 2020 and culminating in the one-year postponement of the Tokyo 2020 Olympic Games—the first such deferment in the modern Olympic era outside wartime (Parnell et al., 2020). Nishiura et al. (2020) demonstrated that cancelling large sporting events in Japan reduced viral transmission by approximately 35%, underscoring the public-health rationale for such measures. The economic consequences were massive: international tourist arrivals fell by 73% in 2020 compared with 2019 (UNWTO, 2021). In China, sports tourism—valued at CNY 6.63 trillion pre-pandemic—contracted by 52.1%, affecting employment and millions of related businesses (Zhang et al., 2024). Studies from smaller Southeast Asian economies, such as Cambodia, corroborate the significant adverse impacts on national sports tourism sectors during this period (Keo & Banhidi, 2023).

Crisis-response strategies revealed the industry's resilience and capacity for innovation. Events staged without spectators or with limited attendance became the norm in late 2020 and early 2021; several European football leagues resumed under strict bubble protocols, regular COVID-19 testing, and athlete segregation (Corsini et al., 2020). Virtual sport platforms expanded rapidly: esports and virtual sports saw audience and market-value increases exceeding 200% (Reitman et al., 2020). Virtual marathons emerged as a new modality, enabling global participation via distance-tracking apps—the London Marathon Virtual Event 2020 attracted over 45,000 participants worldwide (Goodson et al., 2021). Digitalisation permeated every stage of the sports tourism value chain, from contactless booking and payment to AR/VR-enhanced blended experiences and AI-driven visitor analytics and personalization (Buhalis et al., 2019).

Recovery of sports tourism commenced gradually from mid-2021, with marked regional variation. UNWTO (2022) reported that international tourist numbers during January-May 2022 rose 221% over the same period in 2021, yet remained 54% below 2019 levels. Europe led the recovery with a 350% increase, followed by the Americas at 112%, whereas the Asia-Pacific region lagged, owing to China's and other countries' stringent zero-COVID policies. The 2022 FIFA World Cup in Qatar served as a major indicator of sectoral recovery, attracting 2.5 million visitors and generating approximately USD 17 billion in direct economic revenue—close to pre-pandemic forecasts (Al-Otaibi, 2025). This trajectory of sharp decline followed by a resilient, albeit uneven, recovery is illustrated in Figure 1. Nonetheless, recovery patterns remained uneven, with domestic tourism rebounding faster than international travel (Gössling et al., 2021).

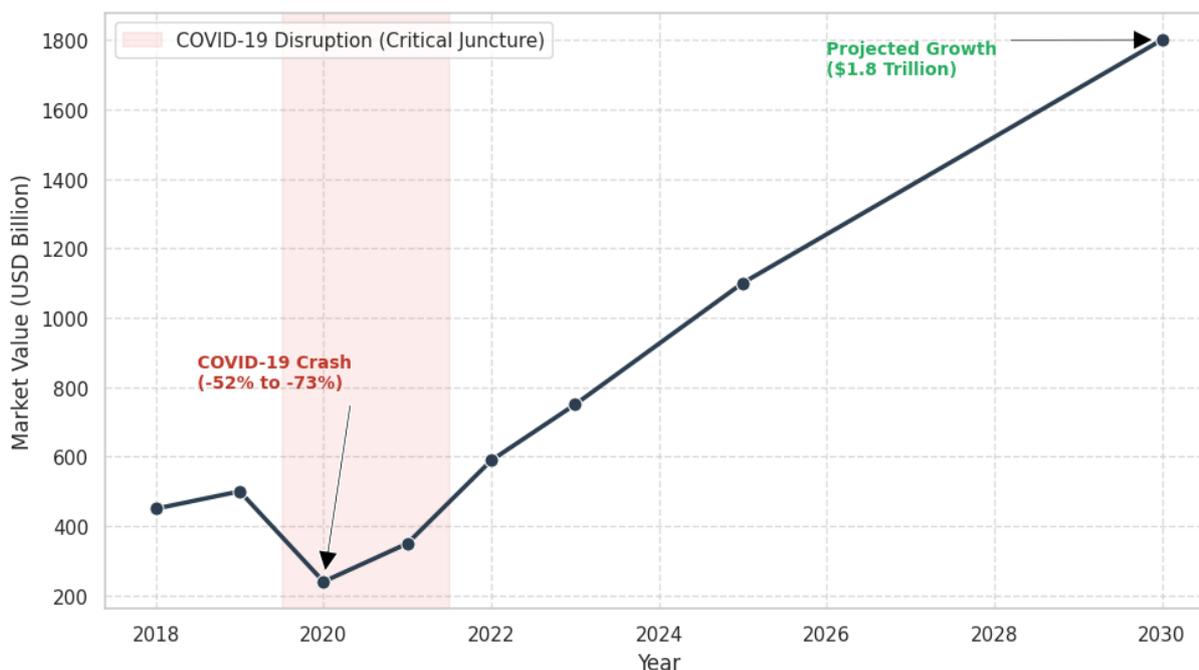


Figure 1 The trajectory of the global sports tourism market (2018-2030), illustrating the 'Critical Juncture' caused by the COVID-19 pandemic and the subsequent V-shaped recovery projected to reach USD 1.8 trillion by 2030

Post-COVID structural shifts and emerging trends have important implications for the sector's future. First, accelerated digital transformation has become a defining feature: digital technologies are increasingly embedded across planning, booking, payment, check-in, experience creation, and content sharing. Several studies, including Zhang et al. (2025), predict a substantial surge in technology adoption within tourism post-COVID. Second, a pronounced shift from mass to experiential tourism has emerged, with travelers increasingly seeking meaningful, personalized experiences that connect with local culture rather than high-volume consumption (Yiannakou et al., 2022). Third, health and safety considerations have intensified—tourists are more hygiene-conscious and tend to prefer outdoor activities and less crowded settings, contributing to greater demand for adventure and nature-based sports tourism (Sharma et al., 2021).

Sustainability gained heightened importance in the post-pandemic era. The crisis prompted reflection on anthropogenic environmental impacts and systemic fragility; both tourists and event organizers placed greater emphasis on sustainable practices. A survey reported that 75% of travelers intended to travel more sustainably after COVID-19 (Booking.com, 2021). Event organisers began adopting circular-economy principles and ambitious carbon-reduction targets: Paris 2024 aims to cut emissions by 55% relative to previous Games, use 95% of existing venues, and source 100% renewable energy (Organising Committee for the Olympic and Paralympic Games Paris 2024, 2021). Developing standards and certification for sustainability in sports tourism has therefore become an urgent industry priority.

Development trends during 2023-2025 indicate increasing diversification and complexity. Integration of sports tourism with wellness and cultural tourism has strengthened. The creation of smart sports tourism destinations—leveraging IoT, AI, and big data to elevate experiences and optimise management—has become a strategic objective for cities and nations (Buhalis & Sinarta, 2019). Market expansion opportunities are significant in Asia, the Middle East, and Africa, particularly in countries such as China, India, and Saudi Arabia, which have invested heavily in sports infrastructure and sports tourism promotion (Al-Otaibi, 2025). Nonetheless, substantial challenges persist, including economic and geopolitical uncertainty, climate change impacts on winter and outdoor sports, and the imperative to balance economic growth with social and environmental sustainability.

Conclusion and Recommendations: Future Directions for Sports Tourism

The comprehensive review of sports tourism's evolution reveals a dynamic trajectory marked by structural shifts. As summarized in Table 1, the industry has transitioned from a volume-driven model in the pre-pandemic era to a more value-based, technology-integrated ecosystem in the post-pandemic period. While the pre-2019 period was characterized by rapid economic expansion and mega-events, the COVID-19 crisis marked a critical juncture that prompted a re-evaluation of resilience. The post-2022 recovery is not merely a return to the status quo but represents a transformation towards hybrid experiences, sustainability, and digitalization. This evolution underscores that future growth—projected to reach USD 1.8 trillion by 2030—must be underpinned by adaptive strategies that balance economic gains with social and environmental stewardship.

The roles of principal stakeholders are central to achieving sustainable outcomes. Public authorities are responsible for policy direction, infrastructure investment, and the creation of enabling environments. The private sector drives innovation and experience delivery; sport governing bodies set standards and ensure governance. Local communities are both impacted stakeholders and essential partners for sustainability. Academia contributes to knowledge generation and critical appraisal. Collaboration among these actors—operationalized through pentahelix models—is a key factor in the success of sustainable sports tourism development. Future challenges and opportunities are interconnected and complex. Major challenges include the impacts of climate change on winter and outdoor sports, balancing economic growth with social and environmental sustainability, ensuring equitable distribution of benefits, and managing economic and geopolitical uncertainties. Important opportunities include market expansion in Asia, the Middle East, and Africa; the application of emergent technologies (AI, VR/AR, blockchain) to enhance experiences and operational efficiency; the development of hybrid tourism products integrating sport with wellness, culture, and sustainability; and the generation of durable legacies from major events.

Table 1 Structural Evolution of Sports Tourism Across Three Key Periods (2001-2025)

| Dimension | Pre-Pandemic Expansion (2001-2019) | COVID-19 Disruption (2020-2021) | Post-Pandemic Transformation (2022-2025) |
|-----------------|---|---|--|
| Primary Driver | Economic growth, Mega-events, Mass tourism | Public health crisis, Lockdown measures | Sustainability, Digitalization, Wellness integration |
| Key Activity | Spectator sports (Olympics, World Cup), Marathons | Virtual sports, E-sports, Individual exercise | Hybrid events, Nature-based/Adventure tourism |
| Technology Role | Booking convenience, Social media sharing | Substitute for physical experience (Virtual runs) | AI-driven personalization, Contactless services, Metaverse |
| Sustainability | Emerging concern (Overtourism issues) | Temporary emission reduction | Core operational requirement (Net-zero targets) |
| Market Status | Rapid growth (CAGR 14-17%) | Contraction (-50% to -70%) | Resilient recovery & Qualitative shift |

Policy and practice recommendations are summarized in five priorities. First, develop integrated national and regional sports tourism strategies that coordinate across agencies and align with the United Nations Sustainable Development Goals. Second, promote investment in sustainable, long-lived infrastructure to avoid post-event “white elephants.” Third, build human capital and institutional capacity to manage professional sports tourism. Fourth, foster research and technology development that support sustainability and elevate visitor

experiences. Finally, strengthen local community participation and establish mechanisms for fair benefit distribution so that sports tourism functions as an inclusive development tool for all segments of society.

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