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RESEARCH RESULTS FOR SPORTS TOURISM 2016

PREPARED BY **INSIGHTS MARKET RESEARCH (IMR)**
FOR **CYPRUS TOURISM ORGANISATION**

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Figure 1: Characteristics of the survey's sample, sorted by type and rate of participation.

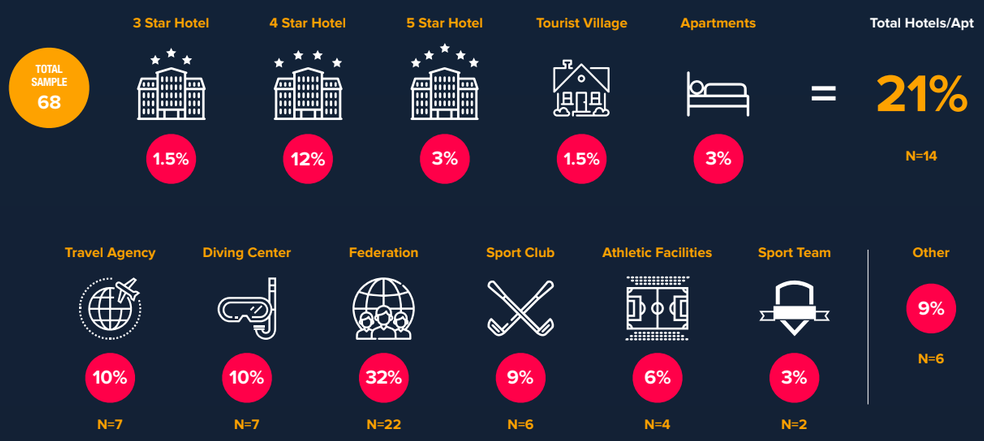
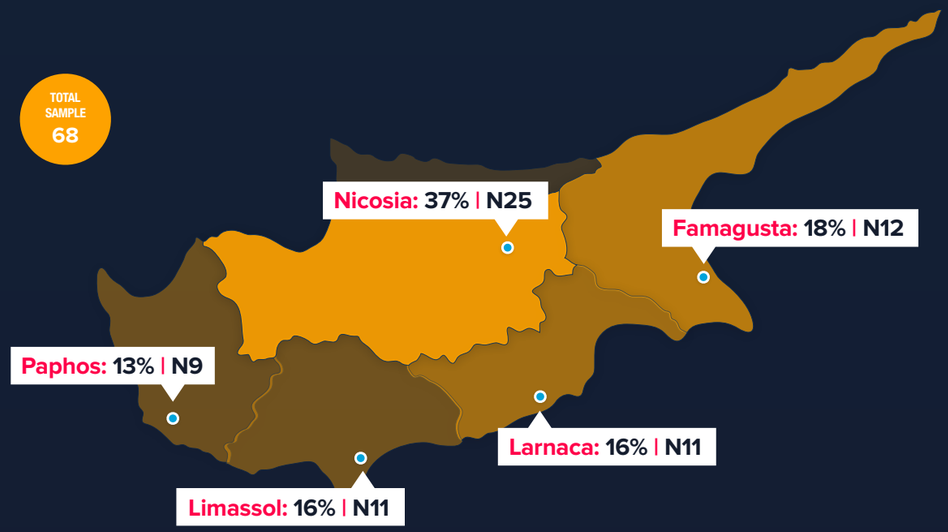


Figure 2: The geographical distribution of the survey sample.



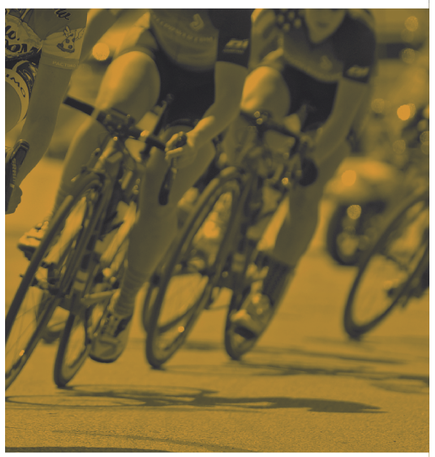
Survey Summary

The survey was based on a statistical sample combined by 68 businesses/organizations, which represents the 25.3% of the total 270 businesses/organizations initially contacted for the survey (fig. 1).

Accommodation businesses consist the 21% of the sample (eg. 5, 4 and 3 star hotels, tourist villages and apartments), which translates into 14 businesses. More than half of the accommodation businesses are 4 star hotels, representing a 12% of the total sample. Travel agencies account for 10% of the sample, whereas diving centers constitute an additional 10%. The athletic federations have the largest participation with 32%, while 9% of the sample consists sports clubs, 6% sports facilities, 3% represents sports teams and 9% other businesses/organizations.

The geographical distribution of the survey sample is shown in figure 2, where the largest share is located within the Nicosia district with 37%, followed by Famagusta by 18%. An additional 16% of the companies/organizations is located within the Larnaca district, 16% in Limassol district and finally a 13% in Pafos.

It is worth noting the difficulties during the data collection, due to the low participation (25.3%) of the contacted businesses/organizations, despite the repeated contact attempts. Therefore, the statistics and estimates presented in this report are minimum value limits, with certainly higher actual figures.



Sports Tourism 2016 Outline

50%
of the sample identified an increase to the number of nights spend in Cyprus for sports tourism, between 2015 and 2016.

6,529
visitors related to football have visited Cyprus in 2016.

68
businesses/organizations participated in the survey.

86
individual countries of origin.

662
sports teams visited Cyprus within 2016.

9.8
average nights of stay per visitor.

27,163
visitors have chosen Cyprus regarding sports tourism for 2016.

€1,365
is the estimated cost per visitor.

50%
of the visitors have chosen February-March and April for their visit to Cyprus.

€37,086,093
is the estimated total revenue due to sports tourism in 2016.

PART A
SPORTS TOURISM 2016
OVERVIEW

Figure 3: Overview of the sample's evaluation towards the number of overnight stays regarding sports tourism between 2015 and 2016.

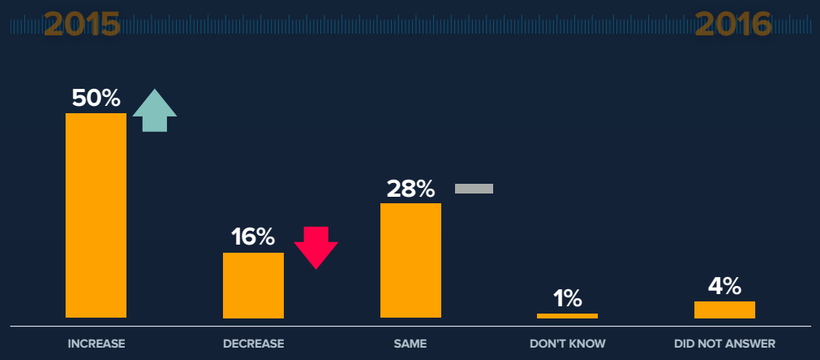


Figure 4: Sample's evaluation for the amount of decrease of the number of overnight stays regarding sports tourism between 2015 and 2016.

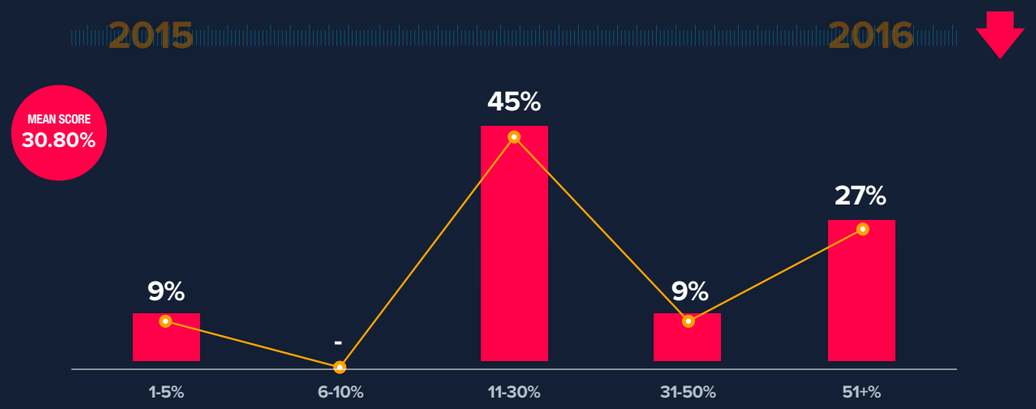
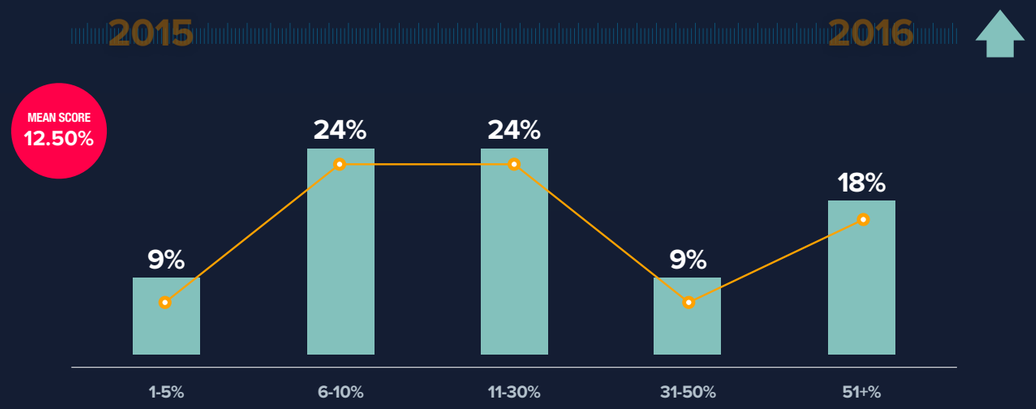


Figure 5: Sample's evaluation for the amount of increase of the number of overnight stays regarding sports tourism between 2015 and 2016.



Sports Tourism 2016 Overview

The survey asked the participated businesses and organizations to evaluate the fluctuation of the overnight stays regarding sports tourism between 2015 and 2016, as well as to quote a percentage of the corresponding increase or decrease, based on their own experience.

The results show that 50% of the sample reported an increase in the number of overnight stays for 2016 compared to 2015, 28% did not perceive a change, while 16% of the respondents noted a decrease (fig. 3). A minor 4% did not answer the question, while 1% responded that they did not know.

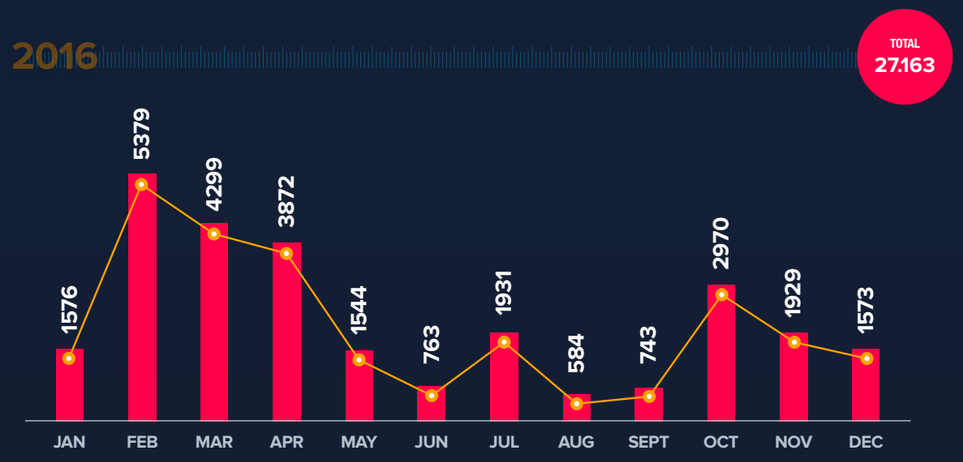
The businesses/organizations who recognized a decline in the number of overnight, were then asked to quote a reduction percentage, which was found to be 30.8%, on average. More specifically (fig. 4), 45% noted a decrease of 11-30%, 27% observed a decrease of more than 51%, while a small decrease of 1-5% was reported by 9%, and a corresponding 9% perceived a decrease in the order of 31-50%.

Figure 5 shows the results based on the increase of the number of overnight stays for sports tourism, as reported by the businesses/organizations. An average increase of 12.5% was recorded, with 24% of those business/organizations stating an increase of 6-10%, whereas a corresponding percentage of 24% reported an increase of 11-30%. At the same time, 18% identified an increase of more than 51%, while the growth rates of 1-5% and 31-50%, obtained percentages of 9%, respectively.

PART B
STATISTICAL DATA
OF SPORTS TOURISM

Figure 6: Total number of sports teams that visited Cyprus in 2016.

Figure 7: Distribution of the total number of sports visitors per month in 2016.



Total number of visitors

In the year 2016, a total of 662 sports teams chose Cyprus, in order to train or to participate in sport tournaments or events (fig. 6).

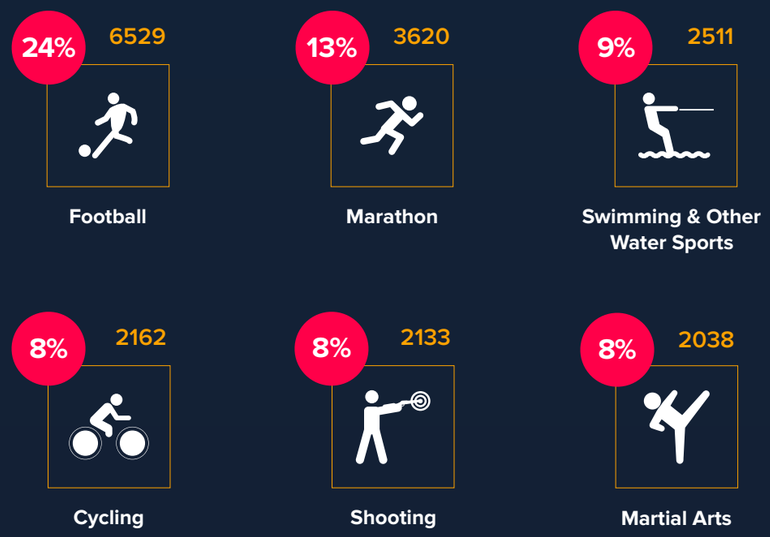
Meanwhile, the total number of sport visitors, both as part of a team and as individuals for training or attending a sports event, amounted to 27,163 (fig. 7).

In detail, figure 7 shows the distribution of the total number of visitors per month, as recorded for the year 2016. Overall, visitors who have chosen Cyprus for sports (training, games, attending a sports event etc.) tend not to visit during the summer, as opposed to the general tourists' population, who visit Cyprus mainly for summer holidays.

In February, the highest number of visitors was recorded with 5,379 individuals, who represent the 20% of the total sports visitors for 2016. March was placed second with 4,299 visitors (16%), while April was ranked with 3,872 visitors (14%).

October recorded 2,970 visitors (11%), whereas the same percentage of 7% was noted both for July (1,931 visitors) and November (1,929 visitors), respectively. January, December and May, gathered 6% each, which translates to 1,576, 1,573 and 1,544 visitors respectively. And finally, 763 visitors (3%) were recorded in June, 743 visitors (3%) in September and 584 visitors (2%) in August.

Figure 8: Distribution of the total number of visitors per sport in 2016.



Visitors per Sport

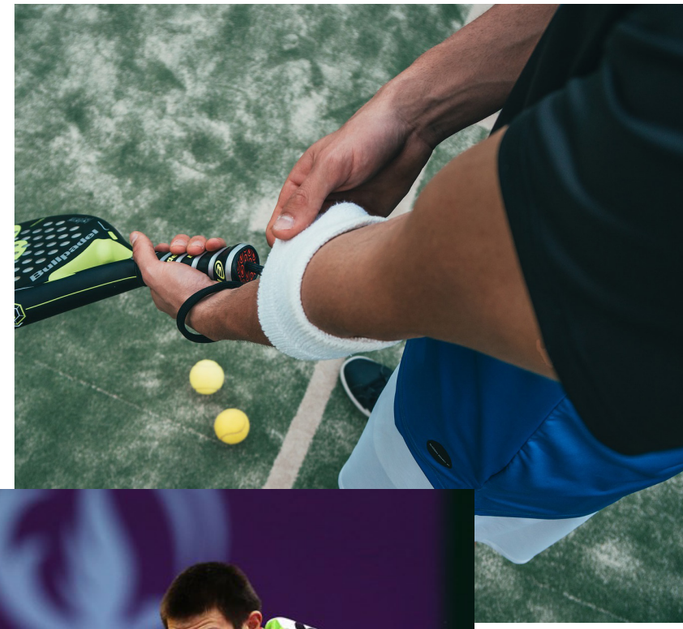
The distribution of visitors by sport for 2016 is shown in figure 8, where football recorded the highest number of visitors with a percentage of 24% and 6,529 visitors.

Second in the rankings with 3,620 visitors and 13% is the marathon, followed by swimming and other water sports with 2,511 visitors and 9%.

Cycling attracted 2,162 visitors, which corresponds to a percentage of 8%, whereas shooting sports gathered an equal 8% and a slightly lower number of visitors of 2,133. Martial arts recorded a percentage of 8% and 2,038 visitors, while diving attracted 1,694 visitors and 6%.

Volleyball (including beach volley) accounted for 1,307 visitors and a percentage of 5%, while climbing accounted for 4%, which corresponds to 1,090 visitors.

The various other sports (sambo, tennis, basketball, triathlon, gymnastics-dance, track and field athletics, badminton, hockey, bridge, weightlifting, boxing, rugby, squash and archery) attracted 4,079 visitors, or 15% out of all visitors for 2016.



SAMBO 2016
Nicosia
Cyprus
FISU World University Championship

Visitors per Sport

With regards to football (fig. 10), the highest number of visitors was recorded in January, February and March, with a total of 4,632 visitors and 71% of all football visitors who chose Cyprus (6,529).

For the marathon (fig. 11), a total of 3,110 foreign visitors arrived in Cyprus during March and April, mainly for participation and attendance to the 10th OPAP International Limassol Marathon GSO, which was held on Sunday 10th of April 2016.

Regarding swimming and other water sports (fig. 12) a relatively uniform distribution of the number of visitors across all months can be noted, with a maximum turnout in October, in which 883 visitors were recorded.

Cycling also showed a nearly balanced distribution of visitors across all months (fig. 13), in which March recorded the maximum number of 552 visitors, followed by February, May and April with 296, 266 and 200 visitors respectively.

As for the shooting sports (fig. 14), March emerged largely with 1,269 visitors, as the International Shooting Sport Federation (ISSF) World Cup 2016 was held in Cyprus with the participation of over 400 foreign athletes.

Figure 10: Monthly distribution of sports visitors with regards to football.

Figure 11: Monthly distribution of sports visitors with regards to marathon.

Figure 12: Monthly distribution of sports visitors with regards to swimming and other water sports.

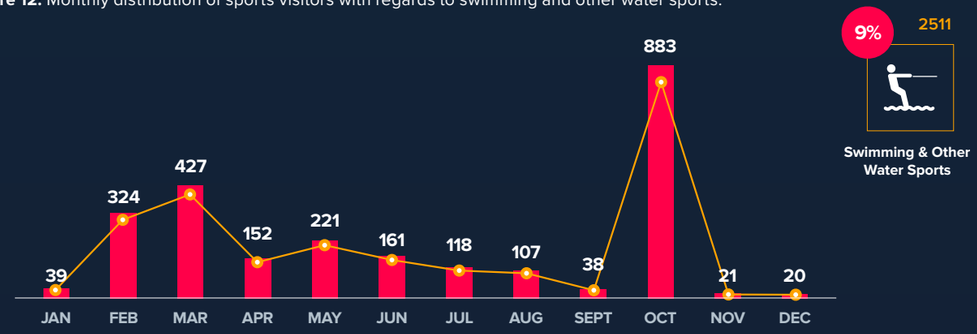


Figure 13: Monthly distribution of sports visitors with regards to cycling.

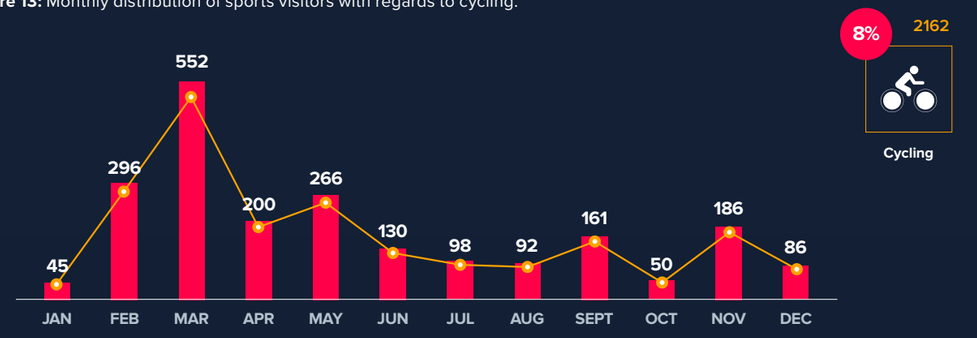
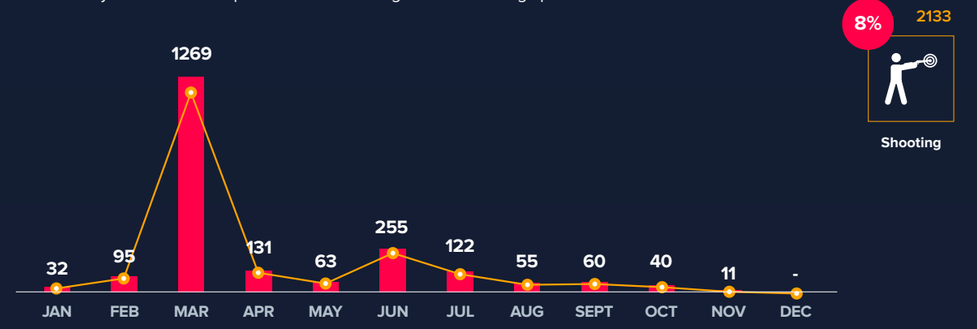


Figure 14: Monthly distribution of sports visitors with regards to shooting sports.



Statistical Data of Sports Tourism

Martial arts (fig. 15) attracted a total of 1,937 visitors during the month of February, while in January and October only 60 and 41 visitors respectively were recorded. With regards to diving (fig. 16), the distribution of visitors per month shows a slight and steady increase during the summer months, with the maximum number of visitors to have been recorded in August with 233 visitors.

Volleyball (including beach volley) recorded its maximum number of 836 visitors in July (fig. 17), due to the Under-19 World Championship, which was held in Larnaca, between 27-31 of July 2016. Climbing sports (fig. 18) recorded its maximum attendance of 657 and 352 visitors in October and November respectively, whereas limited number of visitors were noted during the rest of the year.

With regards to various other sports (sambo, tennis, basketball, triathlon, gymnastics-dance, track and field athletics, badminton, hockey, bridge, weightlifting, boxing, rugby, squash and archery) a fluctuation in the number of visitors per month was noted (fig. 19), with respect to the various sports events that took place within 2016. The highest attendance was recorded in December and May with 874 and 837 sports visitors, respectively.

It is worth noting that due to difficulties during the data collection, some sports (eg. shooting, cycling, climbing) show a seasonality (mainly around the dates of sport events/competitions), which does not correspond to the actual figures.

Figure 15: Monthly distribution of sports visitors with regards to martial arts.

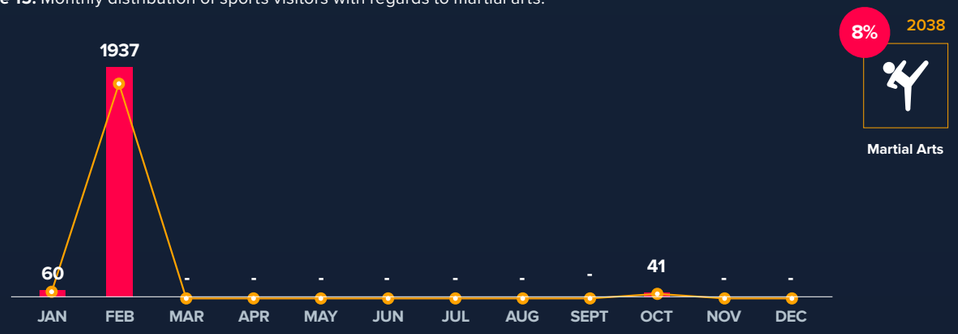


Figure 16: Monthly distribution of sports visitors with regards to diving.

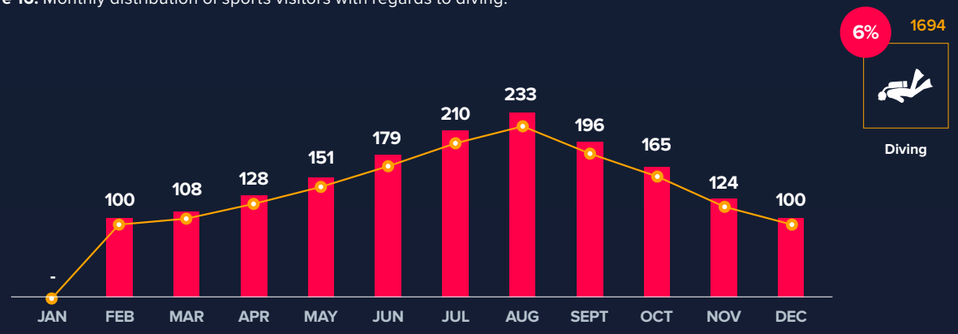


Figure 17: Monthly distribution of sports visitors with regards to volleyball (including beach volley).

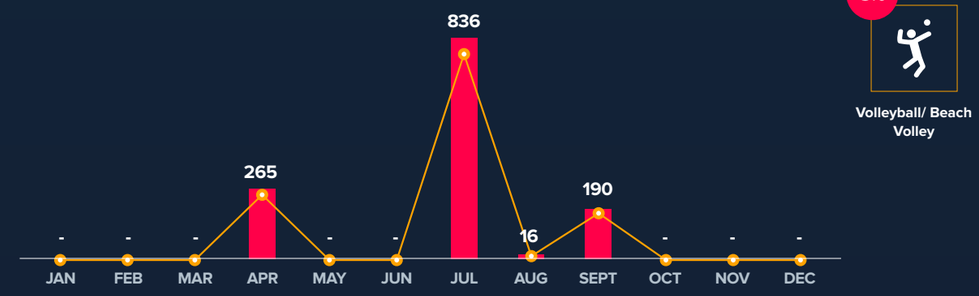


Figure 18: Monthly distribution of sports visitors with regards to climbing.

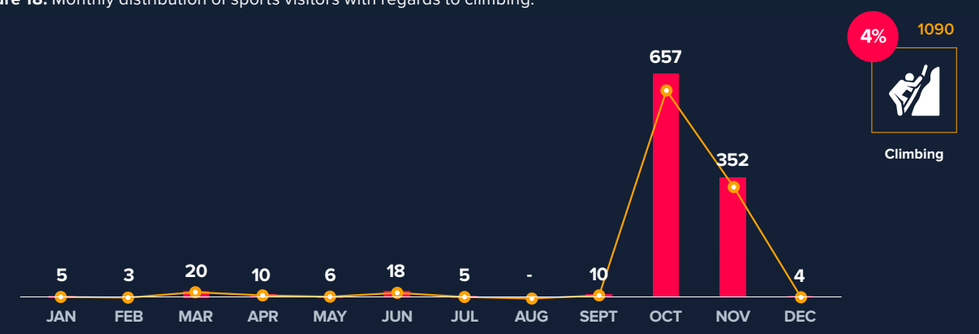
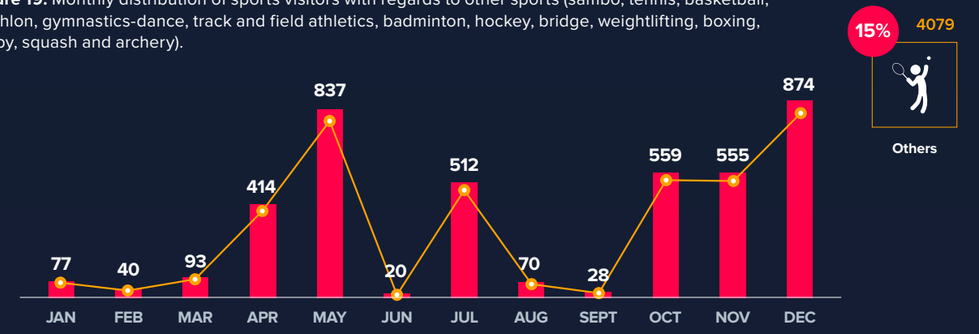


Figure 19: Monthly distribution of sports visitors with regards to other sports (sambo, tennis, basketball, triathlon, gymnastics-dance, track and field athletics, badminton, hockey, bridge, weightlifting, boxing, rugby, squash and archery).



Visitors by Country

The distribution of visitors by country of origin is shown in figure 20, as well as in table 1, which also presents the number of visitors per month. Russia was ranked first with 3,863 visitors, which accounts for 14.2% of the total number of visitors, while Great Britain was ranked in second place with 2,184 visitors, corresponding to a percentage of 8.0%. Sweden was ranked third with 883 visitors and 3.3%, followed by Greece, Poland and Germany, with 441 (1.6%), 436 (1.6%) and 409 (1.5%), respectively.

A total of 331 visitors came from Norway (1.2%), 307 from Finland, 304 from Lebanon and 287 from Italy, with approximately 1.1% each. Cyprus was the choice for sports tourism for 284 Swiss visitors (1.0%), while 278 (1.0%) visitors came from both Austria and Israel, as well as 276 (1%) visitors from Serbia.

Visitors from the countries of Belgium, Czech Republic and Denmark accounted for slightly less than 1.0%, namely 215, 204 and 203 visitors, respectively. A percentage of 9.1%, or 2,475 visitors, includes other countries, with fewer than 200 visitors per country or 0.7% of the total.

It is worth noting that for 13,505 sport visitors, that is about 50% of the total number of visitors, no data about their countries of origin were provided.

Figure 20: Sports visitors' main countries of origin.

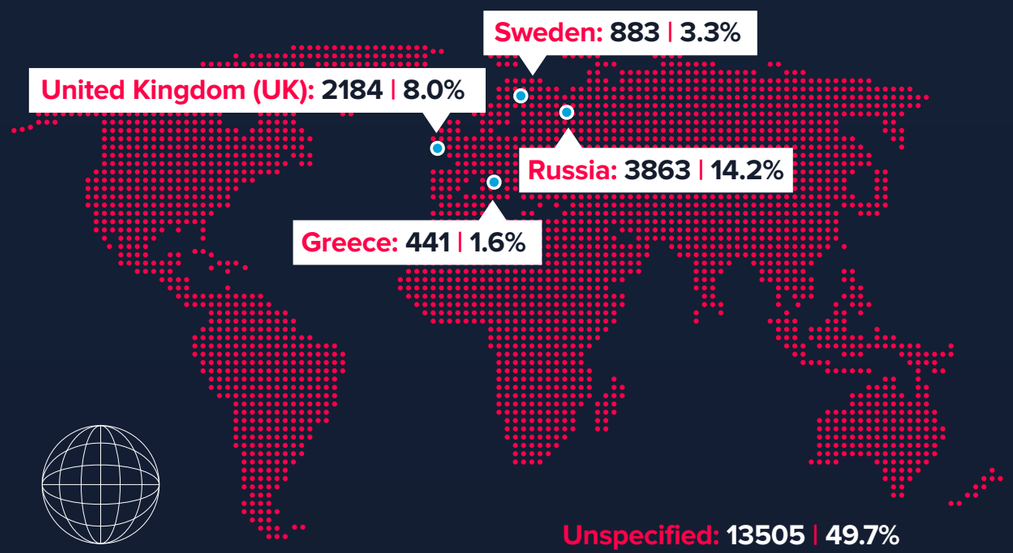


Table 1: Monthly distribution of the sports visitors, with respect to their country of origin.

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	Total	
UNSPECIFIED	270	2041	1967	2796	996	291	611	204	212	1552	1229	1336	13505	49.7%
RUSSIA	831	1752	312	70	89	26	22	70	24	584	71	12	3863	14.2%
UNITED KINGDOM	9	245	457	220	134	149	134	175	130	248	280	3	2184	8.0%
SWEDEN		9	31		4	6	620	14	160	4	35		883	3.3%
GREECE	13	2	15	57	15		86	3	35	180		35	441	1.6%
POLAND	115	173	57	49			13		8	13	8		436	1.6%
GERMANY		24	18	28	35	59	44	27	30	86	58		409	1.5%
NORWAY			192	30		3	11	6	2	3	84		331	1.2%
FINLAND		132	147	26							2		307	1.1%
LEBANON			13	260		3	18		7	3			304	1.1%
ITALY		38	130				5	1		83	16	14	287	1.1%
SWITZERLAND		97	54	31	66		3		2	2	29		284	1.0%
AUSTRIA	16	76	36	8	50	50	10				10	22	278	1.0%
ISRAEL		12	36	21	36	26		25	22	45	20	35	278	1.0%
SERBIA	85	155	5	1					20	10			276	1.0%
BELGIUM	31	5	11			100			60		8		215	0.8%
CZECH REPUBLIC	2	104	47	1		9	18	7			16		204	0.8%
DENMARK	45	136	7				3	2		10			203	0.7%
OTHERS	159	378	764	274	119	41	333	50	31	147	63	116	2475	9.1%
TOTAL	1576	5379	4299	3872	1544	763	1931	584	743	2970	1929	1573	27163	100.0%

Overnight Stays per Sport

In 2016 the total number of overnight stays regarding sports tourism reached 264,901 nights, with an average of 9.8 nights per visitor. The distribution of the number of overnight stays per sport and per month broadly follows the distribution of the corresponding number of visitors for each sport.

As shown in figure 21, football was ranked first with 104,235 overnight stays, representing 39% of the total nights, obtaining an average of 16.0 nights per visitor. At the same time, it can be seen that the distribution of overnight stays per month closely follows the distribution of visitors, where the months of January, February, March and April accounted for the highest number of overnight stays.

Cycling accounted for 11% of the total overnight stays (fig. 22), corresponding to 29,341 overnight stays and resulting to an average of 13.6 nights per visitor. For this sport, visitors had shown preference in two time periods: February-April and October.

Regarding swimming and other water sports (fig. 23), the total number of overnight stays amounted to 23,350 (9%), with an average of 9.3 nights. The distribution reveals two maximum peaks in the time periods of February-March and October, as it follows closely the monthly distribution of visitors, with respect to swimming and other water sports.

Marathon accounted for 17,589 overnight stays and a percentage of 7% of the total nights (fig. 24), with the overwhelming majority being shared between March and April, where the 10th OPAP International Limassol Marathon GSO was held (Sunday, 10th of April 2016). In addition, 3,963 nights were recorded in November and the overall average resulted to 4.9 nights per visitor, with respect to marathon.

With regards to climbing, 16,307 overnight stays were recorded mainly in October and November, corresponding to 6% of the total nights (fig. 25). The average nights per visitor for climbing reached 15.0 nights.

Figure 21: Distribution of overnight stays per month, with regards to football.

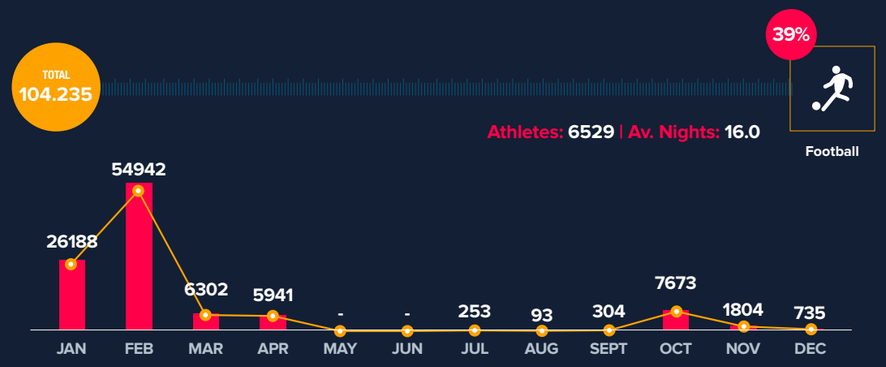


Figure 22: Distribution of overnight stays per month, with regards to cycling.

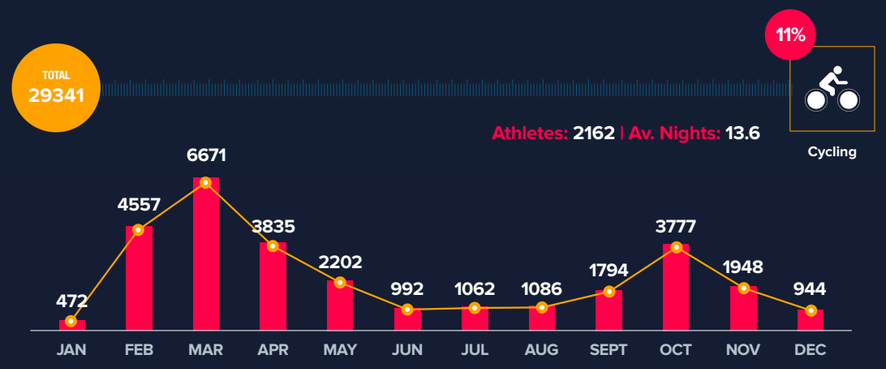


Figure 23: Distribution of overnight stays per month, with regards to swimming and other water sports.

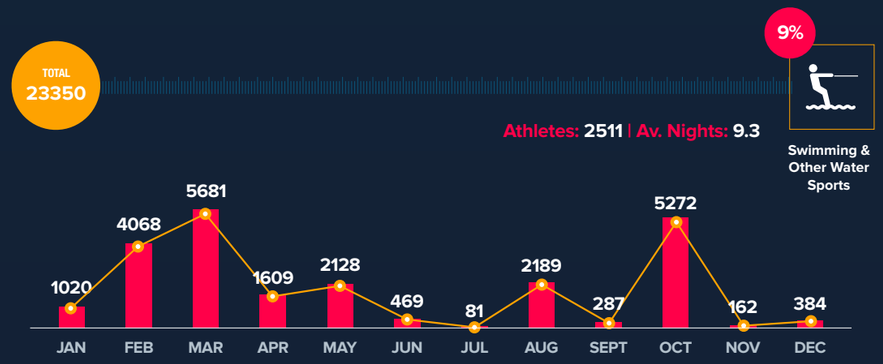


Figure 24: Distribution of overnight stays per month, with regards to marathon.

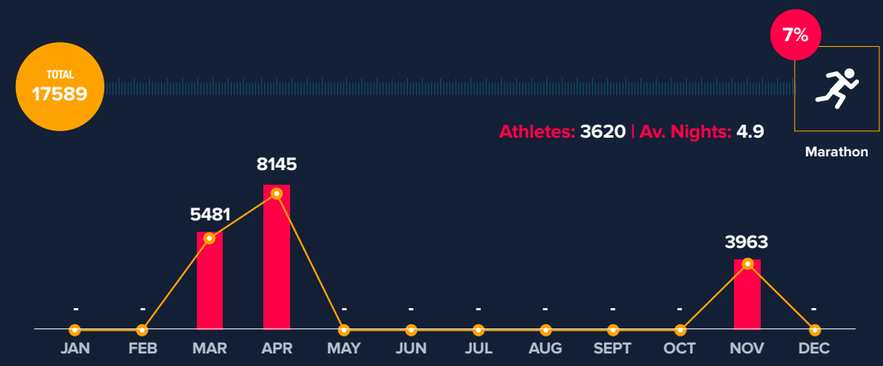
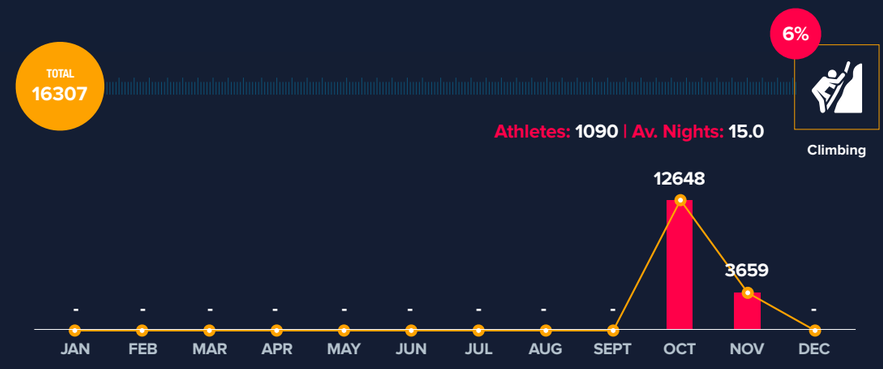


Figure 25: Distribution of overnight stays per month, with regards to climbing.



Overnight Stays per Sport

For shooting sports 15,897 overnight stays were recorded, corresponding to 6% of the total nights and resulting to an average of 7.5 nights per visitor (fig. 26). The overwhelming majority of overnight stays were recorded in March due to the International Shooting Sport Federation (ISSF) World Cup, which was held in Cyprus.

Visitors related to martial arts stayed 11,305 nights in total, with an average of 5.5 nights and a percentage of 4% of all nights. As shown in figure 27, February was the choice of most visitors as 10,363 overnight stays were recorded.

Diving accounted for 3% of the total nights, corresponding to 6,988 overnight stays and an average of 4.1 nights per visitor (fig. 28). The summer as well as December were the main choices of the majority of visitors.

Overnight stays with regards to triathlon reached 7,821 or 3% of the total nights, while 15.7 nights per visitor were recorded as an average value. April accounted for the majority of overnight stays, as shown in fig. 29.

Finally, 32,066 overnight stays (12% of the total number of nights) were allocated to other sports such as (fig. 30): basketball, tennis, sambo, volleyball (including beach volley), hockey, track and field athletics, badminton, gymnastics-dance, weightlifting, boxing, rugby, squash and archery.

Figure 26: Distribution of overnight stays per month, with regards to shooting sports.

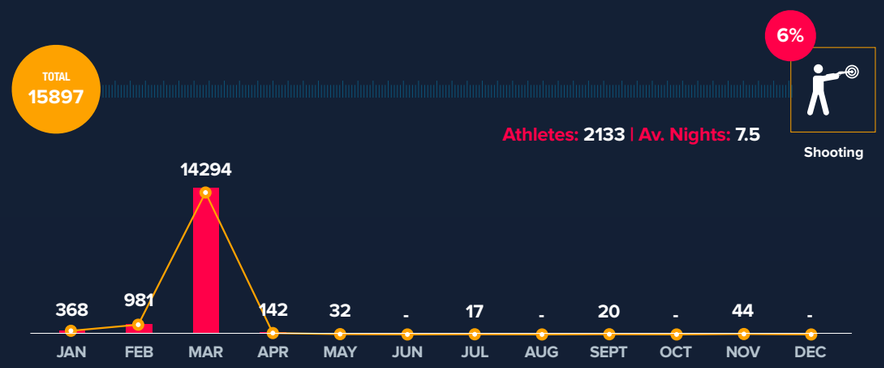


Figure 27: Distribution of overnight stays per month, with regards to martial arts.

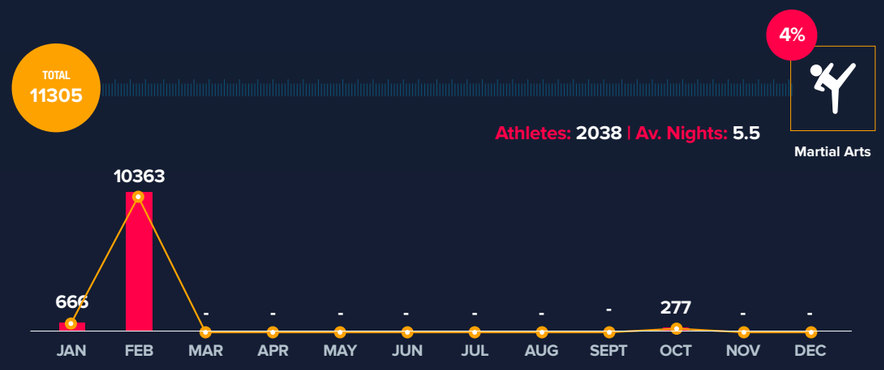


Figure 28: Distribution of overnight stays per month, with regards to diving.

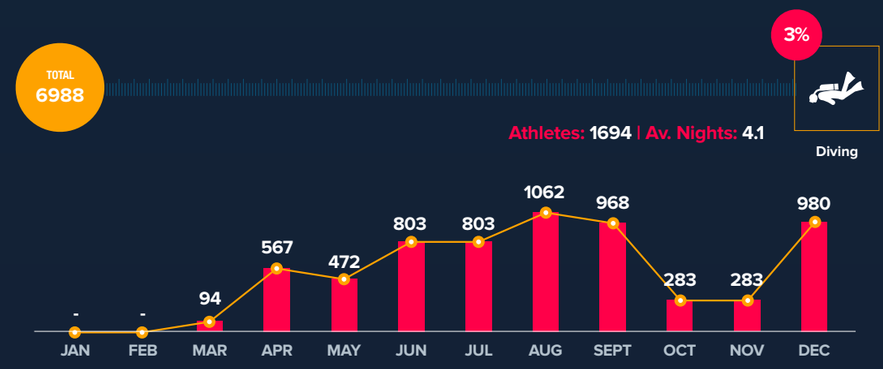


Figure 29: Distribution of overnight stays per month, with regards to triathlon.

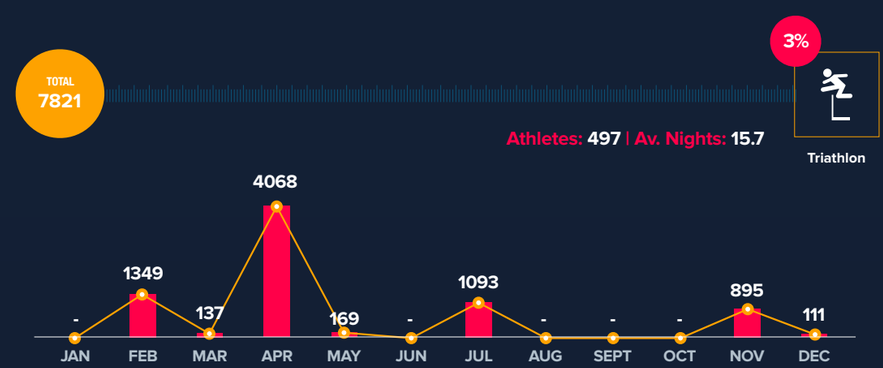
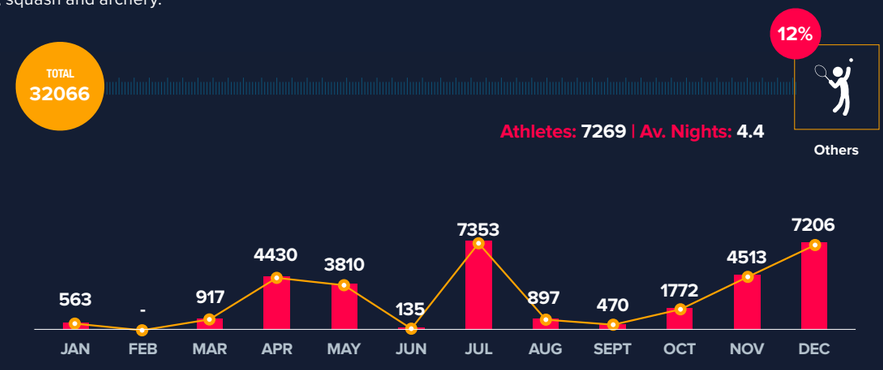


Figure 30: Distribution of overnight stays per month, with regards to other sports: basketball, tennis, sambo, volleyball (including beach volleyball), hockey, track and field athletics, badminton, gymnastics-dance, weightlifting, boxing, rugby, squash and archery.



PART C
SPORTS TOURISM REVENUE

Table 2: Sports tourism revenue breakdown by sport and by category (accommodation, transportation, use of sports facilities and other income).

TOTAL €37,086,093

	Accommodation	Trasportation	Sport Facilities	Other	Total
Football	€12,935,714	€767,244	€580,018	€309,891	€14,592,867
Cycling	€3,641,296	€215,973	€163,270	€87,232	€4,107,771
Swimming & Other Water Sports	€2,897,717	€171,870	€129,929	€69,418	€3,268,935
Marathon	€2,182,810	€129,467	€97,874	€52,292	€2,462,443
Climbing	€2,023,756	€120,033	€90,742	€48,482	€2,283,013
Shooting	€1,972,900	€117,017	€88,462	€47,263	€2,225,642
Martial Arts	€1,403,026	€83,216	€62,910	€33,611	€1,582,763
Triathlon	€970,649	€57,571	€43,522	€23,253	€1,094,996
Diving	€867,264	€51,439	€38,887	€20,776	€978,367
Others*	€3,979,495	€236,032	€178,435	€95,334	€4,489,296
	€32,874,628	€1,949,863	€1,474,050	€787,552	€37,086,093

Table 3: Sports visitors' accommodation expenses breakdown by sport and by type of accommodation.

TOTAL €32,874,628

	Full-Board	Half-Board	Bed & Breakfast	Other	Sub Total
Football	€9,778,073	€1,074,829	€30,030	€2,052,781	€12,935,714
Cycling	€2,752,446	€302,555	€8,453	€577,841	€3,641,296
Swimming & Other Water Sports	€2,190,377	€240,771	€6,727	€459,842	€2,897,717
Marathon	€1,649,981	€181,370	€5,067	€346,392	€2,182,810
Climbing	€1,529,752	€168,154	€4,698	€321,152	€2,023,756
Shooting	€1,491,311	€163,928	€4,580	€313,081	€1,972,900
Martial Arts	€1,060,544	€116,577	€3,257	€222,648	€1,403,026
Triathlon	€733,711	€80,651	€2,253	€154,033	€970,649
Diving	€655,563	€72,061	€2,013	€137,627	€867,264
Others*	€3,008,091	€330,656	€9,238	€631,510	€3,979,495
	€24,849,849	€2,731,553	€76,319	€5,216,907	€32,874,628

Basketball, Tennis , Sabo, Volleyball/ Beach Volley, Hockey, Track & Field, Badminton, Gymnastics/Dance, Bridge, Weight Lifting, Boxing, Rugby, Squash, Archery

Sports Tourism Revenue

In 2016 the total estimated revenue with regards to sports tourism amounted to €37,086,093 and at the same time the estimated average cost per visitor reached €1,365. Based on the official data of the Statistical Service of Cyprus, the revenue from sports tourism corresponds to 1.6% of the total revenue of general tourism for 2016*.

It is important to note that the amount of revenue mentioned throughout this section, were estimated based on the reported incomes by the participant businesses/organizations.

Table 2 shows the sports tourism revenue breakdown per category and per sport. In particular, sports visitors spent €32,874,628 for their accommodation, which corresponds to 88.6% of the total expenses, €1,949,863 (5.3%) for their transportation, €1,474,050 (4%) for the use of sports facilities and €787,552 (2.1%) as other expenses outside from the accommodation units.

Football and its visitors spent the most money during their visit in Cyprus, summing to a total of €14,592,867, followed by cycling visitors who spent €4,107,771. For swimming and other water sports, visitors spent a total of €3,268,935, compared to €2,462,443 spent by marathon visitors. Climbing and shooting sports visitors followed with approximately the same amount of €2,283,013 and €2,225,642, respectively.

Visitors related to martial arts spent a total amount of €1,582,763, compared to the €1,093,996 spent by triathlon visitors, while diving visitors reach €978,367 in their total expenditure. Finally, for the various other sports such as basketball, tennis, sambo, volleyball (including beach volley), hockey, track and field athletics, badminton, gymnastics-dance, weightlifting, boxing, rugby, squash and archery, a total of €4,489,296 was spent.

Table 3 presents in detail the breakdown of the sports visitors' accommodation expenses by the type of the accommodation, per sport. The total amount of €24,849,849 was spent by all sports visitors towards full-board accommodation, while a total amount of €2,731,553 was spent for half-board accommodation. Lastly, €76,319 were spent by all sports visitors in bed and breakfast units, while €5,216,906 were spent on various other charges and services within the various accommodation units.

* €2,363,400,000; Tourism Statistics 2016, Statistical Service of Cyprus

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