

**Final Report
on
Survey for Data on Sports Tourism in Cyprus
for Year 2010**

*Prepared for
Cyprus Tourism Organisation*

December 2011

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Report on the Survey for Data on Sports Tourism in Cyprus for the Year 2010 (Football, Cycling, Swimming & Water-Sports, Track & Field Events, and Golf)

1. Key Findings

Based on the information collected and the answers given by respondents in the course of the survey, the key summary findings as follows:

- The total numbers of visitors to Cyprus from abroad for the purpose of sports tourism** during 2010 was **11371** persons, representing an increase of approximately **22%** compared to year 2009 or – if golf which was not measured during year 2009 is excluded – an increase in the range of **15%**.
- The largest share of sports visitors related to football (**40%**), followed in second position by swimming (**25%**) and then cycling (**15%**).
- The average number of nights stayed at a total level for all sports was **9,9** nights, with the total number of nights stayed reaching **105526**. The average was highest in the regions of Larnaka (**12,8** nights) and Ammochostos (**10,6** nights) while it was lowest in the region of Lefkosia (**4,7** nights).
- Lemesos (with a share of **26%** of the total visitors) and Larnaka (with a share of **25%**) were the two cities with the highest number of sports visitors. In terms of nights stayed, Larnaka holds the highest share (**29%**), with Pafos in second position (with **27%** share).
- Ammochostos and Lefkosia are preferred primarily for football. On the contrary, sports visitors to Pafos are mainly related to swimming and water (**59%**), while Larnaka and Lemesos display a more balanced picture across the various sports.
- The majority of sports visitors was recorded for the months of February and March, holding a share of **39%** of the total, compared to **32%** in year 2009, as a result of the strong presence of visitors for football, marathon and cycling.
- Russia, the United Kingdom and Germany were the main sources of sports visitors during 2010, with these three countries accounting for more than **40%** of the total sports visitors.



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- The economic benefit to Cyprus arising from sports tourism from the sports on which the survey has focused on is approximately **16,742,711 Euro**.

**** the above findings are with regards only to the sports that formed the subject matter of the survey, and do not represent the total market for sports tourism in Cyprus for the year 2010.**

It is also noted that the figures from this survey relating to Golf may be under-estimating the total market size, as a result of the difficulty in identifying individual travellers from abroad who have visited Cyprus for the purposes of this specific sport.



2. Commissioning and Methodology

The Cyprus Tourism Organisation has commissioned NOVERNA Consulting & Research to conduct a survey on collecting data relating to Sports Tourism for the Year 2010. Specifically, this information was in relation to the number of visitors from abroad and nights stayed for the following sports: football, swimming and other water-sports, cycling, golf, track & field, marathon/running events and triathlon. Consequently, the findings in this report are in relation only to these sports and do not represent the total number of visitors who have travelled to Cyprus for Sports Tourism in the year 2010.

Data collection and analysis for the afore-mentioned sports has included:

- number of persons
- duration of stay and nights stayed
- period and month of stay (seasonality)
- geographic distribution of stay
- country of origin
- information relating to expenses

With regards to the definition of ‘sports visitors’, these have included both persons who have come to Cyprus as part of a team, as well as persons who have come as individual visitors or supporters of teams. In the context of the analysis conducted, the results are reported for the year 2010 after cross-checking of information in order to avoid double-counting, as well as on a tracking comparison with the Year 2009. Data collection has been conducted via contacts from a variety of organizations and establishments, as highlighted below, via telephonic interviews, via fax/e-mail and via personal interviews, and on the basis of continuous contact with the target audience:

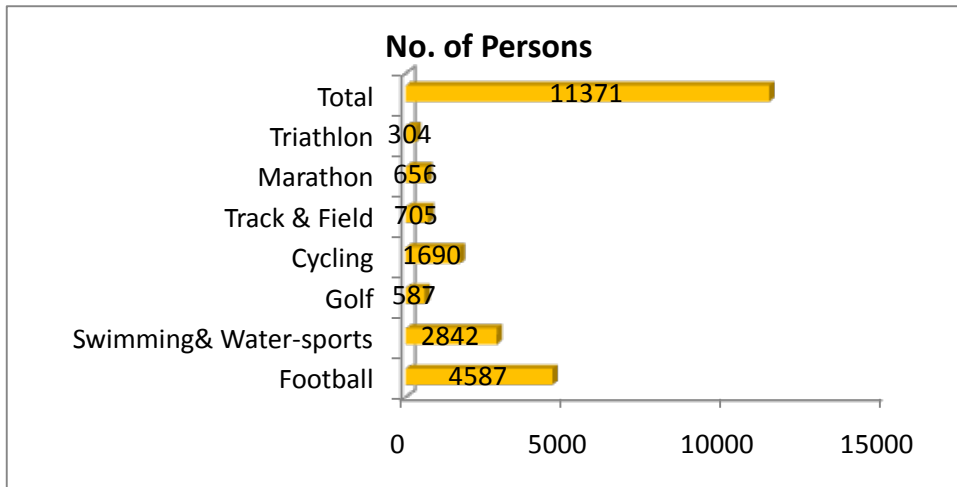
	Invited to Participate	Provided Data on Sports Tourism
3,4 and 5 Star Hotels & Hotel Apartments Class A	217	37
Organizations/ Federations and Sports Facilities	35	20
Tourist Agencies & Organizers of Sports Events	40	17
Total	292	74



3. General Overview: Total Level and by Sport

The total number of visitors to Cyprus from abroad in the Year 2010 for the sports that form the subject matter of the survey was 11371 persons. The largest share of these persons were in relation to football (4587 persons), followed by swimming in second place (2842 persons) and then cycling (1690 persons). With regards to track sports (including track & field, marathon and running events and triathlon) the total number of visitos was 1665 persons.

Number of Visitors to Cyprus from Abroad for Sports Tourism – 2010



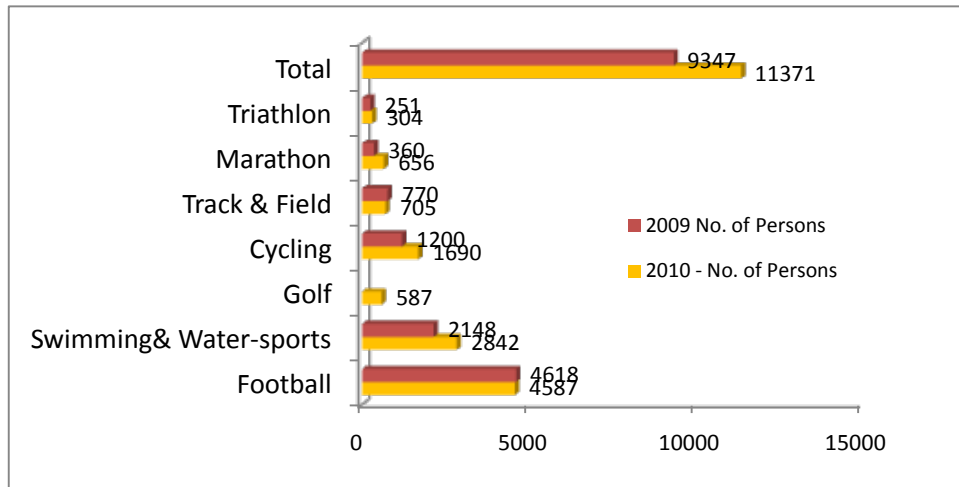
The total number of 11371 visitors represents an increase of approximately **22%** compared to year 2009. Excluding the 587 visitors that were in relation to golf which was not measured in year 2009, the increase would be in the range of **15%**.

Significant increases have been recorded in the case of swimming (**31%** increase compared to year 2009) and cycling (**41%** compared to year 2009).



The share for football in the total number of visitors for year 2010 displays and apparent reduction from 49% to 40%, nevertheless if the number of 1300 Chelsea supporters who had been included in year 2009 is excluded, the figures for football also represent and increase of more than **35%**.

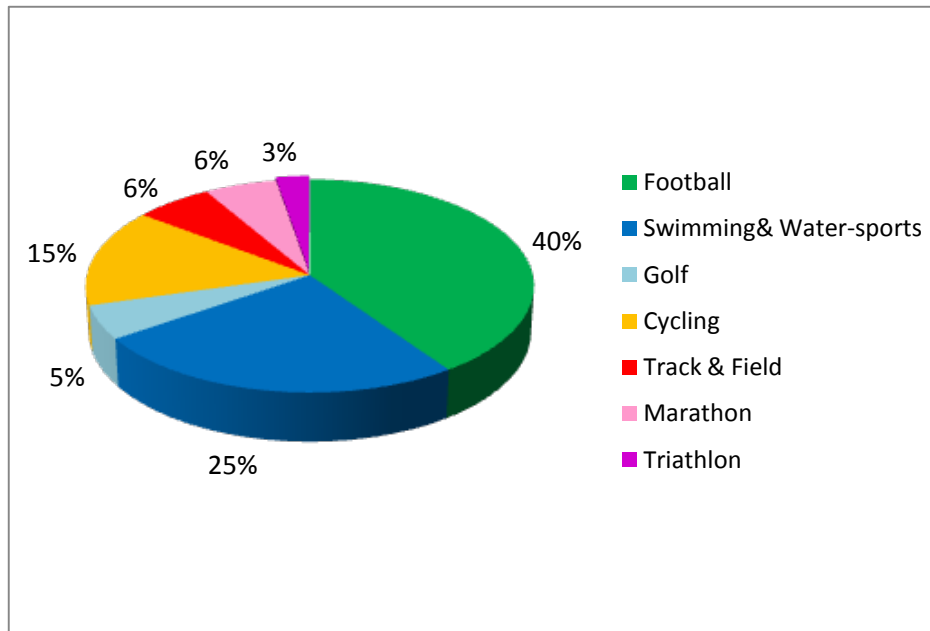
Tracking Comparison of the Number of Visitors to Cyprus from Abroad for Sports Tourism



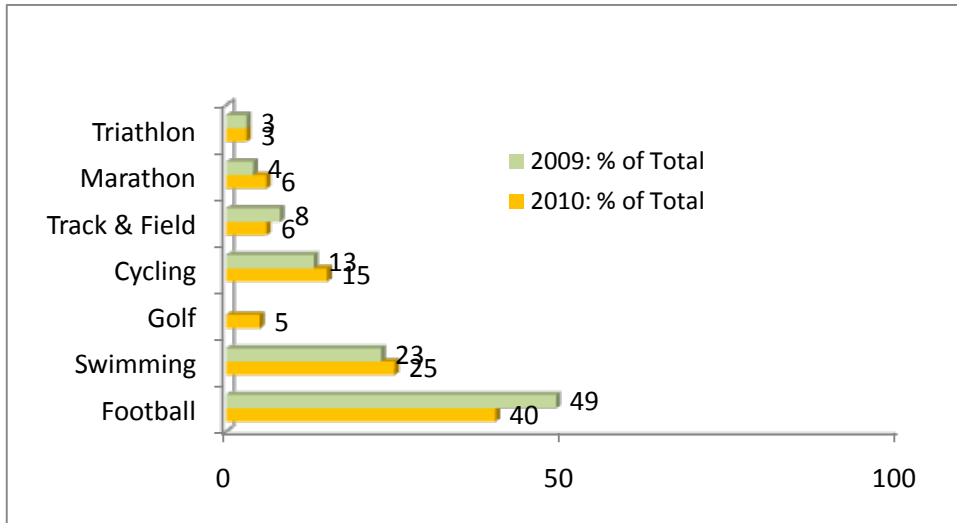
Given the data that has been collected for year 2010, football emerges as the sport with the largest share of total visitors holding a **40%** share, with swimming holding a **25%** share and cycling a **15%** share, while at the lower end the sport of triathlon holds the smallest share with **3%**.



Share of Sports in Total Visitors - 2010



Tracking Comparison of the Share of Sports in Total Visitors



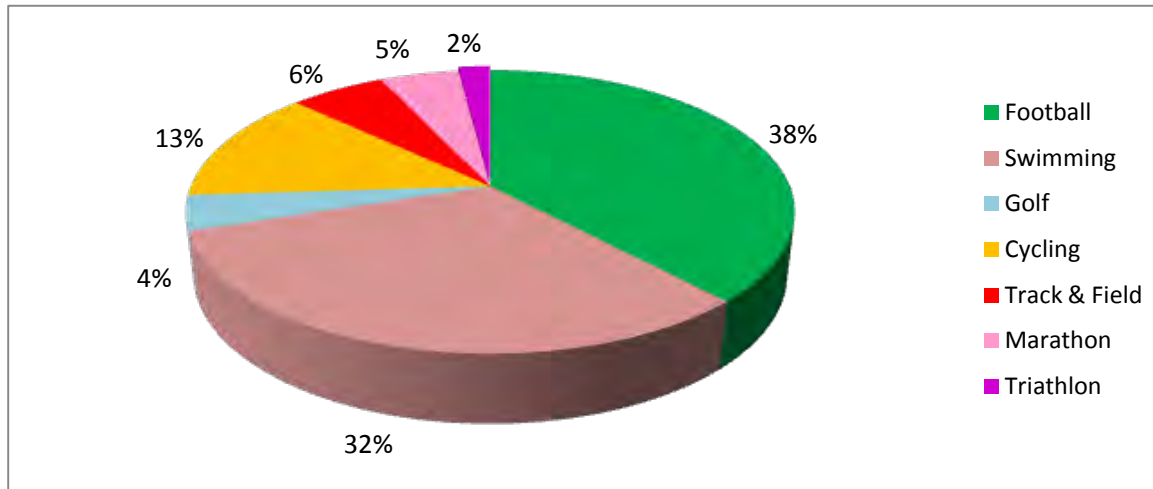
Based on the data that has been collected, the average number of nights stayed at a total level for all sports was 9,9 nights, with the total number of nights stayed reaching **105526**.

Average No. of Nights Stayed by Sports and Estimated Total Number of Nights Stayed

	Average No. of Nights Stay	Total Nights Stay
Total	9,9	105526
Football	9,0	40494
Swimming	10,8	33810
Golf	6,0	4123
Cycling	12,2	13629
Track & Field	9,3	6109
Marathon/ Running Events	5,7	5397
Triathlon	6,3	1963

Based on the estimates, football holds the lion share in the total number of nights stayed with 38%, followed by swimming in second position (32%) and cycling in third position (13%).

Share of Sports in Total Nights Stayed - 2010



In the course of data collection it is apparent that in the large majority of cases the figures were with regards to the arrival in the context of team membership or participation in tournaments or events, in the perception of the respondents. Consequently it is risky to draw a clear distinction of 'team visitors' vs 'individual visitors'. Nevertheless, the table below highlights in summary a general estimate of the split along the lines of such a distinction.

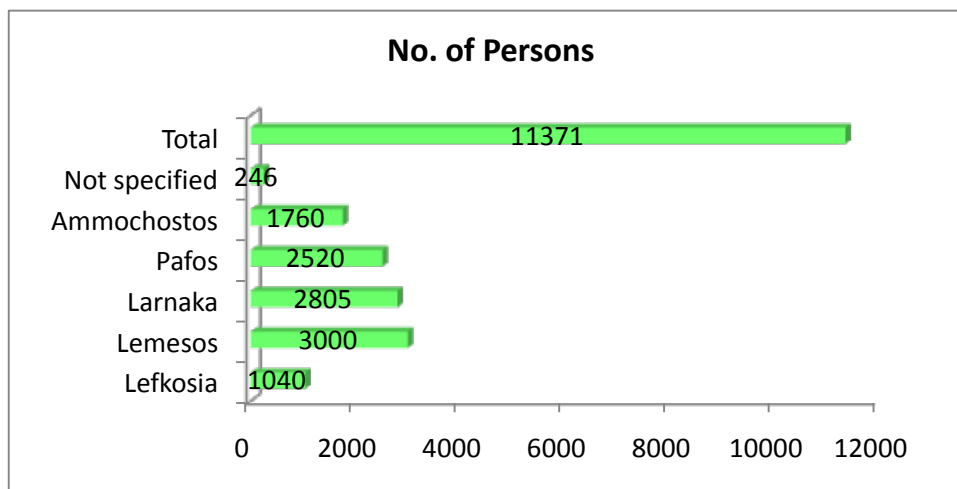
General Estimate of the Distribution of Sports Visitors across 'Team Visitors' vs 'Individual Visitors' for Year 2010

	Football	Swimming	Golf	Cycling	Track & Field	Marathon/ Αγώνες Δρόμου	Triathlon	Total	% of Total
Individual		205	34	60		9	145	453	4%
Teams	4497	2637	553	1630	705	647	159	10828	95%
Supporters	90							90	1%
Total	4587	2842	587	1690	705	656	304	11371	

4. Analysis by Region

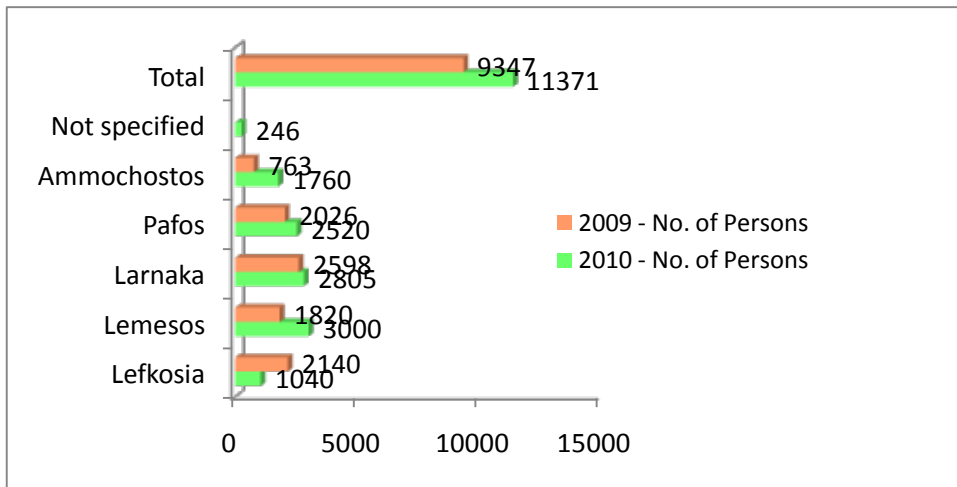
Lemesos (**3000** persons) and Larnaka (**2805** persons) were the two cities with the highest number of sports visitors in 2010, while the respective number for Pafos is also high (**2520** persons). Lefkosia records the lowest number of visitors at **1040** person.

Number of Sports Visitors from Abroad by Region - 2010



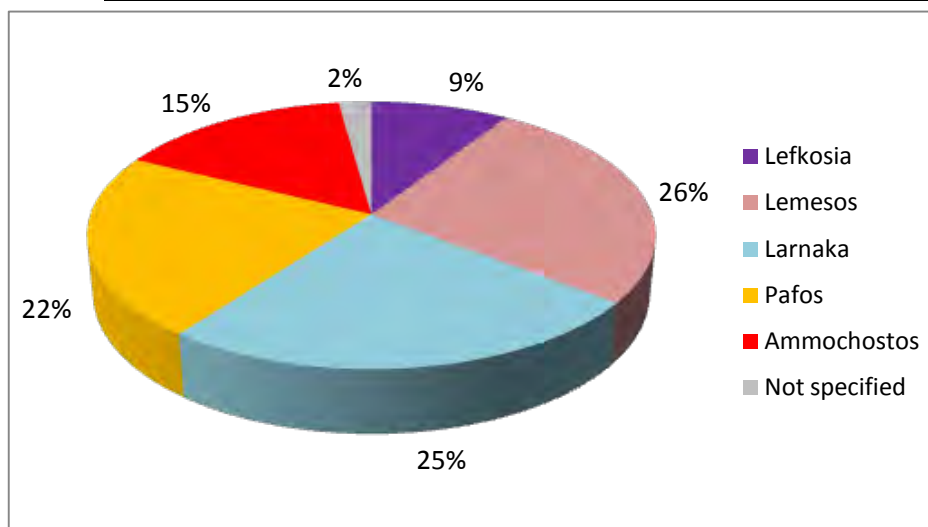
In all regions a notable increase in the number of sports visitors is recorded, particularly in the regions of Lemesos and Ammochostos. Lefkosia is the exception to the rule, however, once more it is noted that if the 1300 Chelsea supporters that had been recorded for the capital in year 2009 for a single game is excluded, the number for Lefkosia also represents a small increase.

Tracking Comparison of the Number of Sports Visitors by Region



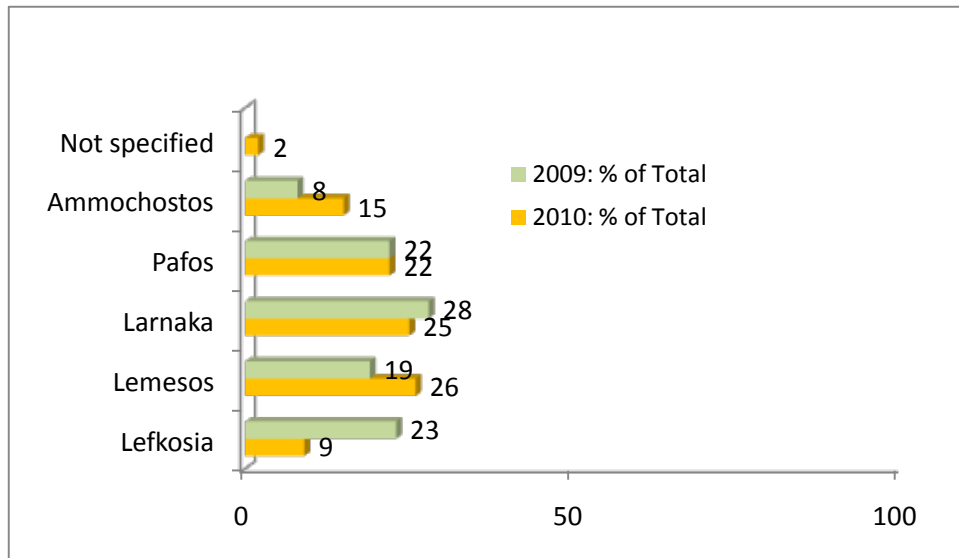
Based on the above figures, Lemesos with 26% of the total visitors and Larnaka with 25% are the regions which are mainly preferred, followed by Pafos with 22% and Ammochosots with 15% of the total.

Share of Regions in the Total Number of Sports Visitors- 2010



Lemesos (up to 26% from 19%) and Ammochostos (up to 15% from 8%) are the regions which record the biggest increase in their share of total sports visitors for the year 2010 compared to year 2009.

Tracking Comparison of the Share of Regions in the Total Number of Sports Visitors



Based on the data collected, the average number of nights stayed is highest in Larnaka (12,8 nights) and Ammochostos (10,6 nights) while it is lowest in Lefkosia (4,7 nights)

Average Number of Nights Stayed by Region

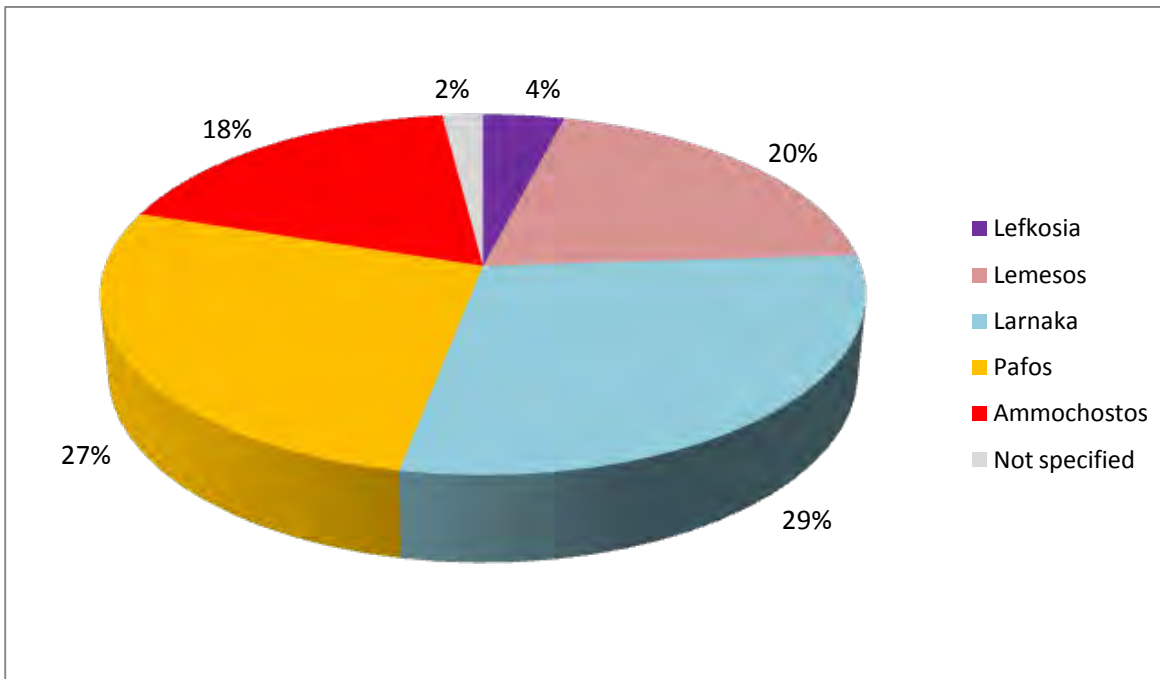
	Average No. Of Nights Stay
Lefkosia	4,7
Lemesos	7,8
Larnaka	12,8
Pafos	9,4
Ammochostos	10,6

Based on the estimates, Larnaka reverses the overall picture that has been seen for the number of persons and hence, concerning the total number of nights



stayed it holds the highest share for year 2010 (**29%**), with Pafos in second position with 27%, followed by Lemesos with 20% and Ammochostos with 18%.

Share of Regions in the Total Number of Nights Stayed by Sports Visitors – 2010





5. Sports by Region

Significant variations have been recorded with regards to the sports which each region attracts. Specifically, both Ammochostos and Lefkosia are preferred primarily for football, with **97%** and **87%** respectively of the total number of visitors in each of these regions related to this sport.

By contrast, sports visitors to Pafos are mainly for swimming and waters sports (**59%**), while Larnaka and Lemesos display a more balanced picture across the various sports. Specifically, sports visitors to Larnaka are in relation to football (37%), cycling (27%) and swimming (24%) alike. For Lemesos, the largest share relates to cycling (23%), while in combination track & field, marathon and triathlon account for 28% of sports visitors to Lemesos. In Lemesos, the share that relates to football (16%) and swimming (21%) is also substantial.

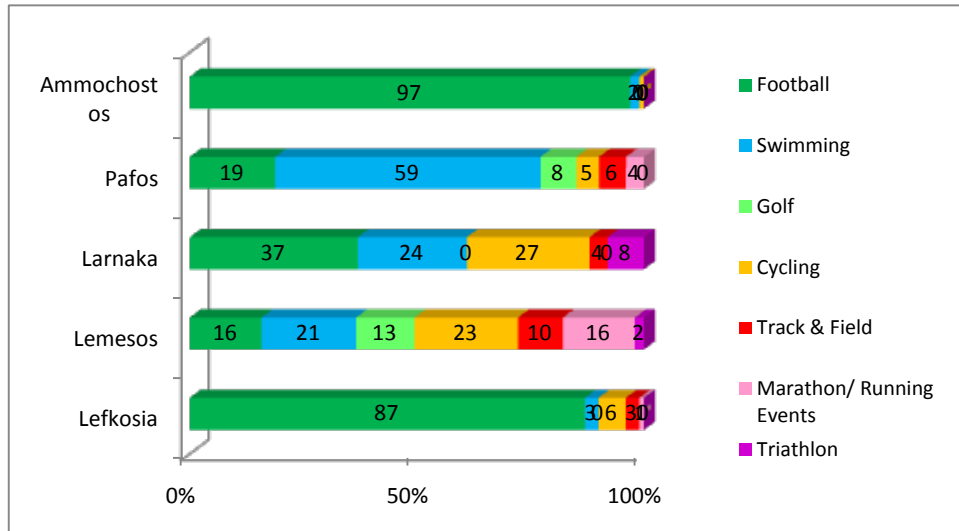
It is also noted that golf accounts for a notable share of total visitors to Lemesos (13%) and also to Pafos (8%)

Number of Sports Visitors by City and Sport - 2010

	Football	Swimming	Golf	Cycling	Track & Field	Marathon	Triathlon	Total
Lefkosia	905	35		60	30	10		1040
Lemesos	465	626	397	680	300	478	54	3000
Larnaka	1036	665		752	108	10	234	2805
Pafos	477	1480	190	116	147	98	12	2520
Ammochostos	1704	36		20				1760
Unspecified				62	120	60	4	246
Total	4587	2842	587	1690	705	656	304	11371



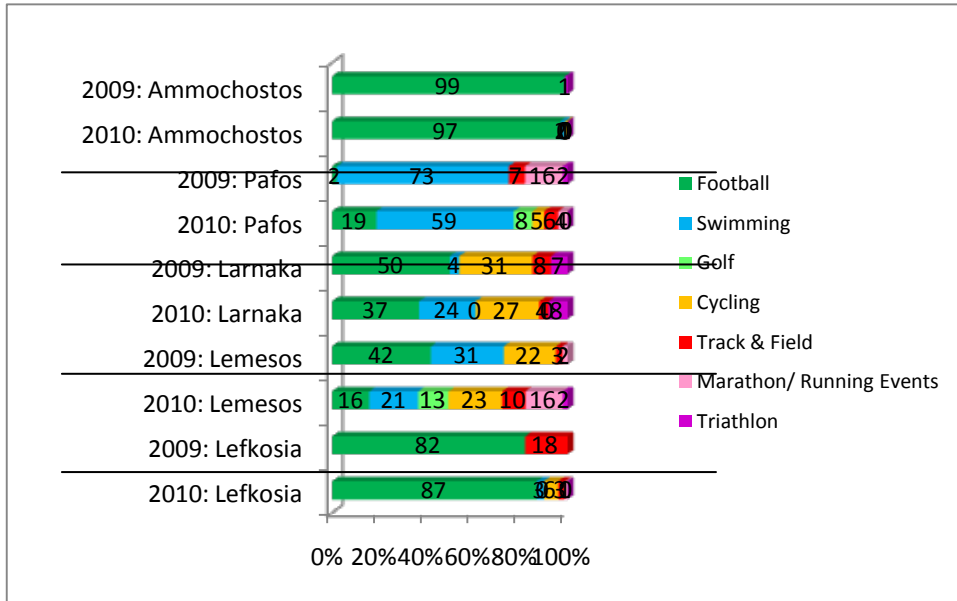
Share of Sports in the Total Number of Visitors of each Region - 2010



With regards to the tracking comparison for the share of the various sports in the total number of sports visitors of each region, the general picture is similar to that of year 2009, with the exception of the significant increase for swimming in the Larnaka region and the increase for track and field, marathon and triathlon in the Lemesos region.



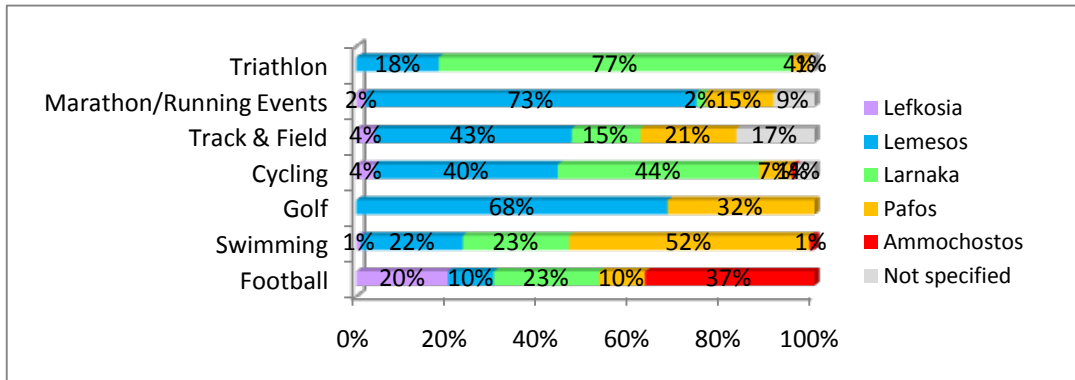
Tracking Comparison of the Share of Sports in the Number of Visitors of each Region



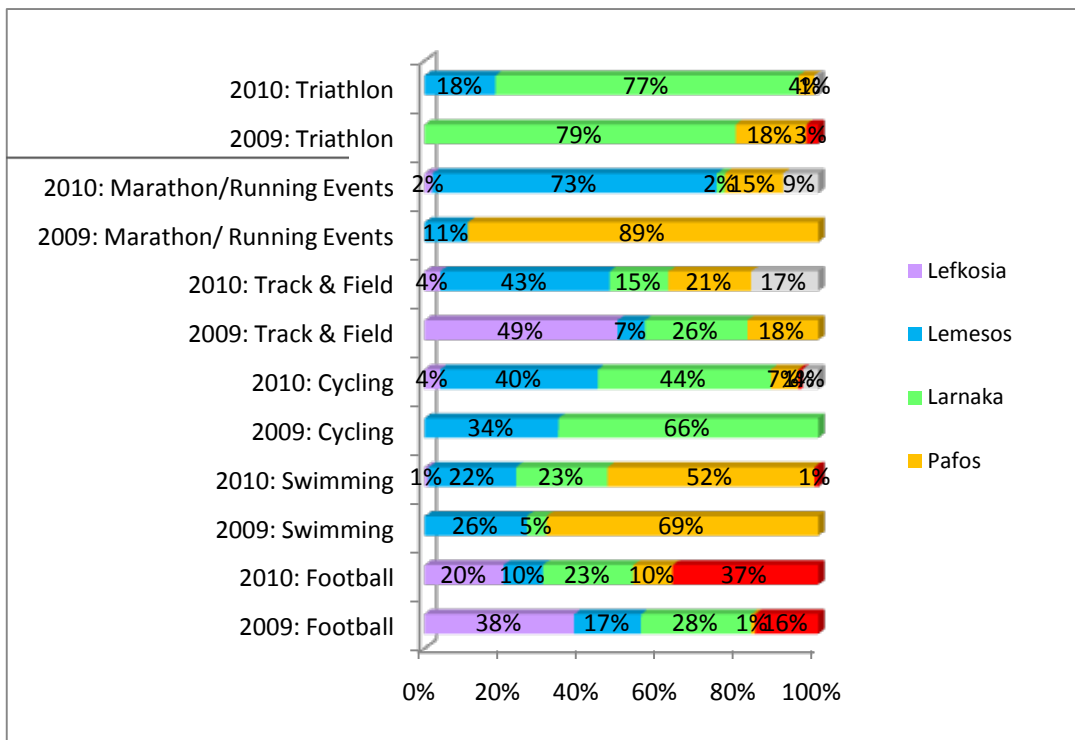
With regards to the distribution of sports visitors for each sports across the different regions, it is evident that Lemesos draws the lion share in track & field and marathon/running events, while Ammochostos holds the majority of football visitors. Larnaka holds significant shares in the cases of cycling (44%), football (23%) and swimming (23%). With respect to golf, the visitors are exclusively distributed to the Lemesos and Pafos regions.



Distribution of Sports Visitors of each Sport Across Region - 2010



Tracking Comparison of Distribution of Sports Visitors of each Sport Across Region

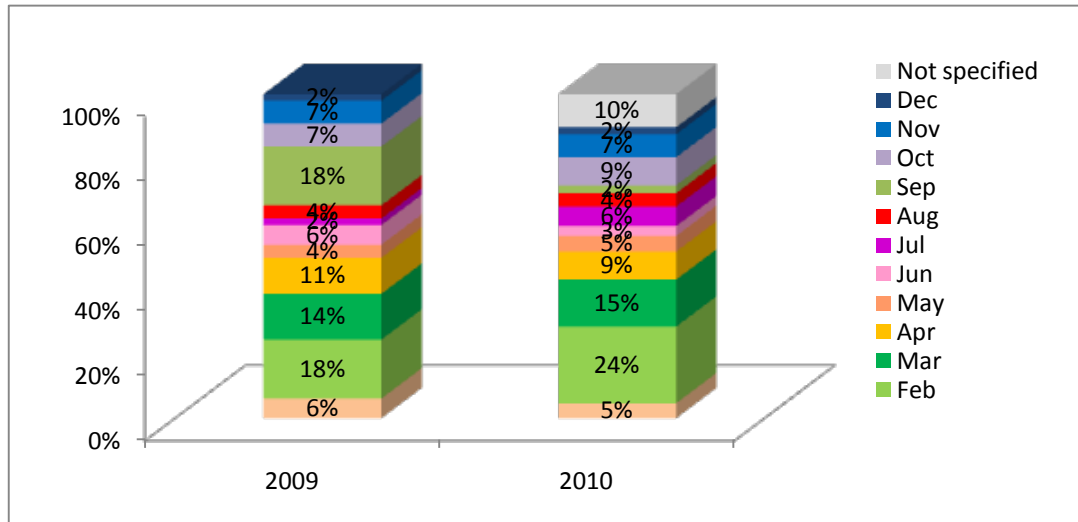




6. Seasonality

Regarding seasonality, the majority of sports visitors in year 2010 was recorded for the months of February and March, holding **39%** of the total, compared to **32%** recorded in year 2009, while it is noted that in 10% of the cases the specific month of stay was not recorded due to lack of sufficient data.

Distribution by Month of Sports visitors for Years 1009 and 2010



The table below shows in detail the specific month of stay for each region separately.

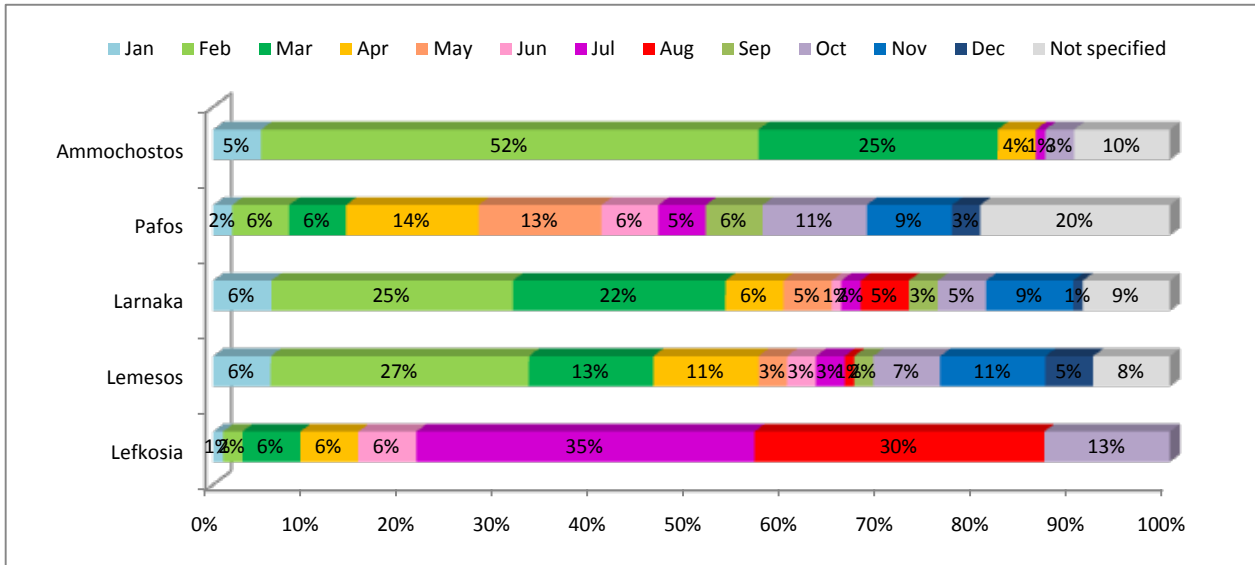
Number of Sports Visitors by Region for year 2010 by Region and Month

	Lefkosia	Lemesos	Larnaka	Pafos	Ammochostos	Unspecified	Total	% of Total
Jan	15	182	164	44	88	30	523	5%
Feb	25	824	713	154	911	62	2689	24%
Mar	58	379	627	144	441		1649	15%
Apr	67	324	180	349	65		985	9%
May		77	146	324			547	5%
Jun	60	90	31	164			345	3%
Jul	364	98	70	129	26		687	6%
Aug	307	30	131				468	4%
Sep		57	72	147			276	2%
Oct	139	221	144	273	56	154	987	9%
Nov		321	266	220			807	7%
Dec	5	149	22	68			244	2%
Unspecified		248	239	504	173		1164	10%
Total	1040	3000	2805	2520	1760	246	11371	

Limassol, Larnaka and Pafos alike display a greater dependence on the months of February and March, while by contrast, the highest share for Lefkosia are recorded during the summer months. Pafos is the single region which records a more balanced distribution across all months of the year.



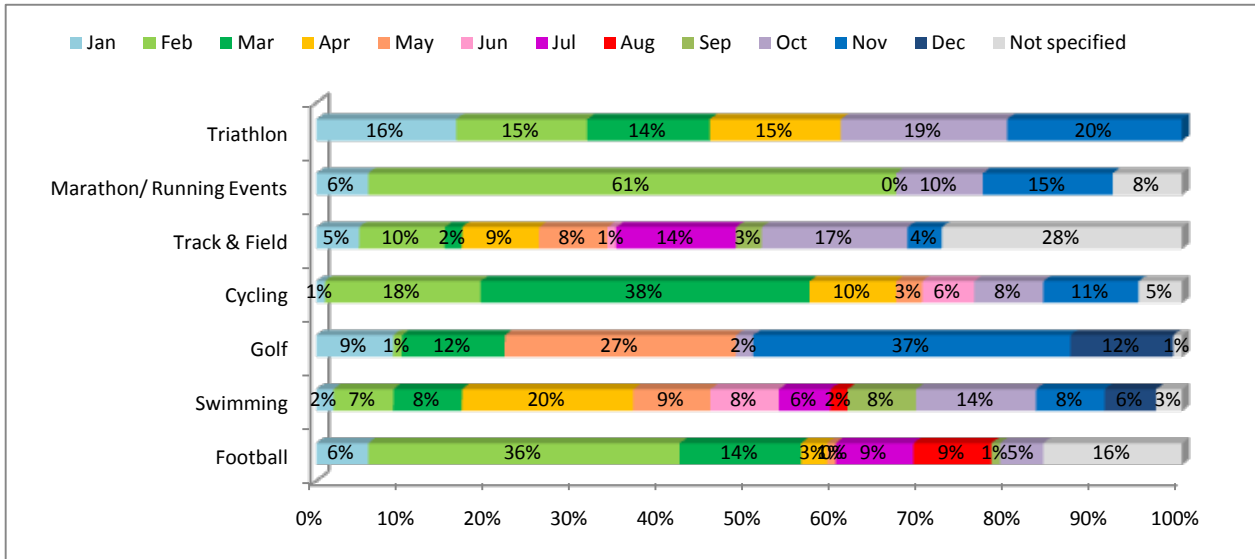
Distribution of Sports Visitors by Month for each Region



It is also clear that the months of February and March source their large share from the strong presence of visitors for football, marathon and cycling, while, on the contrary, swimming records a balanced presence throughout the year. Golf displays a bipolar presence in the months of May and November.



Distribution of Sports Visitors by Month for each Sport

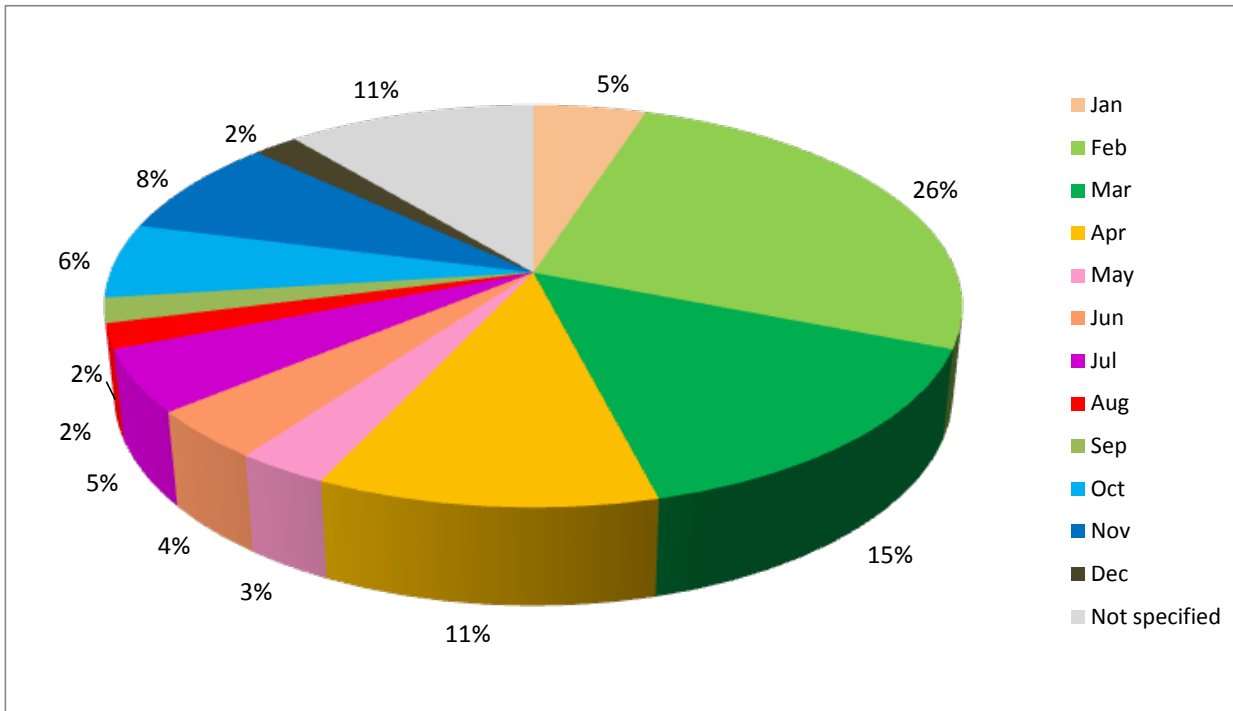


With regards to the number of nights stayed, there is again a greater tendency for a greater duration of stay for the months of February and March, as well as April and November.

Average Nights Stayed by Month

	Average
Jan	9,0
Feb	11,8
Mar	11,4
Apr	12,0
May	6,1
Jun	8,8
Jul	6,9
Aug	4,8
Sep	6,6
Oct	5,9
Nov	11,9
Dec	9,4

Share of each Month in Total Nights Stayed by Sports Visitors - 2010

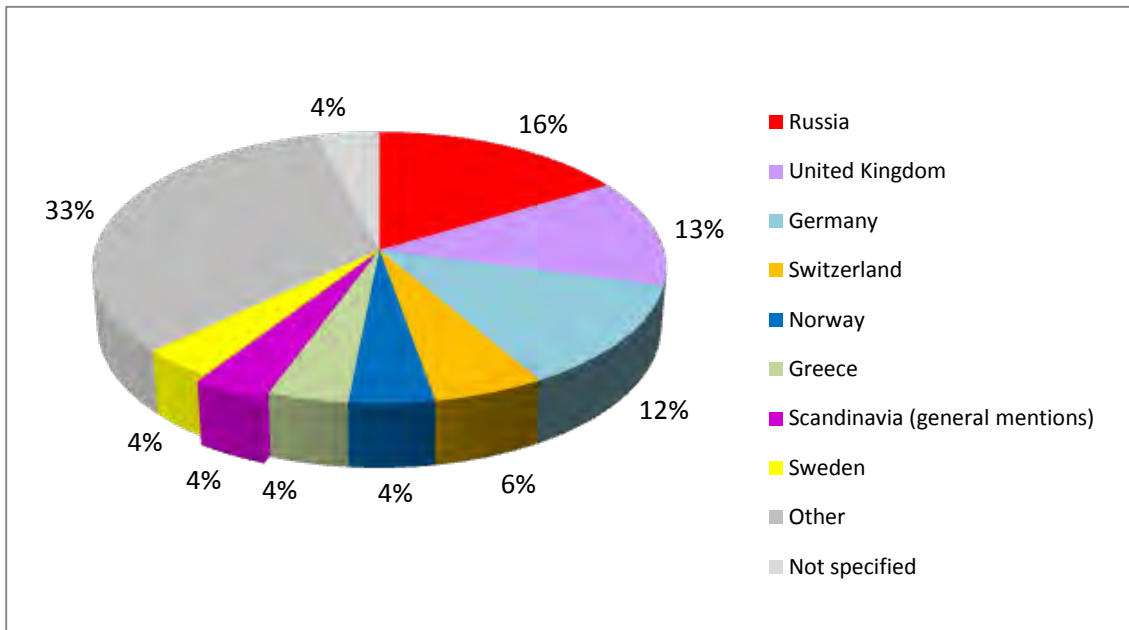




7. Country of Origin

Russia, the United Kingdom and Germany were the main sources of sports visitors during 2010, with these three countries accounting for more than **40%** of the total sports visitors.

Share of Countries of Origin in Total Number of Sports Visitors - 2010



The tables below highlight in detail the number of visitors from each country for each of the 7 sports, as well as the months of stay for each country separately.

Number of Sports Visitors by Country and Sport - 2010

Country	Football	Swimming	Golf	Cycling	Track & Field	Marathon/ Αγώνες Δρόμου	Triathlon	Total
United Kingdom	279	640	167	94	97	174	1	1452
San Marino		22						22
Egypt		28						28
Ethiopia						1		1
Albania						1		1
Other	98	22		30		91		241
Amdorra	26							26
Argentina						20		20
Armenia	147							147
Australia				1				1
Austria	70	105	2	76		6	1	260
Belgium	50			19				69
Bosnia	27							27
Bulgaria	80	2						82
Brazil	18			2		1		21
France	40	17	140	10		28	1	236
Germany	39	212	7	845	259	47	12	1421
Georgia	35							35
Denmark	22	138	2	5				167
Various European Countries	50						145	195
Switzerland	230	46	211	145				632
Greece	109	144	11	5	116	71		456
Estonia				2				2
U.S.A	25	1	1	2				29
U.A.E.			2	12				14
Japan				3				3
India						1		1
Jordan	26							26
Ireland	63	22						85
Iceland		44						44



Spain	39	10				1		50
Israel	62	20	2	2		2		88
Italy	68	29	1	4		10		112
Kazakhstan				10				10
Canada	40							40
Kenya						8		8
China						2		2
Croatia	50							50
Latvia	32			1				33
Belarus	12					1		13
Lebanon			19			5		24
Lithuania	50							50
Luxembourg				15				15
Malta		28		1				29
Moldavia	40					2		42
Monaco				15				15
New Zealand	65							65
Norway	335	136	2	12				485
South Africa	40							40
South Korea				2				2
Netherlands	98	5	2	20		5	1	131
Hungary	54		2	2		21		79
Ukraine	135	22		22		1		180
F.Y.R.O.M.	50							50
Poland	123	31	2	1	53	29	1	240
Portugal						2		2
Romania	25			5	40	15		85
Russia	716	819	2	142		31	142	1852
Serbia	102		1		5			108
Scandinavian countries	352			65				417
Slovakia	30		2	1				33
Slovenia	25							25
Sweden	285	88	2	8	28	3		414
Czech Republic	145			14		5		164
Tunisia		10						10

Finland	20	159	2	1			1							183
Not specified	160	42	5	96	107		72							482
Total	4587	2842	587	1690	705		656			304				11371

Number of Sports Visitors by Country and Month - 2010

Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Un/ied	Total
United Kingdom	74	441	99	220	125	47	159		38	161	10	24	54	1452
San Marino											22			22
Egypt								10	18					28
Ethiopia		1												1
Albania		1												1
Other		98				30					113			241
Amdorra								26						26
Argentina	10									10				20
Armenia	25	35	25				50	12						147
Australia		1												1
Austria	34	25	30	44	31	23	50			4		19		260
Belgium		19						50						69
Bosnia													27	27
Bulgaria		68						12	2					82
Brazil		3		18										21
France	5	21	110		17					10	73			236
Germany	40	155	445	178	70	57		12		228	134	5	97	1421
Georgia								35						35
Denmark		55	52	32	2	4				22				167
Various European Countries	50	95									50			195
Switzerland		156	172	76	1					5	152	70		632
Greece	5	66		12	53	4	182	10	37	35	42	10		456
Estonia		2												2
U.S.A		27			1				1					29
U.A.E.					2						12			14
Japan		3												3
India		1												1
Jordan							26							26



Ireland		32							22			31	85
Iceland				44									44
Spain		1					49						50
Israel		4		2			35		20			27	88
Italy		49		7			10	19				27	112
Kazakhstan		10											10
Canada		40											40
Kenya		6							2				8
China		2											2
Croatia							50						50
Latvia		33											33
Belarus		1						12					13
Lebanon		5		19									24
Lithuania							50						50
Luxembourg						15							15
Malta		1						10	18				29
Moldavia	40	2											42
Monaco						15							15
New Zealand		65											65
Norway		53	70	92	2	61			31	108	22	46	485
South Africa			40										40
South Korea		2											2
Netherlands		96	25		2		5			1	2		131
Hungary	10	57			2					10			79
Ukraine		115	43	18					4				180
F.Y.R.O.M.							50						50
Poland		119	3	1	2				40			25	240
Portugal		2											2
Romania		20	25									40	85
Russia	128	451	269	167	121	31	35	125	50	235	149	91	1852
Serbia	67	35			1						5		108
Scandinavian countries		10	32	20						3			417
Slovakia		1			2			30					33
Slovenia										25			25
Sweden	35	88	190	50	2					22		27	414



Czech Republic		114						50						164
Tunisia								10						10
Finland		2	17	42	24	58			18		22			183
Not specified			2	15	15					64			386	482
Total	523	2689	1649	985	547	345	687	468	276	987	807	244	1164	11371

8. Financial Estimates

Based on the responses of the target audience as well as estimates based on international statistics, the estimated economic benefit to Cyprus arising from sports tourism from the sports on which the survey has focused on is approximately **16,742,711 Euro**, as shown in the table below. Hence, it is noted that the total benefit if other sports were also to be considered would be substantially higher (see part 9). It is noted that the estimates have been made on the basis of projections given that in a number of cases the figures relating to expenses were incomplete as the respondents were unable to provide sufficient data.

Financial Figures

Total Nights Stayed	105526				
Total No. Of Days in Cyprus	123944				
1. Hotel Expenses					
	% of Total	Nights	Cost per night (Euro) – excluding intermediary commission Κόστος ανά	Total Hotel Cost (Euro) –including intermediary commission Κόστος ανά	(Euro)
Stay at 3 star Hotel	27.3%	28808	54,3	1, 838, 022	
Stay at 4 or 5 star Hotel	49.8%	52552	81, 8	5, 051, 034	
Stay at Tourist Village	7.2%	7598	35, 0	1, 168, 044	
Stay at Tourist Apartments	15.7%	16568	60,0	312, 468	
				Total	8, 369, 568
2. Other Catering Expenses for Stay outside Full-Board					
Type of Stay	% of Total	Day	Expenses per day (Euro)	Total Other Catering Expenses (Euro)	(Euro)
% Full Board	81%	100395			
% Half-Board	16%	19831	40	793,240	
% Breakfast Only	3%	3718	60	223, 080	
				Total	1,016,320
3. Other Expenses at Hotel					
	Nights	Expenses per night (Euro)			(Euro)
	105526	15		Total	1, 582, 890

4. Other Personal Expenses per Day					
	Days	Expenses per Day (Euro)			(Euro)
	123944	21,4		Total	2,652, 402
5. Transportation Expenses					
	Total Days	Cost per Person per Day (Euro)			(Euro)
	123 944	3, 9		Total	483, 381
6. Facilities/Training Expenses					
	Days	Cost per Athlete per Day (Euro)			(Euro)
	105526	25		Total	2, 638, 150
					(Euro)
				TOTAL	16, 742, 711



9. Other Sports

In the course of data collection, some respondents have provided additional information on visitors relating to other sports including, among others, shooting, jarate and martial arts, tennis, weight-lifting, volleyball, gymnastics, handball and basketball. Taking into account the large number of such other sports, it is expected that the total market size for sports tourism is substantially higher than that which has been recorded for the specific sports which have formed the subject matter of this survey.