



Game on for the GCC: Turning sporting ambition into lasting tourism impact



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1

Executive summary

Executive summary

Sports tourism has become one of the fastest-growing pillars of global travel, moving from a niche activity to a central driver of economic impact, destination branding and visitor engagement. Defined as travel linked to observing or participating in sport, it spans three categories: spectators, participants and nostalgia-driven visitors.

The sector is expanding rapidly, driven by mega-events, growing participation in active travel and rising demand for memorable, experience-led journeys. Sports tourists often generate above-average spending, although this varies by event scale, destination and traveller profile - making the segment a valuable driver for tourism growth.

For the GCC, sports tourism is both an economic opportunity and a tool for global positioning. The region has already proven its ability to deliver transformative events, build year-round ecosystems and invest in next-generation infrastructure. Beyond the numbers, sports tourism in the Gulf supports job creation, enhances youth engagement and strengthens international perception, positioning the region as a frontrunner in shaping the future of global sports tourism.

Key insights:

- Sports tourism is scaling quickly, with growth driven by mega-events, active participation and nostalgia-led experiences.
- The GCC is already seeing impact, with momentum from global tournaments, esports expansion and diversified year-round event models.
- New growth engines - such as esports, women's sports, sport-leisure, sponsorship alignment and domestic league development - offer opportunities to expand audiences and smooth seasonality.
- The next step for the GCC is to move beyond hosting events to delivering holistic, experience-led sports tourism that creates lasting value across all traveller segments.



2

Sports tourism overview

Sports tourism overview

According to the United Nations World Tourism Organization (UNWTO), sports tourism is a type of tourism activity which refers to the travel experience of the tourist who either observes as a spectator or actively participates in a sporting event generally involving commercial and non-commercial activities of a competitive nature.

It includes individuals who are:

Passive: Spectator-driven, tied to events and fandom



Active: Tourists participating in sports



Nostalgic: Heritage-based, for example, visiting iconic venues



Sports tourism makes up 10% of global tourism spend and is growing fast, with a projected 17.5% compound annual growth rate (CAGR) between 2023 and 2030¹. Valued at US\$600bn in 2022, the market is projected to exceed US\$2tn by 2030, driven by mega-events like the 2026 World Cup and future Olympics².



A recent sports and tourism intelligence agency, GSIQ, survey projects a 63% increase in potential sports tourists. The sports sector already contributes US\$600bn in the Middle East and is growing at 8.7% annually. Saudi Arabia's sports market is set to triple from US\$8bn to US\$22.4bn by 2030, backed by major projects like 15 new stadiums for the 2034 FIFA World Cup and the Kingdom's National Gaming and Esports strategy aiming to generate US\$13.3bn GDP and 39,000 jobs.⁴ Domestic competitions such as the ROSHN Saudi League attracted extensive international broadcast coverage and generated strong social media engagement. Similarly, new events such as the Six Kings Slam in Riyadh generated widespread online buzz during its three-day run in 2024, leading to its broadcast on Netflix in 2025. Examples such as these provide significant media exposure and reinforce the Kingdom's growing appeal as a destination for world-class sports, entertainment, and tourism, with the potential to draw visitors from across the world.

Elsewhere in the region, Qatar is sustaining its post-World Cup momentum with recurring global events, while the UAE leads in innovation with developments like the world's largest wave pool and growing traction in UFC and combat sports. The region is also strengthening its global motorsport footprint, with Bahrain, Abu Dhabi, Saudi Arabia and Qatar all hosting Formula 1 (F1) races. Combined with heavy investments in smart stadiums, immersive fan experiences and year-round event calendars, the GCC is shifting from episodic hosting to building a future-focused, digitally enabled sports ecosystem to drive economic diversification, global visibility and youth engagement.



Sports tourism is set for rapid global growth, driven by high-spending, frequent travellers. MENA is especially well-positioned, with mega events, strong infrastructure, and rising local competitions. Success depends on tailored offerings and seamless access that turn great destinations into repeat, recommended experiences.

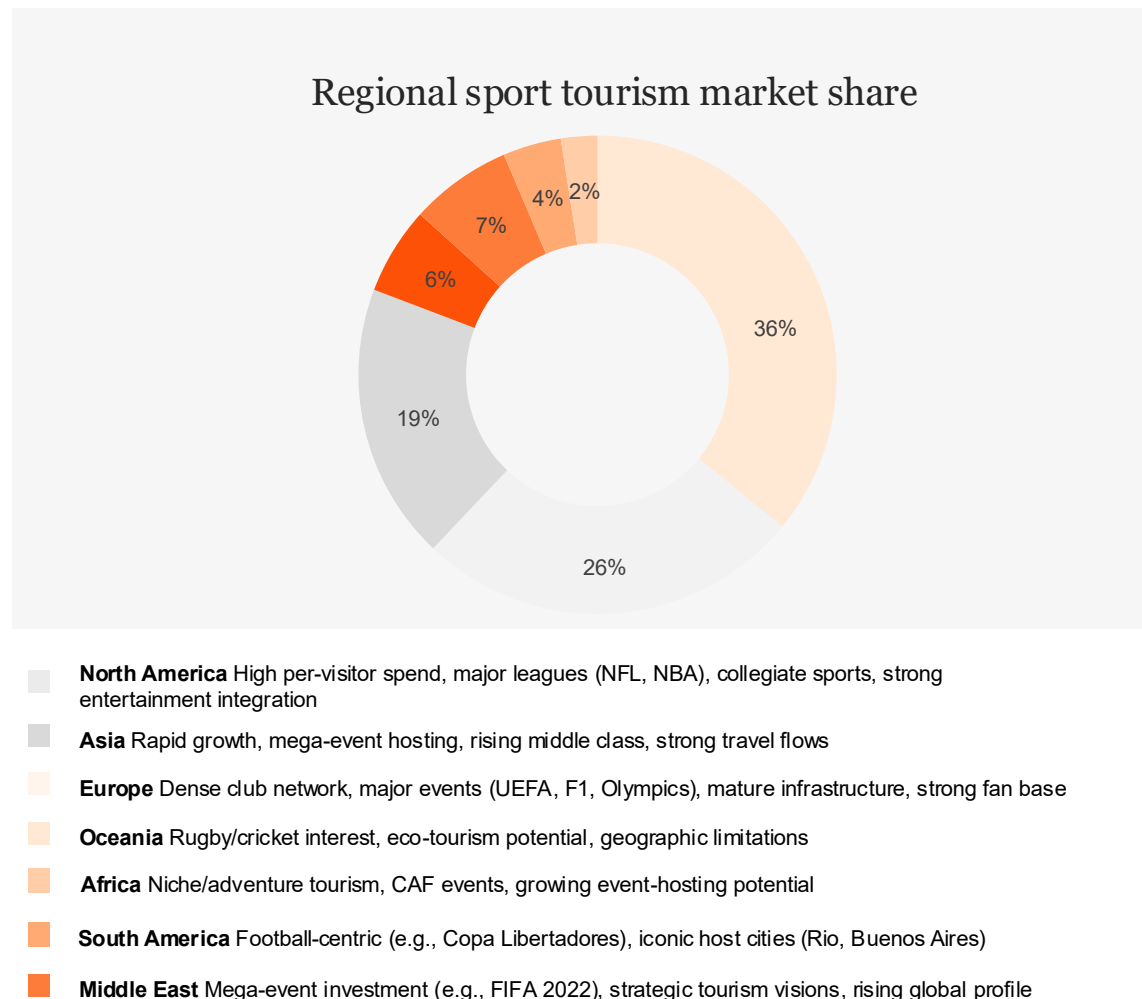
Sam Dawson - GSIQ
Managing Partner, MENA

The economic impact

The GCC is transforming sports tourism into a catalyst for broader economic and social development by turning events into immersive, multi-dimensional experiences. From F1 weekends enhanced with concerts, fan zones and premium F&B, to the rapid growth of esports and VR-led activations like Riyadh's Gamers8 and Qatar's Esports Federation, the region is engaging a younger, digital-native audience with year-round offerings.

Innovations in digital booking, personalised travel packages and direct-to-fan marketing are reshaping how trips are planned, opening new channels to connect with mobile-first travellers. Combined with an expanding global event calendar, these trends create opportunities for year-round tourism potential.

Critically, this supports the region's non-oil economic diversification by boosting sectors such as hospitality, transport, retail and services, while creating jobs (particularly for youth and women) and enhancing regional branding and soft power.



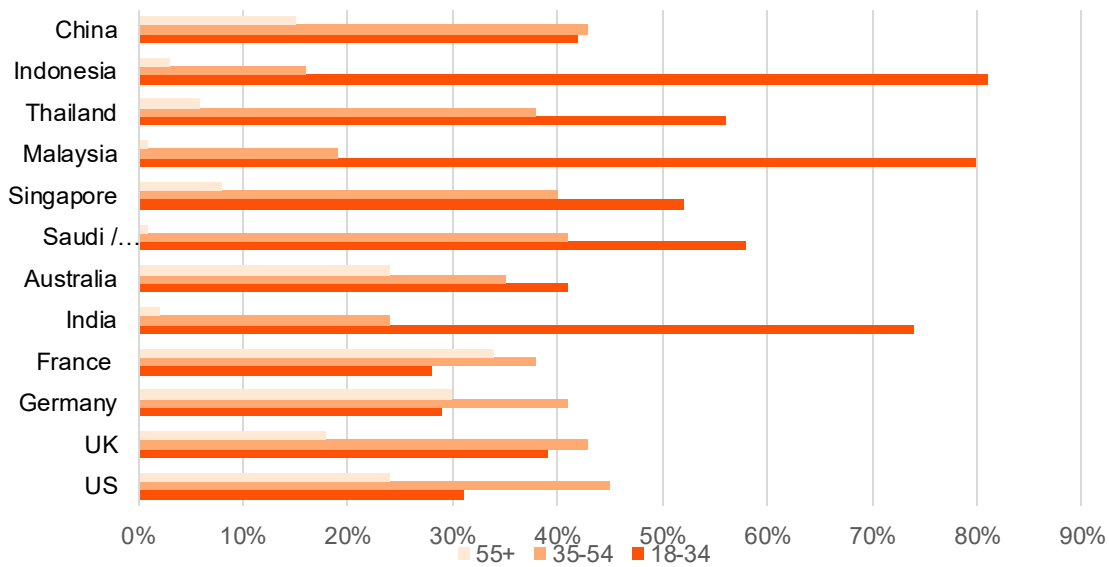
Who is the sports tourist?

Core motivation for sport travel⁶

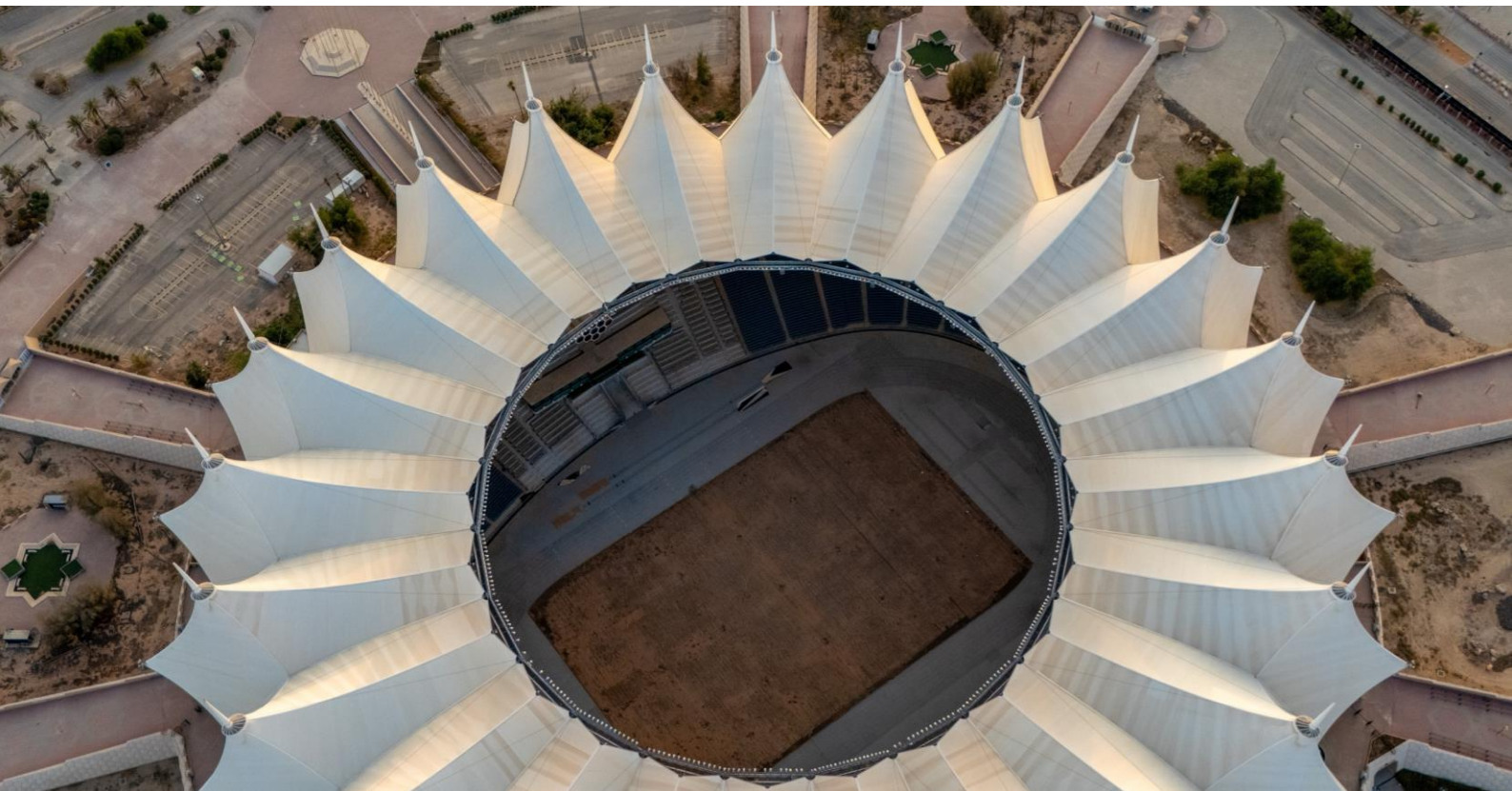
Passion for sport remains the primary motivation for sports tourism, with visitors motivated by the chance to witness iconic events, see top athletes in action and engage in unique, memorable experiences. For first-time or price-sensitive travellers, affordability is critical and value-based ticketing and bundled travel packages significantly increase the likelihood of booking. Younger travellers prioritise combining sport with leisure, seeking opportunities to explore local culture, enjoy sightseeing and participate in social activities alongside attending events. Destination appeal is also a deciding factor, where the city itself must be a desirable location to visit, not just the event.



Sport Tourists: Past Attendance by Age



Note: The nostalgic sports tourist segment is not included in the chart above.



According to GSIQ⁷, age-based trends in sports tourism show that younger travellers (18-34 years) dominate in emerging markets, while 35-54-year-olds are the most economically impactful in developed regions. Older travellers, over 55 years, offer potential for off-season tourism if targeted effectively. This aligns well with the GCC's youthful demographic, with over 60% of the population under 35⁸, presenting a clear opportunity to build a vibrant, digitally engaged sports tourism base and attract global events tailored to younger audiences.

Spending patterns

Sports tourists, globally, spend an average of US\$1,500 per trip as per a recent Expedia Group survey⁹, with repeat and affluent visitors spending significantly more at major events.

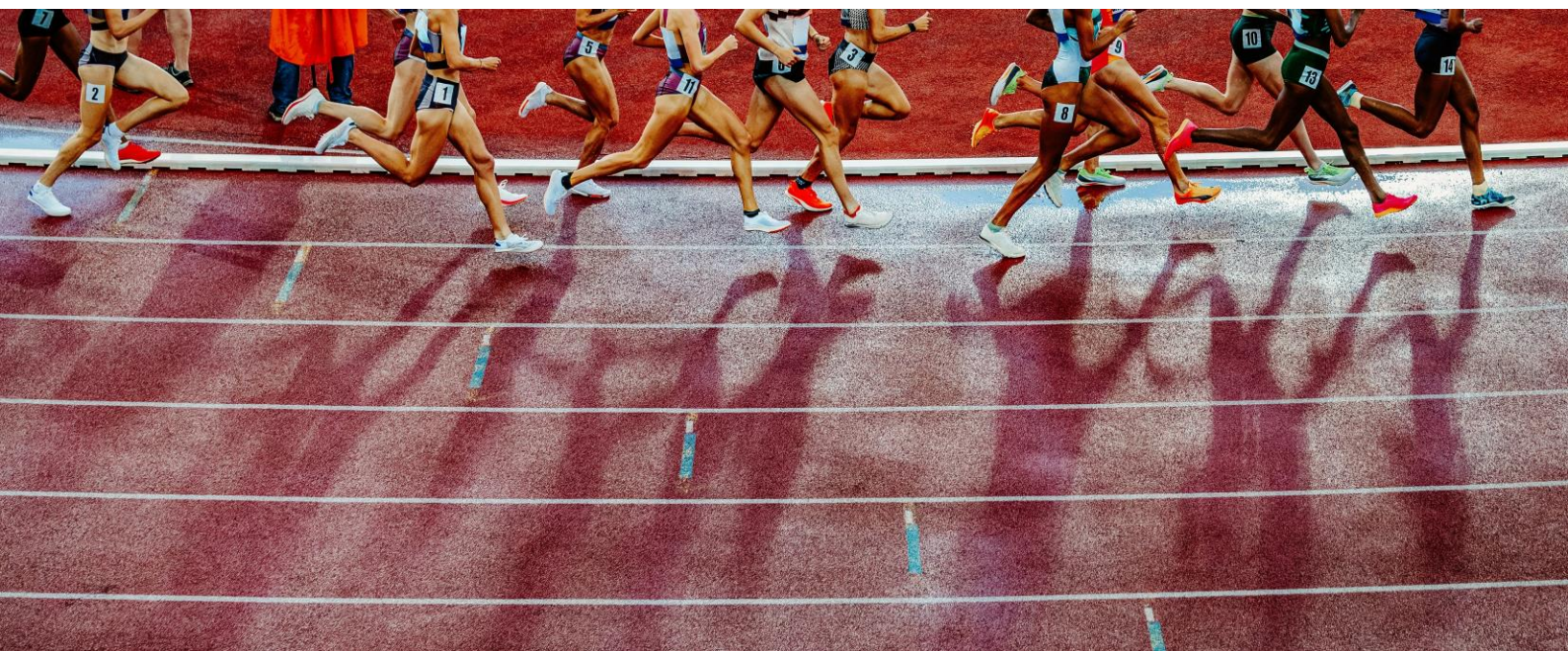
GSIQ¹⁰ shows frequent fans may spend up to twice as much as casual attendees, with high-income tourists taking more trips and spending more per visit. This makes sports tourism not just a driver of visitor numbers, but a powerful tool for increasing tourism yield in host destinations¹¹.



Sports tourism is not just a driver of visitor numbers but a powerful tool for increasing tourism yield in host destinations creating opportunities for the entire hospitality value chain

Marco Rentsch

Partner, Global Tourism and Hospitality Center
of Excellence at PwC Middle East



A close-up photograph of a sprinter in a blue uniform crouching on a red track, with a large orange number 3 overlaid.

3

Regional
highlights and
success factors

Regional highlights and success factors

To understand the GCC's growing momentum in global sports tourism, it is important to examine what has already been achieved. This section highlights key milestones from across the region that demonstrate how targeted investments, visionary leadership and strategic alignment with national goals are already delivering tangible results. These examples showcase the varied models adopted by Qatar, Saudi Arabia and the UAE -ranging from mega-events to immersive digital experiences and multi-sport ecosystems.

By analysing these successes, we can identify the critical enablers behind their impact: long-term planning, multi-sector coordination, calendar diversification and digital engagement. These insights serve as building blocks for shaping a more integrated, sustainable and year-round sports tourism economy across the region.

Qatar's FIFA Men's World Cup 2022

Qatar's World Cup drew 1.4m visitors, generating US\$2.3–US\$4.1bn in tourism and media revenue, and adding US\$1.6 - US\$2.4bn to GDP¹². Regional tourism rose by 30%¹³, with cities like Dubai and Riyadh also benefiting from the event. The momentum continued beyond the tournament, with Qatar welcoming a record four million visitors in 2023 and sustaining growth into 2024 with five million visitors recorded¹⁴, well on track to reach six million visitors by 2030 ambitioned by the Qatar Tourism Authority (QTA)¹⁵.





Saudi Arabia's esports surge – Gamers8 and the Savvy Games Group

Backed by US\$38 billion from Savvy Games Group¹⁶, Saudi Arabia launched the Esports World Cup (EWC) in 2024 as the successor to Gamers8, positioning it as the largest global esports event. Held in Riyadh, the tournament drew over 2.5 million attendees¹⁷ and featured the world's largest prize pool in esports history, exceeding US\$60 million. By combining competitive gaming with concerts and cultural activations, the EWC supports Vision 2030's goals of youth engagement, tourism diversification and positioning Saudi Arabia as a global gaming and entertainment hub.

UAE's multi-sport event ecosystem

The UAE has built a year-round sports tourism model that blends major international events with growing active participation. Iconic events like the Abu Dhabi F1 Grand Prix and Dubai Tennis Championships attract global audiences, while initiatives such as the Dubai Fitness Challenge - drawing over 2.2 million participants in 2023 - highlight strong demand for wellness and active tourism. Supported by world-class venues and outdoor infrastructure, the UAE continues to lead the region in tourism arrivals, experience diversity and infrastructure utilisation.

Success factors

Legacy-driven infrastructure: major events like Qatar's FIFA World Cup and the UAE's F1 Grand Prix show that infrastructure must serve a dual purpose: enabling world-class event delivery while supporting community use, skill development and tourism activation throughout the year. The long tail of Qatar's tourism growth into 2023 and 2024 proves the importance of post-event planning.

Youth engagement and digital innovation: With over 60% of the regional population under 35, the strongest growth has come from digitally immersive, youth-oriented formats. Saudi Arabia's esports surge is a prime example of how tech-led experiences can expand reach, diversify audiences and generate year-round economic activity.

Calendar density and diversification: Saudi Arabia's Gamers8 and the UAE's multi-sport calendar illustrate how a concentrated mix of events - spanning traditional sports, e-sports and lifestyle entertainment - can drive consistent visitation across seasons. This reduces dependency on mega-events and builds a loyal, returning fan base.

Destination branding through sport: the GCC is increasingly using sports to tell a broader story - one of innovation, openness and economic transformation. The post-World Cup momentum in Qatar and the UAE's positioning as a top 10 sports tourism destination underscore how sport can powerfully shape global perceptions and attract repeat visitation and investment.

Cross-sector coordination: The involvement of sovereign wealth funds (e.g., PIF, QIA, Mubadala), combined with private operators and destination marketing, has been essential in scaling impact and aligning investment with national tourism goals.

When well-executed, sports tourism becomes a catalyst for economic growth, social development and global influence across the GCC.



Opportunities

Opportunities

Backed by sovereign wealth funds such as PIF, QIA, ADQ and Mubadala, the GCC is embedding sport at the heart of its transformation agenda. This section outlines key opportunities the region can expand into to strengthen its position as a global sports tourism hub and unlock year-round, high-impact visitor growth.



The Middle East is no longer just hosting global sporting events - it's using them as strategic platforms to showcase its culture, attract tourism and accelerate economic diversification. From Saudi Arabia's 2034 World Cup to Qatar's Olympic ambitions, the region is building a sustainable ecosystem where sport drives investment, innovation and global engagement.

Mushtaq Al Waeli,
Senior Executive Advisor at PwC Middle East

Innovation and niche markets

Esports presents one of the GCC's most dynamic opportunities to expand tourism. Events like Saudi Arabia's Esports World Cup and the UAE's Esports Island go beyond gaming - they draw global fans, players, content creators and media, driving hotel stays, F&B spend and extended leisure visits. Coupled with niche formats such as LIV Golf, desert motorsports and virtual reality experiences, esports enable the GCC to reach younger and more diverse audiences. These offerings also reduce seasonality, enhancing tourism resilience and differentiation.



Sponsoring

Sponsorship is central to the GCC's sports strategy. Sovereign wealth funds and regional champions like Aramco, Qatar Airways and Emirates are embedding the region into global sports ecosystems. The next step is to align these deals with destination marketing, immersive fan experiences and travel offers. Promoting local leagues and regional sponsorships can deepen fan loyalty, create tourism hooks around domestic matchdays and offer visitors authentic, locally rooted sports experiences.

Sport leisure

Rising health-consciousness and active lifestyles are fuelling demand for sport-leisure tourism. The GCC is capitalising on this by expanding hiking trails, cycling routes, fitness festivals, and wellness retreats - positioning itself as a year-round destination for active travellers. Initiatives like the Dubai Fitness Challenge, desert endurance races, and wellness resorts attract both residents and tourists seeking engaging, movement-driven travel. These offerings increase trip length, encourage repeat visitation, and open up new tourism flows beyond traditional sports fans.



Women sports

Women's sports are emerging as a high-growth segment in GCC sports tourism, with 85% of experts projecting double-digit revenue growth in the next three to five years globally¹⁸. Expanded leagues, grassroots programs and fitness events - underpinned by over 500 new sports centres in Saudi Arabia - are creating more inclusive, participation-led travel experiences.

Saudi Arabia, Bahrain and the UAE are driving momentum through investment in infrastructure, prize parity and media coverage. This is diversifying the sporting calendar and supporting year-round tourism. To maximise impact, the region should explore GCC-wide women's tournaments - strengthening cross-border fan engagement, boosting visitor flows and positioning the region as a global leader in inclusive sports tourism.

5



Recommendations:
turning vision into year-
round tourism impact

Recommendations: turning vision into year-round tourism impact

The GCC has entered a defining phase in its sports tourism journey. With a foundation built on state-backed investments, world-class infrastructure and headline events, the region now faces the task of converting these assets into a sustained, visitor-driven growth engine. To do so, it must move from hosting world-class events to delivering world-class experiences - where sport becomes an anchor for tourism, identity and year-round economic activity.

To achieve this, the region should focus on three strategic imperatives: designing experience-led sports destinations, enhancing immersive fan engagement and building a connected, resilient tourism ecosystem. Together, these pillars address the full range of opportunities explored in Section 4, offering a clear path toward deeper impact by 2030 and beyond.



1. Design experience-led sports destinations, not just events

While major venues across the GCC - from Qiddiya to Dubai Sports City - are already redefining the global standard for infrastructure, the next step is to activate these spaces as year-round tourism destinations. The opportunity lies in shifting from event-based planning to visitor experience design, where sport is embedded in a broader lifestyle and leisure ecosystem.

Rather than “host and leave” venues that serve only marquee events, cities must adopt a “stay, play, shop” approach - creating walkable, mixed-use precincts where sport sits alongside retail, wellness, dining and entertainment. This repositioning of sports infrastructure as lifestyle districts not only improves community use but attracts longer-stay and higher-spend visitors.

Sports venues should be masterplanned as permanent community and tourism anchors, offering everyday utility while accommodating peak-event demand.

Active sports infrastructure - such as running trails, cycle paths, waterfront promenades and wellness centres - should be scaled to support participation-led tourism and repeat use by residents and tourists alike.

Domestic sports clubs should be empowered to become year-round tourism drivers through matchday packages, stadium tours, training camps and city-branded fan experiences.

Women’s sports infrastructure and event hosting should be expanded in visible, central venues to attract diverse audiences and normalise inclusive tourism experiences.

If delivered effectively, this strategy can convert physical assets into living, breathing tourism ecosystems - ensuring sport contributes not just to national prestige but to long-term tourism, community wellbeing and economic diversification.

2. Deepen immersive fan experiences to attract and retain visitors

Beyond infrastructure, the quality of the fan experience will determine whether the GCC becomes a sports destination that visitors return to again and again. In today's competitive tourism market, it is not enough to offer a seat at a world-class event. Visitors now expect seamless journeys, emotionally engaging experiences and immersive add-ons that create lasting memories.

The next chapter must focus on reimagining the fan journey - before, during and after the event - by activating private sector participation and rethinking sponsorship, digital engagement and storytelling.



Event operators and sponsors should be incentivised to create multi-day festivals that blend sport, entertainment and local culture - extending visitor stays and increasing destination spend.



Destination marketing should be embedded in global sports sponsorships, with fan travel packages, behind-the-scenes access and curated itineraries tied to regional brands like Emirates, Aramco or Qatar Airways.



Smart digital platforms must allow tourists to plan and book their full journey - from match tickets and hotels to dining and cultural add-ons - with real-time updates and personalised recommendations.



Fan zones, immersive meet-and-greets, AR/VR activations and interactive villages should be standard offerings - transforming events into full-sensory tourism experiences.



The GCC should lead in esports and youth-focused formats by developing dedicated esports hubs and live event experiences that bring gaming, fandom and content creation together - capturing new tourism flows from digital-native travellers.

By elevating the fan experience across all touchpoints, the region can drive repeat visitation, deepen brand loyalty and expand its appeal beyond traditional sports audiences.

3. Build a connected, region-wide sports tourism ecosystem

To fully unlock the GCC's potential, sports tourism must be scaled from city-level efforts to a regionally coordinated ecosystem - one that connects destinations, events, talent and travellers across borders. By creating shared calendars, talent pipelines, and joint hosting models, the region can maximise impact, reduce duplication and present a unified, globally competitive offer.

This regional approach must also focus on developing local capacity to ensure that growth is sustainable and economically inclusive.

To drive this transformation:



The GCC should develop a joint sports tourism calendar, aligning mega-events, niche formats and community activations across member states to promote year-round travel and reduce overlap.



Cross-border fan circuits and visa facilitation should be established, enabling tourists to attend multiple events across the region with one seamless journey - supported by multi-city packages and marketing campaigns.



A unified GCC Sports Tourism Talent Framework should be launched to train the next generation of digital, operational and fan-facing professionals - supported by PPPs and international partnerships.



All major event licenses and infrastructure tenders should include local hiring quotas, youth development requirements and KPIs linked to tourism value creation.



Volunteer exchange programmes and shared knowledge platforms can help build a common regional culture of excellence - one that moves the GCC from event host to experience innovator.

This regional coordination is not only operationally smart - it is strategically essential. It positions the GCC not as six separate hosts, but as one interconnected, culturally rich and globally visible sports tourism powerhouse.

The foundations are strong - but the next phase will be defined by how the GCC delivers impact for the sport tourist. By creating vibrant, year-round destinations; by crafting immersive experiences that turn spectators into storytellers; and by uniting the region through shared vision and capability - the GCC can define the future of global sports tourism on its own terms.

Importantly, this strategy creates value across all segments of the sports tourist market:

For the passive tourist, it offers world-class live events enhanced by curated fan journeys, hospitality experiences and seamless regional access.

For the active tourist, it opens up a broader ecosystem of trails, tournaments, training camps and wellness hubs that turn participation into purpose-driven travel.

For the nostalgia-driven or legacy tourist, it preserves and elevates sporting heritage through stadium tours, cultural exhibitions and the celebration of iconic athletes and moments - both past and in the making.

By placing the visitor at the heart of its sports vision, the GCC can shift from being a global host to becoming a global draw - where every fan, athlete and traveller finds a reason not just to visit, but to return.





A key success factor for the GCC's sports tourism growth will be multi-sector integration. Sports tourism cannot operate in isolation; it must be embedded within broader tourism strategies, urban masterplans and cultural programming. From active sports leisure initiatives through to major event hosting, all should be considered.

Peter Daire

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List of Resources

1. Travel and Tourism at a Turning Point: Principles for Transformative Growth, World Economic Forum, 2025 [Link](#)
2. Sports Tourism Market (2023-2030) [Link](#)
3. GSIQ Essentials Report: Sports Tourists, Traveling with Passion, GSIQ + Milieu [Link](#)
4. Sports Industry Outlook 2025, PwC Middle East, [Link](#)
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6. GSIQ Essentials Report: Sports Tourists, Traveling with Passion, GSIQ + Milieu, [Link](#)
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13. Qatar Economy Watch 2024, PwC Middle East, [Link](#)
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15. Destination Qatar, Strategy&, [Link](#)
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17. Saudi, Welcome to Arabia Joins Esports World Cup 2025 as Official Destination Partner, Esports World Cup, [Link](#)
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