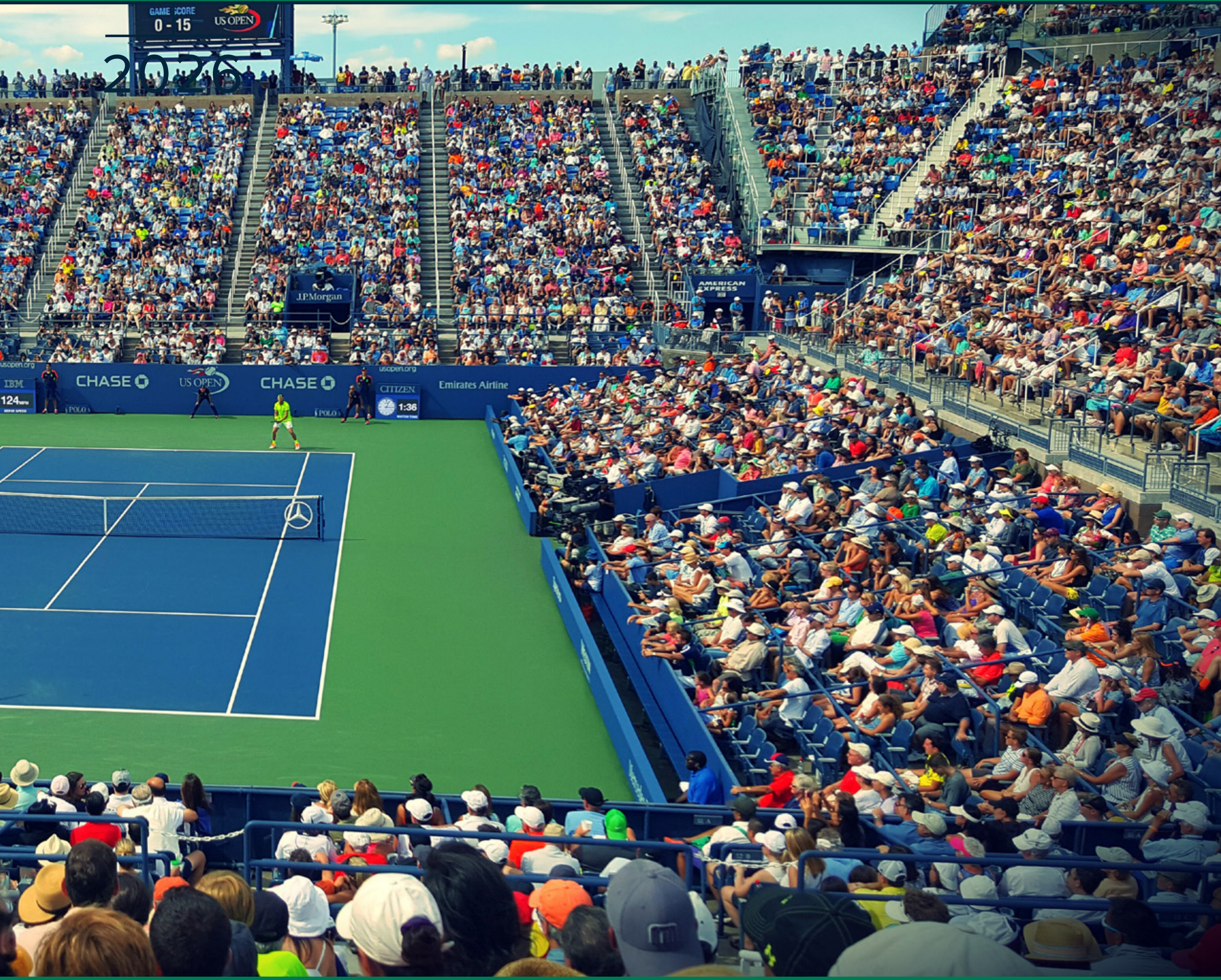
Sports ETA

STATE OF THE INDUSTRY

REPORT

2026

EXECUTIVE SUMMARY



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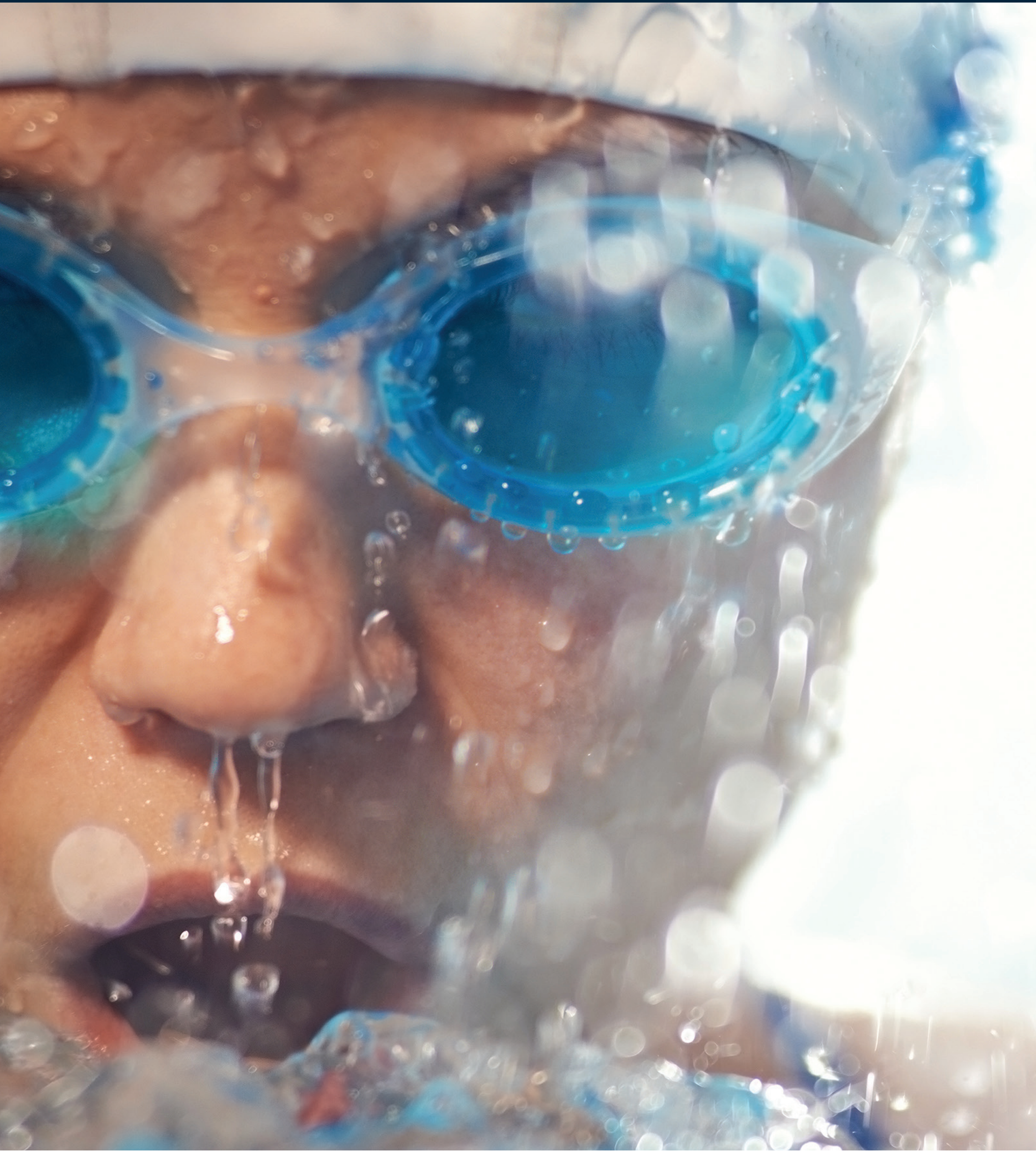

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Letter from Sports ETA **President and CEO John David**

Dear Sports Events and Tourism Industry Colleagues,

It is my privilege to share the 2026 Sports ETA State of the Industry Report, a defining milestone for our industry and our association.

For the first time ever, this research delivers a complete and unified view of sports tourism, combining both participatory and spectator data into one comprehensive analysis. This evolution reflects our ongoing commitment to providing the industry with the most relevant, actionable, and credible insights available.

The findings are powerful.

Sports tourism continues to be a driving force in the travel economy, generating more than **$111.2 billion in direct spending** and over **$274.5 billion in total economic impact nationwide**, while engaging more than **339 million sports travelers** annually. These numbers underscore what many of us already know—sports tourism is not just part of the industry, it is helping define it.

This report also highlights the growing importance of international travel, as millions of visitors come to the United States to participate in and experience sports. With a historic lineup of global events on the horizon, the opportunity to elevate our industry on the world stage has never been greater.

While this Executive Summary provides a snapshot of key findings, it only begins to tell the full story.

Within the complete report, Sports ETA members gain access to deeper insights, expanded data sets, and enhanced industry profiles across destinations, rights holders, venues, and industry partners. These insights are designed to support strategic decision-making, strengthen advocacy efforts, and help organizations maximize the impact of sports tourism in their communities.

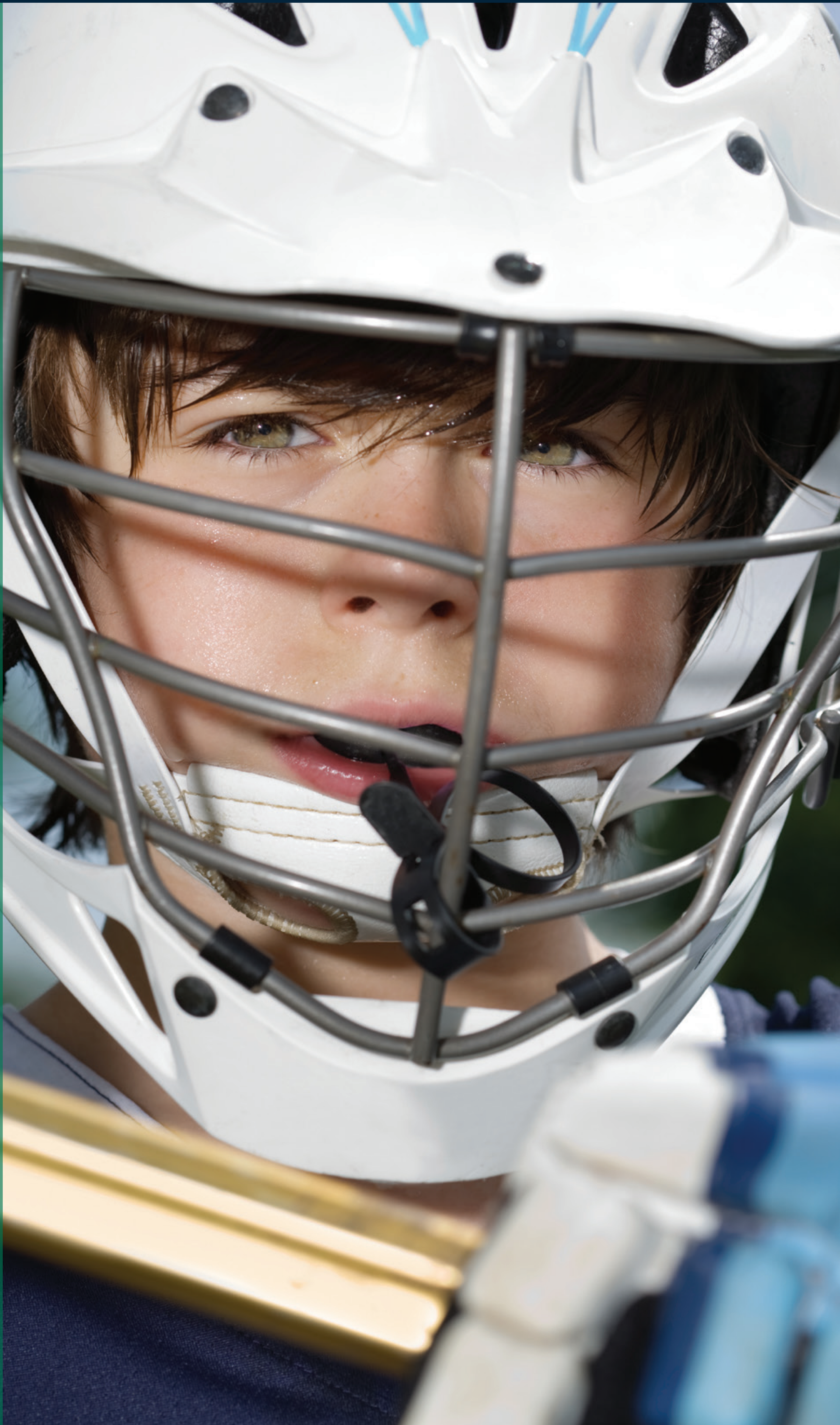
At Sports ETA, our mission is to educate, advocate, and provide resources that empower our members and advance the industry. This report stands as one of the most important tools we have ever delivered in support of that mission.

Thank you for your continued leadership and commitment to growing the sports events and tourism industry.

Yours in Sport,

John David
President and CEO
Sports Events & Tourism Association

INTRODUCTION



INTRODUCTION

Sports are a foundational element of communities across the United States. They unite residents, shape local identity, and enhance quality of life through shared experiences, civic pride, and community engagement. From youth tournaments to major sporting events, sports create lasting memories while strengthening the social fabric of destinations.

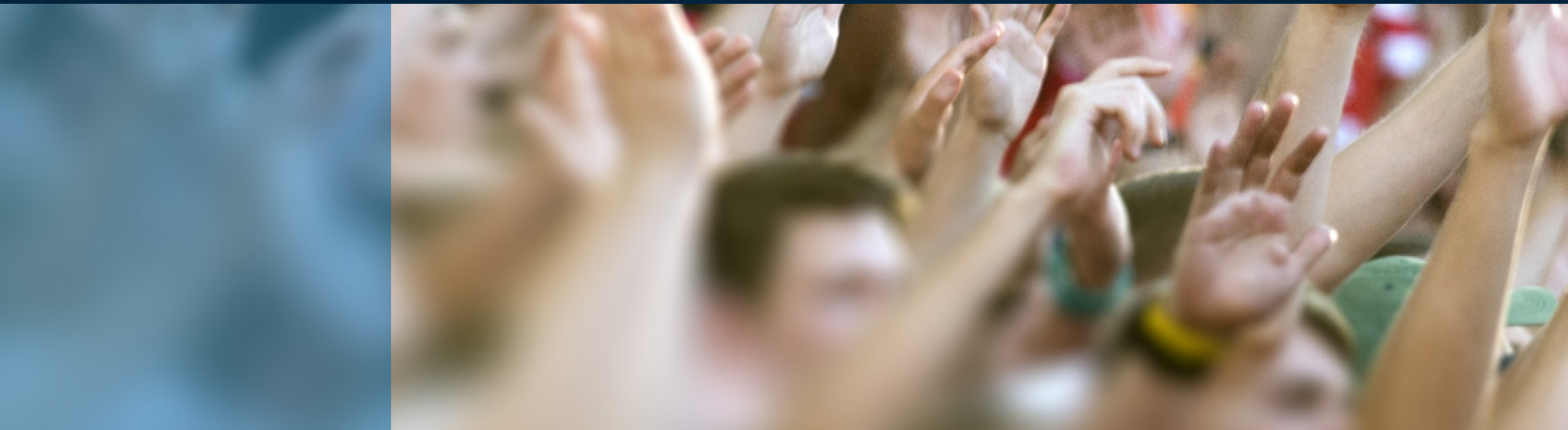
Beyond these intangible benefits, sports also serve as a powerful economic engine. Millions of participants and spectators travel each year to compete, attend, and engage in sporting events, generating significant economic activity in the communities that host them.

While in market, sports travelers contribute to a wide range of local businesses, including sports venues, hotels, restaurants, retail establishments, and entertainment and recreation providers. This spending supports jobs, drives tax revenues, and fuels broader economic growth that extends well beyond the field of play.

The Sports ETA State of the Industry Report quantifies the full economic significance of sports tourism and provides a comprehensive analysis of both participatory and spectator segments. For the first time, this report delivers a unified view of the industry, offering a complete picture of its scale, scope, and impact.

To measure this impact, Tourism Economics developed a robust economic model drawing on multiple primary and secondary data sources to calculate the direct spending generated by sports travelers. An IMPLAN input-output model of the national U.S. economy was used to calculate the total economic impact of sports tourism, including employment, household income, and tax revenues.

Together, these findings illustrate the critical role sports tourism plays in driving economic vitality, supporting local communities, and positioning destinations for long-term success.



EXECUTIVE SUMMARY

Sports tourism in the United States is a fully integrated economic system, powered by two complementary engines: participatory sports and spectator sports. For the first time, the Sports ETA 2026 State of the Industry Report benchmarks the total sports tourism economy, combining both segments into a single, unified industry framework.

This evolution is critical to the advocacy of our industry. It reframes sports tourism from a segmented activity into a national economic development engine, delivering measurable impact across jobs, tax revenue, infrastructure, destination branding and awareness, and community vitality.

The 2026 report reinforces a clear and more powerful narrative than ever before:

Sports tourism is a $274.5 billion industry powered by two interconnected engines.
- **Participatory sports** deliver scale, consistency, and nationwide reach.
- **Spectator sports** deliver intensity, visibility, and high-value impact.

The sports tourism industry can now be clearly articulated as a single, unified economic system, supported by:
- Well over 100 million room nights.
- Millions of international visitors.
- A balanced portfolio of events and infrastructure.

For sports tourism leaders, the opportunity is to advocate for the total ecosystem, positioning sports tourism as one of the most reliable, measurable, and scalable economic development industries in the United States.

Sports tourism is a **$274.5** billion industry powered by two interconnected engines: **participatory sports and spectator sports**.

Defining Economic Impact

Sports tourism delivers layered economic value through:

1. **Direct Impact**
   Visitor spending and event operations.
2. **Indirect Impact**
   Supply chain activity across vendors and services.
3. **Induced Impact**
   Employee spending throughout the economy.

This structure expands impact into hospitality, retail, transportation, finance, and service sectors nationwide.

Total Sports Tourism: The Integrated Economic Engine

The combined sports tourism industry delivers:

- $274.5 billion total economic impact
- $111.2 billion in direct spending
- 339 million total sports travelers

New Insight:
The addition of room nights and international visitation strengthen the case for sports tourism as a primary driver of hotel tax revenue and global destination competitiveness, in addition to domestic travel.

Two Engines, One Industry

Participatory Sports: The Volume and Stability Engine

Participatory sports, driven by youth, amateur, and collegiate events, provide scale, consistency, and geographic reach across all markets.

Economic Impact (2025):

- 227.6 million travelers (67% of total volume of sports tourism)
- $60.1 billion in direct spending

Market Dynamics:

- +4.9% year-over-year growth in travelers
- 80.4 million room nights generated
- Average spend per trip: $240
    - o Overnight: $371 | Day: $85

Spending Mix:

- Transportation: $15.9B
- Lodging: $12.3B
- Food and Beverage: $10.8B
- Retail and Recreation: $15.6B combined

Strategic Role:

- Drives year-round visitation and occupancy stability.
- Anchors youth and family travel markets.
- Produces predictable, repeatable demand.
- Extends economic impact into secondary and tertiary markets.

Implication:

Participatory sports are the foundation of the industry, justifying facility investment, incentive funding, and long-term destination planning.

Spectator Sports: The Impact and Visibility Engine

Spectator sports deliver high-value, high-profile economic impact, concentrated in major markets and tied to event calendars and media exposure.

Economic Impact (2025):

- 111.4 million travelers (33% of total volume of sports event tourism)
- $51.1 billion in direct spending

Strategic Role:

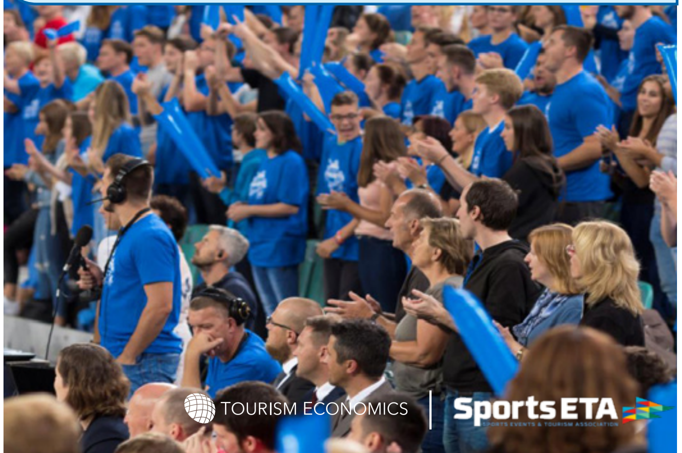
- Drives destination branding and national/global visibility.
- Attracts higher-spending visitors.
- Supports urban cores, districts, and major venues.
- Creates anchor events that elevate entire economies.

Implication:

Spectator sports validate large-scale capital investment and public-private partnerships, delivering concentrated economic returns and potential global reach.

New Insight:

- Includes 1.9 million international visitors contributing $4.3B in spending



The Combined Model: Maximum Impact

The full value of sports tourism is realized through integration, not separation.

Participatory Sports

- High volume
- Year-round demand
- Youth and amateur focus
- Distributed across markets
- Predictable revenue streams

Spectator Sports

- High spending per visitor
- Event-driven peaks
- Professional and elite focus
- Concentrated in major venues
- High-impact economic spikes

Integrated Outcome:

- Stabilized occupancy and demand curves
- Balanced economic impact across regions
- Stronger justification for funding, infrastructure, and sponsorship

New in 2026: Industry Benchmarking Through Member Profiles

A major enhancement in the 2026 report is the expansion of Sports ETA Member Profiles, transforming the report into one of the most practical and actionable tools available to the industry. These profiles go beyond high-level insights, offering a structured look at how organizations are built, funded, and operated across the sports event tourism ecosystem.

These profiles offer a deeper look across four critical segments:

- **Destination Profiles:** Benchmarking budgets, staffing, event volume, and strategic focus.
- **Event Rights Holder Profiles:** Insight into how decisions are made and how events are awarded.
- **Venue Profiles:** Comprehensive data on capacity, utilization, and operations.
- **Industry Partner Profiles:** A new addition, offering visibility into the broader ecosystem supporting sports tourism.

What makes this section especially valuable is the ability to compare and contrast operating models, providing members with a clearer understanding of where they stand and where they can grow. It offers a rare window into how leading organizations allocate resources, prioritize events, and structure partnerships to drive results.

These insights can be directly applied to refine strategy, strengthen competitiveness, and support more informed decision-making. For prospective members, this level of transparency and benchmarking represents a compelling reason to engage more deeply with Sports ETA and the broader industry network.

Geographic Leaders in Sports Tourism

Sports tourism impact is distributed nationwide, with every state contributing to the industry's growth. However, a core group of states consistently lead due to a combination of population scale, destination infrastructure, major metro markets, and the ability to host both participatory and spectator events.

Across both segments, several states emerge as dominant leaders, including Texas, Florida, California, Pennsylvania, Ohio, New York, Georgia, Illinois, and North Carolina, all ranking among the top performers in overall economic impact. These states benefit from a strong mix of youth and amateur event volume alongside professional and collegiate sports assets, creating a balanced and high-performing sports tourism portfolio.

Notably, Texas leads in participatory sports tourism, driven by its scale and event infrastructure, while California leads in spectator sports tourism, anchored by its concentration of major league teams and global events. States like Florida and Texas rank in the top three across both segments, reinforcing their position as national leaders in total sports tourism impact.

Implication:

The overlap among top-performing states underscores a key industry insight: the most competitive destinations are those that successfully integrate both participatory and spectator sports into a unified tourism strategy, maximizing year-round demand, economic impact, and national visibility.

To read the 2026 Sports ETA State of the Industry Report,
visit www.research.sportseta.org/research/industry-reports/.

The most competitive destinations are those that **successfully integrate both participatory and spectator sports** into a unified tourism strategy.

ABOUT SPORTS ETA

As the only trade association for the sports events & tourism industry, Sports ETA is the most trusted resource for sports commissions, destination marketing organizations (DMOs), and rights holders. Sports ETA is committed to the success of more than 850 member organizations and 2,400 sports event professionals. Our promise is to deliver quality education, ample networking opportunities and exceptional event management and marketing know-how to our members, and to protect the integrity of the sports events & tourism industry. For more information, visit sportseta.org.

ABOUT NORTHSTAR MEETINGS GROUP

Northstar Meetings Group is the leading B-to-B information and marketing solutions company serving all segments of the sports, business meetings, events and incentives market. The company's audience includes full- and part-time event organizers, as well as sports, corporate, association and not-for-profit decision-makers, and incentive professionals, facilitating their professional development and achievement of business goals. The company's influential brands – SportsTravel, Meetings & Conventions, Successful Meetings, Associations Meetings International, Meetings & Incentive Travel, Meeting News, Incentive and M&C Asia – currently serve nearly 500,000 active meeting planners, event organizers and incentive professionals across an integrated suite of data, digital, events and print products. In addition to publishing SportsTravel, the Sports Division organizes several industry-leading conferences, including the TEAMS Conference, TEAMS Europe and the EsportsTravel Summit. For more information, please visit NorthstarMeetingsGroup.com.

ABOUT THE RESEARCH TEAM

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 600 full-time staff, including 300 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.

April 2026

The modelling and results presented here are based on information provided by third parties, upon which Tourism Economics has relied in producing its report and forecasts in good faith. Any subsequent revision or update of those data will affect the assessments and projections shown.

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