

Impact on travel of major sporting events

February 2026

Produced by Research & Intelligence
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Major sporting events and travel

Little evidence of a boost to air travel

Global sporting events, such as the Olympic Games and the FIFA World Cup, rarely result in an immediate increase in demand for air travel. That's the conclusion shared by OAG in a recent article.¹ In many cases, air travel suffers a period of weakness, as locals stay at home and visitors are deterred by the prospect of disruption and higher accommodation costs associated with the event. Evidence from the U.K. effectively supports this assertion.

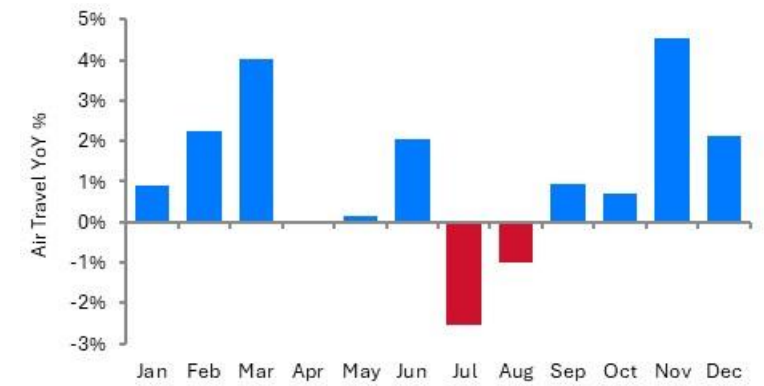
In 2012, the number of airline passengers flying into and out of London rose by just 1%. Passenger volumes increased in most months, and in some cases by as much as 4%. But the year saw two months of clear weakness. Air travel demand contracted by 2.5% in July and by a further 1.0% in August. This period of weakness coincided with London's hosting of the 2012 Olympic Games, which opened on July 27 and closed on August 12.

More recently, the Paris 2024 Olympics has been blamed by Air France for a €160 million reduction in revenue in the third quarter of 2024. In a period when its European rivals IAG and Lufthansa Group posted increases to their passenger revenue of 6.9% and 3.4%, respectively, Air France-KLM posted a 3% decline. The Franco-Dutch group noted outbound travel below the usual summer average, as French residents postponed their holidays. International travelers also showed a "significant avoidance" of Paris.³

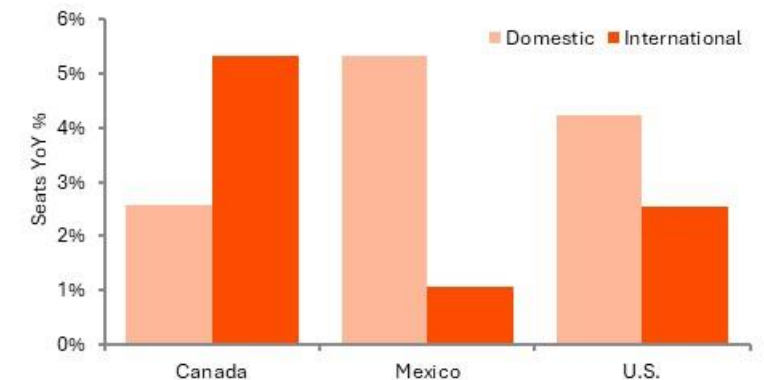
The timing of the 2026 FIFA World Cup will coincide with the traditional summer peak period for travel to North America. Airlines regularly average their highest seat factors during these months, with the strength of demand translating into some of the highest airfares, as airlines maximize revenue from minimal adjustments in capacity. While the experience of London and Paris does not point to a material net increase in total air travel demand during major sporting events, should it defy history and materialize, there needs to be sufficient capacity to accommodate it, or fares will increase.

Based on current schedules, the prospects for capacity are mixed. In Mexico, domestic travelers will be supported with 5% more seats, but with just 1% more seats on international services, travelers using these flights may be more exposed to fares pressure. The U.S. is in a broadly similar position. The reverse should be the case for Canada, where 5% growth in international capacity may contain some of the pressure on prices arising from any strengthening of demand.

London air travel growth in 2012²



Airline seat growth in June/July 2026⁴



(1) OAG, Feb. 12, 2026; (2) CAA; (3) Air France-KLM, Third Quarter 2024 results, Nov 7, 2024; (4) OAG, Feb. 2026

Markets involved in the 2026 FIFA World Cup

The U.S. accounts for 11 of the 16 host cities

Canada, Mexico and the U.S. are due to jointly host the 2026 FIFA World Cup. In addition to the host nations, the competition will involve teams (and supporters) from 45 other countries around the world.

Across the three host countries, the [Group Stage](#) will see 16 different cities play host to 72 matches in a competition running over 17 days, starting on June 11 and finishing on June 27. Most of the action will take place in the U.S., where 52 games will be played, with Canada and Mexico each hosting 10 matches during this initial phase.

The second half of the competition will comprise a further 32 matches played over 22 days, culminating with New York hosting the final on July 19, 2026.

Canada's involvement as a host nation revolves around just two cities, Toronto and Vancouver, and ends on July 7 in the latter. Mexico has three cities supporting the competition, and its involvement ends on July 5, when Mexico City hosts its final game.

During the entire competition, most matches will be played in Dallas, Atlanta, Los Angeles and New York.

Cities hosting 2026 FIFA World Cup matches



Air travel and the 2026 FIFA World Cup

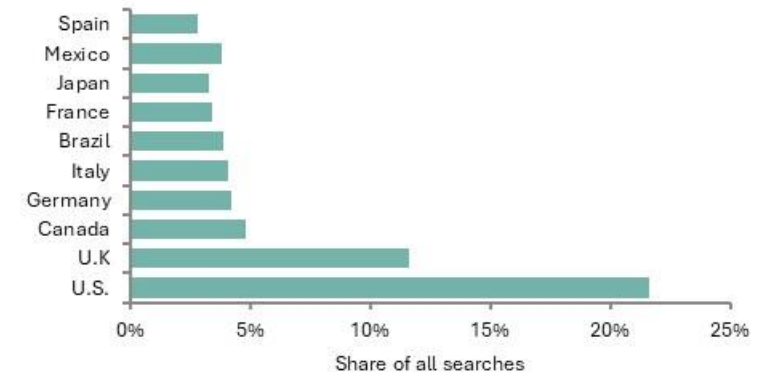
Capacity growth exposes some markets to pricing pressure

While 48 countries are participating in the FIFA World Cup, ten account for nearly 64% of searches conducted so far for flights to visit the three host nations.⁷ With the U.S. set to host 78 of the tournament's 104 matches, it's unsurprising to see domestic travel searches leading the way with a 22% share. With 11.6% of the searches, the U.K. leads a group of European nations including Germany, Italy, France and Spain. Aside from the hosts and European nations, only Brazil and Japan feature prominently.

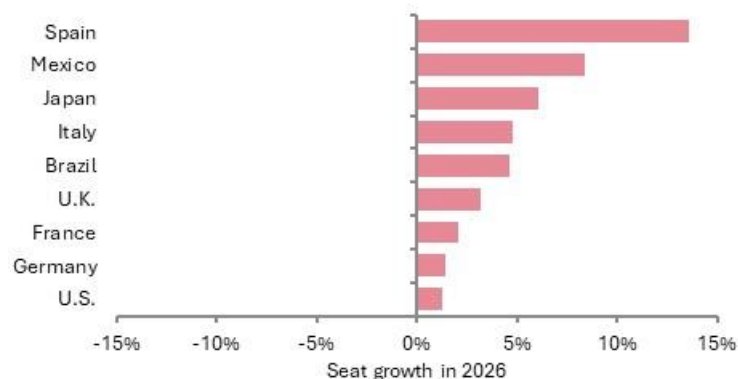
How much extra capacity are airlines offering to meet this demand? Looking at their growth plans for June/July 2026 reveals the markets at most risk of under- or over-capacity, with potential knock-on effects for airline ticket prices:

- **Destination Canada** – more seats in 2026 from all key inbound markets. The strength of this growth suggests pricing pressure should be weakest for travelers flying direct from Spain, Mexico and Japan. There might be an issue for the U.K., as the second largest traveling contingent, served with just 3% more seats on offer than in 2025. But few England matches are likely to be held in Canada.
- **Destination Mexico** – a 12% cut in U.K.-Mexico capacity should be of little consequence, with England unlikely to play in the country. But the 6% decline in seats from Japan may matter, while Spanish travelers may benefit from 8% more seats.
- **Destination U.S.** – little change in capacity is scheduled for most inbound markets, with Italy likely to see the lowest pressure on fares, thanks to an 8% increase in seats to the U.S.

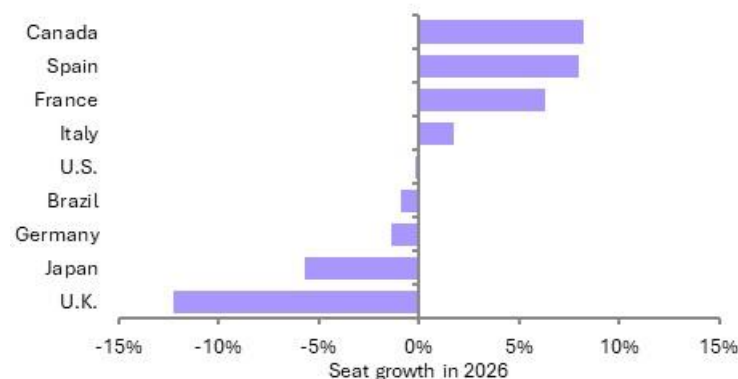
Top ten origin markets searching travel to FIFA World Cup⁵



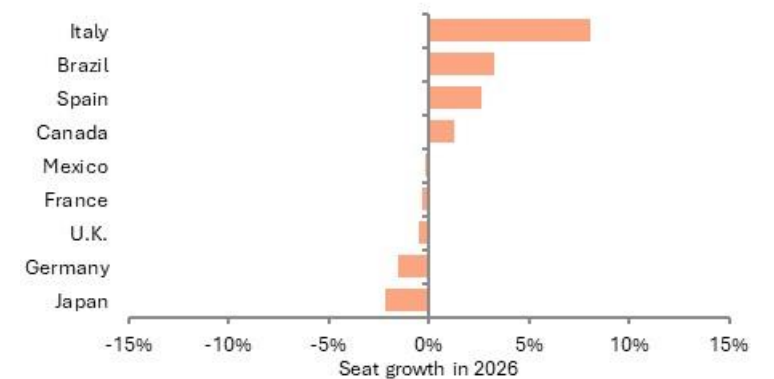
Growth in airline seats to Canada⁶



Growth in airline seats to Mexico⁶



Growth in airline seats to the U.S.⁶



(5) Amadeus, Travel Insights, Football's biggest event in 2026; (6), OAG, June/July 2026 year-over-year

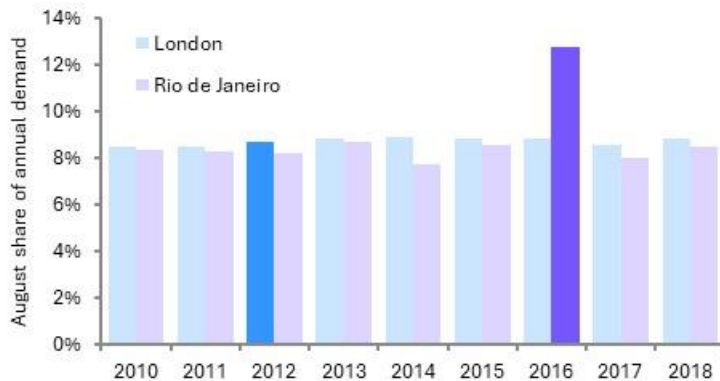
Major events and hotel accommodation

Impact isn't clear cut, and it varies

The 2026 FIFA World Cup will most likely lead to increases in demand year-over-year. But it's not as simple as this. When hosting the Summer Olympics in 2012 and 2016, London and Rio de Janeiro saw demand rise by 5.2% and 53.3%, respectively. Some clear and dramatic differences in growth support commentators' warnings that hoteliers in Canada, Mexico and the U.S. should not necessarily expect skyrocketing demand in 2026. They're concerned that hype around the World Cup may exceed reality, especially given heightened uncertainty about the number of international travelers that attend.⁷ But what can past events tell us? Multinational events hosted in recent years make it difficult to analyze trends, given the disruption caused by the pandemic or the nature of the countries hosting the events. For these reasons, two Summer Olympic Games (London 2012 and Rio de Janeiro 2016) held in the previous decade have been examined to test out three likely impacts on hotel accommodation: demand, occupancy and average daily rate (ADR). Analysis has been confined to the month of August, when most days of competition occurred.

Major events boost hotel demand: **Yes and no**

August typically accounts for close to 9% of hotel demand in London. The figure in 2012 was 8.7%. The August norm is very similar in Rio, but the month's share jumped to 13% in 2016.



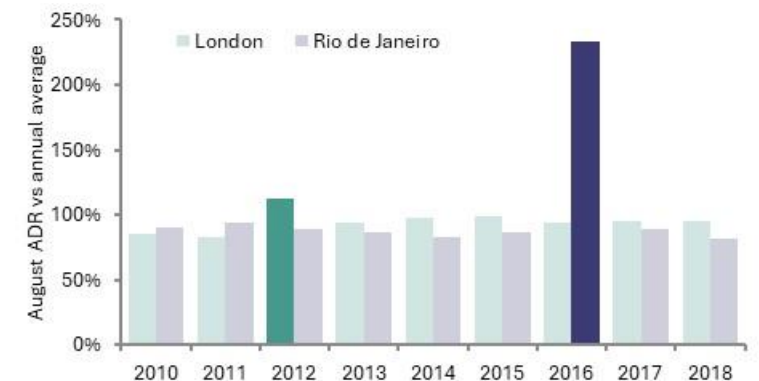
Major events increase occupancy: **Yes and no**

At 81.9%, London occupancy was unchanged on the past two years, but it rose in the following three. Hosting the Games helped Rio restore occupancy after two years of weakness caused by over-supply, which then resumed in 2017.



Major events push up prices: **Most certainly**

London's August ADRs pushed up from 95% of their annual average to 113%. Rio experienced a more extreme reaction. ADRs jumped 188% year-over-year to 234% of the annual average vs 86% normally.



Hosting the Olympics impacted hotel accommodation in London and Rio de Janeiro, but to varying degrees. Much depends on the nature of the host city, with London more able to absorb the effects of hosting a major event. For a more detailed review of an event's impact on core hotel metrics, the 2024 Paris Olympics provides a useful recent example. Its Games opened on July 26, 2024, and closed on August 11. The effects have been reviewed over a 17-week period covering the entirety of July, August, September and October 2024. This allows the impact to be explored not just during the Games (weeks 4-7), but also in the shoulder periods before and after them.

Hotel occupancy in the 2024 Paris Olympics

Occupancy in the lower service tiers

Occupancy across **Economy** scale hotels seems to have been hardly affected by France's hosting of the Summer Olympics. In Week 5, the first full week of the Games, occupancy averaged **five-points higher** year-over-year (YoY), but it only matched normal (2025) levels in Week 6. In Week 7, occupancy was 10-points lower than 2025, despite still covering two days of the event, including the closing ceremony.

The Olympics seem simply to have **brought forward** by two weeks the July occupancy peak typically enjoyed by Economy scale hotels in France.

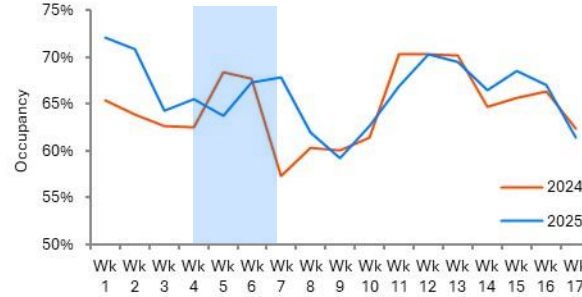
Midscale hotels were generally enjoying a strong year in 2024, achieving occupancy levels that they failed to repeat in 2025. It's possible that its hosting of the Olympic Games may simply have boosted the profile of France as a destination to travelers using this accommodation tier.

The Olympics seemed to have even less of an impact on Midscale occupancy than for Economy. While there was a modest uptick in Week 6, once again Week 7 delivered a much weaker result. After this, seasonal norms seem to have returned.

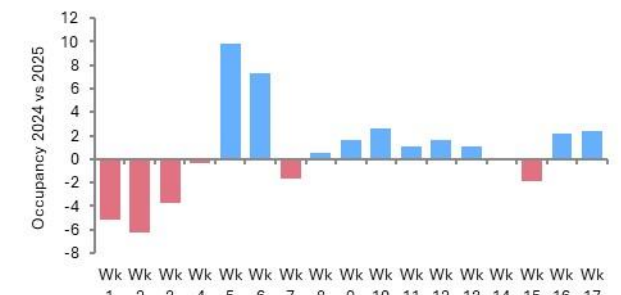
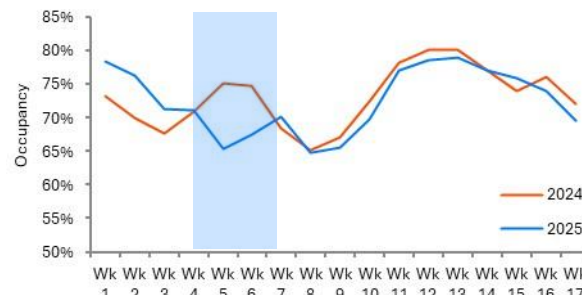
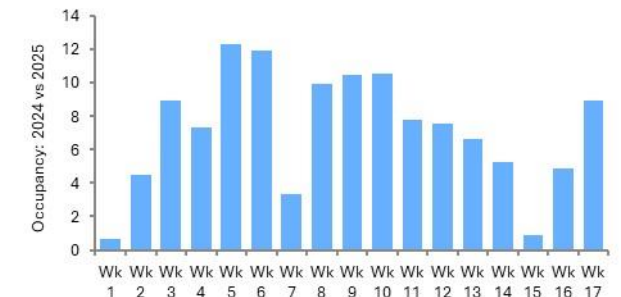
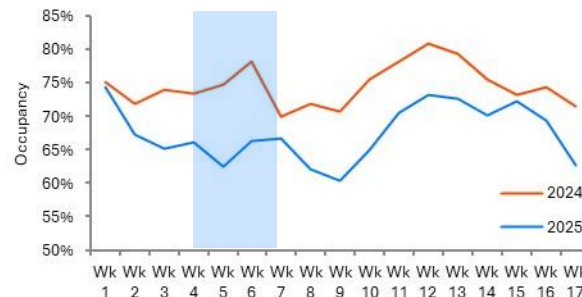
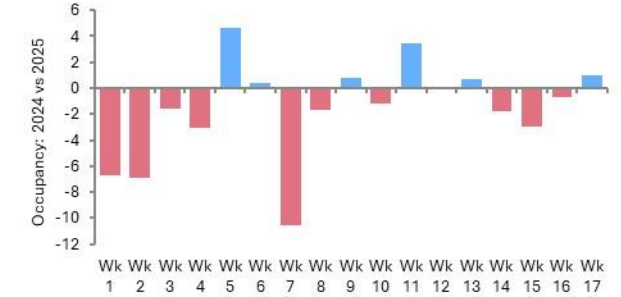
In the weeks ahead of the Games, the **Upper Midscale** segment had seen occupancy tracking **4-6 percentage** points below normal. During the two full weeks of competition (weeks 5 and 6), occupancy moved **8-10 points higher** than normal.

Interestingly, the opening and closing ceremonies appear to have had **no impact** on occupancy among Upper Midscale hotels.

Occupancy: July-October



Occupancy: 2024 vs 2025: percent points change



Hotel occupancy in the 2024 Paris Olympics

Occupancy in the higher service tiers

In the weeks immediately before the start of the Games, occupancy among **Upscale** hotels was lower than normal. But there was a noticeable change during the Games, although the impact was confined to the two full weeks of action.

In weeks 5 and 6, occupancy rates were eight-points higher than in the same period in 2025. But the hike was short-lived. Occupancy quickly returned to normal in Week 7, even though this period included the closing ceremony. Pressure on accommodation was most intense when competition was in full-swing.

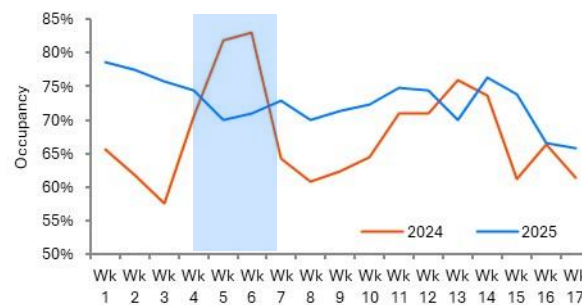
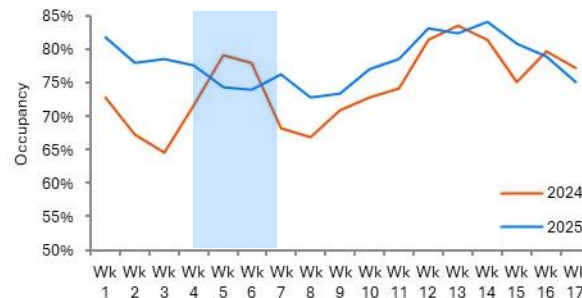
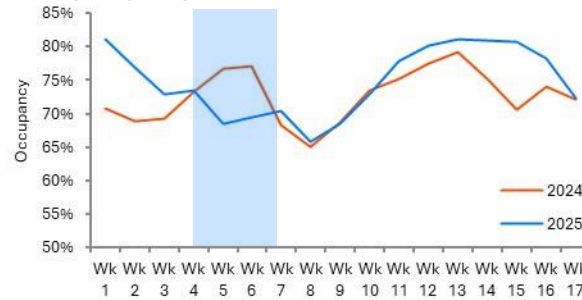
Occupancy rates in **Upper Upscale** hotels were even more depressed in the run-up to the Games. In the week immediately before the opening ceremony, they were **14-points lower** than normal.

While occupancy peaked during the Games, this was more subdued than for Upscale accommodation, moving just **4-5 points higher** than in the same period in 2025.

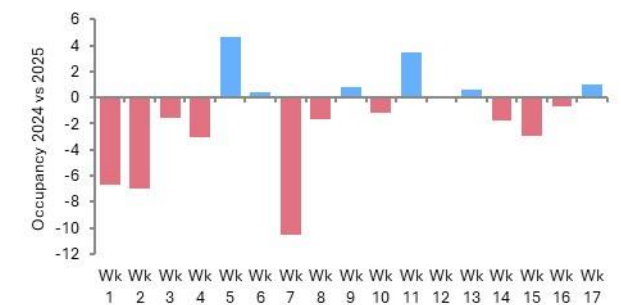
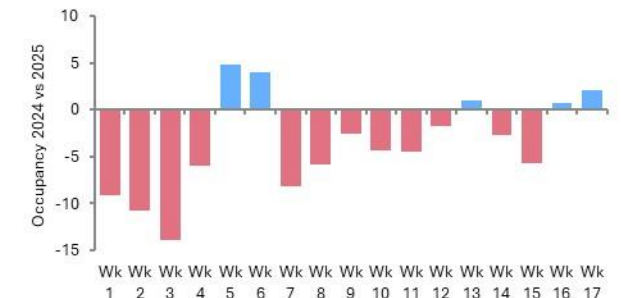
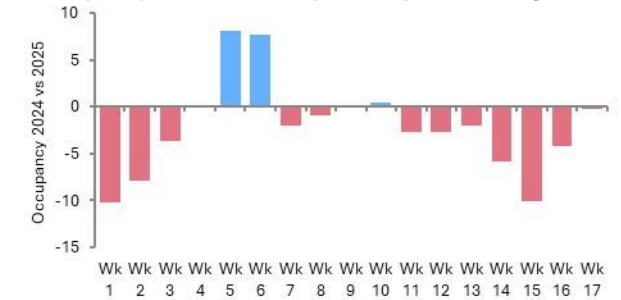
Compared to prevailing trends before the Games, Luxury hotels experienced a sharp spike in occupancy in the two core weeks (5 and 6). But occupancy retreated just as rapidly, falling back sharply in the week that commenced with the closing ceremony.

When compared to more normal levels, occupancy jumped **12 points higher** in both Week 5 and 6. Luxury hotels joined those in Midscale in recording the **highest occupancy relative** to the rates prevailing in 2025.

Occupancy: July-October



Occupancy: 2024 vs 2025: percent points change



Room rates in the 2024 Paris Olympics

Room rates in the lower service tiers

Average daily rates (ADRs) in **Economy** tier hotels were at elevated levels (relative to 2025) throughout summer 2024. Indeed, in multiple weeks, ADRs were more than a fifth higher than was achieved in 2025. It's not clear if these were residual "halo" effects associated with the enhanced profile France received as a tourist destination.

ADRs spiked sharply higher during the Games. In the two full weeks of competition, they were **39%** higher than in the previous three weeks and **55-58%** above rates in the same period in 2025. They'd also been **33%** higher in the week of the Opening Ceremony, but the final days of the Games, they were just 5% ahead of 2025.

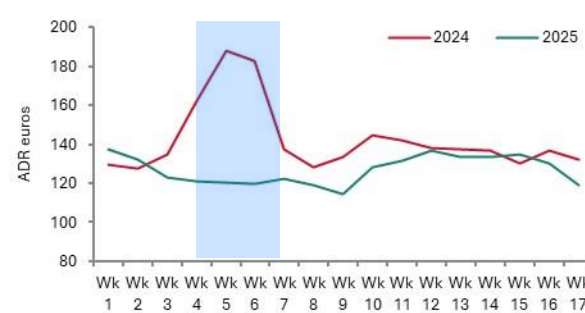
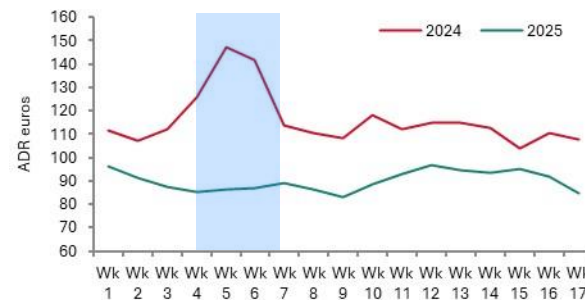
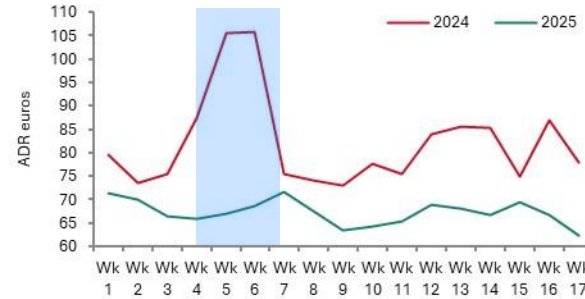
The spike in pricing for rooms in **Midscale** accommodation was less severe, when compared to other weeks in 2024. During the two core weeks of the Games, ADRs were **31%** higher than in the first three weeks of July. But the spike was much more severe when rates are compared to 2025's "normal" levels (right hand chart), as they jumped **60-70%** higher. The degree of price premium all depends on the reference point for the comparison.

In contrast to Economy and Midscale accommodation, ADRs in hotels serving the **Upper Midscale** tier were generally running at normal levels during summer 2024.

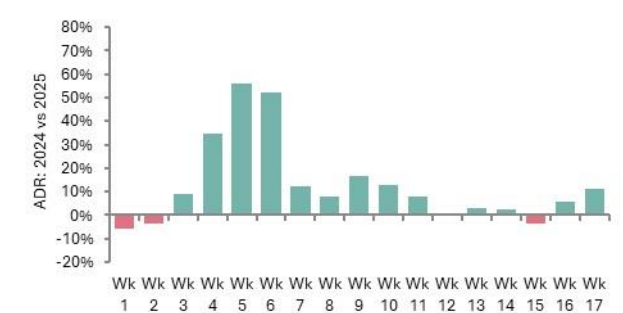
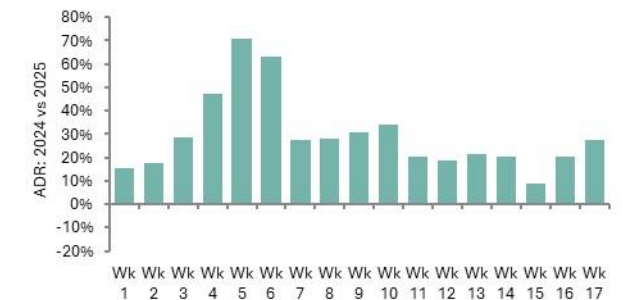
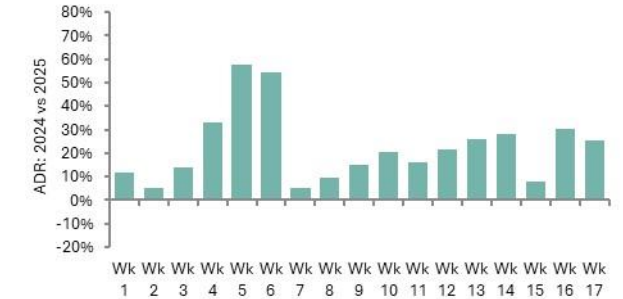
In the week of the Opening Ceremony, ADRs advanced **25%** higher compared to the previous three weeks. This price premium increased to around **40%** in Weeks 5 and 6, before easing to just 5% in the week including the Closing Ceremony.

Across all three tiers, price spikes were most extreme during the two full weeks of competition. A more modest increase

Average daily rate €: July-October



ADR: % change 2024 vs 2025



Room rates in the 2024 Paris Olympics

Room rates in the higher service tiers

Average daily rates (ADRs) for stays in **Upscale** scale hotels across France were broadly aligned with 2025 levels, certainly in the weeks after the Olympics. During the Games, ADRs jumped **68% above normal** in the core weeks to a level that was also **52% higher** than hotels had been charging in the three weeks before the start of the event.

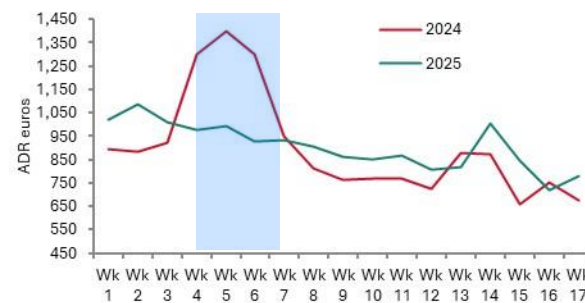
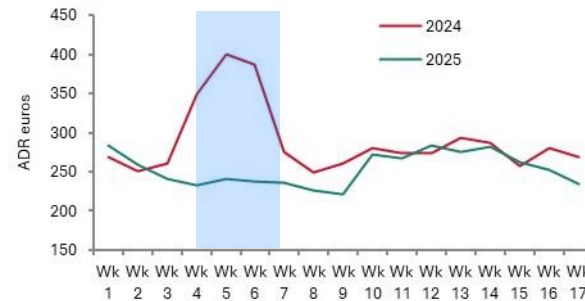
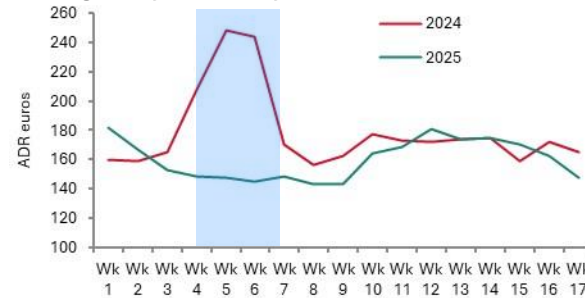
The Opening Ceremony had a bigger inflationary impact on room rates in France than the Closing Ceremony. In the former, ADRs were **29% above** pre-Games levels but only **5% higher** in the latter.

Pricing in **Upper Upscale** hotels followed a similar path to that demonstrated by the Upscale segment. ADRs before and after the Games were little different to what was charged in 2025.

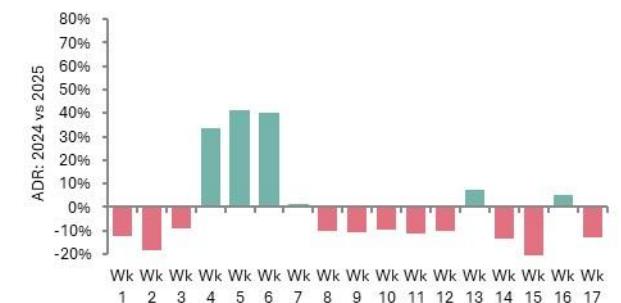
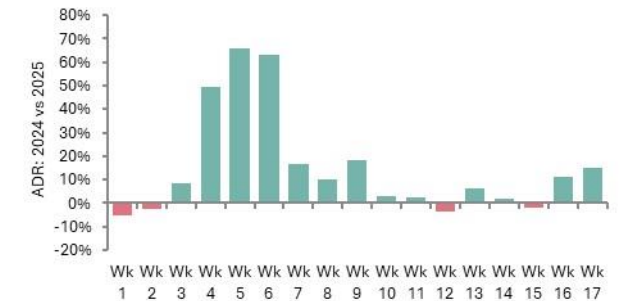
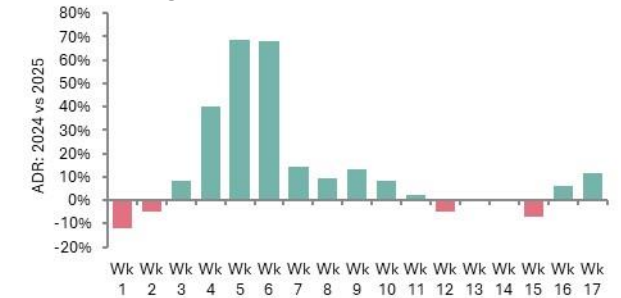
Once again, rates hiked up in the core two weeks of Olympic action to around **65%** above the same period in 2025 and **51%** higher than pre-Games, broadly matching the rate premiums faced by travelers staying in Upscale hotels. Stays in the week of the Opening Ceremony attracted ADRs **34%** above the prior three weeks. This figure fell to just **5%** in the week of the Closing Ceremony.

Compared to rates in a *normal* 2025, **Luxury** hotels secured a more modest uplift in pricing during the Olympics. But the price spike was much more significant when viewed against ADRs in the three weeks in July 2024 before the games: During the Games' two core weeks, ADRs jumped **50%** higher. Even during the Opening Ceremony week, they were **45%** higher than immediately before the Games. But once again, the price premium slumped to just **5%** for the Closing Ceremony week.

Average daily rate €: July-October



ADR: % change 2024 vs 2025



Olympic effect on hotel accommodation in France

Bigger price premiums for upper tier accommodation

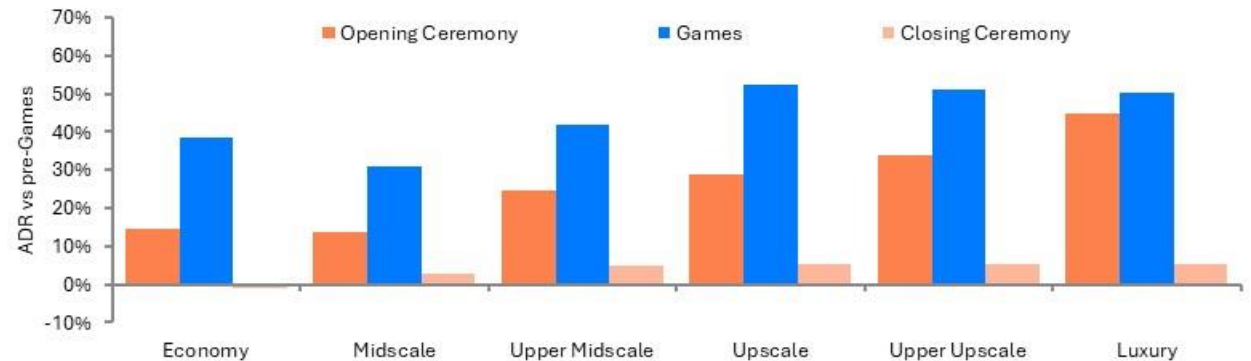
The preceding pages provide a lot of detail about rates and occupancy during the 2024 Olympic Games, comparing them to other weeks in summer 2024 and to the corresponding period in 2025 (representing a normal year). But what are the key takeaways? It's probably most useful to compare average daily rates (ADRs) and occupancy during the Games with the three weeks in July 2024 preceding them. This should establish a sense of the price premium associated with a high profile, global event and the effects on room availability.

Across all six service tiers, the rate premium was at its highest during the two full weeks of competition. Compared to the first three weeks of July, before the opening of the Games, ADRs ranged between **31% and 52% higher**. The premium charged by hotels was lowest in the lower service tiers: **31%** for Midscale; **39%** for Economy; and **42%** for Upper Midscale. The premium was much higher and consistent across the upper service tiers, occupying a narrow **50-52%** range. Travelers paying the most for their accommodation ended up paying the biggest premium for a stay during the Olympics. This core Games period is also the only time when hotels in all service tiers recorded higher occupancy compared to the pre-Games period. The effect was stronger among the higher service hotels and most severe for Luxury hotels, where occupancy was **21-points higher** than pre-Games, double the rise recorded among upper upscale hotels.

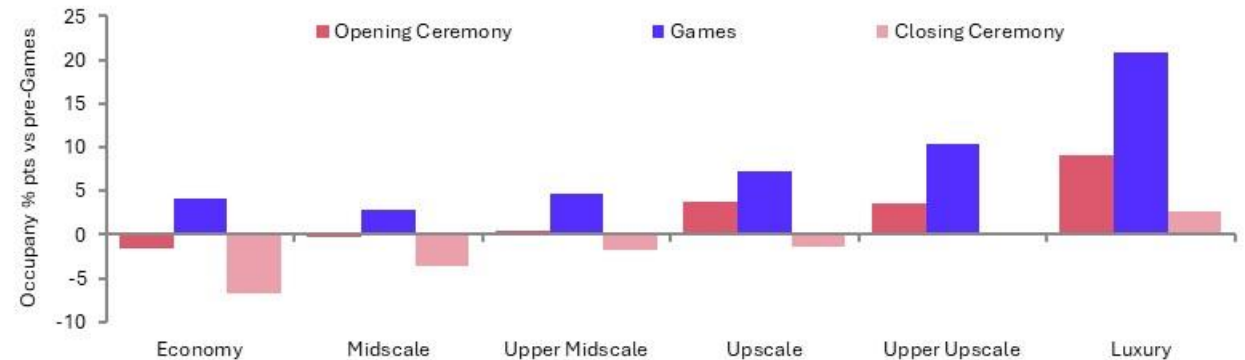
Travelers faced a lower price premium at the start of the Games, ranging from **14-15%** for Economy and Midscale hotels, progressively rising through the tiers to **45%** for Luxury. This mirrored the pattern for room occupancy. For Luxury hotel stays, there was little difference between the price premium for the Opening Ceremony and the main Games.

The price premium was weak across the board in the week of the closing ceremony. At this point, occupancy in most service tiers had already retreated below pre-Games levels, removing much of the support for elevated ADRs.

Average daily rate vs July's pre-Games weeks



Occupancy vs July's pre-Games weeks



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