

The Football Effect: How FIFA World Cup Performance Drives Tourism Demand for Non-Host Nations

Evidence from Croatia (2018), Morocco (2022), and Cabo Verde (2026)

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Abstract

Academic literature on the tourism impact of FIFA World Cup events has focused predominantly on host nations. This paper shifts the analytical frame to non-host participating nations, examining the relationship between exceptional on-field performance and measurable increases in tourism demand. Drawing on secondary tourism statistics, platform search analytics from Skyscanner, Expedia, and TUI, and Google Trends data as a proxy for destination demand intention, this study presents a comparative analysis of three cases: Croatia following its 2018 World Cup final run, Morocco following its historic 2022 semi-final appearance, and Cabo Verde following its 2026 knockout stage qualification as the smallest country ever to reach that stage. In all three cases, a measurable surge in destination searches and, with varying temporal lags, in actual tourist arrivals is documented. The paper proposes a Sport-Induced Destination Awareness (SIDA) model that maps the mechanism from televised exposure to search behavior to booking intent, and argues that for countries with low pre-existing destination awareness, a compelling World Cup narrative constitutes a form of nation branding that conventional tourism marketing budgets cannot replicate. Policy implications for destination management organizations in countries with emerging football programs are discussed.

Keywords: nation branding, sports tourism, place branding, FIFA World Cup, destination awareness, tourism demand, Cabo Verde, Morocco, Croatia

1. Introduction

The FIFA World Cup is the most-watched sporting event on earth. Over 3.5 billion people watched some portion of the 2018 edition; the 2022 tournament in Qatar attracted over five billion accumulated views across broadcast and streaming platforms (FIFA, 2022; Springer Nature, 2024). For the 32 nations that qualify for each edition, the tournament is not only a competitive moment but an extraordinary media exposure event, broadcast in every major market simultaneously, with narrative arcs that generate sustained news coverage over four weeks.

The academic literature on the economic and tourism effects of the World Cup has concentrated almost exclusively on host nations: the infrastructure investments, short-term GDP effects, legacy tourism, and image effects for countries that organize the tournament. This body of work has produced a nuanced and at times skeptical consensus. The short-term economic benefits of hosting are frequently overstated, the long-term tourism legacy is context-dependent, and the political economy of mega-event bids often reflects prestige signaling rather than rational economic calculation (Fourie & Santana-Gallego, 2011; Hagn & Maennig, 2009; MIPA Institute, 2025).

What this literature has examined far less systematically is the tourism effect of exceptional World Cup performance for non-host participating nations, particularly those with low pre-existing destination awareness in key international markets. When a country with limited international visibility performs unexpectedly well in a tournament watched by billions, the televised coverage generates a form of destination exposure that no conventional marketing budget could purchase. This paper asks whether that exposure translates into measurable increases in tourism demand, and if so, through what mechanism and over what temporal horizon.

The question is addressed through a comparative case study of three non-host nations: Croatia, which reached the 2018 final; Morocco, which reached the 2022 semi-finals as the first African and Arab nation to do so; and Cabo Verde, which qualified for the 2026 tournament as the smallest country by population ever to reach the knockout stage. In all three cases, contemporaneous search and booking data document a significant surge in tourism demand. The paper synthesizes these cases within a theoretical framework adapted from place branding and destination marketing literature, and proposes implications for destination management organizations in countries with developing football programs and limited conventional marketing reach.

2. Literature Review

2.1 Nation Branding and Sport

The relationship between national sport performance and country image has been theorized across several frameworks. Anholt's (2006) Nation Brand Hexagon identifies sport as one of six primary dimensions through which country image is constructed and communicated internationally. Within this framework, athletic excellence functions as a signal of national capability and cultural vitality, with the potential to shift country associations held by international audiences who have no direct experience of the destination.

Ginesta and San Eugenio (2013) demonstrate this mechanism in the specific context of football, analyzing Qatar's deployment of sport as a country branding strategy through the Catalan sports press. Their work establishes that for nations with limited cultural visibility in key markets, sport can function as a primary vehicle for country image formation precisely because it reaches audiences that are not reached by conventional tourism or cultural diplomacy channels. Grix (2012) extends this argument to Germany's hosting of the 2006 World Cup, documenting significant shifts in international perceptions of German culture and hospitality following the tournament.

More recently, Dubinsky (2019, 2024) and colleagues at Place Branding and Public Diplomacy have theorized the relationship between sport and soft power, establishing that exceptional athletic performance constitutes a form of public diplomacy that operates through emotional rather than rational channels. A country a viewer had no prior interest in can become, through the narrative arc of a successful tournament run, an object of genuine curiosity and positive association.

2.2 Mega-Events and Tourism Demand

The foundational empirical work on mega-events and tourism demand is Fourie and Santana-Gallego (2011, 2022), whose panel data analyses of international tourist arrivals around major sporting events established three important findings. Hosting a major event does not reliably increase tourist arrivals in the short term, as the displacement of regular tourists by event visitors often approximately cancels out. The media exposure generated by hosting can produce longer-term destination awareness effects that increase tourist arrivals in subsequent years. And these effects are heterogeneous across destination types and origin markets.

Fourie and Santana-Gallego's work focuses on host nations. The extension of their analytical framework to non-host participating nations is the gap this paper addresses. The mechanism for non-hosts is structurally different: there is no displacement effect, no infrastructure shock, and no direct visitor flow from the event itself. The exposure channel is purely media-based, operating through the narratives generated by tournament performance rather than physical presence.

The NYU study by Bari et al. (2024) provides the most direct academic evidence for the "Flutie Effect" in the context of the World Cup. Analyzing digital search data around Morocco's 2022 semi-final run, the researchers documented a 400% average increase in global search volumes related to Morocco's cuisine, culture, and tourist attractions — framing this as a sport-induced discovery effect, where audiences with no prior search interest in Morocco were prompted to investigate the destination by the narrative of its football team's historic achievement.

2.3 Google Trends as a Proxy for Tourism Demand

The use of Google Trends data as a leading indicator of tourism demand is now well established in the tourism economics literature. Choi and Varian (2012) at Google demonstrated that search query data can provide early signals of consumer demand intentions with greater timeliness than conventional survey-based measures. In the tourism context, Yang et al. (2015) and subsequent researchers have shown that destination search volumes on Google predict tourist arrivals with significant accuracy, particularly in the one-to-three month lag between search and booking.

Baldigara and Mamula (2015) applied this methodology to Croatia, demonstrating that Google Trends search volumes for Croatian tourism destinations were strongly correlated with subsequent foreign tourist arrivals. This methodology provides a bridge between the immediate media exposure generated by World Cup performance and the lagged outcome variable of actual tourist arrivals, allowing researchers to examine the demand generation process in real time rather than only through arrival statistics reported with a six-to-twelve month delay.

3. Theoretical Framework: The Sport-Induced Destination Awareness (SIDA) Model

Drawing on the literatures reviewed above, this paper proposes the Sport-Induced Destination Awareness (SIDA) model, which maps the mechanism through which exceptional World Cup performance generates tourism demand for non-host nations. The model identifies four sequential stages.

The first is exposure. Tournament performance generates televised and digital media coverage that reaches audiences in international origin markets. The scale of this exposure is proportional to the drama and unexpectedness of the performance: underdog narratives, in which small nations defeat larger and better-resourced opponents, generate disproportionate media coverage relative to match outcome alone.

The second stage is awareness formation. Media coverage generates country-level awareness and positive emotional associations in audiences with no prior interest in the destination. This stage is consistent with Anholt's (2006) nation brand model and with empirical work on emotional learning from narrative exposure (Green & Brock, 2000). Awareness at this stage is not formed through direct destination marketing but through identification with athletes and a compelling sporting narrative.

The third stage is search behavior. A subset of newly aware audiences convert emotional interest into information-seeking, generating search queries related to the destination on platforms including Google, travel aggregators, and OTAs. This stage is measurable in near real time through Google Trends and platform search data. The conversion rate from awareness to search is moderated by prior destination familiarity, cultural proximity between origin and destination markets, and the availability of accessible travel options.

The fourth and final stage is booking and arrival. A further subset of searchers converts intent into booking decisions, generating actual tourist arrivals with a typical lag of one to twelve months from initial search. This conversion rate is moderated by destination readiness factors including airlift connectivity, accommodation capacity, visa accessibility, and price competitiveness.

The SIDA model predicts that effects at each stage will be most pronounced for destinations with low pre-existing awareness in the relevant origin markets. For well-known destinations with saturated awareness, exceptional World Cup performance may generate search spikes but limited conversion to incremental arrivals. For emerging destinations, the same performance can constitute the first substantive exposure to a market that subsequently converts at meaningful rates.

4. Methodology

This study employs a comparative case study methodology combining secondary tourism statistics with digital demand data. The three cases were selected on the basis of documented World Cup performance that constituted a significant narrative event — a result or achievement that generated disproportionate international media coverage relative to the country's pre-existing football or tourism profile — and the availability of sufficient data to examine the demand response across the stages of the SIDA model.

Primary data sources for tourist arrivals are the national tourism statistics bureaus of each country (Croatian Bureau of Statistics, Moroccan Tourism Observatory, and Cabo Verde's Instituto Nacional de Estatística) supplemented by World Bank international tourism data. For the 2026 Cabo Verde case, where official arrival data are not yet available, OTA platform search data (Skyscanner, Expedia, TUI) are used as the primary demand indicator, consistent with the established use of these sources as leading indicators of tourism demand (Skift, 2026; PAX News, 2026; FTN News, 2026).

Google Trends data are used as a cross-case proxy for destination search demand, allowing comparison of the search response across the three cases relative to pre-tournament baselines. The relevant search terms for each case are the country name combined with tourism-related modifiers ("Croatia holiday," "Morocco tourism," "Cabo Verde," etc.), analyzed in the principal origin markets that showed documented response. This approach is consistent with Baldigara and Mamula (2015) and with Bari et al. (2024) for the Morocco case.

A substantive limitation of this methodology is the difficulty of establishing causal attribution. World Cup performance coincides with other variables that may affect tourism demand, including general destination marketing activity, geopolitical events, exchange rate movements, and airlift changes. Where possible, the analysis controls for pre-existing trend by comparing the observed demand response to the trajectory in the same period of the prior year. The case study approach does not allow for the construction of counterfactual baselines equivalent to those available in large-sample econometric studies.

5. Case Studies

5.1 Croatia 2018: From Adriatic Destination to World Cup Finalist

Croatia entered the 2018 FIFA World Cup in Russia as a recognized but regionally concentrated destination, drawing its international visitors predominantly from European markets with established airlift connections and cultural familiarity. The country had been on a strong growth trajectory throughout the 2010s: international tourist arrivals increased by 8 million between 2012 and 2018, reaching a record 16.6 million foreign visitors in 2018 — four times the country's total population (Croatian Bureau of Statistics, 2019).

Croatia's run to the 2018 final, defeating Argentina, Russia, England, and Denmark along the way, generated sustained international media coverage throughout July 2018. The country's small size (population approximately 4 million), the charismatic persona of its captain Luka Modrić, and the drama of several penalty shootout victories produced a tournament narrative tracked internationally well beyond football-specialist media.

The tourism data for 2018 reflect this exposure. From January to May 2018, before the tournament began, Croatia registered 3.6 million arrivals and 11.6 million overnight stays, representing 19% and 24% increases respectively over the same period in 2017 (Travel Agent Central, 2018). The summer period, during and after the World Cup, saw the growth rate accelerate further. Total tourist spending reached \$11.35 billion in 2018, a 7.73% increase over 2017's \$10.53 billion (Macrotrends, 2025).

Google Trends data show a pronounced peak in Croatia-related tourism searches in English-language markets during the weeks of Croatia's knockout matches.

Attribution is complicated by Croatia's already-strong pre-tournament growth trajectory. However, the acceleration in mid-2018 relative to prior trend, particularly in non-European source markets such as the United States where Croatia had limited prior destination recognition, is consistent with the SIDA model's prediction of strongest effects in low-awareness markets. By 2024, Croatia had reached over 20 million annual tourist arrivals, sustaining a structural step-change in destination visibility that the 2018 tournament helped initiate (Statista, 2025).

5.2 Morocco 2022: Africa's Historic Semi-Final and the Tourism Aftermath

Morocco's 2022 World Cup campaign in Qatar is the most extensively documented case of sport-induced destination awareness in the academic literature. The Moroccan team's progression to the semi-finals — the first African and first Arab team to achieve this — generated exceptional media coverage across all major origin markets, including Western Europe and North America, where Morocco had significant diaspora communities but limited penetration of mainstream tourism audiences.

The demand response was documented in real time. A 400% average increase in global search volumes related to Morocco's cuisine, culture, and tourist attractions was recorded during and after the tournament (Bari et al., 2024). Searches for "best time to visit Morocco," "visa to Morocco," and "Morocco travel" showed particularly sharp increases. December 2022 — the month Morocco's matches were played — saw a 12% increase in arrivals at Marrakech Menara Airport compared to December 2019, the pre-pandemic reference period (VOA Africa, 2023).

The longer-term data confirm sustained conversion from search to arrival. International tourist arrivals to Morocco grew from 10.9 million in 2022 to 14.5 million in 2023 — a 33% increase in a single year. In the first half of 2024, arrivals reached 7.4 million, a further 14% increase over the same period in 2023, making Morocco Africa's most-visited tourism destination (African Marketing Confederation, 2024; Morocco Tourism Observatory, 2024). The country's tourism revenue grew proportionately, with the sector generating 104.6 billion dirhams in 2023 (IJREF, 2025).

The Moroccan government has explicitly connected this momentum to World Cup performance in its forward planning. The country's 2023-2026 tourism roadmap targets 17.5 million annual arrivals and 120 billion dirhams in foreign currency revenue, building in part on the destination awareness generated by 2022. Morocco is also co-hosting the 2030 World Cup with Spain and Portugal, a bid that FIFA's decision was arguably influenced by the global visibility generated by the 2022 campaign (MIPA Institute, 2025).

The Morocco case most closely approximates a natural experiment for the SIDA model, because the 2022 performance was genuinely unexpected and the demand response can be partially isolated from prior marketing trends. The 2020 pandemic created a near-zero baseline for 2021 arrivals (3.7 million), making pre-tournament trend analysis complex. The scale and pace of the 2022-2023 recovery — significantly exceeding both the pre-pandemic peak and comparable Mediterranean competitor destinations in the same period — is consistent with a World Cup exposure effect operating alongside, rather than independent of, broader recovery dynamics.

5.3 Cabo Verde 2026: The Smallest Nation in World Cup History

Cabo Verde's 2026 World Cup campaign represents the most acute case of sport-induced destination awareness in the dataset. A volcanic archipelago of ten inhabited islands approximately 570 kilometers off the West African coast, with a population of approximately 525,000, Cabo Verde qualified for its first-ever FIFA World Cup in 2026 and became the smallest nation by population ever to reach the knockout stage (FTN News, 2026).

The team's unbeaten group stage — a 0-0 draw against Spain, a 2-2 draw with Uruguay, and a 0-0 draw with Saudi Arabia — generated substantial coverage given the context. The subsequent Round of 32 match against defending champions Argentina, in which Cabo Verde pushed the Messi-led team to extra time before losing 3-2, produced what analysts described as the tournament's defining underdog narrative. The match was broadcast across all major global markets, and goalkeeper Vozinha became an international personality whose social media following grew dramatically during the tournament period.

The search and booking data response was immediate. Skyscanner recorded a 177% increase in searches for Cabo Verde from Germany for the June-September period, with a notable peak on and around June 15 — the date of the opening match against Spain (FTN News, 2026). TUI, Europe's largest travel operator, reported a "partial doubling of searches and inquiries in travel agencies" (TUI spokesperson, cited in FTN News, 2026). Expedia recorded an increase of more than 800% in searches from the United States (PAX News, 2026). Interest from Japan climbed 110% according to travel data published during the tournament (PAX News, 2026).

These figures are particularly significant given Cabo Verde's pre-existing tourism profile. Despite welcoming approximately 1.2 million visitors annually — a substantial number relative to its population, reflecting tourism's contribution of approximately 25% of GDP and 40% of all economic activity — the country's source markets were heavily concentrated among European travelers, predominantly from the United Kingdom, Portugal, Germany, and the Netherlands, with almost all visiting the islands of Sal and Boa Vista on all-inclusive packages through operators including TUI and Meliá (Travel and Tour World, 2026; Skift, 2026). North American and Asian markets represented a negligible share of arrivals before the tournament.

The search spikes in the United States (+800%), Japan (+110%), and broader international markets therefore represent exposure to audiences with essentially zero prior destination awareness — the scenario in which the SIDA model predicts the strongest relative effects, though conversion rates from search to arrival for genuinely new markets are typically lower and more delayed than for markets with prior familiarity.

Official arrival data for the 2026 post-World Cup period are not yet available. The structural conditions for sustained demand growth are, however, present: Cabo Verde's recent entry into the Schengen Area and adoption of the Euro in 2023 have reduced travel friction for European visitors considerably (PAX News, 2026), and the country's \$75 million World Bank investment in tourism infrastructure provides capacity to absorb increased demand (PAX News, 2026). The Morocco case provides a directly relevant precedent for the lag between search spikes and arrival data, suggesting that full conversion effects will be measurable in the 2027-2028 data.

6. Discussion

6.1 Cross-Case Patterns

The three cases share several patterns consistent with the SIDA model's theoretical predictions. In each case, a measurable surge in destination search behavior was documented during or immediately following the relevant World Cup performance, with the search response beginning within hours of significant match results and sustained over a period of weeks. The magnitude of the search response is correlated with the novelty and unexpectedness of the performance: Cabo Verde's search spike is proportionally larger than Morocco's, which is proportionally larger than Croatia's — corresponding to the relative level of pre-existing international destination awareness in each case. Where arrival data are available, conversion from search to actual tourist arrivals is documented with a temporal lag of three to twelve months, with the strongest effects in source markets where the destination had lowest prior awareness.

A finding that complicates simple attribution is that all three nations were already on positive tourism trajectories before their respective World Cup performances. Croatia had been growing consistently since the early 2010s. Morocco was recovering from the pandemic. Cabo Verde had been investing in tourism infrastructure. In each case, the World Cup performance appears to have accelerated an existing trajectory rather than created one from nothing — consistent with the SIDA model's proposition that sport-induced awareness functions as a demand amplifier rather than a demand creator, reaching audiences that were potentially convertible but not yet exposed.

6.2 Moderating Factors

The strength of the sport-induced awareness effect is moderated by several destination-level factors. Cultural proximity between the tournament's host country and the destination generates demand from third-party markets that view both through a regional lens. Morocco's 2022 performance, held in Qatar, generated particularly strong demand responses from other North African and Arab markets, where the team's success was experienced as a regional rather than purely national achievement. Cabo Verde's Portuguese-speaking identity and its connections to the African diaspora in Europe and North America create cultural proximity channels that may amplify conversion from search to arrival in those specific markets.

Aviation connectivity is a critical constraint on conversion. Destinations with established airlift from key origin markets capture search-to-booking conversion more effectively than those requiring complex routing. TUI's existing direct flight program to Cabo Verde from five German airports was an explicit factor in the rapid translation of German search spikes into booking inquiries (FTN News, 2026). Morocco's extensive European airlift network, built in part through the Royal Air Maroc network and low-cost carrier expansion, contributed to the rapid conversion of 2022 search interest into 2023 arrivals.

Accommodation capacity and price competitiveness also moderate the conversion rate, though these factors are less visible in the available data. Cabo Verde's concentration of accommodation in all-inclusive resort complexes on two islands, noted by several sources as a structural constraint on tourism diversification, may limit the

ability of the current search surge to generate dispersed economic benefits beyond the established resort operators.

6.3 Limitations

The comparative case study methodology does not permit causal identification of the World Cup effect in the presence of confounding variables. The temporal coincidence of World Cup performance with observed search and arrival increases is consistent with the SIDA model but does not rule out alternative explanations. For the Morocco case, the pandemic baseline complicates pre-tournament trend analysis. For the Cabo Verde case, the absence of post-tournament arrival data means the central outcome variable remains unobserved at the time of writing.

The reliance on OTA platform data (Skyscanner, Expedia, TUI) as demand indicators for the Cabo Verde case introduces platform-specific biases. These platforms capture online search and booking behavior primarily in higher-income markets with established digital commerce infrastructure, potentially overstating the response in markets such as the United States and Japan while understating it in markets where travel is arranged through different channels. Official tourism statistics, when available, will provide a more comprehensive picture.

The selection of cases on the basis of exceptional performance and documented demand response also introduces survivorship bias. Countries that perform unremarkably in World Cup tournaments do not generate the media narratives that drive the SIDA model's demand effects, and these cases are not represented in the analysis. The paper's findings describe what happens when a compelling narrative emerges, not what World Cup participation per se generates.

7. Conclusions and Implications

7.1 Theoretical Contribution

This paper extends the analytical focus of World Cup tourism research from host nations to non-host participants, documenting a mechanism — sport-induced destination awareness — that operates independently of the infrastructure effects and visitor displacement associated with hosting. The SIDA model provides a structured framework for understanding the sequential process from media exposure to search behavior to booking and arrival, offering a theoretical scaffold for future empirical work. The paper also documents, through real-time platform data, the emergence of the Cabo Verde case, which represents an extreme instance of the SIDA mechanism and will constitute valuable longitudinal data as official arrival statistics become available.

7.2 Policy Implications

For destination management organizations in countries with developing football programs, the findings suggest that investment in national team football infrastructure may generate tourism-relevant returns not captured by conventional marketing ROI frameworks. The media exposure generated by a strong World Cup performance — particularly for countries with low pre-existing destination awareness — exceeds what is achievable through conventional destination marketing budgets at equivalent cost. The Cabo Verde case illustrates this with particular force: a country with a tourism GDP

contribution of 25% achieved in weeks a level of international media exposure that its tourism authority could not have purchased through any available marketing channel.

Converting awareness to arrivals, however, requires deliberate infrastructure investment. The Morocco case demonstrates that aviation connectivity, accommodation capacity, and visa accessibility are the key conversion enablers. Destination management organizations in countries that may benefit from future World Cup exposure should use the period following qualification to invest in the infrastructure that converts search spikes into bookings, rather than treating the awareness effect as self-converting.

For international tourism policy more broadly, the findings suggest that football success is a significant component of a destination's nation brand, particularly for countries in the Global South and Africa that face structural barriers to conventional destination marketing reach in North American and Asian markets. Policy frameworks that integrate sports development and tourism development as complementary rather than separate domains may be better positioned to capture these effects.

7.3 Future Research

Longitudinal tracking of Cabo Verde's actual arrival data through 2027-2028 will provide the most direct test of the SIDA model's predictions and should be a priority for researchers with access to national tourism statistics. Comparative analysis of countries that qualified for recent World Cups without exceptional performance — the control group absent from this analysis — would allow more rigorous causal identification of the performance-specific effect. The role of social media amplification in accelerating the SIDA model's early stages also deserves dedicated investigation; the speed of the search response documented in the Cabo Verde case suggests that social media virality may be compressing the timeline between exposure and search behavior in ways that earlier framework models did not anticipate.

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