



# THE FUTURE OF SPORTS IN VIETNAM



2026 - 2028

# EXECUTIVE SUMMARY

Vietnam's sports market is entering a new phase of development, shifting from a predominantly spectator-driven market to a more complex ecosystem built around participation, experience and commercialisation.

## Recent market signals show that:

- Sports participation is increasing rapidly across urban populations
- New sports categories such as pickleball are scaling at an unprecedented speed
- Esports is evolving from digital consumption to live fan experiences
- Cities like Da Nang are positioning themselves as regional sports tourism hubs

Two major events in 2026: the LCK Roadshow in Hanoi and the World Cup Pickleball in Da Nang, highlight this transition clearly. Together, they demonstrate that Vietnam is becoming both a high-value fan market for global sports IP and an emerging host market for new sports categories.

Vietnam is no longer just a sports consumption market. It is evolving into a participation, experience and commerce-driven sports ecosystem.



# 1. MARKET CONTEXT

## 1.1 Participation Growth

- ~60% of adults engage in some form of physical activity
- Urban areas (HCMC, Hanoi, Da Nang) are key growth drivers
- Sports clubs and fitness communities are expanding rapidly
- Sport is shifting from an occasional activity to a daily habit

## 1.2 Market Size and Spending

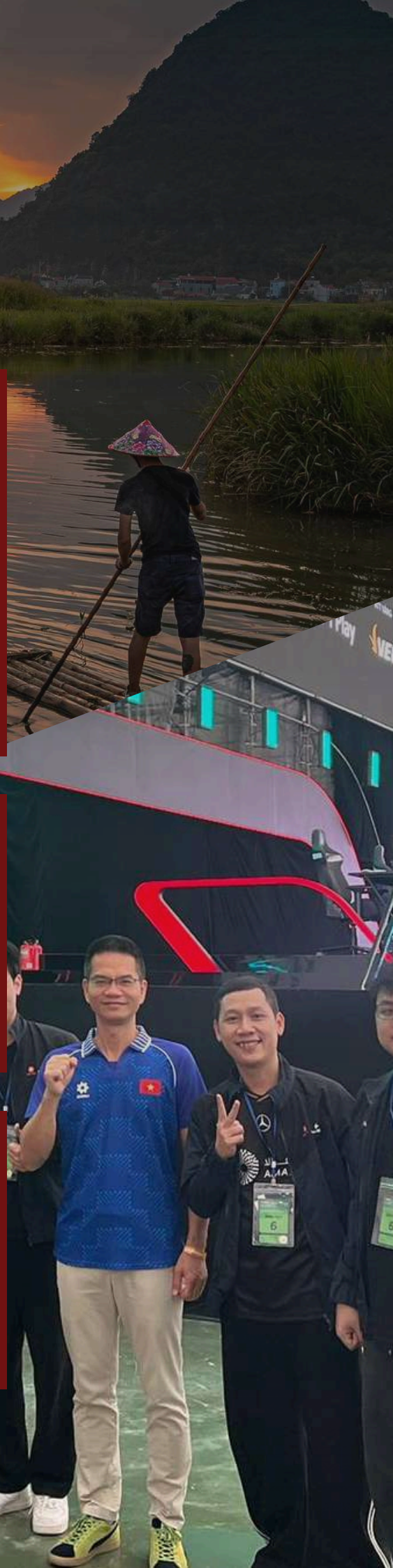
- Sports equipment & retail market: ~\$1.2B
- Growth rate: ~7%+ CAGR
- Average annual spend: ~\$50/person

**Key insight: High engagement, low monetisation = major growth opportunity.**

## 1.2 Market Diversification

- Football remains most watched
- Badminton and running are widely participated in
- New categories emerging rapidly

**Vietnam is transitioning from a single-sport dominated market to a multi-sport ecosystem.**



# 2. KEY TRENDS SHAPING THE FUTURE



## 2.1 Community Sports (Running & Endurance)

### Data

- 8,000–13,000 runners per major marathon
- Strong international participation (up to 25–30%)
- Multi-million USD economic impact per event

**insight:** Running has evolved into a form of community identity, social activity and lifestyle signal.

### Future

- Running becomes default urban sport
  - Triathlon = premium/high-spending niche
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## 2.2 Pickleball: Fastest Growing Sport in Vietnam

### Data


- ~1 trillion VND (~\$38M) sales in 2025
- +600% growth in equipment
- Millions of online searches

### Key Event

World Cup Pickleball 2026 – Da Nang (Aug–Sep)

**Insight:** Pickleball succeeds because it is easy to play, highly social, and low barrier to entry.

### Future

- Becomes mainstream urban sport
  - Drives equipment, venue and event economy
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## 2.3. Esports: From Digital to Live Experience

### Key Event

- LCK Roadshow Hanoi (May 2026)

**Insight:** Esports is shifting from online viewing to live entertainment experience.



### Future

- Hybrid model: streaming + live events
- Growth areas: ticketing, merch, fan events, creator-led content

## 2.4 Sports Tourism & Host City Strategy

### Example: Da Nang

- Marathon
- IRONMAN
- Pickleball World Cup

### Key Event

World Cup Pickleball 2026 – Da Nang (Aug–Sep)

**Sport is becoming a city growth engine.**

### Future

- Cities will compete via event hosting, sports branding and tourism integration



## 2.5. Fitness & Wellness Economy

### Trends

- Boutique gyms growing rapidly
- Pilates, boxing, functional training rising
- Coaching & PT demand increasing

### Insight:

Consumers are buying experience and lifestyle, not just sport.

### Future

- Subscription economy
- Premium fitness segment
- Coaching ecosystem

## 2.6 Creator Economy in Sports

### Insight:

Fans increasingly follow creators, not teams.

### Future

- Creator = new media channel
- Co-streaming becomes standard
- Brand partnerships shift to creators

## 2.7 Women in Sports

Insight: Female participation is rising rapidly, especially in fitness, running and pickleball.

### Future

- Women-led communities
- Female-focused sports products
- Strong growth opportunity for brands



## 2.8 Tech-Driven Sports

### Trends

- Wearables (smartwatch, tracking apps)
- Fitness data tracking
- Health integration

### Insight:

Sport is becoming a data-driven behaviour.

### Future

- Personalised training
- Health + insurance integration



# 3. KEY EVENTS DRIVING MARKET MOMENTUM (2026)

## 3.1 Tech-Driven Sports

- LCK Roadshow - Hanoi (8th - 10th May)
- IRONMAN (full distance) - Da Nang (10th May)
- World Cup Pickleball - Da Nang (30th Aug - 6th Sep)
- ASEAN Cup (football) (24th July - 26th Aug)
- Hanoi Marathon (4th Oct)
- National Sports Games (Oct)

Vietnam is shifting from a viewer market to a host market.



# 4. DEEP DIVE: TWO DEFINING EVENTS

## 4.1 LCK Roadshow Hanoi 2026

### What it shows

- Vietnam is now a priority market for global esports IP
- Fans are ready for offline experiences

**Strategic insight:** Esports in Vietnam is moving towards a fan economy model similar to K-pop.

### Opportunity

- Live activations
- Creator collaboration
- Fan engagement events

## 4.2 World Cup Pickleball 2026 - Da Nang

### What it shows

- Vietnam can host emerging global sports
- Pickleball has moved beyond trend stage

**Strategic insight:** Vietnam is transitioning from adopting sports to scaling and hosting them.

### Opportunity

- Equipment brands
- Wellness brands
- Tourism integration

**These two events represent two parallel forces: digital-native sports moving offline (esports) and accessible physical sports scaling rapidly (pickleball).**

# 5. WHAT THIS MEANS FOR BRANDS

## 5.1 Shift from Sponsorship to Participation

Brands should invest in events, communities and experiences rather than traditional sponsorship alone.

## 5.2 Content Strategy Shift

- Short-form content dominates
  - Localisation is critical
  - Creator-first approach

## 5.3 Category Strategy

- **Running:** Mass participation + FMCG
  - **Pickleball:** Lifestyle + retail
  - **Esports:** Youth + tech
  - **Fitness:** Premium +
    - subscription