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Chapter 1 (6253 words)

Challenges and Opportunities of Contemporary Sport Marketing: Strategic Perspectives

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Abstract

The speed of change and the constant transformation within and beyond sports has meant that any organization associated with the global sport industry must constantly evaluate and horizon scan for pertinent changes that may impact upon its organizational performance and marketing strategies. Strategic sport marketing consists of identifying the needs and wants of potential customers and satisfying those needs through the exchange of products and services. The role of strategic marketing planning is vital to the success of many sport organizations that are relying on the articulated vision and well-thought-out road map to ensure that they are well positioned to deal with changes and challenges, and to effectively deliver high quality products and services to customers. This leading chapter outlines the purpose of this book aimed to examine strategic sport marketing and identifies some of the current changes occurring within the global sport industry that may potentially impact upon successful marketing initiatives.

Keywords: strategic sport marketing, global sport industry, future trends, challenges, and opportunities.

Introduction

The impact of sport marketing and the increasing strategic role it plays within a growing and diverse global sport industry has been the subject of escalating research over the past few decades (Manoli, 2018). Researchers have identified many dimensions of the sport marketing mix and formulated numerous theoretical models and frameworks to help guide examining the related variables (Lahtinen et al. 2020). Based on the derived information, sport managers can devise and implement comprehensive and sophisticated marketing plans that are aimed to realize organizational goals and achieve competitive advantage. Doing so, it is fundamental that sport marketers have a thorough understanding of key variables affecting marketing strategies, their intricate relationships, and the constant environmental changes that impact upon the organization's strategic planning and implementation. The dynamic nature of the global sport industry and the pace of change demonstrates the evolving, flexible, and adaptive role that sport marketers need to undertake to achieve strategic success.

Strategic sport marketing consists of identifying the needs and wants of potential customers and satisfying those needs through the exchange of products and services, such as sports apparel, live events, spectator sports, fitness activities, gym products, and media outlets (Coutinho da Silval & Luzzi Las Casas, 2017). Dees et al. (2020) highlight the importance of strategic planning in the sport marketing process and suggest several key components for effectively developing strategic plans, including but not limited to the following: (a) setting a vision, (b) forming strategic goals, and (c) specifying marketing plans whilst identifying the relevant resources needed. Developing and understanding the factors within the marketing plans, commonly referred as the marketing mix (i.e., 4P's+), is a fundamental aspect of successfully formulating and implementing strategic plans.

Shilbury et al. (2020) suggest that the sport marketing mix consists of seven component strategies, including product, price, place, and promotion that are deemed to be

the traditional 4P's associated with sport products, along with physical evidence, people, and process that are the 3P's associated with sport services. Products refers to the actual goods to satisfy a need or demand from customers. Price is the perceived value that customers are willing to pay. How sport products are distributed and bought refers to place and promotion involves the various techniques that are used to persuade customers to purchase the product or service through such procedures as advertisements, celebrity endorsements, or sales promotions. When referring to sport services such as using a gym, physical evidence is often associated with the aesthetics and appearance of the facility. People refer to professional qualification of service provider, how customers are treated by staff, and interactions between staff and customers. Process refers to the overall experience of service provision and delivery to the gym customers.

Researchers have suggested that the sport industry is different from mainstream business sectors and that sport managers and marketers need to have an understanding of the unique dimensions when developing and implementing marketing plans (Mullin et al., 2014; Zhang, 2015; Zhang et al. 2017). Andrew et al. (2021) highlighted the need for researchers to identify and challenge theoretical concepts and how they need to be modified for the sport context. Agha and Dixon (2021) propose that sports are unique due to what they term 'spectatoritis' and how many products and services within the sport industry involve spectators. Whilst these scholars acknowledge that many generic theoretical principles are relevant, they suggest that sports are unique partially due to the lack of competition in the business of spectator sports, which can fundamentally act as potential co-creators, buyers, and suppliers that effectively diminishes the competitive environment that other sectors may have to deal with. Modern sport managers and marketers need to be aware of such nuances to effectively deliver organizational goals and achieve competitive advantage.

Cunningham et al. (2021) consider that the uniqueness of sports is related to the social impact that sports can play within society and the role that athletes, coaches, and fans can have based upon their social conscience. Sports are different from other business sectors because individuals in sports have the power to affect societal attitudes with regards to social justice and can influence many others based upon their personal views, which can be a formidable force through marketing messages wishing to be portrayed. The role that fans and stakeholders play in sports has been recognized by many as one of the key factors that make sport marketing unique to mainstream business marketing practices (Bradbury & O'Boyle, 2017; Fujak et al. 2017; Scola & Gordon, 2018). For example, the growth of research investigations into such aspects of sport marketing as team branding, event sponsorship, and celebrity endorsements (Jin, 2017; Maldonado-Erazo, 2019; Strobel & Germelmann, 2020; Von Felbert & Breuer, 2020) have been well documented in recent years, demonstrating the significance that marketing plays in the global sport industry. Imperative to effective strategic sport marketing is understanding and being aware of the many changes that can potentially impact upon the diverse stakeholders that influence the sport industry; hence, recognizing changes in the globalized marketplace is a necessity for any sport manager and marketer.

Changes in the Global Sport Industry

The speed of change and the constant transformation within and beyond sports has meant that any organization associated with the global sport industry must constantly evaluate and horizon scan for pertinent changes that may impact upon its organizational performance and marketing strategies. All aspects of the sport industry from sport products, events, operation, and consumption have changed dramatically over the past decade and continues to transform at an accelerating pace. Such change can offer many opportunities for sport marketers, but also present challenges if organizations do not react in a timely manner to external changes that can impact upon the consumers of their products and services

(Johnson et al., 2019; Lee et al., 2020). A recent study by the Business Research Company (2020) estimated that the global sport industry is estimated to be worth over \$500 billion, with over 50% of this revenue generated from spectator sports (e.g., teams, events, media rights, sponsorship, merchandising) and participatory sports (e.g., recreation centers, community sports, sport facilities, personal training services). The report acknowledges that a slight decline would take place due to the COVID-19 pandemic before the market is expected to recover and increase to an estimated \$599.9 billion by 2025, and \$826.0 billion by 2030.

The sport industry is recognized as the second fastest growing business for brands, outpacing the GDP growth of most countries, and it is predicted that Africa and the Middle East will undertake the largest growth rates over the next five years (Sport Industry Insights, 2019). Whilst the largest share of the sport market sector has often been associated with North America and Europe, new geographical markets are emerging in countries including: Brazil, China, Korea, South Africa, and Russia offering new opportunities and developments within sport (Zhang et al. 2018). Governments are investing resources into creating new sport zones and event hubs aimed at improving the health of the nations, attracting international sport events, and attaining associated benefits of hosting sport events of various kinds and magnitudes; for example, the Singapore Sport Hub and the Aspire Zone in Qatar have used the opportunities of staging sport events to attract new investments, conferences, tourists, and customers to their countries.

Whilst the global sport industry continues to grow and transform at a fast pace, it is imperative that sport managers and marketers are aware of such changes and new opportunities to ensure that they keep up the pace with changes in the wants and needs of existing and potential consumers. Understanding the dynamic market environment and the impact upon new products, services, and consumers is a constant requirement of strategic

marketing to achieve success in an increasingly competitive marketplace (Anderson et al., 2021; Geurin et al., 2018; Pifer et al., 2018).

Sport Marketing Trends

The globalization of sports and the impact across the world have presented both opportunities and challenges to people working within the sport industry. Many advantages associated with increased market share, economic benefits, employment opportunities, and positive social and cultural impacts have been extensively discussed by researchers (e.g., Desbordes et al., 2019; Schulenkorf, 2017). However, researchers have also identified challenges that have resulted due to increased globalization of the sport industry, such as social injustice, market dominance, unfair employment conditions, detrimental ecological impact, and loss of diversity due to mass production and marketing (McCullough & Orr, 2020; Zhang et al. 2018, 2021). Attempting to predict and preempt future trends that impact the sport industry, as well as to deal with the challenges of globalization, is a key skill needed for strategic sport marketing. The following sub-sections touch on a few trends that are currently revolutionizing the sport industry and are predicted to have a significant impact upon the future direction of its marketing.

Technology and Digitalization

Without doubt, one of the most revolutionary changes to impact the sport industry is the advancements in technology and digitalization and the constant developments in virtue communication, digital marketing, broadcasting, and transportation (Danylchuk et al., 2015; Wang et al., 2018). A recent report undertaken by Deloitte (2018) suggests that digital technology is transforming the global sport industry and presenting many opportunities for its growth; however, for organizations to take advantage of such opportunities, they need to embrace changes and that “doing digital is not enough, they will have to embed digital in every aspect of the business, transforming people, processes, and technology” (p. 3). Ratten

(2020) concurs with such sentiments, suggesting that technology is transforming the way that sports are played and consumed and highlights the need for organizations to adapt and respond to such changes. There is a need for leading sport organizations to establish 'entrepreneurial ecosystems' within the sport industry and embrace a sport technology perspective to be able to survive and thrive in a global economy. MaCaulay (2020) suggests that digitalization is changing the sport industry beyond recognition that nobody could predict a few years ago. Innovations in artificial intelligence, virtual reality, augmented reality, mixed reality, and over the top (OTT) marketing through online streaming content are having a huge impact upon sport consumers. To be successful in sport business, one needs to be fully aware of such advancements, not only for the products and service that are provided but how one conveys the marketing messages to consumers. The digital age is a constant demand for those involved in sport marketing and almost an impossible task to keep constantly informed about such developments.

Recent research findings highlighting how technology has transformed sports revealed many noticeable perspectives, including but not being limited to the following: (a) wearable technology (Watson et al. 2018; Windt et al. 2020), digitalization of sport media coverage (Hutchins et al. 2019), impact upon spectator sports (Daehwan & Yong, 2019; Spitz et al. 2021), participation of sports (Ha et al. 2017; Watanabe & Zhang, 2019), sport performance (Qian & Zhang, 2016; Marinho & Neiva, 2018), sport engineering (Novak & Novak, 2020), and wide adoption of data analytics (Ratten & Hayduk, 2020; Zhang et al., 2021). It is apparent that many areas of the sport industry are affected by technological advancements, which subsequently impact their planning of strategic marketing mix from undertaking market research, identifying changes in consumer needs, producing products and services that satisfy market demand, and ensuring that the marketing message appeals to the target markets.

eSports

Aligned to technological advancements is the huge growth of esports that has been witnessed across the globe. Hamari and Sjöblom (2017) define esports as “a form of sports where the primary aspects of the sport are facilitated by electronic systems; the input of players and teams as well as the output of the esports system are mediated by human-computer interfaces.” (p. 211), which is often referred by others as simply ‘gaming’. The breadth of gaming and its usage across the globe has risen at an incredible rate. A recent report by Statista (2021) highlighted that the global eSports market was estimated to be worth over \$1.08 billion in 2021, increasing to \$1.62 billion revenue by 2024. The report states that Asia, in particular China, and North America represent the largest markets and growth. Main revenue sources include sponsorship, advertising, publisher fees, merchandise, ticketing, and media income (i.e., rights, digital, streaming).

The increase in revenue is matched with the number of people watching esports too. It is estimated that there are currently over a half billion viewers globally, making it more popular than many large international sport events such as the NFL and the PGA. To add to this phenomenon, the number of professional gamers is rising all the time, with thousands around the world competing at various levels for enormous sums of prize money; for example, the 2019 Fortnite World Cup held a \$30 million prize pool (ENUK Report, 2021). Insider (2021) suggest that the appeal of esports has also been powered by celebrities such as Michael Jordan and the coverage it receives from traditional television outlets, such as ESPN, as well as by the ease of access to streaming platforms such as YouTube and mobile smartphones, reducing barriers to entry.

Whilst the rise of esports has resulted in tremendous opportunities, many researchers have suggested that further research is needed to fully understand the impact the phenomenon has had upon the sport industry and associated stakeholders (Vera et al. 2018; Steinkuehler,

2019). Recent work by Qian et al. (2020) and Reitman et al. (2019) highlight how research into esports is multidisciplinary and they suggest that due to the global appeal of esports, particularly from Western and Asian continents, this relatively new segment of the sport industry has resulted in a focus of research on the internationality of esports, particularly investigating the consumption of sport through playing, spectating and governance. Whilst researchers have questioned whether esports can be considered a sport, research by Hallmann and Giel (2018) emphasize that regardless of opinions, esports have a major role to play and present many opportunities for sport managers and marketers. Practitioners need to understand both players and consumers and its relevance for the global sport sector, including associated stakeholders, namely the gaming industry, media, sponsors, sporting goods companies, and sport events. Cranmer et al. (2021) suggest that to have an in-depth understanding of the impact of esports upon the sport industry and the various sectors, a holistic approach is needed to take into account the inter-disciplinary nature and investigate spectator engagement.

Betting and Gambling

Another area that has risen dramatically in the past decade is the sport betting and gambling sector, which is aligned to the online platforms available for such usage. Due to the legalities of gambling within different countries, it is difficult to attain information on market leaders. The five leading gambling companies are based in the USA, Macao, and the UK. Forecasts for the global online gambling market is estimated to be worth more than \$92.9 billion by 2023 and it is estimated that the increase will continue for the foreseeable future (Lock, 2020). The exponential growth is mainly due to the use of smartphones and tablets and the ease of streaming sport. Such access to technology and digitalization advancements have made online gambling available to many customers across the globe who previously did not have such access. The impact that sport gambling plays within the sport sector is evolving

and the complex role that it has within sport management will continue to increase and researchers have suggested that it requires further research to fully understand such power and influence (Lopez-Gonzalez et al. 2017).

Researchers have highlighted the importance of responsible and ethical marketing and the important role that sport marketers need to undertake (Parke & Parke, 2019). The impact of sport gambling and the negative consequences associated with betting have been well documented, from match fixing (Abarbanel & Johnson, 2018; Breuer & Kaiser, 2017), illegal gambling (Kabiri et al. 2019), gambling addiction (Li et al., 2012), to other social issues (Killick & Griffiths, 2020; Lopez-Gonzalez et al. 2019). Houghton et al. (2020) suggest that gambling marketing can present numerous concerns including: dangerous narratives regarding risk and control; high complexity marketing bets that can result in significant losses for the individual; and affiliate marketing that incentivizes third party involvement which may not benefit the consumer. Similar concern is expressed by Lopez-Gonzalez and Griffiths (2018) who go so far to suggest that sport and modern forms of gambling can present serious concerns to public health, and work to understand the relationship between sports related marketing and the potential harmful consequences of sport gambling is an area that requires further work.

Undoubtedly, the sport betting and gambling sector will continue to evolve as technological advancements progress and new markets are opened across the globe. Such growth potentially allows many opportunities for sport organizations to benefit from this development. However, the role of sport marketers and how they target their potential customers, the message they present, and the ease of transaction warrants responsible and ethical decision-making processes, as well as constant scrutiny of robust systems to address the associated negative and illegal consequences of sport gambling (Li et al., 2015; Mao et al., 2015).

Social Issues Affecting Sports

Sports have always played an important role in society and social changes have always had a major impact upon strategic sport marketing. Understanding changes that affect consumer needs, wants, and demands is key to effective sport marketing, including societal changes that impact upon the sport sector. For example, in recent years environmental and climate issues have become an increasing area of concern. McCullough and Orr (2020) suggest that this is now considered an important sub-discipline within sport management due to the impact ‘sport ecology’ has on the sport industry and subsequent behavior of organizations, participants, fans, and customers. Similar views are endorsed by Graham et al. (2018) who indicate that environmental sustainability is a key aspect of sport management needed to fully understand what needs to be done to build a sustainable sport industry for future generations. Other researchers have investigated the importance of carrying out corporate social responsibility and highlighted how sport organizations are demonstrating their concerns for social and environmental issues through governance and marketing initiatives to demonstrate their commitment to sustainability (Lu & Lin, 2020; Miragaia et al. 2017; Naess, 2020). According to Trail and McCullough (2019), understanding fan needs and values with regard to environmental sustainability is critical for sport marketers today. They stress the importance and potential power sport marketers have to ‘craft messages’ when engaging with their customers regarding sustainability and using marketing campaigns to potentially change people’s attitudes and behavior. Similar beliefs are endorsed by Kim et al. (2021) who stress the role that marketing and communication strategies can play in consumer beliefs and attitudes regarding environmental issues.

Another key area that has enormous ramifications for sport marketing now and increasingly in the future is the rise of different consumer segments (e.g., females, LGBTQ, children, and senior people). MaCaulay (2020) suggests that whilst historically the sport

industry was male dominated, social changes across the globe in recent decades have resulted in increased target group segmentation due to the changing demographics of sport users. Understanding who your customers are and potential new areas of growth are key to success. Sport organizations that can predict and preempt such changes often gain competitive advantage. Timm (2019) suggests that women are a major focus for sport organizations and many organizations are now concentrating on gender-specific marketing strategies that addresses different consumer's needs to that of men. Similar research identifying the rise of the LGBTQ consumer sector within sport (Melton & McCharles, 2021) and how this is now seen as extremely appealing to many sport organizations, who are using marketing communications to compete for increased market share. "For a sport organization to truly be seen as engaging in LGBTQ inclusive marketing, all of its actions, statements and behaviors should signal inclusivity" (p. 13). Segmentation has always been an important element of the marketing mix and adopting the correct strategies to target sport consumers is key. Sport marketers need to be aware of which channels their customers will use and implement effective campaigns that will appeal (Zhang et al., 2003).

Whilst advancements in technology have been discussed, such platforms may not always be the most appropriate forum. Armstrong et al. (2020) suggest that modern marketing needs to be customer driven and to understand that customer segmentation is complex. They suggest that the most effective marketers are those that cultivate capabilities for effective engagement across many microsegments, allowing greater understanding of their customer's needs, motivations, and behaviors, resulting in increased number of consumers and greater loyalty. A recent study by Deloitte (2021) suggests that through challenging times of change as demonstrated by the COVID-19 pandemic, organizations that demonstrate human-centric solutions are best equipped to deal with uncertainty. Thus, marketers should focus on initiatives that bolster customer engagement and increase the

organization's impact on society. Most importantly, organizations need to demonstrate 'authenticity' to their customers by responding to their needs, delivering on guarantees, and ensuring that the marketing messages are authentic and compatible.

Closing Remarks

The global sport industry continues to grow at a fast pace, which is coupled by growing economies and emerging new markets. The diverse nature of the industry and the wide appeal to people of different backgrounds offer countless opportunities for developed sport organizations to expand, as well as new entrants to the marketplace. Key to being successful in the sport industry is an awareness of changes within the external environment and how they can potentially impact the organizational strategy. As identified, such variations can be diverse including, but not limited to, demographics, technology, socio-cultural, environmental, and economic changes. It is apparent that being aware and 'ahead of the game' with regard to forecasting, horizon scanning, and using research and data analytics to inform of change is constructive for formulating effective marketing plans and implementing the plans successfully. Sport marketers need to comprehend their consumers more than ever; for example, with the advancements of communication technology, consumers are better informed of great social issues associated with inequality, discrimination, and injustice. All such factors have an enormous impact upon how consumers view brands, products, and services. The overarching message that is apparent from much of the research findings is the importance of knowing who the customers are, what they want, and how sport organizations can engage with them. The role of strategic marketing planning is vital to the success of many sport organizations that are relying on the articulated vision and well-thought-out road map to ensure that they are well positioned to deal with changes and challenges, and to effectively deliver high quality products and services to customers.

The co-editors of this book have selected research papers relevant to the topical issues. In addition to this introduction chapter, this book contains a total of 15 chapters. The chapters are contributed by a total of 36 scholars representing 13 countries or territories around the world, including Brazil, Canada, China, Iran, New Zealand, Portugal, Russia, Spain, Tanzania, Thailand, Turkey, United Kingdom, and United States of America. Co-Editors Ruth M Crabtree and James J. Zhang would like to take this opportunity to thank these eminent scholars for their remarkable contributions to the completion of this book project. This book is commissioned by the WASM Executive Board, in line with the mission to “facilitate sport management research and teaching and learning excellence worldwide” and to fulfil the aims of “celebrating diversity and cross-cultural understanding of sport management behavior and practice”. It covers a range of key research and practical issues in globalized sport marketing strategies offering insight from various cultural contexts, allowing informed understanding of current issues across the globe. The book combines scholarly output derived from diverse inquiry protocols, including review of literature, documentary analysis, qualitative research, and quantitative investigations.

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