

Eva Čáslavová et al.

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# Trends in Sports Marketing



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# Foreword

Eva Čáslavová

Sports marketing has seen a turbulent evolution in recent years. Behind it all are the intentions of sports institutions to develop their revenue streams and to attract, retain and grow their fan bases. The contributing causes are many. First and foremost, it is the development of the sports industry itself. The factors cited by Pitts and Stotlar (1996) define the sports industry and are still relevant even though they have shifted in content. I list them myself in my latest publication, *Management a marketing sportu 21. století* (Managing and marketing sport in the 21st century). By some measures, the sports industry today generates global revenues in excess of USD 80 billion per year and is growing faster than almost any other major industry in the world (Gough, 2023). The development of sports marketing is further influenced by the evolution of the media. In this respect, new technologies are bringing about changes. Furthermore, sport is becoming an increasingly competitive environment for sponsors who want to promote their marketing and communication intentions in conjunction with their chosen sport. Sponsorship is thus moving towards projects that are 'tailor-made' for partners. The sports business is also increasingly taking its brand into account. Branding and rebranding activity is most observable in professional sports popular with fans. The innovations are many, and not all of them are represented in Czech literature.

Therefore, it was my effort and the effort of my co-authors to broaden general knowledge of sports marketing in the Czech context. This publication, which we are presenting on the basis of our knowledge from the sports environment attained through many years of experience, should contribute to this with the support of the results of our research. The

content of the publication thus focuses on trends in the development of sports marketing in a global context, as well as specifically on trends in digital marketing in sport, the field of sports services, their development trends and the use of sports celebrities in marketing.

In the first chapter, the author formulates future trends of sports marketing in general and specifically in the Czech context. The analysis is based on the formulation of megatrends that influence the development of our society including income and wealth, working hours and leisure time, changing values, changes in technology and medicine, changes in population growth and urbanisation, and changes in the relationship between sport and economics. Furthermore, the trends in sport today and the demands of sport in the future are used in the analysis, such as increasing leisure spending, the growth of sporting activity, the concept of sport as an individual experience, new technologies in training and competition, changes in the natural and physical environment, and the commercialisation and globalisation of sport. The trends in the development of sports marketing themselves present elements on which to build in the future and shape the basic development trends with respect to strategic and tactical marketing of sport as well as the Czech environment.

The second and third chapters focus on current trends in the online marketing environment. These chapters describe the possibility of the use of trends in the sports environment and show how each of them can be implemented by sports organisations in practice. Furthermore, they deal with the structure of online marketing strategy and marketing planning in the digital environment, as this is a topic that is currently highly emphasised by sports organisations. Online marketing strategy is presented using current trends, taking into account the specificities of the sports environment and the options available to sports organisations in implementing online marketing activities.

The fourth chapter focuses on the use of a specific reference group, i.e., sports personalities and celebrities, in the marketing of companies. First, the general effect of reference groups on customers is explained, followed by the definition of sports celebrities as a specific reference group. The chapter then focuses on the main categories of effects resulting from the use of sports celebrities in marketing, both positive and negative in the form of possible risks. The chapter also presents methods and procedures for selecting sports celebrities for corporate marketing strategies and their subsequent specific forms of use.

The fifth chapter deals with sports services. These represent the fastest growing sector in sport. Services can be divided into those with active

customer participation (the customer is actively involved in the sport or physical activity), or those with passive customer participation (the customer is in a passive spectator role). Both types of customers need to be communicated with differently, so it is necessary to know the specific characteristics of these services and to choose different marketing mix tools. Finally, the chapter discusses future trends in service development, which are not only related to the increasing globalisation and commercialisation of sport, but also to the field of digitalisation and artificial intelligence.

The book is not only intended for students of universities and colleges who are dealing with the issue of sports marketing, but also for practitioners who want to acquire new knowledge and insight into sports marketing and apply it in practice. The possible use of these findings gives the authors a sense of the publication's purpose as well as motivation for future research in this field.



# **1. Trends in the development of sports marketing**

Eva Čáslavová

The marketing of sport has evolved very rapidly over the last 20 years. If we look back at the past, the application of marketing in sport started with partial concepts, which, in sports organisations, were mainly oriented to the sale of individual advertising. Later on, other counter-service offerings were added, which formed the axis of sports sponsorship. Nowadays, sports are about comprehensive marketing concepts that are developed by sports organisations to sell sports products using modern technical means and new media with an orientation towards selected target markets.

The scope of marketing in sport is wide, it includes the marketing of sport events and sport organisations, such as professional sports clubs, on the one hand, and the non-profit marketing of sport organisations, such as associations and a variety of organisations offering sport services for a fee, on the other hand. If we want to look at the development of sports marketing globally, we must first start from the megatrends that influence this development.

## **1.1 Megatrends influencing the development of sports marketing**

Sports marketing reflects the development in sport, which is based on the long term. As stated by Freyer (2018), development trends, forecasts and scenarios in sport need to be examined in relation to the research of the sport environment. According to Freyer, trends that dynamically influence the sport environment can be divided into megatrends, sport

industry trends and market trends. He sees the very basis for the development of sports marketing trends in the continuity of the effects of megatrends, current trends in sport and demands on sport in the future. We believe that this analysis is the most comprehensive one of the sports marketing publications presented at the same time, so we will discuss it at a greater length.

Freyer (2018) classifies the following as general megatrends: income and wealth, working hours and leisure, the changing values of society, changes in technology and medicine, changes in population growth and urbanisation, and the relationship between sport and economics. We will take a closer look at them in the Czech context.

### **1.1.1 Megatrend 1: Income and wealth**

According to the database of the Czech Statistical Office (CSO), the GDP of the Czech Republic was CZK 675,424 million in 1990 and developmentally increased to CZK 7,618,647 million in 2023.

As far as the total leisure expenditure is concerned, unfortunately, no data are recorded in the CSO database. We can only rely on data from Czech households, where leisure spending can be seen on items such as recreation and culture, where it increased between 2016 and 2019. In 2020, there was a decline due to the Covid pandemic. The same trend can be seen in consumer durables for recreation and culture.

As the wealth of the Czech society grows, with the exception of 2020, so does the expenditure on the personal care of the population (expenditure of Czech households), which can also include expenditure on the health and fitness of citizens.

### **1.1.2 Megatrend 2: Working time and leisure**

The amount of leisure time depends mainly on the workload. In the ratio of working hours to leisure time, a number of authors show that leisure time is increasing. (Dumazedier, 1988; Aguiar and Hurst, 2007; Freyer, 2018; Mišovič, 2020) Of course, longer working hours result in less leisure time. The situation here is significantly affected by the age distribution of the population. The research report of the Institute of Sociology of the Czech Academy of Sciences states (Sociologický ústav ČSAV, 2015) the following regarding the situation in the Czech Republic:

Young people under 24 years of age have the most free time – more than 7 hours a day. After that, the amount of free time decreases to 5 hours for the 35 to 44 age category. As age increases, leisure time increases again. Seniors over 65 years of age enjoy over 8 hours of leisure time per day. This age trend reflects the different economic activity of each group. The amount of leisure time among the unemployed under the age of 50 is similar to that of seniors. (Transl. by author)

The report also states that stress levels decrease as the amount of leisure time increases.

### **1.1.3 Megatrend 3: Changing values**

Currently, values are dominated by a focus on the self and self-development. This is of course linked to the need for health and fitness. At the same time, there is a strong orientation towards pleasure, which is beginning to take precedence over work for millennials (otherwise known as Generation Y, or the internet or digital generation). A feature of the new generation, unlike previous generations, is the reluctance to sacrifice their interests, non-work activities and hobbies exclusively to their jobs. Young people also have a greater need to communicate their experiences to others (increased communication). Values are also influenced by the alternative cultures that reach us. At the same time, awareness of environmental protection is growing.

### **1.1.4 Megatrend 4: Changes in technology and medicine**

The present is characterised by an unprecedented amount of technical change. The work process is undergoing turbulent changes due to the use of computers and computer networks, automated or digital machines and devices. Technical changes also affect our personal lives. We are using mobile phones, computers and tablets more, which help us to communicate more intensively with our environment, manage our homes and fill our leisure time. Medicine is also demonstrating the use of new technologies, both in patient care and in preventive care. At the same time, given our topic, people's performance boundaries are constantly increasing through the use of new knowledge.

The use of artificial intelligence in technology and medicine is being increasingly addressed. Examples of the use of artificial intelligence according to Frankenfield (2021) are:

- intelligent assistants;
- tools for disease mapping and prediction;
- manufacturing and flying robots;
- optimised and personalised recommendations for medical treatments;
- conversational robots for marketing and customer service;
- robo-advisors for stock trading;
- spam email filters;
- tools for monitoring dangerous content or fake news on social media;
- song or TV show recommendations from Spotify and Netflix.

### **1.1.5 Megatrend 5: Changes in population growth and urbanisation**

As stated in the Czech Statistical Office report (CSO, 2024) on population development:

At the end of 2023, the population of the Czech Republic will slightly exceed the 10.9 million for the first time since the end of the Second World War, when according to the balance sheet of the Czech Statistical Office, the population as of 31 December 2023 was 10,900,555. During 2023, it grew by 73,000 representing a 0.7% annual increase. Within the last decade, such growth has been well above average (only 0.1-0.4% between 2014 and 2021), although far short of the rate in 2022. At that time, the population of the Czech Republic grew by 3.0% and by 310,800 in absolute terms, the highest in history in both relative and absolute terms. (Transl. by author)

Regarding the age structure of the population, the report states that the senior and child population has been increasing in the long term (since 2006) and the proportion of the working age population has been decreasing, so it can be said that the population is ageing.

In 2023, the long-term trend of population ageing continued. The average age of the population, steadily increasing since the early 1980s, increased by two-tenths of a year to 42.8 years in 2023. Over the last decade, it has increased by a total of 1.3 years. The median age, which divides the population into two equal parts, increased by an aggregate of 3.2 years to 44 years during

2014–2023. The Economic Dependency Index, which compares the size of the components of the population generally referred to as non-productive (0–19 and 65+ years) and economically productive (20–64 years), increased from 59 to 72 non-working age persons per 100 working age persons over the decade. (ZDROJ, transl. by author)

Regarding urbanisation, the Czech Government’s Analysis of the Development of the Czech Republic (The Government Council for Sustainable Development, 2016) states as follows:

The majority of the population lives in cities in the Czech Republic; over 60% of the population lives in municipalities with a population of over 5,000 inhabitants. Medium and small cities stabilise settlement structures and people from the surrounding area find jobs and services there. (Transl. by author)

Of course, this also applies to sports services. If we focus on small municipalities, services are less available there, whether it be health and public services, drinking water supply, sewage networks, or leisure activities for children and young people.

Public services are being undermined by internal migration. Young people are leaving the countryside for big cities in search of work. Even if the trend is towards abandonment, those villages that have built up adequate facilities and offer employment opportunities are not losing population. It is also necessary to take into account the economic crisis in the context of the Covid pandemic, which also encouraged migration to big cities.

In addition to the above, the development of suburban districts, which often lack proper infrastructure, can be observed in the last quarter of a century. Regional inequalities must also be taken into account. As the demands on space increase, measures to protect natural assets are increasingly being taken into account. Areas under protection are divided into national parks and protected areas. In addition, there are also small-scale protected areas in populated areas.

### **1.1.6 Megatrend 6: Sport and economics**

The connection between sport and economics has become increasingly important in many ways over the last quarter of a century. Economic issues are being addressed in connection with professional sport, with the

provision of sport services on a business basis, but also in the non-profit sector of sport, for example, with the assessment of their economic performance.

There is a significantly higher leisure offer through a variety of industries. Companies are racing from basic to luxury products, so the consumer can choose. This of course also applies to the offer in sport, various sports equipment, sports services as well as sporting events.

Changes are also occurring in the market environment. With rising income and the saturation of needs, producer markets are changing into buyer markets. This means that the buyer has the final say. They choose from a wide range of products and this results in organisations having to promote their products more than before, to inform their customers in detail about their products and to define themselves in their offerings relative to competitors. This then has a direct impact on the use of marketing in the sports environment. As industrialisation and commercialisation of daily life takes hold in our conditions, ethical principles, pedagogical action, and selfless behaviour are more suppressed in this connection.

The relationship between sport and economics is also affected by globalisation. It is manifested in the technologies used in sport, in the increased supply of sport services on a commercial basis, and in products such as equipment and gear for use in sport. Furthermore, the effects of globalisation can be seen in the increasing and intensive use of the media for sport with regard to marketing communication on an international scale, the use of sport for the marketing communication of companies in the international space, and the increasing number of jobs in sport that can be pursued within the European Union.

## **1.2 Trends in today's sport and requirements for the sport of the future**

### **1.2.1 Increasing leisure spending**

Although leisure spending declined during the Covid period, the overall trend is upwards. This includes spending on sport. This is firstly due to the fact that sport is becoming more accessible to a wider segment of the population and secondly because sports associated with high costs, such as golf, skiing, motor sports etc. are becoming more popular.

These societal developments are leading to a passive consumer society and this, in turn, is resulting in sport being seen as a consumer good that reinforces a consciousness of social empowerment and wealth.

The Czech Statistical Office (2020) presents data on consumption in sport in the Czech Republic in the publication *Statistika sportu: základní ukazatele 2019* (Statistics on sport: basic indicators in 2019). The five-year average of consumption between 2015 and 2019 in the category of sports equipment, camping and outdoor recreation, including repairs, was approximately CZK 6.6 billion, with the consumption average in the recreational and sporting services category reaching nearly CZK 20.6 billion. However, it should be noted that the COICOP classification used to capture individual consumption does not have a separate category for sports footwear and clothing. These are included in the equipment for sport, camping and recreation category. At the same time, sports services are grouped together with recreational services.

### **1.2.2 Increase in sports activities**

The increase in sporting activity is due to the rich offer for the population in organised as well as unorganised sport. The Czech Statistical Office presents data on the Czech population's participation in sport activities from the European Health Interview Survey (CSO, 2020), which provides internationally comparable information on the Czech population's active participation in sport activities.

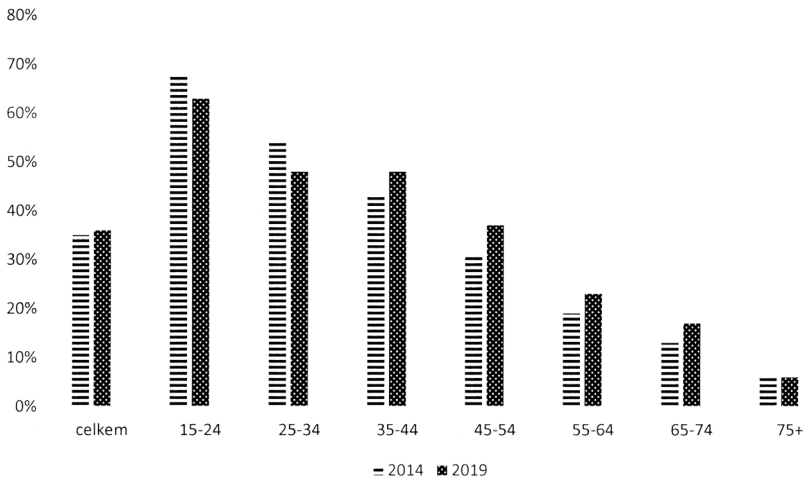
The study compares data for 2019 with data for 2014. The data show that more than a third of the population is involved in sport, fitness or recreational physical activity on a regular basis (at least once a week, for at least 10 minutes at a time). Compared to the 2014 data, the proportion of people under the age of 34 playing sport has decreased slightly. In contrast, the proportion of middle-aged and older age groups playing sport has increased.

Despite these data, we need to take into account the growing competitors for leisure activities such as television, internet, video, and gambling. New sports have emerged that were not around ten years ago, for example, skateboarding, surfing, breakdancing.

New professions are emerging in sport. There are, for example, sports managers, whose profession has arisen out of the need for someone to take care of the finances of sports organisations, who had been handling financial matters and seeking financial resources themselves, the need

to strengthen the business activities of these organisations, provide systematic care for sports talents, and expand the range of services for the athletes of these organisations, as well as due to an increase in paperwork in relation to legal issues. These problems had to be addressed primarily by professional sport, but today the need to address some of these areas is being transferred to non-profit sports organisations.

The increase in sporting activity is also reflected in the growth of employee sport. Large companies that operate in the Czech Republic support sport for their employees. They do this not only by providing vouchers and passes to fitness and wellness centres (e.g., the Multisport card), but also by organising sports activities through their companies. Examples of the latter are various types of sports games and tournaments, such as the Golden Tour (a football league for companies), Innogy's summer sports games, etc.



**Figure 1.1.** Percentage of the population actively practising sports by age  
Source: European Sample Survey 2019 (CSO, 2020)

### 1.2.3 Sport as an individual experience

Focus on sport as an individual experience is becoming increasingly important. As stated by Chelladurai in his classification of sport products (Čáslavová, 2020), service-oriented or psychological benefit-oriented products are gaining ground. Increasingly, the emphasis is on

individualising sports services for individual consumers to provide a ‘tailor-made service’ for each consumer, while also underpinning the consumer’s desire to achieve something through sport, to outdo themselves.

New offerings in sport, the so-called lifestyle sports, respond to this concept. According to Wheaton (2004) – quoted in Veselá, 2019 – lifestyle sports can be characterised as:

- a historically recent phenomenon that has emerged in the last few decades;
- sports that are fundamentally about participation rather than spectatorship;
- sports that are based on the consumption of new products and often involve new technologies, change and innovation;
- sports that require a high commitment in time, finances, lifestyle and forms of collective expression, attitudes and social identity;
- sports that promote a participatory ideology of fun, hedonism and living for the moment;
- sports where there is a predominantly, not exclusively, individualistic form or approach;
- sports that are non-aggressive and non-contact;
- sports that are practiced in new or appropriate outdoor zones, often in non-urban environments such as the mountains or the ocean.

Sports tourism is also developing in this direction, with sport being the main or secondary motive of the trip.

Following the individualisation of experiences, we are seeing a gradual move from associations to private organisations that meet this need and do not bind consumers to organisational forms with which they are linked in the long term. The mode of socialisation in sport, previously based on friendship and camaraderie, is often turning into business-managerial encounters through sporting activities.

#### **1.2.4 New technologies in training and competitions**

Technical innovations are being applied in sport. Significant advances are evident in the measurement technology of sports performance in sport.

At the Olympic Games, the Swiss company Omega provides the time-keeping. At the London Olympics, the Quantum Timer system was used for the first time, specifically in cycling and swimming. This timing system can measure time to a resolution of 1 millionth of a second, 100 times more accurately than previous devices. However, the official times are

still given in thousandths of a second at most. It can therefore be concluded that the measuring accuracy of devices like these is constantly improving. At the first modern Olympics in 1896, stopwatches could only measure to an accuracy of one-fifth of a second.

New technologies are used in sport. An example of this is the use of nanotechnology in skate grinding. However, new materials form the basis for innovation in a range of sports tools and equipment. An example is the development of skis, which involves the application of a large number of technologies such as the use of glass fibres, the interlacing of glass fibres with sheets of titanium, etc. In training aids, it is the development of various training devices for athletes – running, cycling, breathing. Some of them are combined with virtual reality.

New techniques are also making their way to physical medicine. Bio-mechanical analysis of movement – kinograms – is used here. Many techniques are also combined in the diagnosis of sports performance.

New techniques and technologies are also used to present sport through new media based on digital, numerical data encoding. Digitalisation focuses on the broadcasting of sporting events, the use of virtual advertising at sporting events, as well as neuromarketing in exploring consumer responses to sporting events.

A chapter in itself is esports, which many people discount as ‘real’ sports. However, there is no doubt, as I document in my publication (Čáslavová, 2020), that the fan base of esports is growing. Esports are most prevalent in Asia, especially in South Korea, China, and Taiwan, where they were officially recognised as a sport first.

Sports marketing agencies see a big opportunity here to boost sports revenue. Further opportunities for professionalisation and self-realisation give these sports a future. The biggest esports event is the World Cyber Games (WCG), an international multi-game esports competition in which hundreds of athletes from all over the world participate in various events. These games have been held since 2000, and in 2024 they were held in Jakarta, Indonesia. The system of competitions following these games continues to expand around the world. In the Czech Republic, the Czech Esports Association, z.s., is a guarantor of organised esports.

### **1.2.5 Changes in the natural and physical environment**

The changing age structure (see Megatrend 5) provides space and marketing opportunity for the growth of sport for the elderly. Sport for the

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