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## **Introduction: sport and COVID-19: impacts and challenges for the future (Volume 1)**

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## Introduction: sport and COVID-19: impacts and challenges for the future (Volume 1)

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On 13 December 2020, the New York Times ran a detailed piece entitled ‘2020: The Year in Sports When Everybody Lost’ (Drape et al., 2020). The article lamented the economic impact of the COVID-19 pandemic across the world’s sporting organizations, describing losses of US\$13b in the US sporting leagues, US\$28.6b in wages and earnings, and nearly 1.5 million jobs in the US alone, while revenue losses exceeded 1 billion euros among some of Europe’s biggest football clubs. Similarly, dire outcomes careered through all sub-sectors of sport when major events and competitions were cancelled, postponed and shortened, including Wimbledon and the Olympic Games, the latter polarizing the residents of Tokyo (Sato et al., 2020). Participation sport ground to a halt or a series of stop-starts, and leisure, recreation and exercise continued only outdoors and in homes.

At the same time, as crises gripped mainstream sport, alternative sporting content and activities proliferated leading to a massive surge in home fitness equipment sales, online exercise studios, esports and re-packaged sporting material. While conventional sport and its supply chain exsanguinated, new versions blossomed, the two blending in the middle as hybrid fan-facing initiatives were invented by the more innovative and well resourced, thanks to mobile, streaming technologies and the giant firms providing them. Meanwhile, those lucky enough to maintain jobs in the sporting industry worked largely from home. Forget about the ‘Fourth Industrial Revolution’ or even the ‘Age of Information’, according to an e-book produced by technology giant Cisco in collaboration with Wired magazine, we have arrived at the ‘Age of WFA’ – Work from Anywhere (CiscoWired, 2021). So arrived yet another ‘new’ working model, in this case based on a hybrid response to a sudden amplification of the remote economy.

As the articles in this special issue demonstrate, the pandemic has revealed the extent to which traditional sport is inextricably coupled to participation and fan attendance. Hyperbole for once seems inadequate to fully account for the prodigious impact the sporting world and its stakeholders and fans have endured and are continuing to combat. If the response to the call for papers for this special issue is a measure of the sport management scholarly community’s assessment of COVID’s importance to the industry, we would conclude that has never been a single exogenous event that has

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ever come close to rivalling its brutal shockwave. In fact, the call for papers yielded the largest ever volume of submissions that the journal has ever received for a special issue. So many high-quality articles were received that the journal has committed to producing two volumes to accommodate as many as possible.

The COVID-enforced closure of local venues and facilities in conjunction with fierce social distancing forced the most social and participatory sport to cease (Mastromartino et al., 2020), a starting point for several of the studies published in this first volume. At the other end of the spectrum, professional sport and its competitive leagues drained their cash in the absence of revenues tied to fans, from gate receipts and concessions to merchandise and sponsorships, although the worst accompanied the losses connected to reduced broadcasting. Although US juggernaut leagues like the National Football League (NFL) and its franchises were able to push through the financial chasm left by the pandemic's estimated but ongoing US\$6b impact, few sport organizations had either the reserves or state support to offset the losses. One of the most generous government alleviation packages was delivered in the UK in the form of 300 million pounds in an emergency government bailout for a select group of professional sports such as rugby and horse racing, but excluding the wealthiest like football and cricket.

Few sub-sectors of the sport industry have escaped the impact of the pandemic, although some have enjoyed unprecedented growth. For the majority of participation starved recreational players, venues and facilities, sponsors and broadcasters, and sporting organizations and leagues, the impact has been swift and severe (Evans et al., 2020; Horky, 2020; Parnell et al., 2020; Ratten, 2020). Events 'pivoted' to compensate for the need to exclude live fans. Some, like the X-Games Aspen, invested heavily in a broadcast-only model in lieu of the absence of 50,000 live attendees. Their January 2021 event was a huge risk for a sport that had built its base on a culture of live experience. As it turned out, the event was a massive success, as viewers shifted their attention to social media and digital platforms in record numbers. Even double-digit television viewership increases were eclipsed by the triple-digit growth across social and digital media platforms, with 105 million video views across TikTok, Instagram, YouTube, Facebook, Twitter and Snapchat (+483% year-over-year). Other winners were esports, such as Electronic Arts, which shifted to a fully online, digital event model.

Like event owners, the media and broadcasters relying on sporting content have been severely challenged by the pandemic, especially given their significant long-term and largely fixed rights deals with major leagues, having turned to sport as a major platform for investment over the last decade or so (Hutchins et al., 2019). Connections to sport suddenly faded, leaving the traditional and new media scrambling to replace the content with alternative programming (Rust, 2020). At the same time, digital sporting communities surged (Roth Smith, 2020).

Sponsors have suffered, especially those relying on a combination of event exposure, player endorsements and retail sales (Dašić et al., 2020). Adidas, for example, closed its retail stores across the world, while their sponsorship deals collapsed in the vacuum of event and competition closures, not the least of which were the hopes attached to the 2020 Olympics and Euro 2020. During the worst period of the pandemic so far, 70% of the company's stores were closed. However, Adidas ramped up its digital efforts, driving its products to a record 160 markets around the globe based on a personalization-at-scale model that yielded more than a 90% increase in e-commerce sales.

The most innovative responses by sport organizations were born from necessity. Desperate to find new revenue opportunities to compensate for the losses associated with the absence of content for which fans and others pay, sport properties turned to novel engagement strategies, often through partnerships emphasizing new forms of content monetization and the commercial exploitation of sport brands. For example, English Premier League club Southampton followed the trend set by a series of other European football clubs, including AC Milan, Swansea City, FC Barcelona, Real Madrid and Paris Saint-Germain, in entering an agreement with a cryptocurrency firm. Such agreements transcend the traditional composition of sponsorship, incorporating matchday rights deals to engage fans with cryptocurrency opportunities as well as Bitcoin value for VIP fans. It might well have been the pandemic's impact on revenues that encouraged a cadre of big brand European football clubs to precipitously announce their formation of a European Super League, without accounting for the response from fans. While abandoned within days of its April 2021 pronouncement, it remains clear that even the mightiest have felt acute losses and are frantically pursuing new and secure business models (Hammerschmidt et al., 2021).

In the US, the National Hockey League (NHL) secured a deal with Amazon Web Services to enhance fan experiences. Just as with the National Basketball Association (Microsoft), the NFL (Cisco) and Major League Baseball (Google), the NHL used the pandemic to dive deep into data thanks to the colossal analytical might of a technology giant. Player tracking, bespoke insights, super-connectivity, mobile enhancement, platform interaction, social media, at-home experiences, AI and learning algorithms, and immersive technology have become keywords in the new jargon of the pandemic era. Despite the unprecedented upheaval, sport organizations were energized into finding new mechanisms through which to engage with their fans. Of course, social media proved an ideal fit for the job as sports and athletes made brands out of tweets and posts, the most effective of which encouraged personal responses, media co-creation, daily following, influenced engagement and content monetization (Sharpe et al., 2020).

Meanwhile, golfer Bryson DeChambeau used the stay-at-home requirement to post social media updates of his innovative applications of technology, in the process of triumphing the endorsements and sponsorships that were exposed. DeChambeau's HD golf simulator from Flightscope apparently provided all the data he could ever need about his swing, and in-between gym sessions, he managed to exercise his Fortnite thumbs raising US\$25,000 for charity. Most sport participants were unable to mobilize this kind of technology, however, leading some commentators to predict a potential generation lost to sport as a consequence of the virus (Drummond et al., 2020). The effects have also been uneven, disproportionately affecting those living under trying socio-economic circumstances, as well as those sporting participants at the lower end of the performance continuum who were already marginalized in terms of access to, and quality of equipment and facilities (Kelly et al., 2020). In addition, suggestions that disability sport has been severely affected as a result of limited access to alternative facilities and exercise options, as well as its comparatively poor funding base, unable to weather a period of limited or no cash flow (Fitzgerald et al., 2020).

Perhaps in contradiction, exercise has become even more important during the shutdown periods, despite the increased difficulty in its performance. One consequence has been a proliferation of home-based exercise technologies, equipment and virtual

experiences, in some cases like the now ubiquitous streaming biking technology Peloton, all rolled into one product (BBC News, 2020). Also unsurprisingly, the gaming industry went through the roof as millions of listless, house-bound bodies sat on the couch and played games and esports (Edgar, 2021). In the interests of getting people back to exercise in safety, some public health institutions have since released various kinds of 'rebooting sport' principles, frameworks and guidelines (see, e.g. Hughes et al., 2020).

In their analysis of the post-pandemic implications for sport, Grix et al. (2020) foreshadowed three legacy issues. First, they argued that the pandemic should force governments to re-evaluate their investment decisions in sport, most notably the tension between elite and participation resourcing, the latter a perennial loser to the former's allure. Secondly, that the crisis will significantly increase the use of remote and online work and business, including those in the sport sector. Finally, Grix and colleagues suggested that the remarkable growth of esports during the pandemic, as well as its use by mainstream sports like Formula 1 and FIFA to enhance its traditional product with new layers, would continue. Both volumes of the special issue pick up on aspects of these predictions, in addition to many others.

As we see in this volume, one side-effect of the virus' ubiquity is that it has facilitated the study of infected populations, and in the case of sport, the opportunity to observe natural experiments about fan behaviour in the absence of spectatorship. For example, researchers have mobilized swiftly to capitalize on the data available concerning a wide variety of questions, including how an airborne virus spreads among crowds, how social distancing can be employed to control contagion, and of course, a suite of economic and behavioural modelling around purchasing and market behaviour during periods when sporting services and content have been interrupted (Drewes et al., 2020; Singleton et al., 2021). Begović (2020) noted that crises test resilience and economic and socio-political dynamics are subjected to intense pressure. As the contributions to this special edition foreshadow, the COVID-19 pandemic has stimulated the first significant interdisciplinary study of crisis, disaster and emergency management in sport (Miles & Shipway, 2020), as well as a renewed debate about the once inviolable assumption that the sport product is what happens on the field of play and is consumed live.

For sport organizations faced with a series of seemingly impossible choices in terms of their responses to the pandemic, the decision-making motif has been one juxtaposed between the competing tensions of risk versus opportunity, and of cautious inaction versus competitive proactivity. Adding to these complexities have been a series of ethical considerations, including the health and welfare of athletes, support staff, spectators and employees with respect to the immediate environment and its safety. Equally, sport organizations have counterbalanced their restraint with an eye on the future to mitigate the severe implications to stakeholders in the event of radically curtailed revenues and business opportunities. The first article of this special issue by Hindman, Walker and Agyemang reported on the decision-making challenges accompanying the COVID crisis, especially with respect to the management of risk and the ethical sensitivities impelled by the pre-eminence of personal safety. Based on a content analysis of NBA media coverage in the first half of 2020, Hindman et al. discovered that decision-making by the league was partitioned by a form of bounded rationality. Following the eponymous theory, the research reinforces the idea that decision-makers are bounded in their rational judgements, instead landing on satisfactory decisions rather than

optimal ones. Accordingly, the NBA's decision-making process was seen to waver between caution and risk depending upon the priorities rising to the top in each situation, whether a matter of health and safety, finance, or even the possibility of securing a competitive advantage. Caution and risk were embraced simultaneously, shifting with the strongest imperative at the time. Not only were decisions rationally bounded, but they were also morally bounded too. That meant the NBA acted to protect health and safety when the acute need was present, but that it also prioritized economic and financial pressures as soon as the immediate health threats had diminished. Inevitably, there have been innumerable lessons for sport's leaders emanating from the pandemic, with ethical and consistent decision-making in the complex tension between caution and risk a prominent theme.

The second article by Fühner, Schmidt and Schreyer also examined the risk implications for sport from COVID, testing whether highly diversified professional football clubs were less vulnerable to the crisis than undiversified clubs, at least from an investor's perspective. The researchers operationalized the robustness of diversified clubs via the proxy of their daily stock returns during the 2019–2020 season. In total, over 5000 daily returns were examined for 21 publicly listed football clubs in Europe. During the COVID crisis period, investors gave preference to stocks of clubs with higher levels of product diversification, while those with greater geographic diversification were less popular. Strong local positioning combined with product spread provided clubs with greater immunity to stock fluctuations and crashes. Product diversification also appears to decrease a club's vulnerability to the 'match result trap', where stock value can tumble along with poor on-field performance. Of salience was the finding of Fühner et al. that no significant advantage accompanied club size, which suggests that product diversification might have benefits for any sport organization seeking to protect its value in a turbulent marketplace.

This issue sheds some light on the potential legacy of COVID-19 on sport in the future, especially during what might be a lengthy period of tension between unrestricted freedom and complete shutdown where events and competitions must navigate changing regulations as well as nervous consumers. For example, the third article by Vegara-Ferri, Pallarés and Angosto assessed the extent to which fear and concern for health affected the perceptions of a professional cycling event held by the residents where it was staged. Their study offers a unique snapshot of residents' perceptions – and undoubtedly one that has no precedent – as it was focused on the first international cycling event held since the earlier cancellation of all competitions (and during a pre-vaccine period), in this instance in the Spanish city of Burgos. Based on a post-event Facebook survey, a cluster analysis revealed three groupings of residents – Safe, Unsafe and Neutral. Curiously, the data pointed to an almost even division of perceptions where one-third of the sampled residents were unafraid (Safe), one-third afraid (Unsafe) and one-third indifferent (Neutral). Perhaps unsurprisingly, the attending spectators were less fearful than their residential counterparts who stayed away from the event. Although Vegara-Ferri et al.'s study was local in nature, its relevance seems resounding in light of the number of major sporting events that have postponed with little insight about when to re-start. Indeed, like Sato et al.'s (2020) study of Tokyo's residents wherein half were in favour and half against the 2020 postponement, the dangers and risks of COVID might have a polarizing effect on consumers trying to decide whether to risk exposure.



Two other implications from this study are worth noting. The first is that the residents of Burgos uniformly reported favourable opinions about their future intentions to follow live sport, suggesting that even those who felt unsafe had not permanently lost their sport interest. The second is that the unafraid followers of the event valued it highly, especially because it offered entertainment at a time when other social activities were curtailed.

Faced with the unprecedented nature of the virus and its unclear risk profile, sport organizations delivering competitions and events continued to operate in the early stages of the outbreak, prior to the social shutdowns. The fourth article by Reade and Singleton looked to stadium attendances in the elite football leagues in England, Italy, France, Spain and Germany, with the aim of revealing how fans responded during this initial period. Accordingly, Reade and Singleton used panel data methods to scrutinize the variation in day-to-day attendances in each of the leagues, effectively quantifying the impact of COVID-19 sentiment on the spectator attendance behaviour. Analyses highlighted a negative effect on Italian, English and German spectators, who reacted cautiously to the previous day's newly confirmed case and death numbers, and who consequently shied away from attendance. Curiously, Spanish and French fans exhibited no such reluctance. It seems reasonable to assume that Reade and Singleton's work presages ongoing challenges for live event attendance during re-opening should there remain a consistent and non-trivial level of case and death numbers in a hosting location, even notwithstanding any boost from pent-up demand. The authors offered some excellent advice that probably applies to all sport organizations. With risk and its associated effects on the enthusiasm of fans to attend live venue-based sport, competition managers should practice more flexible and dynamic pricing strategies, and strive to understand how the perceptions and expectations of their spectator bases have changed.

One pointer to the resilience of sport consumer's preferences is presented in the fifth article. Nosal and Lopez-Gonzales seized on the opportunity to test the thesis that sport gambling constitutes a unique category of the pastime, and that its practitioners are intrinsically connected to sport gambling in particular due to a sense of personal belonging, ownership and identification. Little is known about how sport gamblers might respond to a suspension of the gaming marketplace, as occurred in consequence of the COVID sport shutdown. During the suspension of sport gambling, Nosal and Lopez-Gonzales surveyed 'regular' (at least once a month prior to the pandemic) Polish sports bettors to determine how the interruption had affected their gambling behaviours. The notion that sports bettors might possess some unique motivations and affiliations turned out to be salient. Most bettors decided to abandon or greatly reduce their betting activities in the absence of sport gambling availability and chose not to substitute it with other forms of wagering instead. In fact, many reported that they did not miss betting, and for the most part, the respondents declared little urgency to return, let alone much to suggest addiction. A small group did continue gambling in alternative areas though. On the upside, the regular bettors saved time and money. While possibly good news for the bank accounts of the Polish sport gamblers in this study, the results suggest that industry efforts to attenuate gaming losses by offering alternative activities like virtual events, esports and casino-styled games, might have missed the mark. The Nosal and Lopez-Gonzales study does also highlight the utility in further investigation around the substitutability of preferred sport products for fans and consumers, whether in gambling or other forms of consumption behaviour.



Whether competitions cannibalize each other remains a long-standing empirical question, especially in favour of large leagues over their smaller counterparts, but little is known about the relationship even in good times. Weimar, Holthoff and Biscaia in the sixth article took the opportunity to dig deeper into the issue in response to the presence of a unique opportunity caused by the COVID shutdown of major professional football leagues. Despite the major league freeze, the Belarus league continued to operate. Employing social media follower statistics of the Belarus clubs and well as those participating in 48 first divisions under shutdown, as a proxy for league interest from fans, Weimar et al. estimated the effects of the COVID impact. Fan attention did indeed turn towards the Belarus clubs, which experienced a surge in social media following while the big leagues were not playing. With their re-commencement, however, the Belarus clubs experienced a decrease in social media attention, slowing to pre-pandemic levels. With evidence that big leagues can attract fan attention away from more parochial and smaller competitions, questions arise as to whether improved cooperation or even compensation should be considered. Perhaps more alarmingly, the data signal that some leagues could find it compelling to remain open longer than their competitors during health or other crises, potentially at the expense of public safety. Clearly, live games stimulate fans and drive them to follow social media as a consequence. In this case, fans turned to the only game in town, demonstrating that there really is no substitute for the live sport experience even at a lower level of quality. Under circumstances where all sport discontinues, the responses of fans observed from the Weimar et al.'s study again reinforce the importance of maintaining content that can impel fans to connect, identify and remain involved with their clubs, a lesson that permeates much of the COVID sport research in this issue. It would also seem self-evident that social media presents a powerful mechanism in order to achieve greater fan engagement and can be pursued with comparatively fewer resources than most marketing, making it an ideal vehicle for smaller leagues and clubs. Since fans will seek temporary social connections in the absence of live gameplay, clubs and leagues might also need to amplify their off-season social media content.

In another study surveying the horizon, and the final article of this special issue, Bowes, Lomax and Piasecki asked UK elite sportswomen to contemplate the post-pandemic future of women's sport, concerned that the upward trend in participation, media coverage, investment and support would not only be torpedoed by the shutdown, but that the start-up would sacrifice hard-gained territory in favour of getting men's sport back on track. Using a thematic analysis of online questionnaire responses, Bowes et al. teased out the key concerns about the future held by a sample of elite sportswomen. Although most of the sportswomen had observed a favourable change in the trajectory of women's sport, they balanced that optimism against a long-standing inequality when compared to the resources and attention given to men's sport. They worried that the post-COVID sporting world would regress deeper into its traditional mode, subordinating women's sport even further as the meagre available funding, sponsorship and media focus would be appropriated by men's sport. Bowes et al. also suggested that the pandemic would provide an advantageous pause for personal development, the potential for a post-pandemic surge in participation, and perhaps even the opportunity for sport to re-start in a reconfigured and more equitable form. Digging deeper, Bowes et al. cautioned that the 'progress narratives' common to observations about the future of

women's sport hide enduring structural and symbolic inequalities, reflecting a broader and resistant social gender schism. Women's sport was getting better, but had much distance left to traverse prior to the pandemic. The remaining question is whether in the post-pandemic environment women's sport can make up some ground, or whether it will regress to the greater disequilibrium of the past. A reboot has already seen a significant acceleration in some sport consumption trends, pushed along by the pandemic's experiential and viewing constraints. Elite sportswomen anticipate that COVID-19 will have a more pronounced impact on women's sport than on men's sport. It's not difficult to see how, but perhaps it might yet be in the positive direction.

This first volume of the COVID special edition was inspired by the most acute and universal trial that sport throughout the world has ever faced. It has exposed sport's vulnerability, characterized as it is by a fundamental dependence upon its live-action, media-resourced, sponsorship-dependent, broadcasting-rich, fan-reliant consumption experience. As Rowe (2020) observed, COVID-19 has laid bare sport's inner workings, susceptible to disablement by its own global interdependency. As a consequence of this global disaster, however, segments of the sport industry have found ways to adapt and prosper, in some cases abandoning the once sacrosanct belief that sport needs live fans. The result has been a proliferation of creative action. Sport organizations, and media and broadcasters, have found new ways to engage fans, solicit user-generated interaction, integrate digital content, expand social media and re-package content (Majumdar & Naha, 2020). For some commentators, such as many of the scholars writing for this special issue, these developments have accelerated and amplified the importance of sport's technological and media axis. Sport's delivery might have shifted radically, but whether this shift has embedded into permanency has yet to be seen.

Although governing sport bodies and leagues initially responded quite differently (Byers et al., 2021), sport across the world inevitably shut down, from the postponement of a series of major international events and competitions to the closure of local facilities and recreational venues. Some sport organizations chose to upscale their community and corporate social responsibility activities (López-Carril & Anagnostopoulos, 2020). According to Smith and Casper (2020), some like the NBA created entirely new engagement platforms, while others like MLB integrated their COVID response into their existing programmes. One recent study concluded that the most desirable impact of the pandemic on sport would come in the form of an increased awareness for social responsibility (Beiderbeck et al., 2021). The theme – and its decision-making and ethical implications – was also present in several of the studies presented in this issue.

Despite the catastrophic impact that COVID-19 has inflicted upon world sport, never before has sport been so appreciated (Evans et al., 2020). During the pandemic, Liverpool manager, Jürgen Klopp, observed that football was 'the most important of the least important things' (Wilson, 2020). Whether Klopp's declaration was prescient or preposterous (Black, 2021) remains debatable. Indeed, the pandemic is not over, and its effects may well ricochet through sport for a generation. But readers of this special issue might, like its editors, conclude that to many, football – or sport in general – just might be the least important of the most important things.

## Disclosure statement

No potential conflict of interest was reported by the author(s).

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