David against Goliath: Diagnosis and Strategies for a Niche Sport to Develop a Sustainable Fan Community

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Abstract: Pilota, played using the hands, is a niche sport with origins dating back to Greco-Roman times. In the Valencian region of Spain, an indigenous version of the sport is played with healthy participation rates despite having to compete with the major global sports. This study is aimed at understanding the current situation of this sport in terms of knowledge, transmission channels, fan experience and media consumption, as well as the brand strategy challenges it faces for building a stable and sustainable fan community. The methodology consists of a combination of quantitative and qualitative techniques. Nearly 1500questionnaires completed across three study universes, four focus groups and 33 in-depth interviews with stakeholder representatives have served to check the data obtained and discuss the challenges facing the sport in a process of dialogue. The main finding lies in the management proposals that can be applied to most of the world's surviving traditional sports. On a theoretical level, the study presents an analysis of niche sports in Europe from the point of view of branding and sustainability.

Keywords: traditional sport; niche sport; branding; sustainability; Valencian pilota

1. Introduction

People have played with spherical objects in their leisure time in many different civilisations since time immemorial [1]. Studies of the ancient cultures of Egypt, Greece, Persia, China and various pre-Colombian peoples attribute to them the common practice of a game that involved hitting a ball with the hand [2]. In its expansion phase, the Roman Empire took the tradition it inherited from the Greeks to many parts of Europe. Centuries later, what we now know as "pilota" reached the area now known as the Valencian country—the part of eastern Spain with its capital in Valencia—via Christian settlers of the former Muslim territory [3]. The hand ballgame has been played in the streets or on specific courts called *trinquets* since the 13th century. Although there are 10 official formats of Valencian pilota, the common denominator of all of them is that two teams of two or three players hit a 50-gram ball with their hands. In some formats they face one another, in others they face a wall.

Throughout its history, this traditional sport has enjoyed golden ages when it has had great social influence, particularly between the 16th and 19th centuries [4,5]. Alike, it began to decline in the second half of the 20th century, suffering from the emergence of a wider range of leisure activities, the contempt of the ruling classes and the Francoist regime, and the gradual abandonment of the streets as a space for play and socialisation [6]. The emergence of the mass media is particularly important in this context, as they focused their interest on other sports [7]. However, the last two decades of the last century saw the completion of a process of sportification [8,9] in which the "game" finally became a sport.

Valencian pilota is not the only hand ball game that has survived from the classical period. In fact, the origins of tennis lie in these games (jeu de paume), but the French kings in the 16th century included rackets so as not to hurt their hands [10]. Now there are international competitions organised by the "Confédération Internationale du Jeu de Balle" (International Ball Game Confederation—https://cijb.info/ (accessed on 5 December 2021)) which includes federations from 14 countries. Because of the ancient origin of the game, it has its own features and idiosyncrasies in different territories, and traditional local names. However, at international level these converge into common hand ball formats.

Nowadays, Valencian pilota has a professional circuit with about 60 elite sportspeople taking part (https://www.funpival.com/ (accessed on 5 December 2021)). Half of these are professionals, competing in 300 matches a year, 55 of which are broadcast live on Valencian regional television. At amateur and youth level, there were 1596 federation-registered players (https://fedpival.es/val/inici (accessed on 5 December 2021)) in 2019, including 250 women, a group that has appeared in force over the last few years. The Valencian regional government's programme to promote the sport in schools involved 22,156 pupils in 626 schools in 2019, complemented by 108 clubs and 97 municipal pilota schools.

After this brief overview of the history of, and level of participation in, this traditional, niche sport, ourstudy aims to examine the media impact, knowledge and transmission of the sport by different segments of the population, and fans' experience in contact with Valencian pilota. At the same time, based on a process of dialogue with its main stakeholders, it will seek to provide innovative branding solutions to expand Valencian pilota's fan community in the face of the threat from global sports that have been competing in all local markets for decades.

The proximity and importance of Valencian pilota in the region where the authors of the study operate and their work with the Professorial Chair of Pilota at the University of Valencia invited them to choose this research subject. Research on traditional and niche sports is also necessary as the sporting institutions do not have the resources necessary to promote studies shedding light on management processes, unlike mass global sports with clear financial capacity.

It is hoped that the research findings can contribute to more effective management of niche sports brands while, in the theoretical context, covering an original topic rarely featured in scientific journals. In fact, this paper may go some way to meeting the need pointed out by Mastromartino et al. [11] to deepen the model for building fan communities in various areas of the world in order to determine how this process differs in different sociocultural contexts.

1.1. Global Sport vs. Traditional Sport

Nowadays, we are a long way from seeing sport as exclusively something for leisure and recreation. Sport as simple physical activity clearly coexists with another kind of sport which, although it has the same origin and shares the same values and principles, has a very different dimension: media-led, global sport [12].

The process of globalisation has been analysed from different points of view for decade [13] and sport, because of its universal and cultural nature, is one of the dimensions most widely examined. As Giulianotti [14] says, the relationship between global sport and consumer culture is based on three historical stages: "First, a 'take-off' phase from the late 19th century to the mid-1940s; second, an 'integrative and expansionist' phase from the late 1940s to the late 1980s; third, a 'transnational hyper-commodification' phase from the early 1990s onwards".

This process of transnational commodification began to emerge in the 1990s, involving landmarks, risks and resistance. Maguire [15] warned of Western hegemony in the world practice of sporting activities, leading to the imposition of the American model in the worldwide organisation of sport. In fact, Grainger and Jackson [16] and Giardina and Metz [17] made case studies of Nike and the 2000 Olympic Committee, whose communication campaigns met strong resistance from local communities. They questioned the "think

global, act local" strategy and attempts at homogenising multiculturalism. The study by Bernstein and Blain [18] are also noteworthy, focusing on an analysis of the conflicts and tensions between global and local factors in sports communication.

One of the main concerns about the hegemony of transnational sport is the establishment of a single global sports culture [14]. This threat was detected early on. In 1997, Renson noted the trend towards local sport becoming merely residual, and the same concern was expressed by Soler, Ispizua and Mendoza 20 years later. Along the same lines, Maguire [19] warns of the danger of extinction of local sporting traditions to the detriment of modern and elite sport.

UNESCO has worked hard over the last few decades on this intersection between global sport, traditional sport and culture, generating protection programmes and recognising that "they are part of the universal heritage diversity" [20]. It is worth bearing in mind that, as Bronikowska and other experts in TSG state, "sports, and many 'traditional' sports in particular, have fallen by the wayside of modern living. Therefore, we should remember that ignoring or even neglecting traditional sporting heritage is simply like 'killing' the physical culture of individual region, country or continent" [21].

As might be expected, the issue of globalisation and sport remains just below the surface in academic circles. O'Brien et al. [22] analyse the challenges and problems involved in the governance, ownership and cultures of international sport today. For the matter we are concerned with, it is essential to know the aims, tools and frameworks of the "global media and sporting complex" as Ginesta Portet [23] calls it, consisting of sports business owners, media groups, investment funds and technology multinationals.

1.2. The Battle for the World's Attention in the Era of Sport as Spectacle

In this third decade of the century, there are two battlefields between these great agents of global entertainment: the battle for the attention of the citizen/consumer [24] and the exploitation of mass data [25].

Behind the enormous volume of information hitting our screens today, an enormous number of broadcasters are battling to attract audience attention. We are in what is known as the "attention economy" [26]. This is not a new concept in the field of sociology, communication and psychology, but in the times we live in, the competition between media, technological and sporting complexes has come into sharper focus [23]. Sport has become one of the sectors with the greatest economic potential and, if one thing has facilitated its transformation into an omnipresent sociocultural force and an influential commercial institution, it is sports communication [27].

Today, sport as spectacle, as mentioned by Moragas [12,28] Ratten, plays a vital role in attracting the attention of audiences of millions. The brand promise [29] of its product—a source of emotions, passions and positive values—is so powerful that it has served as an inexhaustible source of content for worldwide media [30,31], connecting fans of all generations in all corners of the world [32]. Some authors have coined the term "sportainment" for this use of the sporting phenomenon to go beyond competition and aim to achieve high indices of visibility, notoriety and positioning, for both the brand and the sport itself.

Both landmark [33–35] and recent studies point out the importance, impact and vitality of world sport [36]. However, executives in the sector [37] acknowledge that everything that has happened in the past year, from the emergence of the pandemic to learning to live with it, involves a paradigm shift. The main European football leagues have emptied their stadiums but, as they have strengthened their digital content, they have increased their social media followers by 10%, according to "The European Football Club Report" [38].

We are also seeing "streaming wars" [39] on the new audiovisual distribution scene between the leading OTT platforms, such as Netflix, Rakuten TV, HBO and Amazon Prime Video. Live sport could be the next battleground between them. Innovation will be decisive in this struggle for global hegemony between sports business owners, broadcasters, sponsors' brands and investment funds.

1.3. Fan Communities in Niche Sports

Niche sports have been extensively studied in the American literature. In the past decade, authors including Greenhalgh and Greenwell [40–42] and Mastromartino [11,43,44] have presented papers examining fan communities formed around niche sports and sponsorship in that context. In this sense, the definition of niche sports [21]—understood as non-conventional sports that do not attract mass audiences—must be narrowed down.

In Europe, this question has been approached mostly from an anthropological or cultural point of view [21,22,45]. There are no substantiated precedents that explore it from the point of view of marketing or strategic communication. However, academic research in the field of fan communities in relation to new media [46], technology in sporting events [47], virtual communities [48], and digital marketing [49,50] has reflected in depth on the inexorable trend towards digital content generation for fan communities.

Thus, in a market in which niche sports cannot go head-to-head against major conventional sports, professionals who manage niche sports must find a way to differentiate their product or offer from the major sporting competitions [40]. The ambition of all these professionals and managers is to consolidate their fan community, expand it in the long term and even get the fans themselves to be the prescribers of the sport [51].

Following the publication of the article by Mastromartino et al. [11] in this journal, there has been an academic debate on whether sports fans' identification with a sport or a club arises from the influence of family, peers, schools and the media [52–54], or whether, as the authors demonstrate with niche sports, aside from these traditional factors, the strategy and actions of a sports organisation are decisive in creating the relationship between the sport or team and the fan.

These issues are crucial in approaching the study of the diagnosis and challenges of Valencian pilota in forming a sustainable fan community, as they outline the main ways in which fans identify with a sport. According to research, if we place the generic identification factors surrounding the fan in order by level of importance, we find first the influence of family and/or friends [44,52,55], then geographical region [56,57] and then media exposure [43,57].

In the case of niche sports, as pointed out by [11] Mastromartino et al. (2020) with the case of field hockey in the Sunbelt area, the most outstanding actions initiated by sports club owners involve the individual relationship with the fan, school programmes, the experience in the arena, team victories and promotions. Geographical location and the practice of the sport itself are important in fan-initiated actions. It is worth noting that another qualitative study by these authors, carried out on club managers on the same subject, revealed the importance of attracting children as members in order to draw in their families.

Social, but not necessarily digital, media are a source of innovation and stabilisation for communities. A sport that cannot have messages channelled via the mass media can only grow if it uses social innovation to replace the dominant institutions [58] through active recommendation by its agents: "Sport innovation requires a system approach due to the need to get input from multiple stakeholders. Increasingly sport innovation requires feedback from different entities in order to gain acceptance in the marketplace," notes Ratten [59].

Finally, the study by [40] Greenhalgh et al. presented an important difference between mainstream sport and niche sports in shaping the fan community. Specifically, fans associated "affordability" and "similarity with players" with niche sports, and "star power" and "popularity" with mainstream sport. At the same time, the authors stress the great opportunity that niche sports managers have to generate access through digital content.

In short, the different variables surrounding sports and sports club owners map out different paths towards fan socialisation and identification. In order to offer knowledge to the managers leading the challenge by niche sports to mainstream sports at a difficult time due to the COVID-19 crises, and considering the need to fill the gap in research

on traditional niche sports in Europe, the following research questions (RQ) have been designed based on a review of the existing literature:

RQ1: What is the level of notoriety and knowledge of Valencian pilota among the inhabitants of the Valencian territory?

RQ2: How is Valencian pilota transmitted among the fan community?

RQ3: What is the fan experience when they consume this sport?

RQ4: What are the strategies to be applied, depending on the stakeholders, to achieve a sustainable fan community?

2. Materials and Methods

A triangulated study design [60–63] combining qualitative and quantitative techniques was chosen as can be seen in Figure 1.
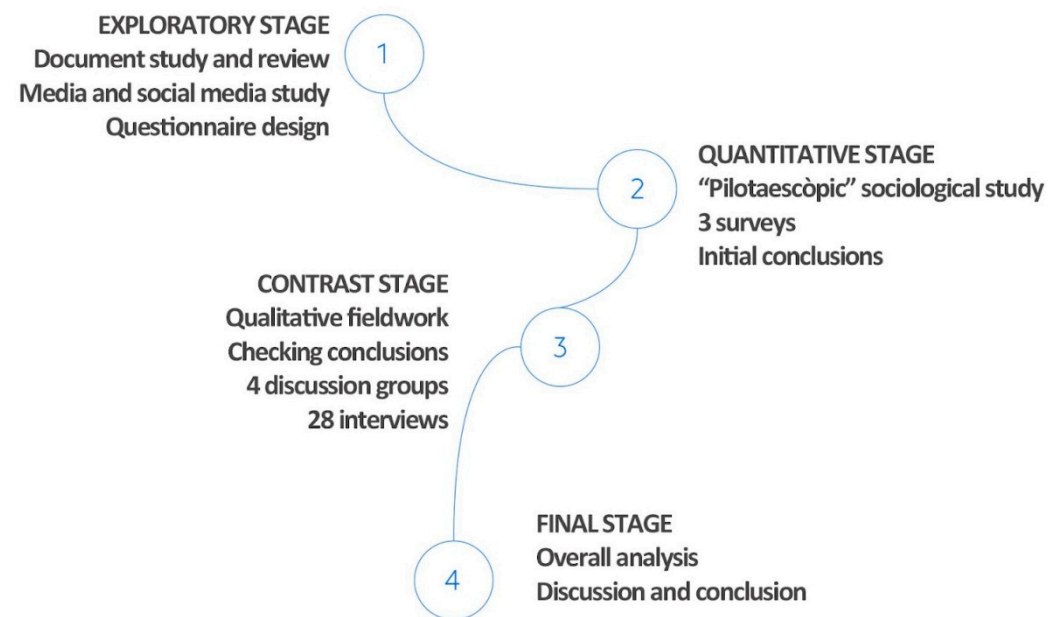

Figure 1. Research stages.

2.1. Document Study

This phase consists of a document study of the main theoretical contributions and of the sport of Valencian pilota itself. The following aspects have been analysed based on secondary sources or content analysis drawn up by the researchers:

- Media notoriety.
- The audience figures for television broadcasts.
- Social media followers of institutional profiles or professional players.

2.2. Quantitative Stage

This consisted of three surveys carried out between October 2018 and November 2019 in the Valencian region. Three universes of study were chosen depending on their links with the sport under examination:

- The general population—all residents of the Valencian Country, consisting of 5,057,353 inhabitants, according to the last census by the Spanish National Statistical Institute.
- Fans of Valencian pilota—all the people who spend leisure time enjoying playing or watching this local sport.
- The 1596 players aged over 16 who hold a federation licence.

To ensure the validity and reliability of the questionnaires, before the final surveys were carried out both the reliability of the questionnaire and its internal consistency were

measured by calculating Cronbach's alpha with the items of each subscale or dimension. A pre-test version of the three surveys was given to 20 people and the questions that did not work properly were reformulated in the questionnaire to ensure that all the questions made sense and that the categorisation was always correct. The SPSS statistical package, version 26, was used for the statistical analyses.

The survey had various blocks of questions concerning the level of knowledge of this sport among the general population, the routes by which it is passed on and the way the sport is followed in the media and, finally, the fans' experience of direct consumption of the sport.

The following Table 1 includes the technical details of the quantitative studies, amounting to 1468 questionnaires.

Table 1. Details of the questionnaires.

Universe	General Population Men and Women Aged 18 or Over	Fans of Valencian Pilota Men and Women Aged 18 or Over	Federated Players in the Last Few Years Men and Women Aged 16 or Over
Area	Valencian Country	Valencian Country	Valencian Country
Sample size	670	473	325
Sample error	+/− 3.8 for a 95.5% (2 sigma) confidence level with p = q = 50	+/− 4.5 for a 95.5% (2 sigma) confidence level with p = q = 50	+/− 5 for a 95.5% (2 sigma) confidence level with p = q = 50
Technique	In-person survey using the CAPI system. Structured questionnaire lasting 10 min	In-person survey at match venues	In-person survey at match venues
Sampling	Multi-stage sampling: probability stratified by sizes of municipality and not probabilistic for age and sex quotas	Multi-stage sampling, probabilistic by conglomerates, not probabilistic for age and sex quotas 17 sampling points	Multi-stage sampling, probabilistic for territorial, age and sex quotas. 51 sampling points

2.3. Comparison Stage

The dynamic of focus groups and interviews is orientated towards possible innovative solutions. Firstly, four discussion groups were held, later complemented by 33 in-depth interviews. A total of 54 people took part in this phase, completing a broad representation of all stakeholders and groups involved in studying, publicising, managing and teaching Valencian pilota.

The qualitative methodology used consisted of a semi-structured in depth interview with open-ended questions to 33 stakeholder representative of the Valencian pilota context. A purposive sampling was carried out for their selection following the snowball technique and their field of expertise. The interviews were manually transcribed into documents in .doc format and analyzed with the qualitative research software Atlas.ti. Once in Atlas.ti, a thematic analysis approach was carried out, in which the interviews were coded based on the themes included in the dimensions of analysis (knowledge, experiences, beliefs and attitudes) along with emerging themes. In this way, those fragments that, after transcription and reading, were considered to be related to the dimensions of the analysis were considered. In this sense, coding decisions have been made based on various elements of the content, including length, complexity, manifest meanings and latent meanings, and the tone and expressions of the people interviewed were also taken into account [64].

The dialectic spirit of a discussion group [65] included a presentation of the initial conclusions concerning knowledge, perception, experience and transmission of pilota. Table 2 shows the details of the discussion groups conducted.

Table 2. Characteristics and members of the discussion groups.

	Focus Group 1	Focus Group 2	Focus Group 3	Focus Group 4
Focus	Sports experts and trainers	Marketing and communication professionals	People involved in the sport	Researchers and publicists
No. of participants	6	6	4	5
Profession of the participants	Teacher (2), federation officer (2), coach, technical director of club	Sports journalists (3), sponsor's PR officer, sponsor's communications director, communication officer for professional organisation	Professional players (2), manager of the governing body for professional championships, federation officer	Editor, cultural journalist, teacher/researcher, museum director, researcher/publicist

The in-depth interviews [66] followed a specific design based on a pre-established, semi-structured questionnaire. Their duration was fixed at between 20 and 60 min and has been carried out on the profiles detailed in Table 3.

Table 3. Profiles of in-depth interviewees.

Club presidents	3
Amateur players	2
International player	1
Former professional players	2
Professional players	2
Sports promoters and business people	4
Managers of main organisations	4
Former directors of main organisations	1
Associated political leaders	2
Teachers	3
Researchers/publicist	3
Sports journalists	3
Managers of TV companies with audiovisual rights	3

2.4. Final Stage

The last stage consists of analysing the overall results of the research. It involves summarising the information, organisation and hierarchisation of the main findings on innovation for Valencian pilota.

3. Results

3.1. Notoriety, Audiences and Coverage in Traditional Sports Networks

The document study reveals (Tables 4 and 5) the notoriety of this traditional sport in the media, based on content analysis, audience figures for the regional television station from its own reports and social media audiences for the different corporate and personal profiles.

Table 4. Media impact of Valencian pilota in January 2020.

	Newspapers	Digital Media	Radio	TV	Total
News items published	128	155	9	12	304
Percentage	42%	51%	3%	4%	

Table 5. Media impact of Valencian pilota in November 2016–May 2020.

	Facebook 2016	Facebook 2020	Twitter 2016	Twitter 2020	Instagram 2016	Instagram 2020
No. of official accounts with more than 500 followers	8	45	8	16	6	36
Cumulative no. of followers in all the accounts counted	22,685	102,002	11,803	20,424	4571	48,098
Profile with largest number of followers	4178	10,319	2236	2236	1131	5729

Firstly, a search was made for news items linked to the words "pilota valenciana" in all Valencian media in January 2020 and these were counted.

For TV audiences, the regional public television channel provided a report [67] with data it had collected, including the following figures:

- During 2019, there were 55 broadcasts of Valencian pilota.
- 40 of these showed professional matches and 17 amateur games (30% of the total), while five women's matches—8.5% of the 57—were televised.
- The average audience for Valencian pilota broadcasts is 12,000 spectators per programme, with an audience share of 1.6%.
- The five broadcasts with the biggest audiences—over 25,000 viewers—showed professional matches.
- The most-seen match obtained a peak of 49,000 viewers. The second most popular broadcast had 32,000 viewers.

From the social media content analysis on two dates with a difference of four years, it can be concluded that Twitter is the social network that has changed least. Instagram, which hardly used to have any activity related to pilota profiles, now has the profiles with most social media followers, together with Facebook, which has grown considerably. Both have profiles with considerable vitality.

3.2. Quantitative Results

3.2.1. Knowledge of Valencian Pilota among the General Population

The first issue to be analysed is the level of knowledge of this traditional niche sport in relation to other big and minority sports in the sample representing citizens of the Valencian Country—1 represents the lowest level of knowledge and 10 the highest level of knowledge as shown in Table 6.

Table 6. Percentage distribution of the level of knowledge of sports among the general population.

	Basket Ball	Baseball	Soccer	Handball	Motorcycling	Traditional Sport	Rugby	Tennis
1	12.4	46.9	9.1	17.6	20.9	27.0	48.8	14.14
2	5.8	14.0	3.3	7.6	9.0	14.8	15.7	4.8
3	6.3	9.4	4.2	9.6	7.3	9.1	9.99	5.7
4	5.2	6.7	4.0	6.6	7.9	7.3	6.0	6.4
5	17.5	10.9	11.9	18.1	15.4	13.1	9.6	14.9
6	8.7	3.9	8.1	13.0	11.3	7.6	2.1	11.3
7	10.6	2.8	8.4	8.2	9.0	6.3	2.7	13.7
8	14.6	2.4	19.0	9.3	8.2	6.3	1.8	13.6
9	5.2	0.9	10.3	3.7	4.2	3.4	1.6	5.7
10	13.6	2.8	21.6	6.3	6.7	4.6	1.8	9.0

Although it is a local sport, in terms of knowledge among the general population, Valencian pilota is behind football, basketball, tennis, motorcycling and handball, although it is ahead of baseball and rugby.

If public knowledge is analysed specifically (Table 7), it can be seen that 71.2% of the people surveyed have a low or very low level of knowledge of this traditional sport. 21.6% have a medium level of knowledge, while only 7.1% have a high or very high knowledge of pilota.

Table 7. Percentage distribution of the level of knowledge of Valencian pilota by gender among the general population.

	Very Low	**Low**	**Medium**	**High**	**Very High**
Men	31.7	35.3	23.9	7.5	1.7
Women	40.3	35.8	19.0	3.9	1
Total	35.7	35.5	21.6	5.8	1.3

3.2.2. Transmission Routes for Pilota and Media Consumption

The next block of analysis shows the transmission routes (Table 8) for the local sport in each of the groups making up the sample.

Table 8. Transmission channels for the traditional sport in the three universes analysed.

	General Population	**Fans**	**Federation-Registered Players**
Family	15.3%	43%	38.5%
Primary/secondary school	38.8%	4.9%	9.8%
Friends	37.8%	38.4%	36.6%
Municipal sports activities	2%	3.2%	6.4%
Mass media	1%	0.6%	1.8%
Sport events	2%	2%	3%
Cultural association	2.1%	1%	1%
Traditional sport club	0%	2%	2.3%
Others	0%	5%	0.6%
DN/NA	1%	0%	0%

The general population which has a medium or high level of knowledge of Valencian pilota have come to the sport via schools (38.8%) friends (37.8%), and family/home (15.3%). Schools are therefore the main transmission routes.

Pilota reaches fans through the people closest to them: family (43%) and friends (38.4%). Schools, pilota schools and local clubs are secondary routes.

Meanwhile, according to federation-registered players, their main transmission route for pilota has been their family (38.5%) and friends (36.6%). Then come schools (9.8%), municipal pilota schools (6.4%) and, finally, clubs (2.3%). Fans and federation-registered players therefore share the same pilota transmission routes.

One quantitative finding is the relative unimportance of the media as transmission route for pilota. However, we continued to analyse the role of the local media (Table 9) in supporting the sport. Specifically, we asked about the way people follow Valencian pilota in the media, which only 16.4% said that they did. Among fans and federation-registered players, the answer was completely different, with 85.8% and 88.9%,respectively, following the sport in the media. If those who do follow news about the sport are asked about the type of media they use, about 70% in all three categories talk about television. The number using radio is residual, while fans in particular use digital media.

Table 9. Following niche sports in the media.

	General Population	Fans	Federation-Registered Players
Percentage of each audience which follows news about Valencian pilota in the media	16.4%	85.8%	88.9%
Percentage of each audience which follows coverage in a particular medium	TV: 78%	TV: 76%	TV: 68%
	Radio: 3%	Radio: 5.7%	Radio: 9%
	Press: 12%	Press: 27.3%	Press: 36.9%
	Digital: 10%	Digital: 23.9%	Digital: 4.6%

3.2.3. The Consumer Experience at Live Sports Events

The general population group and the fans of Valencian pilota answered on a scale from 1 to 5 regarding the importance of each of the different variables appearing in the Table 10 that determine their experience of the sporting event.

Table 10. Evaluation of the perceived level of importance in relation to the following criteria.

	General Population	Fans	Average for Both
Accessibility	3.1	4.4	3.75
Schedules	3	4.2	3.6
Ticket price	3	3.6	3.3
Comfort	3	3.8	3.4
Players	2.9	4.5	3.7
Information	2.9	4.4	3.65
Location	3.1	4	3.55
Bathrooms	2.9	4.3	3.6
Hospitality	2.7	4.2	3.45
Lighting/acoustics	3.1	4.7	3.9
Public transport	2.9	3.5	3.2
Car park	3	4.6	3.8

Those surveyed in the general population who say they have medium, high or very high levels of knowledge (28.7%) answered this question. The others, given their low or very low level of knowledge, did not answer. This subgroup indicates that the most important variables for their experience are accessibility, location and the lighting/acoustics of the sports venue, with a score of 3.1 out of 5.

Meanwhile, fans believe that, when it comes to the pilota experience, lighting and acoustics (4.7 %), parking (4.6 %), the participating players (4.5 %), accessibility (4.40%) and information about the event (4.4%) are the main issues.

The fact that the general public seem to feel that these variables are less important than regular fans do is clear. This can be interpreted as this kind of sports event having less of an impact among "casual fans".

3.3. Qualitative Results

Here we present the conclusions of the discussion groups and in-depth interviews organised in two sections: checking the data presented; and innovative proposals for the governance and communication and marketing strategy for the traditional sport.

3.3.1. Checking the Data Presented

Concerning Knowledge

The experts and agents involved valued the figures concerning knowledge positively. "The situation is better than I thought. There's an intermediate level that's not bad. There's some potential," said the PR of a financial organisation sponsoring the sport. This assessment sums up the position of most of those surveyed.

The interviewees agreed in pointing out that the problems for improving knowledge are insufficient television coverage, closed venues, transmission between generations and the complexity of the game of pilota itself. A sociologist and researcher reflected on the generation gap in which the prominence of sport was diluted in favour of the major global sports, and the subsequent emergence of pilota schools.

On the Transmission and Media Coverage of the Traditional Sport

Those taking part highlighted schools as a principal transmission route among the general public. Along these lines, a political leader believed that "it shows that planned work like the "Pilota a l'escola" (Pilota in Schools) programme can help introduce new generations to this sport, as they begin at a very young age". On one hand, one contributor—a sports journalist—underlined the lack of importance of the transmission of pilota via the media: "A sport that is known and transmitted basically in an oral environment is basically an invisible sport".

The presence of this sport on television was the issue most debated in all the discussion groups and interviews. The participants needed no prompting to launch into an in-depth discussion of the visibility, treatment and problems of pilota in the mass media. Another sports journalist underlined the importance of television, not only broadcasts every weekend but also the news. A coach of professional players stressed the need to "create a story and decide which format is the best for television. That way, we will find the formula for communicating pilota. We are a region that deserves to attract visitors".

A researcher and essayist, this commentator observed that "The pilota that appears on television is based on broadcasts. It's not been made into enough of a spectacle". In line with this, the sports director of the regional television station maintained that "if we want a lot of presence in the media, we need to stop it focusing only on broadcasting finals. I think there ought to be other audiovisual productions: content that explains things and tells stories". Another technician from the regional television station notes that "We need more production resources—a motorised camera from above, like in tennis".

3.3.2. Innovative Proposals in the Governance and Communication and Marketing Strategy for Traditional Sport

This section features new tools and projects to improve the strengths of this traditional sport in the sports and leisure market.

Many proposals come under the heading of digital content. A president of a local club noted the importance of a digital platform offering all kinds of pilota content quickly. A professional player called for a website publicising pilota that covers all aspects. A club director suggested "a television programme about 15 min long that wouldn't cover particular competitions but would provide a weekly programme with news and interviews".

A sports researcher and the president of a club made a suggestion going beyond a strict definition of communication. The former suggested the need to establish a link between physical education teachers and the pupils in "Pilota a l'escola". The latter stressed the importance of including women: "Without a female contribution there is no future".

A teacher indicated the priorities in the process of publicising pilota: "We first need to try to make sure Valencians know about it, carrying out very simply publicity campaigns to give people a quick understanding of it, so they know what we have. That way we can create pride among Valencians. This is the key". Meanwhile, a professional player bemoaned the lack of a marketing and communication structure with an established plan.

To conclude this point, sociology specifically notes three market niches as a basis for conquering fans. A researcher felt that "the future is in cities. For this reason, it is very important that pilota is introduced into the urban context of the media and social media. If not, we are condemned to extinction".

A political leader reflected on the contradictory characteristics of modern society: "The modern world needs standards, but at the same time contradictions. The rural world can be found within this modern world and you find it in symbols in any image from multinational establishments. Many rural practices have been reborn in the post-modern context. Why not pilota? We have to aim at a new audience to replace all the older people".

Finally, a sociologist and researcher observed that it is very important to open the sport up to tourism. As soon as the game begins to act as even the slightest tourist attraction there will be a call effect on local people.

4. Discussion

4.1. Relationship between Results and Background Research

Having presented the quantitative data and the process of dialogue between the different leading groups involved in Valencian pilota, in this discussion we will detail the way the findings fit in with or contradict the theoretical background.

First, it is appropriate to acknowledge that this study, analysing traditional sports in relation to global sport, has the limitation of having been carried out with a single sporting discipline: Valencian pilota. In the same way, no similar studies are known in other geographical areas setting out specific figures for knowledge of sports among the population or in relation to other sports with which they compete for fans' attention. The fact that it is impossible to make direct comparisons with other traditional sports therefore highlights a possible future line of research. However, the contributions of the stakeholders present in interviews and discussion groups have shown a similar concern to the one raised by UNESCO [20] and Bronikowska [21] about the intersection between global sport and traditional sport.

This study has revealed that this niche and traditional sport maintains a socialisation process similar to that of the major sports, in which school, friends and family are the most important transmission factors for the general population. The fans themselves consider family and friends to be the main factor. This model coincides with the studies by [52–54] by McPherson, Wann and Kolbe et al., on the one hand, while the thesis defended by Mastromartino [11] in relation to actions begun by sports clubs themselves with school programmes is borne out in the case of the general population. In other words, fans tend to have accessed the sport individually through their environment, while the population that has significant knowledge but who are not fans have learned about the sport through school. Despite media prominence in the discussion groups, with many comments, and the level of notoriety enjoyed by Valencian pilota (55 live broadcasts over the course of a year and a daily impact of 10 news items), the media is an inconsequential variable in the transmission of this sport. This coincides with the findings of Mastromartino in the research developed on the NHL fan community in the Sunbelt, as the attention of the media is on large sports franchises.

It should be noted that its transmission model is a hybrid between those of conventional sports and niche sports. The fact that Valencian pilota is a minority sport which is known and played by a fraction of the population, but nevertheless has a history going back 100 years and a traditional nature, means it combines classic elements of sports socialisation, such as the influence of family or friends or the low level of importance of price, while managers are using tools typical of niche sports, such as school promotion, to capture new audiences.

Similarly, in comparison with the consumer experience variables pointed out by Greenhalgh et al. (2011) [40], giving priority to affordability and player similarity, in the case of Valencian pilota the highest degree of importance is given to the conditions at the

sports venue, accessibility, players and times. Price, as stated by the authors, is not relevant in this case, as this variable is in the penultimate place in the table of importance.

With certain parallels with Mastromartino's qualitative study [43], the stakeholders' representatives in the discussion groups and in-depth interviews suggest two key areas for innovation, further developed in the conclusions, in order to attract the attention of the big communication circuits, new audio-visual consumption platforms and prestigious spaces allowing them to compete with the big agents in global sport. In that direction, many people taking part in the study agreed on three specific content marketing tools to stimulate digital communities, along the same lines as those mentioned by Dos Santos et al. [48]: "They highlight the importance of developing effective communication strategies within the community based on content marketing with relevant, frequent, and appropriate information that contributes pertinent, specific knowledge about a subject".

Concerning socialisation strategies, the participants' statements in the interviews agree with Ratten's thesis [58,59] about the need to apply social innovation in the face of the lack of attention from the mass media and the participation of different agents and organisations in the process of generating fan communities to sustain the sport in the long term: the incorporation of women into practicing this sport and the successful school sports projects provide evidence of this and of the opening up of new market niches. In fact, various interviewees agreed that there are market opportunities in post-modern society in the form of a demand for genuine social and cultural manifestations. Valencian pilota has remained original, as opposed to other sports or cultural expressions that have been vampirised by the processes of global homogenisation.

4.2. Theoretical Implications and Future Research

Traditional sports do not usually attract the attention of academics when it comes to marketing, sponsorship and communication [68]. However, in sports sociology there is something of a tradition of analysing minority expressions of sport when faced with the risk of homogenising globalisation. Therefore, this document can be considered a pioneering contribution when it comes to analysing niche sports from the point of view of innovation in sports marketing in Europe. Perhaps it can stimulate other researchers who can contribute by stringing a series of studies together to reduce the gap between global sport and indigenous niche sports.

As mentioned above, it would be advisable and necessary to continue with parallel research work in other sports in other geographical contexts and in other minority sports. In this way, a comparative analysis could be established between the situations and innovation programmes of different sporting and cultural expressions all over the world.

5. Conclusions

5.1. Review of Research Questions

Valencian pilota is an ancient local sport that has survived to the present day embedded in the collective imagination of a people. More than a sport, it is a badge of identity translated into the registration of hundreds of players with the federation, the existence of a professional circuit with visibility in the media and the participation of its players in international competitions. Despite the difficulties involved in being a traditional sport in the global context of an overt battle to attract attention, the current situation shows figures (education programmes, social media activity, knowledge among the public) offering reasons for a degree of optimism. Most importantly, in the current situation, the COVID-19 pandemic is making people think about the consequences of globalisation and there is a move in the opposite direction: a return to looking closely at what is around us and to the contribution that can be made by our immediate surroundings.

In relation to the first research question, as a general diagnosis about the level of notoriety and knowledge of Valencian pilota among the inhabitants of the Valencian region, it can be stated that there is a reasonable level of knowledge of Valencian pilota, as a traditional, niche sport. It remains ahead of other niche sports that are not traditional in the

area, such as rugby and baseball. However, it is, quite understandably, behind conventional sports such as soccer, basketball, tennis, handball and motorcycling. Although the figures cannot be compared with those for other traditional and niche sports in other regions, it is considered that 21.6% with an average level of knowledge of the sport and 7.1% with a high or very high level of knowledge of this indigenous sport among the general population are relatively positive figures. The data presented by the different social media profiles (162,000 followers accumulated in the main social media) also indicate remarkable vitality among younger segments of the Valencian population.

The transmission routes for Valencian pilota were at the heart of the second research question. The general population who have a medium or high level of knowledge of Valencian pilota have come to the sport mainly via schools (38.8%) and friends (37.8%), while fans and federation-registered players have accessed it via family (43%,38.5%) and friends (38.4%, 36.6%). Fans and federation-registered players therefore share the same pilota transmission routes. Another finding is the relative unimportance of the media as transmission route for pilota. We only asked about the way people follow Valencian pilota in the media, which only 16.4% said that they did. Some participants point out in this sense that a sport that is known and transmitted basically in an oral environment is effectively an invisible sport.

The third research question revolves around the fan experience when they consume this sport. The subgroup of the general population who say they have medium, high or very high levels of knowledge Valencian pilota indicates that the most important variables for their experience are accessibility, location and the lighting/acoustics of the sports venue. Meanwhile, fans believe that, when it comes to the pilota experience, lighting and acoustics, parking, the participating players and accessibility are the main issues. The fact that the general public seem to feel that these variables are less important than regular fans do is clear. In other words, casual fans and regular fans maintain different motivations or perceptions regarding the experience in this sport. Therefore, the treatment, communication and adaptation must be unique for each group.

The last question of the research concerns the strategies faced by the sport as a whole in achieving innovative branding solutions to expand its fan community under the threat from global sports. The stakeholders' representatives in the discussion groups and in-depth interviews, suggest two key areas for innovation in order to attract the attention of the big communication circuits, new audiovisual consumption platforms and prestigious spaces, allowing them to compete with the big agents in global sport:

(a) Expanding the base of the sport through recommendation from its agents and an attractive story.

The education programme "Pilota a l'escola", which reached 585 schools and 22,200 pupils in 2019–20, has been confirmed as an effective transmission channel. In fact, this type of programme is shown to be one of the most powerful and clearly socially innovative tools [69] that a sports club can use to maintain and expand its fans [48]. Following the logic used in place branding strategies [70,71], in which the priority is to arouse a feeling of identity and pride among the public so that they are the main recommender to other audiences, the governing bodies of Valencian pilota can work on its brand as if it were a (symbolic) territorial brand, turning its entire base (7.1% of the population had a high or very high level of knowledge of this niche sport) into the main ambassadors for the sport.

At the same time, considering the multiplicity of agents and the lack of professionalisation, there is a chance of implementing a homogeneous story and a defined positioning for the whole sport; in other words, organising messages via storytelling that underline its unique, ancient identity, taking into account that digital media are currently reinforcing or altering dominant cultural identities and ideologies [72].

(b) Digital audio-visualisation

Although the media impact data are reasonable (four news items a day, one TV broadcast a week, a media following of 16.4% by the general population), the social media

environment has been shown to be very active. Its growth has doubled in the last few years, confirming that the digital environment is an ideal place for publicising minority manifestations and achieving interaction. This confirms the relationship between sport, the media and its impact on feelings of identity and citizenship [73]. So, it would be a digital platform that could offer all kinds of pilota content, creating and sharing attractive audio-visual content among a particular community.

The presence of pilota on television has been the issue most debated and commented on in the discussion groups. We can say that this "audiovisualisation" of pilota is one of the great challenges of the future. However, television alone is not enough as an audiovisual space. All the trends seen in the theoretical framework and audiovisual consumption data show the tendency of the Millennial Generation and Generation Z to consume via OTT rather than classical or linear television. There are three over-arching ideas in the whole dialectic surrounding audiovisuals and pilota: rethinking pilota on television; the suitability of vibrant television formats; and audiovisual formats other than linear television. We advocate taking advantage of the transmedia nature of the new digital environment by generating content to be consumed on different media in the form of micro-stories, with storytelling based on Valencian pilota but going beyond purely broadcasting sporting events.

5.2. Management Implications

In this context, dialogue between the different agents involved in the sport under analysis has specified two focuses of innovation that can be applied to many other minority sports. Firstly, there is an urgent need for an attractive brand story recommended by the active agents to arouse a feeling of identification and pride and recommendation from among the fans themselves [51]. Secondly, digital audiovisualisation is crucial. In an uncertain and volatile scenario, digital content as a gateway to access and knowledge can be decisive in achieving survival in the market against the great Goliaths that dominate global sport as spectacle [23].

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