Scoring with the Net – the Cybermarketing of English Football Clubs

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INTRODUCTION

The adoption of cybermarketing as a significant component of an organization’s marketing strategy has varied from sector to sector. Some sectors have been rapid and enthusiastic adopters, while in other sectors companies have taken more of a ‘wait and see’ approach, content to take a cue from other players in the sector.

The football clubs that constitute the English Premiership, which have provided the focus of this research project, fall clearly into the latter category. There is a complex set of factors that can be advanced as to the reason for this, ranging from concerns about the technical factors shaping the development and maintenance of internet communications – concerns that might be found in any sector which frequently has traditional and conservative approaches to management – to factors specific to the sector. Nonetheless, the slowness to adopt is to some extent surprising. As Harverson and Garrahan (2000) argue, ‘sport and the internet look like a marriage made in heaven … because of the unmatched enthusiasm and loyalty it generates among consumers’.

Professional football is unarguably a commercial operation, one large enough to attract investment from global communications organizations such as Rupert Murdoch’s, but it retains a number of characteristics that make it different from more conventional forms of mainstream commerce:

- Historically, the advent of a major commercial dimension to the sector has been a relatively recent development. The major commercial impetus has taken place as recently as the last ten years (Dempsey and Reilly 1998; Slack 1998).
- The ‘new commercialism’ has been driven by external forces, notably a legal requirement to improve stadium facilities following the Taylor report into the Hillsborough Disaster (Conn 1999).
- Commercial success is not the only measure of success, although there is evidence to suggest a loose correlation between success on the pitch and commercial success (Szymanski and Kuypers 1999).
- The consumers – football fans – are increasingly aware that they are stakeholders in the football operation and are seeking to share power in the decision-making processes at the level of the clubs (Michie and Ramalingham 1999).
- The nature of the operation as one of popular entertainment results in the interest of broadcasting organizations and the highly lucrative emergence of broadcasting rights. Broadcasting in turn has resulted in a market for club sponsorship, both

Abstract

In the past eight years, English Premier League football has become increasingly commercial, and there has been a consequent growth in the importance of club marketing. The Internet and cybermarketing have simultaneously developed as commercial phenomena over the same period.

The main aim of this paper is to examine the scope, nature and content of football club websites from a marketing perspective. It also seeks to highlight the competitive advantages that clubs may derive from their sites. The paper is based upon a qualitative survey of club sites, building on earlier work by the authors. It was based on an existing model for analysing sports websites, and involved site surveys, and telephone and face-to-face interviews with club officials.

The authors found that, despite improvements compared to their earlier study, most club sites remain underdeveloped and that many clubs have still to seize the opportunities that the Web offers. While some clubs are becoming more sophisticated in their use of cybermarketing, all clubs still need to address a number of issues. The paper thus highlights intermediation, organizational change, and the development of marketing activities and functions as key areas for future research.

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in the form of sponsoring team clothing and in the placement of billboards around the club’s pitch. Some commentators expect the distinction between television and Internet to blur with respect to the broadcasting of sports events, with a major increase in the use of WebTV (Turner 1999).

- The structure of the operation – an independent league of 20 clubs (three being relegated and a new three being promoted from a lower league each year) – has resulted in secondary sponsorship.
- It has strong social and cultural dimensions.

These factors alone suggest that the approach by clubs to the use of the Internet as a marketing tool may be different from that found in other sectors. Additionally there are factors which derive from the characteristics of the modal consumer – the average football fan – which might imply that some kind of ‘special case’ might be made for the role of cybermarketing to football fans. Among these are the suggested correlation between the average sports supporter and the average internet user (Delpy and Bosetti 1998), the propensity of football fans to be collectors (Tapp et al. 1999) and the emergence of the New Fan, who does not necessarily support his local club for all his (or indeed her) life, rather seeking clubs to support across national borders – see Tapp and Clowes (1999) for a typology of fans, and Pope et al. (1999) for research that women are less likely to purchase sports products over the Internet than men.

The social dimension of football organizations suggests that it would be natural for clubs to try to build virtual communities since fans/consumers have a natural bond, one that extends well beyond the common purchase of identically branded products. This beyond extends even to those fans who do not make purchases. Indeed sports communities have been identified as being among those in which market growth can be achieved by use of the Internet (Hagel and Armstrong 1997). The use of chat lines by clubs may lead to an easy growth of such communities. However, earlier studies, which suggested that such communities might be more equitable than traditional supporters’ clubs, have been questioned, Weisband et al. (1995) and such communities will need to be managed by clubs (Armstrong and Hagel 1995).

The context of the research project is thus the three-way intersection of the disciplines of marketing, e-commerce and sports management, specifically that of football management. While the overlap of the first two has been widely studied, their joint overlap with the third has not.

MARKETING AND THE INTERNET

Earlier work by the authors, on the opportunities that database marketing offered to football clubs (Tapp et al. 1999), led them to consider how the Internet might be an ideal medium to form and develop relationships, in a marketing sense, with the growing number of football fans who were using the Internet. The case for competitive advantage in direct marketing by use of the Internet had already been made in a general context (Thomas 1998). A casual survey of football sites on the Internet made it clear to the authors that a healthy counter-culture of unofficial websites, produced through loyalty to a specific club, indicated that the Internet was becoming a significant medium of use by football fans.

The nature of the activity of professional football and the characteristics of the fans suggested that a range of electronic activities might hypothetically take place either in the form of direct e-trading between club and fan or in the form of indirect customer service. This would in the longer term lock the fan more tightly into a relationship with the club, and hence encourage a longer-term ‘spend’ with the club. These included:

- ticket booking and sales, with perhaps the option to preview the view in the stadium from nominated seats;
- the sale of club merchandise (Alba et al. 1997);
- the provision of a news service regarding the club and its players;
- the provision of a ‘statistical’ service, giving historical data of the club’s performance;
- the provision of sound broadcasting of live games (the television broadcasting rights being already assigned);
- the provision of video clips of recent games;
- the promotion of club-branded Internet services;
- the provision of club-directed chat lines;
- the mutual promotion of products with those of the club’s sponsors;
- the collection of direct marketing data (Paul 1996).

Some synergy between these services might be expected, with a fragmented and hence segmented range of potential buyers (Armstrong and Hagel 1996). As the work of Belk et al. (1988) and Berthon et al. (1996) suggests, these buyers will be likely to include passive browsers who may drift into purchasing if the right product is presented. This boundary between browser and purchaser is less significant on the Internet than in the context of a ‘flea market’ – the context of the work of Belk et al. – an effect which makes the mutual promotion of information and merchandise on a single website all the more commercially successful (Armstrong and Hagel 1996; Spar and Bussgang 1996).

The nature of the relationship between club and fan would suggest that the connection between the promotion of information and merchandise might well change over time, and hence any research methodology should include a longitudinal aspect. Over time there is likely to be a shift from the physical market place to the virtual – (Pattinson and Brown 1996; Sahay et al. 1998; Weber and Kollmann 1998) – and, in the case of football clubs, this will parallel an increasing shift away from the match-day gate revenue as the major contribution to club finances (Szynanski and Kuypers 1999). This will necessitate the development of information-based marketing, which continues to be deliv-
ered at appropriate levels of speed, content and quality. If this development does not materialize, the strength of the club brand will be eroded in the perception of the individual fan. And, where in the past the fan’s loyalty might be thought of as sufficiently strong to tolerate the annoyance of the weaknesses of a poor website, today’s net-surfing, internationally minded fan may move his allegiance to a club with a better website – with more up-to-date news, more information and news of club and player developments, or a more impressive website per se. The website might thus lead a football club to a position of competitive disadvantage if mismanaged.

The interactive nature of Internet activity raises a further issue for clubs to resolve in determining their cybermarketing strategy. Since this interactivity lends itself to the participation of fans and the possibility of providing a forum for expressing their views – ultimately it might even provide a forum for the launching of ‘fan power’ – the club must consider carefully whether to manage the expression of fans’ views on their (official) website or to monitor the unofficial sites over which they have no control. It should be borne in mind that football clubs have spawned a much stronger range of unofficial websites than organizations in other sectors. Indeed, there are few examples in other sectors at all, and, where they do exist, they are antagonistic in the extreme towards the organization that prompted their existence – as has been the case with MacDonalds; see Anonymous (1999b), for example. The sites spawned by football clubs are generally not antagonistic, but their natural loyalty and support is for the club rather than for the current manifestation of management. While it would be wrong to suggest that fans currently play a significant role as powerful stakeholders in many clubs, there are examples where fans have managed to achieve a measure of boardroom power (Michie and Ramalingham 1999) or have played a part in the shaping of boardroom events (Brown and Walsh 1999).

The challenge for football clubs is thus three-fold:
- to attract fans and sell the club’s products to them;
- to retain fans and build their loyalty to prevent them ‘defecting’ to support other clubs;
- to maintain a dominant position against the multifarious competition offered by unofficial sites.

Clubs may well assume that their existing customer base will provide a hard core of supporters who will seek out and use the club’s website, but to ‘rest on this laurel’ is to fail to recognize that the Internet empowers a wide and fragmented range of people who are potentially club supporters (Dholakia and Rego 1998). It further fails to recognize that to achieve this initial and then repeat website access requires careful nurturing and management (Berthon 1996) and a variety of offerings, including genuine incentives and promotions as well as entertainment (Godin 1996). In order to achieve this, clubs will need to integrate their marketing strategies, and lead fans to their websites by promoting them at the stadium and in match programmes, for example. Duncan and Campbell (1999) identify a number of issues that make the process of leading fans to websites problematic.

The conclusions of the above literature review are that football clubs will need to resolve the following issues if they are to maximize the potential benefits that the Internet offers them:
- Are specific objectives established with regard to the range of commercial activities that an Internet presence enables (e.g. ticketing, direct sale of merchandise, development of database marketing, supporter relationship building)?
- Is the club website evolving in design terms to meet the challenges of competition from unofficial sites and competitor sites, and to maintain a competitive advantage?
- Is the club website a success? What criteria does the club use for measuring such success?
- What perception do users have of club websites?

RESEARCH METHODOLOGY AND METHODS

The driver of this research project has been the desire to investigate the nature and function of football websites as a means of marketing club products. The initial objective was thus to investigate what perceptions football clubs had of the provision of websites and how they saw the role of websites in their overall strategy. These findings needed to be compared and contrasted with empirical observations of the websites themselves and then a systematic assessment of them. To further facilitate an evaluation of the correlation, or otherwise, between intended strategy and the reality of the club website, it was decided that a qualitative approach was desirable to reinforce the role of empirical observation (Guba and Lincoln 1994), and the richness of an interview approach was considered desirable because of its essential intersubjective interaction (Kvale 1996). In the light of the newness of the investigation into the overlap of e-marketing and professional football, with the latter’s wide variance from conventional business organizations, an essential consideration of the research was to develop an understanding of the processes taking place as much as to explain them (Gummesson 1991).

The selection of appropriate models of e-commerce for analysis was problematic as models of e-commerce are normally developed as generic precursors. Professional football is an atypical sector, as has been outlined above, and so it is not surprising that generic models do not offer great insight. The business function under investigation was restricted to marketing, and this militated against the use of holistic models such as Zwass’s (1998) model or the widely adopted Hoffman and Novak model (1996). Within the limited literature of sports marketing on the
Internet, Caskey and Delpy’s (1999) model was rejected because of its reliance on revenue data, which were unavailable in the culture of commercial confidentiality which permeates the traditional world of soccer club management.

Three models were considered helpful and appropriate to the research programme. First, as the programme envisages a series of annual surveys (see below), a developmental model was chosen to monitor changes to the overall state of websites year by year, based loosely on the work of Lawrence and Thomas (1999). Giaglis et al.’s (1999) model was chosen to review deeper changes at the level of intermediation issues. Finally, Hair and Keep’s (1997) predictions of how Internet marketing is likely to develop were used as a yardstick.

The following research methods were used:

- in-depth interviews with marketing personnel of a Premiership club that was considered by the authors to be modal, in that it had remained in the Premiership for longer than the clear majority of its competitors, yet had no strong tradition of spectacular success on the pitch – a thoroughly middle-of-the-road club unlikely to be considered a success or a failure by a neutral observer;
- structured telephone interviews with marketing personnel of other clubs, ranging from the Premiership to the Third Division;
- a systematic survey, between December 1998 and March 1999, of the official websites of all 20 Premiership clubs. The 28-point pro-forma was developed following a preliminary survey (see Brown (1998) for a similar approach to baseball marketing on the Internet);
- an informal survey of the official websites of the Football League clubs;
- an informal survey of the unofficial websites associated with Premiership clubs;
- a repeat survey of the Premiership official sites a year later (the 17 continuing clubs, the three now-relegated clubs and the three newly promoted clubs were surveyed). This survey was begun in December 1999 and completed in January 2000.

Annual repeat surveys are planned for the immediate future.

The systematic surveys consisted of a 28-point pro-forma and were conducted by trained research assistants, who were encouraged to record additionally any observations they wished to make regarding the content of the websites that had been assigned to them, and their reactions to the websites. Each website was further reviewed by at least two of the three authors.

**FINDINGS OF THE FIRST PHASE OF RESEARCH**

Some of the findings of the first phase were reported in outline in a paper at the Twelfth Bled Electronic Commerce Conference (Chadwick et al. 1999), but the present paper reflects further and more detailed analysis of the data gathered during that phase. The second phase of the research project was conducted subsequent to that Conference.

Earlier work (Tapp and Clowes 1999) had suggested that the Premiership football clubs had only recently begun to develop a sense of being ‘market led’ and that this awareness was rather patchy. This research had shown that the clubs had undertaken little market research, and had scarcely started to develop strategies of either database marketing or relationship marketing. The emergence of websites lends itself to all these approaches and so the authors had some expectation that evidence of progress in these areas would emerge.

The situation that emerged was more complex than that of adopting a ‘pro-marketing’ approach. While some had indeed taken the opportunity of improving the customer service orientation of the organization, other clubs had much less clear views on website strategy. Some clubs had, at the time of this first phase survey, the attitude, as revealed in interviews, that a web presence was necessary because their rivals had websites. This reactive approach led to poor quality websites. Examples of unimaginative practice included:

- no team news, but a clickable link to the website of the local newspaper as if this were an acceptable alternative;
- a website that consisted entirely of text;
- a website totally devoted to the retailing of club merchandise.

One reason that this initial survey extended to three months’ duration, however, was the speed at which good practice spread across the 20 sites. Within that three-month period, two of the three examples above were upgraded.

By the end of the three-month period, some clubs had begun to adopt practices that were already the norm on North American professional sports websites, such as the use of loyalty schemes. The ‘trolley’ or ‘basket’ approach to selling online had emerged, and the range of branded goods continued to grow, although there is no evidence to suggest that the Internet was a driver in this expansion of goods offered.

One reason for the differing styles of the club’s websites was that clubs had different views of which department within the organization should have responsibility for the website. While all saw the website as notionally a marketing operation, their general lack of an integrated approach to marketing saw responsibility fall to ‘Ticketing’, ‘Merchandising’ or ‘Public Relations’ departments for example. This diversity of responsibility, and how each club chose to decide where to place responsibility, may well be a cause of the range of quality of club websites, with some departments seizing the opportunity and others showing much less interest and/or ability in IT opportunities.

Premiership clubs vary in size, as measured by revenue, assets and gates. There was some tendency for the ‘bigger’
clubs to have the ‘better’ sites, in terms of facilities and presentation skills. The correlation was not overwhelmingly strong, however, and clubs with weaker financial resources and support could ‘close the gap’ by employing effective website designers. Whether these designers were professional or not was in some cases unclear, and it was very obvious that even teams down in the Third Division attracted highly talented website designers who produced unofficial websites noticeably more sophisticated than their official counterparts.

Further key data, which indicate the then current state (December 1998 to March 1999) of the Premiership website art, are given in Table 1.

**FINDINGS OF THE SECOND PHASE OF RESEARCH**

The repeat survey of Premiership clubs was conducted almost exactly a year later (December 1999 to January 2000). At the end of the previous season three clubs had been relegated and three other clubs had been promoted to take their place. The repeat survey was conducted to cover all 23 clubs.

The first observation to note is a considerably greater degree of consistency in the content of each individual website over the period of this second phase, which enabled it to be completed in a shorter time. Other obvious changes, discussed in the following sections, had taken place.

**Generic Sourcing**

At the time of the initial survey, the vast majority of clubs had either produced their websites in-house or had used the services of independent producers. Only three had websites produced by Planetfootball. A year later, 11 of the clubs had Planetfootball sites. These 11 websites were not crude clones from a generic precursor – it was transparent that they had each been produced independently – but there were elements of an implicit house style reported by the observers.

Planetfootball had its own site (Anonymous 1999c) which provided links to these 11 clubs, to other Planetfootball websites for clubs in lower divisions and to other generalized football sites. This partial offering seemed to be of limited interest to general football fans, who would be more likely to use the Carling website (Anonymous 1999a) – Carling being the sponsor of the Premiership and provider of a website which has detailed information on all 20 clubs currently in the Premiership. Another example of such a meta-site is that provided by Sky Sports

**Table 1. Key results of initial survey of the 20 Premiership clubs 1998/1999**

<table>
<thead>
<tr>
<th>Category</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket sales</td>
<td>Sixteen out of 20 clubs offered information on ticket sales, but only two had the facility for online purchasing.</td>
</tr>
<tr>
<td>Merchandising</td>
<td>Only one club did not promote merchandising. Liverpool FC devoted its site to merchandising.</td>
</tr>
<tr>
<td>Corporate hospitality</td>
<td>Seventeen clubs promoted corporate hospitality.</td>
</tr>
<tr>
<td>Cyber products</td>
<td>A few clubs had begun to offer IT-based products, with the commonest being club-branded domain names and club-based screen savers.</td>
</tr>
<tr>
<td>Club news</td>
<td>All except Liverpool FC offered club news.</td>
</tr>
<tr>
<td>News of individual players</td>
<td>Extensive player information was the norm.</td>
</tr>
<tr>
<td>Fixtures and match reports</td>
<td>Again, these were the norm, although the extent to which club reports went back chronologically varied.</td>
</tr>
<tr>
<td>Away travel</td>
<td>Nine clubs offered some information on travel to away games, but only one offered a comprehensive Travel Club.</td>
</tr>
<tr>
<td>Club history</td>
<td>Sixteen offered a club history, but the information offered was scant, and unlikely to be of surprise to even semi-loyal fans.</td>
</tr>
<tr>
<td>Building a database of supporters</td>
<td>Six clubs planted cookies. Eleven collected data more overtly.</td>
</tr>
<tr>
<td>Community activities</td>
<td>Seven clubs promoted community activities. A majority made some form of special offer to promote junior interest.</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>Roughly half the clubs had some form of sponsorship displayed on their website, a surprisingly low figure as all 20 had major sponsorship deals, typically associated with the team’s kit. There was little overlap in promotion, only one product – a beer – appearing on more than one website.</td>
</tr>
<tr>
<td>Ownership</td>
<td>There was a distinct absence of ownership information, only Chelsea choosing to promote its ownership, by Chelsea Village, strongly.</td>
</tr>
<tr>
<td>Supporters clubs</td>
<td>Ten clubs promoted Supporters Clubs, but they were clearly a part of the football club’s marketing operation rather than the traditional type of supporters club.</td>
</tr>
<tr>
<td>Chat rooms</td>
<td>Fourteen offered chat rooms, some charging for the service.</td>
</tr>
<tr>
<td>Live audio reports</td>
<td>Thirteen clubs were offering this service.</td>
</tr>
</tbody>
</table>
Football (Anonymous 1999d), which similarly provides comprehensive multi-club information.

Some clubs have chosen external site designers who do not specialise in football. Watford, for example, have used Digital Ink, whose other clients include Nivea, Adobe Systems and Agfa UK. Liverpool’s merchandising site was developed by Stem, who have also produced sites for Hallmark and Bristol Zoo, and Designercity have produced websites for Eurotunnel, Ted Baker and Tesco as well as Arsenal.

American research (Smith et al. 1999) suggests that 56% of sports facilities have a presence on the web, and of these only 30% constructed and managed their own site. Premiership football clubs are thus ahead of their American counterparts in terms of presence, and have caught them up in terms of using professional outsourcing.

Sophistication

Most websites had designs that were far more sophisticated than those of a year previously – sophisticated in the sense that a) the structure was larger and more complex and b) there were many more instances of text being incorporated into .GIF images rather than as plain text. In the case of Arsenal, the homepage had been designed to represent a Sega game machine, Sega being one of the club’s sponsors.

The use of generic sourcing had also contributed to the sophistication of the design of the website (Armstrong and Hagel 1995). Technical sophistication was also evident, with some clubs offering variants – Java/non-Java; Shock Wave/non-Shock Wave – for fans to choose between.

Increasing Cyber-awareness

Clubs had become much more aware of the uniqueness of the medium in which they were operating, and those in the industry of the medium had started to take far more notice of football club sites.

An excellent example is provided by the website of Manchester United (TWI 1999). The title page of this site acknowledges the following:

- Sun Microsystems
- Official Technology Partner of Manchester United
- Lotus
- Official E-Business Partner of Manchester United
- UUNET
- Official ISP of ManUtd.com
- Informix
- Official Database Partner of ManUtd.com
- sports.com
- Official Internet Sports Media Partner of ManUtd.com
- Trans World International
- Site creator and manager

All six references are thus to IT organizations rather than to organizations associated either with the club or the sport. Reference to Sharp, main sponsor of the club, is made only obliquely, in that the name is readable on the shirt in the main image.

Second-party Advertising

Many websites now carry straight advertising for other organizations, a phenomenon that had started a year previously but was then uncommon. Football websites have, in this respect, started to assume the role of virtual stadia, in that the bill-boarding along the side of the pitch is being replicated along the edge of the VDU.

CONCLUSIONS

Three areas of research have been addressed through conducting two phases of an ongoing longitudinal project:

Intermediation

Giaglis et al. (1999) point out that the impact of web marketing may be found in three intermediation effects – disintermediation, reintermediation and cyberintermediation. The emergence of a marked cyberintermediation effect has been noted above. The effect is, at the moment, essentially a technical matter from the clubs’ perspective – an opportunity to provide a website which compares favourably with the sites of their perceived competitors, other football clubs. There is, however, a case for the need for cyberintermediation that deserves closer consideration by clubs. With an increasingly far-flung supporter base, international in the case of, for example, Manchester United, who already have a retail outlet in the Far East, and a fall in the relative importance of gate revenues, the significance of the cybercommunity of fans will only increase (Hagel and Armstrong 1997). To meet their needs, which are different from those of the traditional, local supporter base, clubs will increasingly need to buy in the skills of cybermarketers (Ballam 2000).

Although outside the scope of the present study, some evidence is available to suggest that traditional intermediation activities related to the sale of club merchandise have changed. A interesting example is provided by Coventry City. This club has traditionally sold its merchandise direct, through a retail outlet at the stadium and through a shop in the city centre, and with some mail order sales. These activities continue strongly, and in this respect Coventry City is typical. It is also typical in that it has developed strong sales through the chain retail outlets of sports and leisure wear which have emerged during the last ten years. Coventry City has now extended intermediation to the non-sport sector, and has reached a successful and
growing relationship with Safeways, the UK food supermarket chain, in Coventry. This suggests that at the present time the market for club merchandise is expanding sufficiently to see growth without competition between different sales chains, and hence the web presence will not in the immediate future pose any threat to more traditional outlets.

Change

Lawrence and Thomas (1999) argue that the emergent approach to change, as opposed to a planned approach to change, offers ‘a structure which more appropriately delivers the flexibility and integration which is required in the development of such dynamic and innovative projects’. ‘Projects’ refers to three case studies of companies that they investigated.

Although the present study is restricted to business-to-customer applications of e-commerce, it has already been noted that the context of the study is one of change. The change process has taken place over the last ten years with regard to commercialization at the industry level. At the club level, the change is towards lower dependence on gate receipts, higher dependence on revenues from merchandising and greater reliance on revenues from broadcasting rights (although this is actually generated at league rather than club level, its distribution results in club income).

The management of e-marketing has been widely different at the club level, with respect to a number of variables, including time of adoption, centre of responsibility and reliance on out-sourcing. Variables associated with an emergent approach include a turbulent environment, and lack of exploration and planning, and these characterize the changes that are taking place in the football industry. In other areas, the distinction is less clear cut – for example, the varied use of either external consultants or internal staff. On balance, however, the clubs individually, and the industry as a whole, have been reluctant to plan, and the emergent-by-default approach has been appropriate, if more by luck than judgement.

Marketing Development

Hair and Keep (1997) offer a ten-point schema of how marketing might be predicted to develop on the Internet:

- more worldwide sourcing;
- increased emphasis on building customer loyalty; and
- safeguards designed to provide information security and buyer/seller confidentiality.

The evidence the authors found strongly supports those factors that relate to selling, either of tickets or merchandise. The broader extension of e-marketing to a more integrated e-commerce involving both ends of a supply chain is not greatly evident on Premiership websites, although the second phase survey did produce the first examples of clubs attempting to attract suppliers. Whether this is likely to develop into a trend will be monitored in future surveys.

The authors plan to continue with annual surveys and to monitor the development of Premiership Club sites until a ‘steady state’ has been reached. Other research strands that they intend to pursue are the use of websites by other football clubs and other sports and leisure organisations. The role of unofficial websites and their contribution to the emergence of a strong counter-culture at club level is also being investigated.

At both the preliminary and subsequent phases of this website research, a number of key observations can be made. First, the existence of a significant array of unofficial club sites supports the view that there is a healthy counter-culture among football website users. It is important to stress that, while the relationship between official and unofficial sites may appear to be an adversarial one, determining whether or not this is the case is beyond the scope of this paper and provides an opportunity for further research in the future. Second, in strategic terms, the development of football club websites is largely characterized by emergent club strategy rather than being a deliberate or planned strategy. This is starkly illustrated by the way that the majority of clubs have used the ‘PlanetFootball’ agency to develop their sites for them. Consequently, there is both a large degree of homogeneity between these sites, and a significant absence of clubs seeking to derive a first-mover or differential advantage from their sites. The general lack of clarity, in terms of the clubs understanding of the nature and purpose of their sites, is apparent in the way that some clubs are using their sites. Some are clearly commercial outlets, others are community foci, while a small number are taking tentative steps towards the development of their sites as Internet portals. This underpins the third observation that, despite the homogeneity and predominant emergent strategies, clubs are now seeking to build more sophisticated and differentiated sites (which is linked to the growing number of sponsorship and strategic alliances between football clubs and telecommunications companies). As such, the orientation of club websites can be presented in a matrix (see Table 2).

As the note to Table 2 indicates, the position of a club’s website on the matrix is dynamic over time. Most clubs began with Low/Low websites, which typically developed in either or both dimensions.

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These observations are significant for the future work of current and prospective researchers. The orientation of websites, and the content and development of them linked to this, is an important area of work. This will contribute more to our understanding of how websites can be used, how users relate to them and the value that can be added over and above the use of more traditional media. In addition, the strategic development of Internet sites has, thus far, received little attention. Although there is an emerging body of work examining first-mover advantage on the web, the use and development of websites as a deliberate strategy rather than an emergent one has not been considered. In a more specific context, the sport sector will continue to provide a fruitful basis for further research. Links to media company strategy, the introduction of WAP technology, and the growing self-management of football club websites are notable highlights of a changing sector. Allied to this are the continuing popularity of football and the net, the parallel existence of a counter-culture, and the need for clubs to reconcile their sporting, community and business roles. To this extent, it would be interesting, for example, to see further work in the area that links sport management and marketing, stakeholder theory and Internet strategy.

**NOTE**

1. It is important to distinguish between the major commercialization of football, which has taken place in the last ten years, and the professionalization of the game, which was formalized in 1885 (Tischler 1981).

**References**


