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# Internet and Social Media Strategy in Sports Marketing

Christopher P. Holland

University of Manchester, [chris.holland@mbs.ac.uk](mailto:chris.holland@mbs.ac.uk)

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# INTERNET AND SOCIAL MEDIA STRATEGY IN SPORTS MARKETING

## *Teaching Case*

Holland, Christopher P., University of Manchester, Manchester, UK,  
[chris.holland@mbs.ac.uk](mailto:chris.holland@mbs.ac.uk)

## **Abstract**

*The Internet and social media are transforming sports marketing. Historically television broadcasting was the main source of revenue for elite sports teams, leagues and sports federations. This is now changing because the Internet creates new possibilities for the distribution and consumption of sporting events. Social media is creating new forms of communication between fans, athletes, teams and sponsors. Mobile technology is also changing the way that fans consume sports content generally and also at live events. These changes create many strategic challenges and opportunities. This case study presents several frameworks and ideas, in particular the sports ecosystem model, event-driven marketing, star marketing and international differences in sports viewing for specific sports. These concepts are illustrated using sports marketing data from ComScore, individual sports organisations and personal research. A framework for the development of a social media strategy is proposed that can be used to evaluate the current position of a sports organisation and also to facilitate the development of a social media strategy. A series of questions is posed to structure the discussion of the strategic and technology issues facing the commercial director of a major sports team.*

*Keywords: Sports marketing, social media, Internet strategy*

## **1 Challenges in sports marketing**

As a senior manager in sports marketing you are faced with several related challenges and strategic problems. Traditionally most of the revenue in sport at the elite level has been generated from live broadcasting. Contracts with television broadcasters and media companies continue to be very lucrative. For example see ESPN's deal with the NFL (Sandomir 2011). Sponsorship and gate receipts from live events are also important sources of revenue. However, the technology and competitive landscapes are changing. In particular the advent of social media changes the way that fans interact and communicate with each other and with teams, athletes, and sponsors. There are also new types of media companies entering into the sports market that threaten to disrupt the current dominance of television companies in sports broadcasting.

Internet distribution threatens the value of live broadcasting because of Internet piracy and changing consumer habits for the consumption of sport, which may make live events less appealing to broadcasters. The Internet also creates new possibilities for minority sports that are not large enough to attract significant revenue from mainstream television broadcasting. In addition the value of content for future use on the Internet and in social media is not well understood. How should you deal with new broadcasting deals that may stretch five to ten years into the future? Should Internet rights be included in television broadcasting agreements? Or should they be kept separate? Who will own the sports content for future use in social media and Internet applications, some of which have not been invented yet? How should distribution in markets that are not covered by the broadcasters be managed? New companies such as Apple TV and Google are entering into the sports market. What are

their long-term objectives? Are they a threat to sources of revenue or a new opportunity for improved distribution and marketing of sports content?

Your task is to develop an Internet and social media strategy that takes into account the complex and related issues of innovations in social media, mobile technology, threats to sources of revenues, new entrants into the sports market such as Google and Apple TV and changing expectations from fans. You must protect the commercial revenue of your organisation whilst also growing the sports brand and value of your team by engaging with fans in a meaningful and creative manner. You must also exploit new developments in technology in areas such as mobile technology and position your organisation so that you can enter into relationships with new media and technology companies that are likely to be in the vanguard of sports marketing innovation.

## **2 What is sports marketing?**

Kotler et al. (2005), defined marketing as:

*“a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with each other.”*

**Kotler et al. (2005).**

In a sports context, sports marketing is therefore about the social and managerial processes by which fans, sports organisations and other companies related to sport, e.g. media and technology companies, create and exchange products and services with each other, increasingly through digital media such as set-top boxes, Internet, mobile devices and social media, as well as live sports events.

The major sources of revenue from sports markets are ticketing, merchandising, sponsorship and broadcast rights management. Looking at the organisation of sports markets in more detail, one of the characterising features of the sports industry is that it has a multi-tier structure (Mason, 1999) and each tier has a different role and interest in the business and marketing of sport. Shaw (2007) conceptualised the sports industry as a network that is normally centred on a major sports club or league.

The customers are the sports fans, and ultimately the fans are the source of all revenue. But unlike other markets where there are clear definitions of organisations involved in a market, typically in terms of the function of an organisation in the supply chain, e.g. retailer, distributor, manufacturer and raw materials, sports markets are more accurately described as a network of organisations involved in the creation, marketing, distribution and consumption of sports products and services. Starting with the athletes, individual players are arguably the building blocks of sport, and their increasingly important role is demonstrated by the growing interest in the concept of star marketing that is based almost exclusively on the persona of the individual athlete. Ritson (2010) made the argument that social media is inherently suited to promote and advertise individuals and conversely is ineffective at promoting brands compared with other media.

The club, or team, is the next major tier in the hierarchy. In most popular team sports, including soccer, American football, basketball and cricket, the sports club (e.g. Barcelona football club and Dallas Cowboys) is responsible for hosting the sports events, which are the focus of most fans' interests. The clubs are also very closely involved in managing the sources of revenue, e.g. match

ticketing, club and player sponsorship, and selling media rights in conjunction with other clubs and their sports federation.

Sports federations are responsible for managing the interests of the sport as a whole and setting strategic direction in areas such as promoting the game to new participants, encouraging international expansion, managing national and international leagues, knockout competitions and special events. The sports federations also act as an advocate for the sport generally.

In addition to the sports federations there is a set of related companies including major sponsors, media and technology companies, together with other companies with a direct interest in sport such as sportswear and equipment manufacturers (e.g. Nike and Adidas), sports marketing companies and independent fan groups.

One way of representing the diverse range of organisations, groups and individuals involved in sport and relating them to each other is through the concept of an ecosystem. See Figure 1 for a diagrammatic representation of the sports sales and marketing ecosystem model.

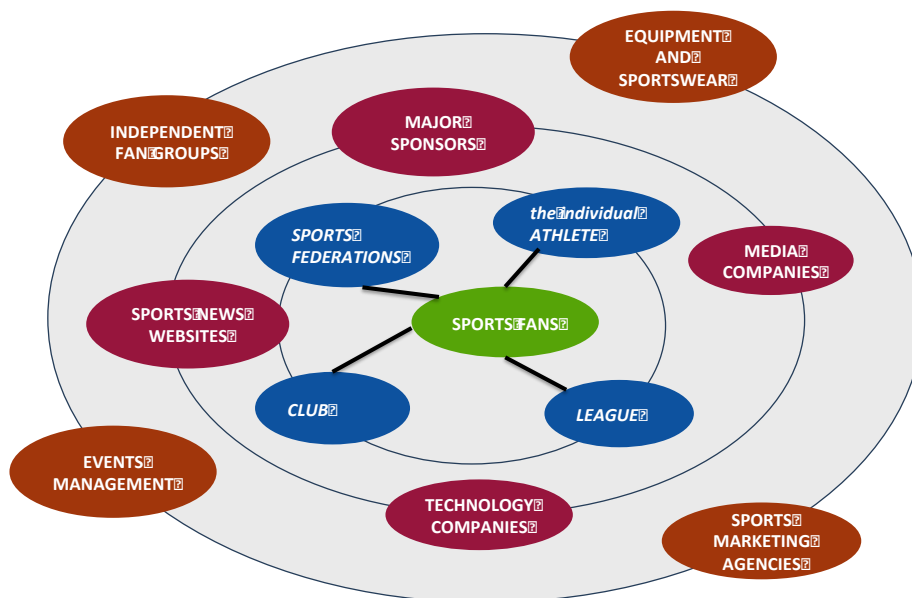


Figure 1. The Sports Sales and Marketing Ecosystem Model, © Holland 2012.

The business and social processes that connect these different groups together can be defined in terms of communication, i.e. information flows between the different entities. This sharing of information, whether in the form of video, news articles, televised sporting events, blogs, chat-rooms or social networking, is at the heart of how fans interact with sports markets and with each other. It is therefore important to be able to understand the impact that changes in media have on these exchange processes and in particular to try and articulate the effects of web 2.0 and social media on sports marketing.

Before television, sports fans would attend sports events and read about their teams and individual athletes in newspapers. There were very few other sources of information, except of course, face-to-face discussions with other fans. The advent of television revolutionised the marketing and

consumption of sports because it made individual sporting events available to millions worldwide and removed geographic boundaries of participation. Social media is having a similarly dramatic effect because it affects the way in which fans become interested in a particular sport or event, the way in which they consume sports products and critically, it will change the current balance and sources of revenue and therefore affect the economics of sports marketing.

### 3 Competitive threats and opportunities facing sports federations

The increased use of the Internet, including traditional websites, web 2.0 and social media creates new threats and opportunities for sports federations in terms of changing consumer behaviour, social networks of fans, new entrants in the form of technology companies and new patterns of strategic behaviour by media companies. An overview of the competitive threats and opportunities facing sports federations is shown in Figure 2.

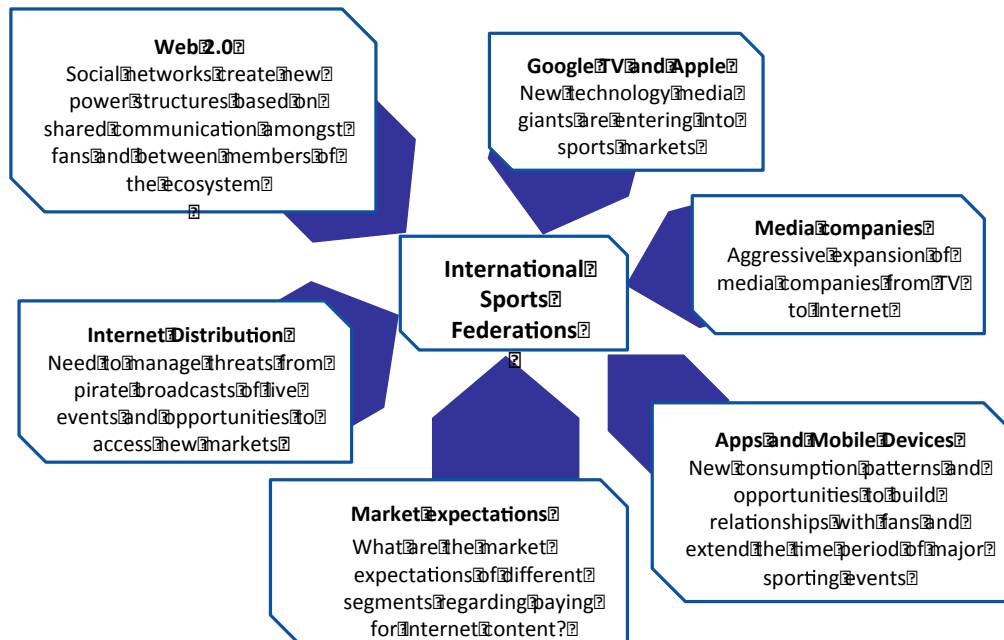


Figure 2. Competitive threats and opportunities arising from the Internet and web 2.0

The use of social media based on web 2.0-technology potentially changes the structure of markets, and sports markets are no exception. Individual sports fans can be targeted directly by the individual athletes, thereby circumventing agreed media rights between teams and sponsors. Technology companies may view sports markets as an interesting and powerful way to engage customers, even though this may not their primary focus. Apple’s effect on the music business and Google’s ambitions in understanding all aspects of online consumer behaviour both indicate severe threats to incumbents in the sports industry, given these companies’ recent entry into sports infotainment services.

Existing media companies such as ESPN are also becoming much more aggressive in acquiring online and media rights together and there is arguably a trend towards television broadcasting becoming less influential in terms of overall consumption because online consumption through personal computers, tablet computers and mobile phones is gaining in terms of its customer reach.

The Internet in general raises specific problems and issues related to pirating of digital content. This can be a major problem for sports organisations that are charging for a live event when it is now technically possible to feed a live stream of the event to multiple web servers that can be viewed for free by potentially millions of fans. There are also groups of users who have become accustomed to ‘free’ content, e.g. the youth market, and sports organisations must find ways of engaging with this market, even if it is on unfamiliar terms compared with historical custom and practice. In addition, there are significant differences between the attitudes of international audiences regarding paying for Internet content.

#### 4 The structure of the global online sports market

Sports and other commercial organisations are interested in what percentage of their total market can be influenced by a particular media such as TV, radio or magazine. In online markets it possible to measure the number of unique visitors and this can be developed into a measure of reach in specific markets. The online size of a sports website is defined as the number of online users over a defined period of time, in this case over a three month time period. The results for the top 100 sports websites worldwide for the fourth quarter in 2011 are shown in Figure 3.

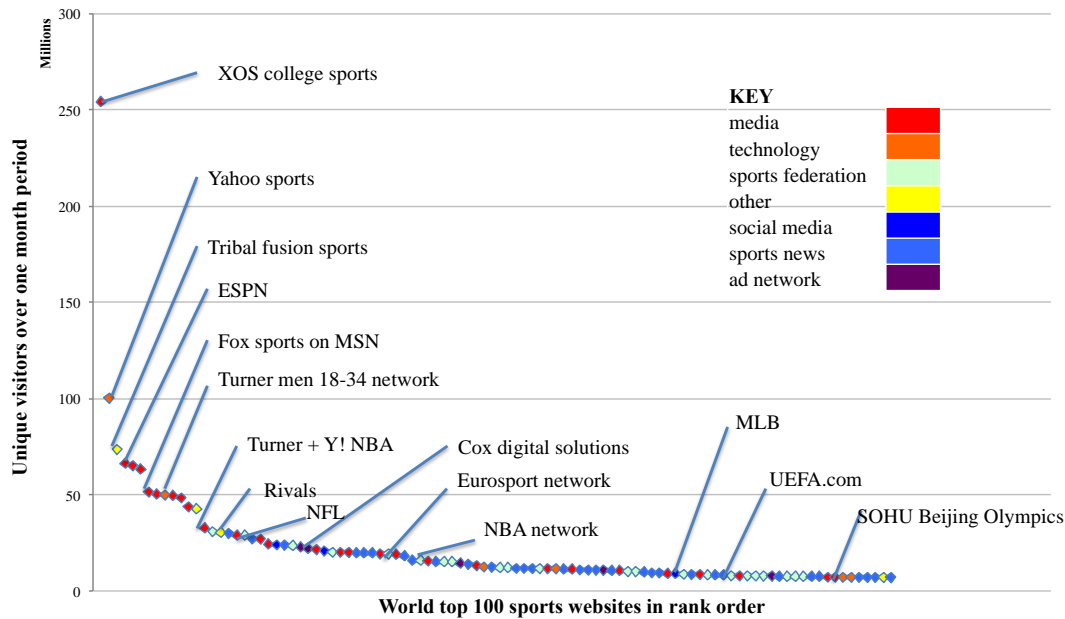


Figure 3. The distribution of the top 100 sports websites worldwide. Source: ComScore 2012.

The websites are plotted in rank order on the basis of the number of unique visitors to each website. It can be seen that the distribution is highly skewed with a small number of very large websites, a middling number of middle-sized websites and a lot of small websites. The number of each type of website and its share of online traffic is shown in Table 1.

Type of sports website	Number of websites (%)	Share of unique visitors (%)
Sports news	32	19
Sports federations	22	14
Media	28	46
Technology	6	9
Other	12	13
<b>Total</b>	<b>100</b>	<b>100</b>

Table 1. The distribution of sports websites and their share of unique visitors

#### 4.1 Relative size and dynamic use of sports federation websites

A sample of international sports federations and their dynamic share of unique visitors are shown in Figure 4.

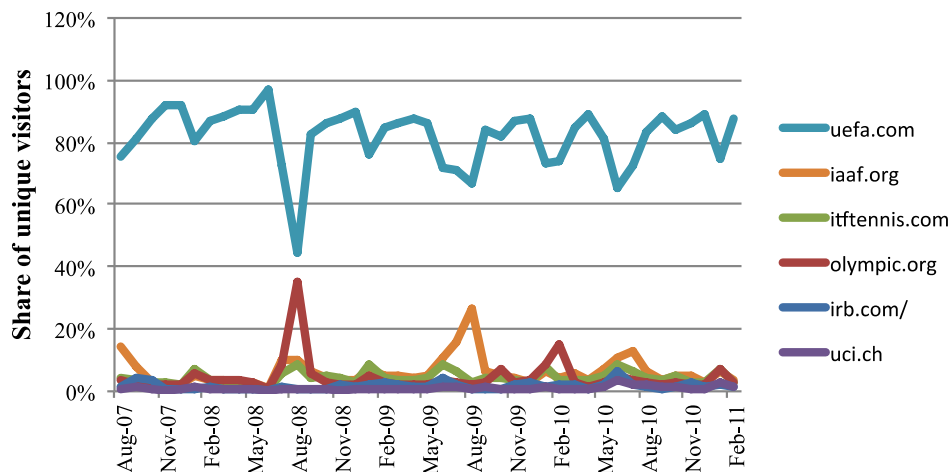


Figure 4. Share of unique visitors for a sample of international sports federations 2007 – 2011

It can be seen that football’s governing body, UEFA, dominates the share of unique visitors relative to these other sports federations. Several peaks can also be observed. The peaks represent surges in online interest that correspond to an important sporting event or tournament. A more detailed view of these websites excluding UEFA is shown in Figure 5.

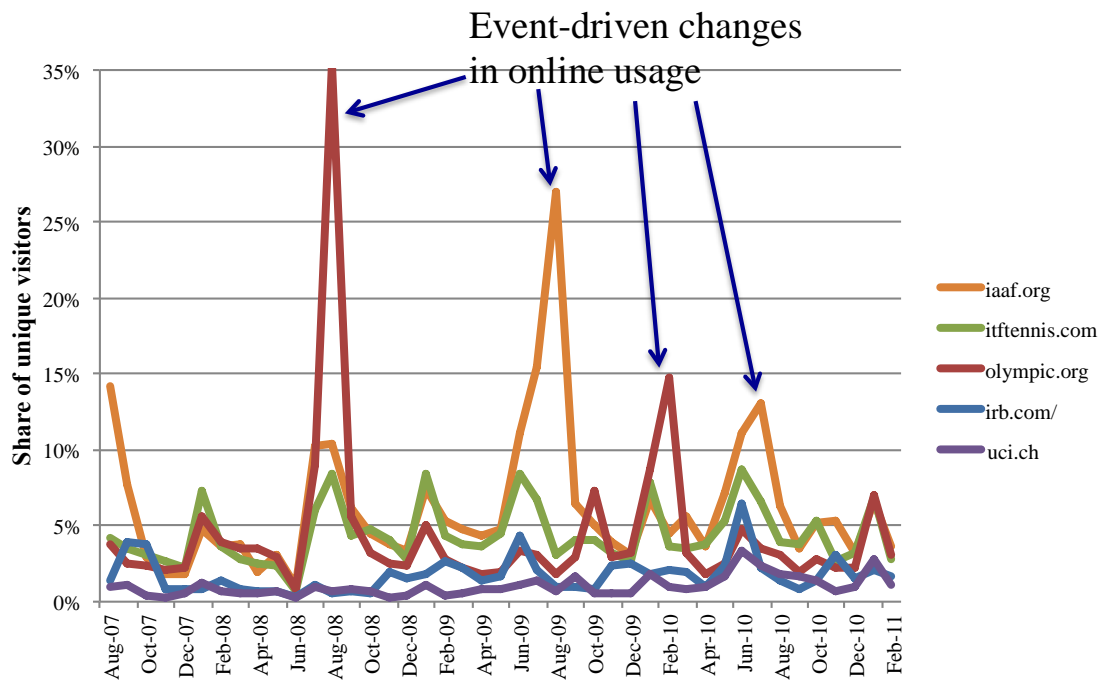


Figure 5. The event-driven nature of sports websites

The online peaks for the Olympic movement naturally correlate with the Olympic games events. This phenomenon is termed event-driven online use and should form an important part of any Internet sports marketing strategy. The problem for sports organisations, including clubs, leagues and federations, is that the peaks tend to happen over a very short period of time. For example, in Formula 1, this could take place over a weekend race event. For the Olympics, it takes place over two weeks. The strategic question is how should sports organisations use the Internet and social media to extend the duration of the peaks in order to maximise interest and revenue potential in their events? A detailed example of Internet activity during an event is shown in Table 2.



Activity area	Day 6 report from the IPC
Unique visitors	Yesterday was our second best day of the Games in terms of online visitors on sports days. 160,000 people logged on yesterday, which means that since 29 August 926,000. We will break the million barrier today ☺
Facebook	Last night we broke the magical 100,000 likes figure on our main Facebook group adding about 14,000 in one day.
Star marketing on Facebook	Our athlete facebook pages are now doing extremely well and the number of people liking these pages have tripled in the last few days.
Twitter	We now have 36,000 likes on Twitter.
Youtube videos	In five days of competition over 1 million videos on demand have been downloaded from our YouTube channel.
Technology infrastructure	We have added a new server and extra bandwidth to the IPC website in anticipation of record visitor numbers for Sunday’s closing ceremony which will see us live stream a Coldplay concert.

Table 2. International Paralympic Press Release on Day 6, London 2012

#### 4.2 International differences in online markets

Sport is a global phenomenon but individual sports federations, clubs and also athletes need to address important local differences in interests and behaviour. To illustrate some of these international differences in online users, a regional analysis of a sample of the top sports websites is shown in Table 3.

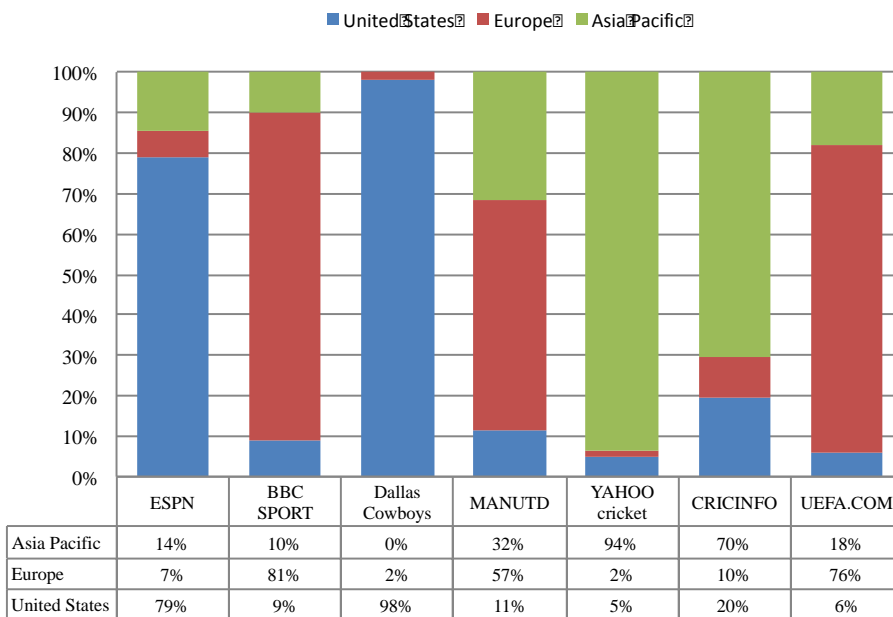


Table 3. The distribution of sports websites and their share of unique visitors

## 5 Social media

The definition of web 2.0 and social media is a difficult problem because on the one hand the concept is rather nebulous and on the other it can sometimes be perceived as being all-encompassing, and to cover almost any new innovation that is web related. In the context of Internet marketing, a non-technical definition is proposed that is based on the actual use of the technology from a managerial perspective:

*“Web 2.0 and social media are the new forms of applications such as social networks, blogs, media sharing and discussion forums, that enable user generated content that results in relevant and meaningful information and outcomes at a social network level, for example group opinions, social connections, tag clouds and virtual worlds.”*

To expand on this description, a taxonomy of social media examples is described in Figure 6. Each type of social media application is illustrated with a business example, some of which are very well know, for example YouTube, and others which are much more specialized, for example Covisint, that is used to connect together manufacturers and suppliers in the global automotive industry.

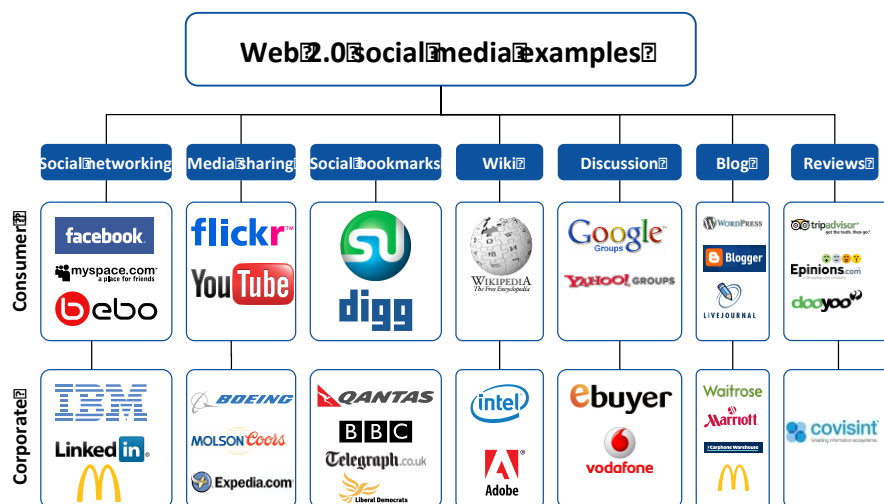


Figure 6. A taxonomy of web 2.0 social media examples

### 5.1 Marketing and social media

The taxonomy of web 2.0 social media examples defines the range of social media applications but how are these related to marketing? Sports marketing typically has objectives regarding engagement with fans including generating interest and awareness of the sport, increasing participation, developing the brand of the club, league or federation, selling tickets to live events, selling TV rights and activating fans so that they become fully engaged with the sport. A framework is therefore proposed that starts to relate marketing objectives with some specific examples of the use of social media in sports marketing, see Table 4.

Sports marketing objective	Social media strategies	Evaluation
Develop brand and awareness of sport	Offer news and competitions on social media platforms and own platform, encourage fans to share recent experiences. Share proprietary content that is only available to social media users. Integrate individual athletes' social media presence with club and federation strategies.	Online and social media performance measured by unique visitors, posts, Facebook likes, Twitter followers and simple content analysis.
Understand fans' interests and opinions.	Listen in to discussion forums and take part. Develop techniques to identify the most influential websites and opinion leaders.	Quality of insights gained from social media research.
Generate awareness of specific event or product	Buzz marketing, encourage existing fans to promote the event with offers that can be tracked through social media. Reward fan advocacy.	Online and social media sales relative to other channels.
Ticket and subscription sales: Digital Advertising	Online promotions should include paid search, Internet advertising, email and affiliate marketing through social media.	Total sales and cost per sale split out by channel.
Enhanced digital experience	Use digital media including Internet, video, mobile and social media to enhance the fan experience through multiple perspectives, highlight repeats and commentary from experts and other fans.	Feedback from fans collected through discussion forums, and social networking sites.
Build ties with individuals and fan networks	Develop CRM strategies to make customized offers and promotions to fans.	Growth and activity of fan database in areas such as advocacy, responsiveness to offers and effectiveness of network marketing

Table 4. Sports marketing and social media strategies

The marketing objectives in the first column reflect the fan journey from becoming aware of a sport or sporting brand, and then going through the classic stages of adoption from developing an interest, possibly trialing the sport, going to an event, buying a subscription or season ticket and ultimately developing close ties both with the sports organisation and other fans.

The National Hockey League makes extensive use of video and social media technology to enhance the digital experience of fans for live events, both within the stadium and for fans that are watching the event on television or social media. The Ultimate Fighting Championship (UFC) uses its Facebook and Twitter pages to promote upcoming live events and to promote subscription television sales and tickets. It also encourages its athletes to use social media and rewards them for doing so. Manchester United football club has invested heavily in database marketing to communicate directly with its fans internationally.

## 5.2 Social media strategy and stages of growth model

The central question in sports marketing is how to develop a social media strategy? What types of social media applications should be used and how should they be implemented? Should sports clubs build their own social media platforms and communities? Or should they use existing social media platforms such as Hi5 and Facebook? How should the performance of a social media strategy be measured? What kind of technical and marketing expertise is required?

To facilitate the discussion of social media strategy in a sports marketing context, a stages of growth model is proposed that defines the key stages of evolution in the use of social media and the associated growth processes that define the maturity of an organisation (see Figure 7).

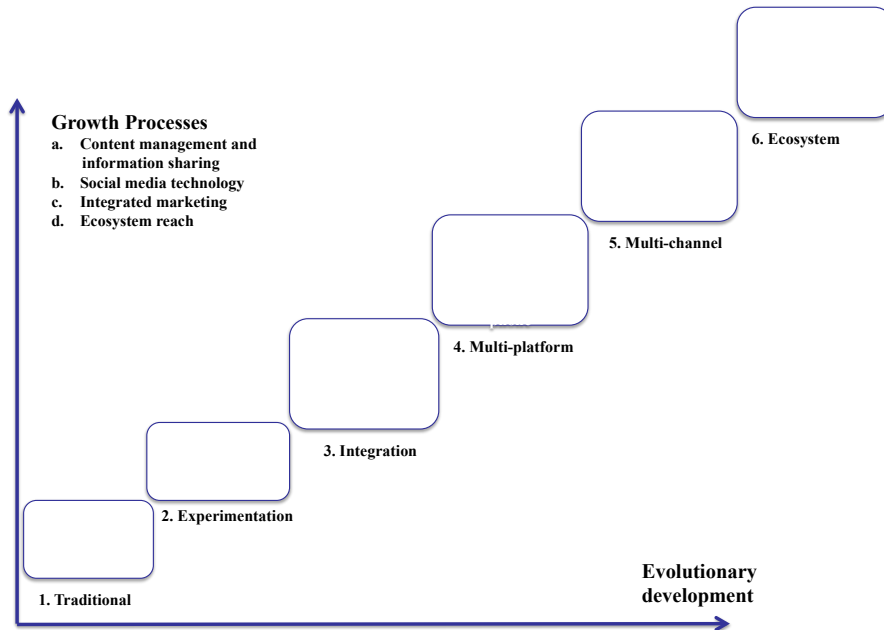


Figure 7. Stages of growth model in sports marketing

The logic of the stages of growth model is that organisations develop through distinctive stages of growth for a particular technology that is defined in terms of their maturity with respect to different growth processes. It has been widely applied in information systems theory and its use in social media is therefore justified. Each of the growth process is defined before describing development stage.

#### Growth processes

- Information management and communication strategy is the organisation's approach to managing its sports content and the way in which this information is shared with consumers and its economic partners
- Social media technology is the use of specific web 2.0 technologies such as XML, ajax, APIs and platforms such as Facebook and Twitter. It captures the technical component of the social media marketing strategy.
- Integrated marketing is the way in which the organisation combines and integrates all forms of marketing, including advertising, branding, sales promotions and event management, across online and offline channels such as TV, radio, print and social media.
- Ecosystem reach is the extent and depth of the connections between the focal organisation and the sports marketing ecosystem.

*Stages*

**Stage 1** is defined as a traditional website, that is, one that has simple content based on a broadcast model of the Internet with little or no interaction with fans or user generated content.

**Stage 2** is when an organisation starts to experiment with social media strategy, perhaps for a particular event, or by starting to use the well known social media platforms. This would include the development of some expertise in the technical aspects of web 2.0 and would also typically impact the information management and communication strategy.

**Stage 3** represents increased maturity in terms of the establishment of an integrated strategy that combines the active use of external social media platforms and systems with internal use of social media and communities that are focused on the club or federation's own website. This indicates a fairly high sophistication in terms of the technical strategy, and also starts to move towards a more advanced approach to information management and communication. For example, selected content that was previously inaccessible to fans may be made available over the social media platforms. New marketing initiatives will also include social media content and initiatives.

**Stage 4** starts to focus and achieve a common user experience across multiple technology platforms including smart TV, personal computer and mobile devices such as tablets and phones. This stage represents increased technical sophistication that creates new marketing possibilities regarding integrated communications for the promotion and broadcasting of sporting events.

**Stage 5** is concerned with the development of a multi-channel marketing strategy that uses both individual channels for specific purposes and also exploits synergies across channels with integrated campaigns and broadcasting. The most important channels in sports markets are the Internet and social media and TV, but other channels such as email, press and outdoor advertising still play an important role in promoting events. The ability to coordinate and track the performance of marketing activity across multiple channels is therefore important. This stage represents a high degree of sophistication in both technology and marketing integration.

**Stage 6** is about developing social media strategies across the sports ecosystem. It goes beyond taking a single organisation perspective to take a network perspective that exploits synergies across multiple partners based on collaboration and trust. In other industries a supply chain or network perspective based on alliances between separate organisations involved in the design, manufacture, distribution and retail of a product or service has become an important strategic concept. In sports markets the nature of the interdependencies between for example athletes, clubs, sports federations and media organisations means that there are significant opportunities for developing collaborative social media strategies that collectively are much more powerful and create a more compelling offer and user perspective than would otherwise be possible by taking a single company approach.

### 5.3 Star marketing and social media

One aspect of sports marketing that is of obvious importance to social media is the concept of star marketing. Fans are arguably as or more interested in individual sports stars than in clubs or sports federations. Looking more closely at the use of social media in sports, a comparison of Facebook popularity between sports federations and individual athletes is shown in Table 5.

Sport	SPORTS FEDERATION		INDIVIDUAL	
	Name	Popularity (no. likes)	Name	Popularity
Golf	PGA Tour	416,953	Tiger Woods	2,959,251
Cricket	ICC	930,439	Sachin Tendulkar	6,355,353
Football	FIFA.com	8,159	Lionel Messi David Beckham	37,012,577 19,460,862
	UEFA	2,716,780		
	EA Sports FIFA	971,554		
Skiing	FIS	295 members	Ski legends	1840 members
Athletics	IAAF	1208	Usain Bolt	6,902,193
Tennis	ATP	1,196,378	Rafael Nadal	10,940,860
	ITF	12,254		
Basketball	FIBA	280,916	LeBron James Michael Jordan	11,082,803 19,452,446
	NBA	13,792,236		
Climbing	UIAA	1475	Chris Sharma	25,294
Chess	FIDE	2936	Gary Kasparov	2,582
Mixed Martial Arts	UFC	8,937,948	Georges St Pierre	2,984,706

Table 5. Facebook popularity of major sports federations and individual athletes, July 2012

In golf, the PGA tour has over 400k unique visitors, but one of its star players, Tiger Woods, is seven times larger and has almost 3 million followers. In cricket, the International Cricket Council is very successful with almost a million likes, but its top star, Tendulkar, has over 6 million likes. With the notable exceptions of the NBA and UFC, individual athletes are far more popular than their respective sports federations.

Sport	FEDERATION / GROUP		INDIVIDUAL	
	Name	Popularity	Name	Popularity
Golf	PGA Tour	232,132	Tiger Woods	2,385,963
Cricket	ICC	349,003	Sachin Tendulkar fan-page	2,489,559
Football	FIFAcOm	278,509	Lionel Messi	385,934
	UEFAcOm	147,431	David Beckham (fan page)	129,921
	EA Sports FIFA	278,662		
Skiing	FIS	7,999	Ski legends	-
Athletics	IAAF	373	Usain Bolt	551,916
Tennis	ATPWorldTour	215,487	Rafael Nadal	2,582,827
	ITF Pro Circuit	2711		
Basketball	FIBAWorld	39,303	LeBron James	5,234,123
	NBA	34,784		
Climbing	UIAA	2,968	Chris Sharma	-
Mixed Martial Arts	UFC	673,697	Georges St Pierre	457,296

Table 6. Twitter popularity of major sports federations and individual athletes, July 2012

To illustrate some of the ideas regarding social media and sports marketing strategy in a specific sports context, some examples of media and broadcasting rights in sports federations and leagues are given in the next section.

## 6 Rights management in sport

Sports federations generate the bulk of their revenue from television broadcast rights to international sporting events such as the Olympics, the cricket world cup and the Tour de France. Similarly, television broadcast rights account for most of the revenue for leagues such as the Premiership football league in the U.K. and the National Hockey League (NHL) in the U.S. The International Cricket Council sold its broadcast rights to ESPN for \$1.1 billion covering an eight-year period 2007 – 2015. The Premier football league has recently announced a three-year deal starting in the 2013-14 season through to 2015-2016, valued at £3 billion (BBC, 2012). ESPN agreed to paid the NFL \$1.9 billion per year for Monday night television broadcast rights (The New York Times, 2011).

In addition to broadcast rights, there is also Internet coverage and social media for which there is a large and growing international audience – the distribution of the Internet users to the top 100 sports websites in Figure 3 demonstrates the very high levels of unique visitors to websites. The strategic question for sports marketing is to what extent will the Internet and social media take viewers and revenue away from television, and how fast will this happen? The NHL is one of the more proactive of the sports leagues in exploiting social media. Some quotes from John Collins, the Chief Operating Officer of NHL, provide some insights into their strategic direction in this area and dispels some common myths surrounding sports and new technology.

**Myth # 1: Sport can only truly be experienced live**

*“The NHL is the best sport to attend live in person. It’s fast, it’s exciting and technology enables us to try to replicate that, the experience, and make it really as good at home as the experiences in the arena”.*

**Myth # 2: Television ratings are the only measure of success in sports management**

*“For any sports league, television ratings are traditionally the biggest metric of success and what we’ve tried to do over the last couple of years is to really highlight and promote other metrics that show the activation of our fan base and the passion of our fan-base...”.*

**Myth # 3: New media does not generate revenue in sport**

*“The new media and technology in particular have been a major driver of all of our growth over the last couple of years. We are less wed to just delivering and focusing on television maybe than some of the other sports leagues and we’ve seen it as a real opportunity for growth for us”.*

**Source:** [Video interview on the CISCO youtube channel.](#)

## **7 Case Questions**

1. Imagine you are the commercial Director of a sports team of your choice. What are your strategic objectives in your use of Internet and social media? You should define a set of 4-6 relevant strategic objectives and outline how you will use social media to achieve these objectives.
2. How should a team or sports federation use individual athletes to grow and promote the sport?
3. What are the threats posed by the Internet and social media on the sources of revenue for a sports federation such as the International Rugby Board, or International Cricket Council?
4. Position your team’s current strategy on the social media stages of growth model.
5. For a sports federation such as the International Cricket Council, how should the Internet be used in conjunction with traditional live television broadcasting?
6. In minority sports such as badminton and extreme sports, how can the Internet be used to promote the sport in a different manner to television broadcasting?
7. How can social media be used to increase participation and inclusion of disadvantaged groups and developing countries?



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