

An Analysis of Online Marketing in the Sport Industry: User Activity, Communication Objectives, and Perceived Benefits

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Abstract

The purpose of this study was to analyze marketing on the Internet in the sport industry. The rationale for the study was based upon the industry's need to understand this technology as an effective marketing tool. Seven hundred and fifty sport organizations in the performance segment of the industry were randomly selected and surveyed. Three hundred and twenty-eight usable surveys were returned for a 44% response rate.

The online marketing communications objective of most organizations was to provide information about the organization to the visitor or to generate awareness of the organization. Very little emphasis was placed on interactive marketing. In the opinion of the author, most sport marketers need to emphasize the online consumer/seller relationship to continue developing this medium as an effective marketing tool. Without this focus, business will be lost to organizations effectively implementing their interactive marketing plans.

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Introduction

As sport is the sixth-largest industry in the U.S. with a Gross Domestic Sports Product (GDSP) of \$213 billion (Howard & Burton, 2000), it is important for sport marketers to develop new methods for reaching targeted audiences to increase their organization's share of the GDSP. If used effectively, the Internet may help.

Pope and Forrest (1997) add that, since the advent of television, this is the first opportunity for marketers to develop techniques for a new communications medium. When marketers began to use television as an advertising tool, ad revenue immediately grew tenfold, from \$12.3 million in 1949 to \$128 million in 1951. Web advertising revenue grew at a greater rate during a similar period of development, from \$55 million in 1995 to \$900 million in 1997 (Foskett, 1996).

The Internet has grown faster than all other forms of electronic technology and all other mediums of communication (Berthon, Pitt, & Watson, 1996c). So many people are now online that the Internet is mass media. In 1996, 35 million adults were online (Snider, 1997). At the end of 2002, the online adult population reached 114 million Americans, or 61% of U.S. adults. The number of females online was

slightly greater than the number of males. The average web user had an income above \$50,000, at least one college degree, and had been online for four years (Horrihan & Rainie, 2002).

With the emergence of the Internet came new economic opportunities for business (Madsen, 1996). In addition to online advertising, web-based commerce, or the buying and selling of goods or services via the Internet (Ubois, 1997), has grown rapidly.

In 1993 the Mosaic browser transformed the way Internet information is transmitted and received. Users were able to view website information graphically, hear a sound, see video, and link to different websites or webpages. By 1995, \$100 million of Internet commerce was conducted on the web (Stipe, 1996). That same year web advertising revenues were \$55 million (Welz, 1996).

In 2001, advertising revenue had grown to \$7.2 billion and forecasters expect that online advertising revenue will remain at this level in 2002 (Mangalindan & Angwin, 2002). Internet commerce will reach \$920 billion in 2002 and is expected to grow to \$1.5 trillion in 2003 (Bruce & Fox, 2002).

Despite the swift growth in Internet commerce and online advertis-

ing revenue, few major corporate or organizational websites make a profit. While companies have collectively saved billions of dollars by moving to web-based sales and support, there have been few businesses successfully generating a profit while using the Internet as a sales tool (Bradner, 2002).

Of the 200 publicly traded Internet companies in 2002, 52 are profitable, most being travel, software, and financial services organizations. These successful companies generate profits because they sell information.

After the cost of constructing the website and purchasing the e-commerce infrastructure, providing these services to the consumer was close to zero in cost. In contrast, online retailers must develop a site, purchase the hardware to engage in online selling, and purchase or produce the product they sell (Mullaney & Hof, 2002). As a result, only 5% of web-based catalog companies are turning a profit (Numbers, 2002).

Because of this current lack of profitability, organizations are still reluctant to invest corporate resources in an Internet venture (Bradner, 2002). The high fixed cost of an online business, combined with a small decline in revenue can lead to financial loss. Yahoo! and America Online lost money in 2001 when their online advertising revenue decreased (Mullaney & Hof, 2002).

Furthermore, for many businesses, web-advertising revenue does little to cover costs. In 1996, 66% of total web advertising was concentrated among ten websites. These sites included Lycos, Yahoo!, and ESPN.com (Welz, 1996). In 2001, ESPN.com, Yahoo!, and America Online received most of the advertising revenue, with America Online receiving \$1.6 billion of the \$7.2 billion total (Mangalindan & Angwin, 2002).

Corporations have also been reluctant to enter into Internet commerce because, for several reasons, web users still find Internet shop-

ping awkward or confusing (Alreck & Settle, 2002).

To these consumers, items are hard to find and the shopping interaction is viewed as not being user-friendly (Fram & Grady, 1997).

Consumers are also concerned about privacy. They are reluctant to send credit card information, required for online shopping, across the Internet, and/or they fear that

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personal information, needed for online transactions, will be sold to Internet marketers ("Building Customer," 2002).

For these reasons, many Internet users do not make online purchases (Bush & Gilbert, 2002). Therefore, until privacy issues are resolved to the satisfaction of a majority of online consumers, corporations have been reluctant to fully develop their online operations.

Despite the Internet's current shortcomings, corporations like Walt Disney Company's ESPN unit are establishing or have already established an online presence. Today, the Internet is estimated to contain more than 800 million webpages (Bush & Gilbert, 2002). Corporations have been establishing websites to create brand positioning, gain Internet marketing experience while the web is in its relative infancy, establish customer loyalty, develop new one-to-one marketing techniques, and reduce organizational costs (Brown, 1998).

For sport organizations, the web provides access to a desirable target market that justifies establishing an online presence. The demographic profile of the average Internet user, that of an educated, upscale, 18- to 34-year old male, closely resembles the demographic profile of the fan base in the National Football League (NFL), National Basketball Association (NBA), National

Hockey League (NHL), and Major League Baseball (MLB) (Jensen, 1995).

Further, computer users are already accessing sport information via the Internet, as 39% of those who had access to a personal computer in 2000 used it to access sport information online. Of NFL, NBA, NHL, and MLB fans, approximately 72% checked sports scores online in 2000. Further, of these fans, 83% went online at least once in 2000 (Street & Smith's Sports Business Journal, 2002). Sport marketers must ensure that their online presence is an effective marketing tool in order to reach this potential market.

Need for Study

Most research on the use of the web by marketers has focused on describing the new medium to marketers (Berthon et al., 1996c). However, with sport organizations developing websites, even while the future of site profitability remains uncertain, sport marketers must understand how this technology works as an effective marketing tool. Successful web marketing efforts will only occur when a corporation has a clear idea of how the website fits with its market position and integrates the site into its overall marketing plan (Pope & Forrest, 1997).

Currently, there has been no attempt to make clear the web's anticipated role in the sport marketing process (Berthon et al., 1996c). With the literature primarily focused on building a successful sport website, little is known about the use of these sites for marketing purposes. And what little is known focuses on only one professional sport league, Major League Baseball (Brown, 1998). A need exists, therefore, to determine the online marketing status of all sport organizations.

Unlike traditional broadcast media, the web presents a unique opportunity for marketers because it facilitates two-way communication between the seller and buyer

(Berthon et al., 1996c). Visitors at a corporate website are able to communicate directly with the business without concern for distance or time (Berthon, Pitt, & Watson, 1996b). Thus, organizations using their sites as advertising tools have the ability to hear from visitors, whether in the form of a sale or customer e-mail comment.

Berthon, Pitt, and Watson (1996a) stated that managers of organizations have likely not considered the complete potential of the web as a marketing tool, partic-

are chosen (Kerlinger, 1973). Strata for the sport industry have been defined by Pitts, Fielding, and Miller (1994) in the Sport Industry Segment Model. These segments included sport performance, sport production, and sport promotion.

This study focused on the performance segment of the sport industry, as the researcher considered this segment to best represent the majority of Internet activities connected to the sporting industry. Of the 12,000 organizations listed in the *Sports Market Place*, 5,529 were

subject to subject is less likely than for the interpretation of only a series of numbers. Second, with numbers only, there is no possible mistake about the fact that there is a single dimension.

The authors add that the number of possible responses should be between two and either seven or eight, with the selected breadth being one commonly used by the respondents. The seven-point scale was selected, as both five-point and seven-point are commonly used in conventional scale types. The seven-point scale was selected to provide greater variation between responses.

To ensure that the survey questionnaire was a valid instrument, content validity was used. As content validation relies upon the judgment of the researcher (Kerlinger, 1973), an acceptable level of representation by the items in each instrument must be certain. To ensure an acceptable level is reached, both instruments used in this study were constructed based on the purpose of the study and the research questions. Additionally, each item in the questionnaire was compared to the base of web literature, ensuring that the instrument items epitomized the universe of knowledge in the field. By doing so, the content validity of the instruments was assured.

Conducting a pilot study tested the reliability of the survey questionnaire. As test-retest reliability is the most common method used to determine survey instrument reliability (Litwin, 1995), this method was adopted for the present study. Test-retest reliability is calculated through correlation (Rothstein, 1985). To be considered a reliable instrument, the correlation must be greater than .80 (Nunnally, 1959). The result of the pilot study was $\alpha = .87$.

Descriptive statistics were used to analyze the data collected from the survey instrument. These statistics included both frequencies and percentages. All statistics were computed using the Statistical Pack-

The site visit and page view are seen as more accurate measures of the number of unique people to visit a site and surf through it.

ularly in transforming a prospective buyer into an interactive customer. Additionally, little has been written on what individual teams, leagues, and sport organizations are doing to augment marketing through this newest electronic medium. A greater understanding of the current use of the web by sport organizations is needed.

The purpose of this study was to analyze Internet marketing in the sport industry. Three research questions were established to guide this study: a) What is the profile of website user activity in the industry? b) What are the most important marketing communication objectives of website owners? and c) What are the perceived benefits of establishing a website?

Methodology

A self-administered survey, distributed by mail, was utilized to collect information from a sample of website owners. The sample for this study included 750 sport organizations listed in the *Sports Market Place* (Mayers, 1999). The *Sports Market Place* is a comprehensive list of 12,000 organizations involved in the sport industry. Stratified sampling was used to select the subjects. Stratified sampling divides a population into groups from which random samples

classified as belonging to the performance segment of the sport industry. Of these organizations, 750 were randomly selected for this study using a systematic sampling technique.

The instrument used for data collection was a survey questionnaire. To collect data on the characteristics of site usage in the sport industry, conditional, implied, and explicit branching approaches were utilized. A forced ranking scale was used to collect data on the most important marketing communication objectives of website owners. Forced ranking produces ordinal values with each item ranked relative to one another (Alreck & Settle, 1985).

A section of the instrument was designed to collect information on the importance of nine potential organizational benefits of establishing a site on the web. A seven-point horizontal, numeric scale with the extremes labeled "extremely unimportant" and "extremely important" was utilized to collect this data. According to Alreck and Settle (1985) this type of scale is useful for judging items on a single dimension.

Intermediate points on the scale were not labeled for several reasons. First, agreement on the meanings of intermediate labels from

age for Social Sciences (SPSS) version 10.0.

Results

Three hundred and twenty-eight usable surveys were returned for a 44% response rate. This study's first research question pertained to the profile of user activity on sport websites. Data collected included

information on the number of site hits, visits, repeat visits, page views, e-mail received, purchases, and repeat purchases (Table 1).

These data revealed the overall mean number of site hits per week to be 280,652, and the median to be 2,250. For in-season hits per week, the data showed the mean number to be 110,050, and the median to

be 5,000. For post-season hits per week, the data indicated the mean to be 39,907 and the median 1,000. Ninety-four organizations reported this information.

One hundred and fifteen respondents monitored site visit information (see Table 1). The data indicated the mean number of site visits per week to be 19,847 and the median to be 994. For in-season site visits, the visits-per-week mean number was 8,504 and the median was 1,112. Data on post-season visits per week revealed the mean number to be 2,666 and the median 650. For comparison, visits at the top ten U.S. league and governing body websites ranged between 1.67 million and 125,000 visits per week in 2000 (Street & Smith's Sports Business Journal, 2002).

The data additionally indicated that the mean number of page views (Table 1) was 244,401 and the median was 4,000. The data showed that the mean of in-season page views was 33,957 and the median was 1,200. The data also showed that the mean of post-season page views was 12,396 and the median was 400.

The data on e-mail communication (see Table 1) showed the mean number of e-mail messages received per week to be 88 and the median 20. The mean was 85 and the median was 30 for in-season e-mail communication, while the mean was 22 and the median 10 for post-season e-mail communication.

Finally, the data revealed that the mean number of total purchases made per week was 62 and the median was 5 (see Table 1). The mean number of items purchased in-season per week was 5 and the median was 2. The mean and median number of items purchased post-season per week was 1. The mean number of individuals making more than one purchase per year was 1 and the median was 0. No organizations reported tracking the number of in-season and post-season repeat purchasers.

Regarding research question two, the data on the importance of differ-

Table 1
Characteristics of Weekly Website Usage

Site Usage Information	n	M	Mdn	Min	Max
Site Hits	200	280,652	2,250	10	15,000,000
In-Season	94	110,050	5,000	100	1,500,000
Post-Season	94	39,907	1,000	30	900,000
Site Visits	115	19,847	994	10	650,000
In-Season	45	8,504	1,112	28	45,000
Post-Season	45	2,666	650	25	10,000
Repeat Visits	33	1,086	75	10	8,000
In-Season	15	634	50	20	2,800
Post-Season	15	188	20	5	800
Page Views	70	244,401	4,000	5	5,000,000
In-Season	28	33,957	1,200	7	200,000
Post-Season	28	12,396	400	3	85,000
E-mail Received	274	88	20	1	2,500
In-Season	118	85	30	3	1,200
Post-Season	118	22	10	1	120
Purchases	59	62	5	1	800
In-Season	16	5	2	1	10
Post-Season	16	1	1	0	2
Repeat Purchases	10	1	0	0	4

Table 2
Rank Order by Mean of Marketing Communications Objectives

Objective	M
Providing Information on Organization to Visitor	1.97
Generating Awareness of Organization	2.27
Projecting Favorable Organizational Image	3.58
Establishing an Interactive Channel of Communication with Visitors	4.12
Gaining Access to Previously Inaccessible Customers	5.25
Providing Opportunity for Feedback on Product/Service Performance	5.41
Selling Merchandise/Tickets	6.36
Generating Leads for Salespeople	7.15

ent marketing communications objectives (Table 2) showed that providing information about the organization to the visitor was the most important objective of sport organizations, while generating qualified leads for salespeople was least important. In addition to the marketing communication objectives listed in Table 2, these objectives were occasionally mentioned as well: recruiting students and/or athletes, eliminating telephone inquiries, relaying information on results, providing educational content, providing Real Audio broadcasts, providing information to affiliated organizations, and promotion.

The data relating to research question three (see Table 3) showed that, on a 1–7 Likert scale, with 1 being “extremely unimportant” and 7 being “extremely important,” reaching a desirable demographic was considered the most important benefit of establishing a site, while accessing online purchasers was considered least important.

Discussion

Question one: “What is the profile of website user activity in the industry?”

An observed result relating to the first research question is the number of organizations stating they do not track or monitor website hits, visits, or page views. Most frequently tracked were site hits, as 61% of organizations reported on the num-

ber of hits to their site. Second were site visits (35%) and third were page views (21%) (see Table 1).

Almost always when information was not provided in one of these three areas, the organization responded that it did not track or monitor this information. The lack of information in these areas probably is damaging to organizations when attempting to sell online advertising and/or sponsorship, because, when determining online advertising rates, advertisers are most often looking for the number of page views a site generates (Bernstein, 1999). Measurability is a problem when determining advertising rates, and utilizing the site hit

has long been viewed as invaluable to advertisers (Berthon et al., 1996a; Brown, 1998). The site visit and page view are seen as more accurate measures of the number of unique people to visit a site and surf through it. The

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page view was a fairly new measurement at the time of this study and organizations may not have yet adapted to its use. Some, however, are touting the page view as the most accurate means by which to base advertising rates. As such, advertising rates on sport sites for banner ads range \$30 to \$32 per 1,000 page views (Bernstein, 1999).

Question two: “What are the most important marketing communication objectives of website owners?”

Regarding research question two, the most important marketing communication objective of website owners was “providing information on organization to visitor.” Site owners placed eight web-based marketing communications objectives in rank-order (with one being most important and eight being least), and providing information about the organization received an average rank of 1.97.

Following closely was the objective “generating awareness of organization” (average of 2.27). Slightly behind the first two objectives was “projecting favorable organizational image,” with an average rank order of 3.58. It was not until the fourth-highest ranked objective, “establishing an interactive channel of communication with visitors,” that utilizing the uniqueness of the web as a marketing medium entered the ranking (see Table 2).

The fifth- and sixth-ranked objectives were “gaining access to previously inaccessible customers” and “providing opportunity for feedback on product service performance.”

Table 3
Mean Responses to Perceived Potential Benefits When Deciding Whether or Not to Launch a Website

Benefit	M
Reaching Desirable Demographic	5.22
Establishing Customer Loyalty Prior to Competition	4.65
Reaching Global Market	4.52
Creating Brand Positioning	4.21
Creating Databases of Information	3.87
Enable One-to-One Marketing	3.79
Reducing Marketing Costs	3.54
Gaining Web Marketing Experience	3.50
Accessing Online Purchasers	3.24

Finally, and surprisingly, with the explosion in the growth of e-commerce, were the final two marketing communications objectives. The seventh-ranked objective was "selling organizational merchandise/tickets," and the last objective was "generating leads for salespeople."

Question three: "What are the perceived benefits of establishing a website?"

The potential benefit sport organizations considered most important when deciding whether or not to launch a website was reaching a desirable demographic. However, the organizations did not rank this as an extremely important factor. On a 1-7 Likert scale, with 1 being "extremely unimportant" and 7 being "extremely important," the mean rank was only 5.22 (see Table 3).

The only other perceived benefits that were considered as even slightly important were establishing customer loyalty (4.65), reaching a global market (4.52), and creating brand positioning (4.21).

Most of the potential benefits were considered slightly unimportant to sport organizations. Creating databases of customer information (3.87), enabling one-to-one marketing (3.79), reducing organizational marketing costs (3.54), and gaining web-marketing experience before the competition did (3.50) fell into this classification. The benefit ranked least important was accessing online purchasers (3.24).

These results were rather astonishing. The answers to the last two research questions show that organizations in the sport industry have a long way to go in developing an understanding of the Internet and its potential value to their marketing efforts. Overall, sport organizations are ignoring the fact that the web enables marketers to simultaneously advertise their product and sell to site visitors (Berthon et al., 1996c).

As a result, many sites are static and merely electronic versions of media guides or press releases. The author is of the opinion that organi-

zations, with the exception of most professional sport teams/leagues and many NCAA Division I collegiate teams, are missing the enormous potential of the web as an interactive marketing tool. As stated by Berthon et al. (1996c), site owners must develop and use interactive means to reach potential customers online.

Professional and collegiate sport organizations have begun to sell tickets via the Internet, either through in-house operations or third-party vendors, like

they wished to do so. Just over 700,000 tickets were pre-sold for this movie ("Web Tickets Add," 2002).

Sport organizations must place a greater priority on marketing communication objectives relating to selling merchandise and tickets online and/or generating potential sales leads through web activities.

Much has been written about the growth of e-commerce. Since 1995, when \$100 million worth of Internet commerce was conducted (Stipe, 1996), e-commerce has

The online ticket exchange service allows season ticket holders to sell unused season tickets to interested parties. The team benefits as unused season tickets are sold and the tickets' purchasers consume merchandise and concessions at the stadium or arena.

tickets.com. Several professional sport teams, including the San Francisco Giants, Chicago Cubs, and Colorado Avalanche, have even been offering online ticket-exchange services. The service allows season ticket holders to sell unused season tickets to interested parties. The service is designed to benefit the team operating the site, the season ticket holder, and the team's fans. The team benefits from ticket purchasers consuming merchandise and concessions at the stadium or arena. The season ticket holder benefits because unused tickets are no longer wasted money. And the purchaser benefits by seeing the game at the stadium (Bowe, 2001).

Sport organizations not placing an emphasis on the online seller/consumer relationship may potentially lose revenue to other forms of entertainment that completely utilize these resources.

For example, *Harry Potter and the Chamber of Secrets* sold \$88.4 million worth of tickets its opening weekend. Of this total, \$4.5 million was generated via online sales. Consumers were able to pre-order tickets to guarantee seeing the movie at the time and on the day

grown at a very rapid pace. In 2002, over \$900 billion of e-commerce will occur (Bruce & Fox, 2002). Further, one must note that, since less than 5% of those online buy a product or service during a typical day surfing the web (Horri-gan & Rainie, 2002), there is still potential for rapid growth in e-commerce. Sport organizations must realize that \$1.5 trillion of Internet commerce has been predicted to occur during 2003 (Bruce & Fox, 2002).

If sport organizations fail to enable forms of e-commerce on their sites, as stated previously, they may lose revenue to other forms of entertainment or even other sport organizations that have completely developed their online sites. For the 20 MLB teams that used online ticketing in 2002, a combined three million individual game tickets were sold during the first four months of the season ("MLB.com Reaches," 2002).

Further, online ticket orders are currently small, but the future has great potential. Online event ticketing (sports, the theater, movies, etc.) accounted for approximately 3% of all ticket sales in 2001. By the year 2006, it is expected that over 10%

of all tickets will be sold via the Internet (Orwall, 2001). Sport organizations failing to include an online means to purchase tickets may miss the opportunity to make a sale to the site visitor and potential customer. That visitor, when looking for areas in which to spend his or her discretionary income, may surf to another team website to purchase tickets. Or, he or she may go to a theater site and purchase an online ticket for *The Producers*.

Recommendations

The following advice to sport marketing professionals is based upon the results of this study and recent developments in the operation of sport websites: Sport marketers must focus on the online seller/consumer relationship. Without this focus, business may be lost to organizations effectively implementing forms of e-commerce.

Sport marketers should reconsider their website marketing communication objectives. For those organizations utilizing it as such, the web has the potential to be more than just a public relations tool. These site owners need to refocus their objectives on the interactive nature of the web. Sport marketers should ensure that their sites are constructed using elements that allow the visitor to interact with the organization. To take advantage of the potential of interactive marketing, sites cannot be static, unidirectional suppliers of information.

Also, further research on the sport industry's use of the Internet is needed. Importantly, a study should be conducted on why sport organizations are not using the full potential of the web as a tool of interactive marketing. Specifically, a need exists to discover why so many sport organizations are failing to place an importance upon selling through their sites.

Future research should also be conducted on the websites of sport organizations from the perspective of the site user. For example, it would be helpful for a marketer to

understand why a consumer prefers one site versus another.

Finally, research must be conducted on the latest web-related trend, the licensing of Internet rights to a second party. This trend began to develop just prior to the time this study got underway and was initiated when the NFL licensed the rights to their league site for \$10 million over three years (King, 1999). In July 1999, the New York Yankees became the first professional sport team to license their online rights, for an estimated \$3 million per year (Bernstein, 1999).

Through the licensing of Internet rights, sport organizations can now be guaranteed of making a profit via their online venture. This latest online development leads to a myriad of research possibilities.

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