

Fan Expectations on Digital Services in German Professional Football

Dominic Habenstein, Marie-Christin Barton, Florian Ingwersen

Abstract: The rising demand for online services and new technologies for connected stadiums and fan experience is compelling professional football clubs to adapt their fan relationship management (FRM) strategies to the digital transformation. Understanding and incorporating fans' expectations on digital services is essential for customer satisfaction. However, there is a significant research gap in this area. To address this, an online KANO survey (Kano et al. 1984: 165) was conducted with 7387 fans from a German Bundesliga club, examining participants' reactions to 25 digital service attributes (e.g., mobile payment or ticketing, VR stadium tours). The survey identified the unspoken fan preferences, which were clustered into five segments and prioritized. Results revealed that only a few features, such as a club app, an online fan shop, in stadium Wi-Fi and a club-owned web radio, are critical for overall satisfaction. Most features showed indifferent ratings, indicating the need for more segment-specific analyses. While fan segments differ slightly in expectations, many remain indifferent to new features, highlighting the importance that clubs communicate the service values. Given the constantly changing expectations, it is essential to let fans participate actively in building a digital club infrastructure to avoid malinvestments.

Keywords: Digital Fan Experience, KANO Survey, Fan Relationship Management, German Professional Football, Expectations on Digital Club Services

Fanerwartungen an digitale Vereinsangebote im deutschen Profifußball

Zusammenfassung: Die steigende Nachfrage nach digitalen Clubangeboten zwingt Profifußballvereine dazu, ihr Fan Relationship Management (FRM) verstärkt an den digitalen Wandel anzupassen. Dabei ist das aktive Einbeziehen der Fanerwartungen an das digitale Clubangebot von entscheidender Bedeutung für den Grad der Kundenzufriedenheit. Der Stand der Forschung in diesem Bereich ist dennoch dünn. Um dem zu begegnen, wurde eine KANO-Umfrage (Kano et al. 1984: 165) unter 7387 Fans eines deutschen Bundesligisten durchgeführt, um deren Erwartungen an 25 digitale Clubangebote (z. B. Mobiles Bezahlen, E-Ticketing, VR-Stadiontouren) zu identifizieren, zu clustern und zu priorisieren. Die Ergebnisse zeigen, dass nur wenige Services, wie etwa eine Vereins-App, ein Online-Fanshop, stabiles Stadion-Wifi und ein vereinseigenes Webradio, als grundlegende Zufriedenheitstreiber für die gesamte Anhängerschaft angesehen werden können. Die meisten Services wurden hingegen indifferent bewertet, was ein Indiz für die Notwendigkeit segmentspezifischerer Analysen ist. Doch auch innerhalb der (fünf) einzelnen Cluster unterscheiden sich die Erwartungen eher geringfügig; viele Services bleiben indifferent. Der Mehrwert vieler Services scheint Fans schlichtweg (noch) nicht bekannt zu sein, was verstärkte Kommunikationsmaßnahmen der Clubs notwendig macht. Durch diese, sowie durch die aktive Einbeziehung der Anhängerschaft in den Aufbau einer digitalen Vereinsinfra-

struktur, können die sich stetig wandelnden Fanerwartungen adäquat adressiert und Fehlinvestitionen vermieden werden.

Schlagwörter: Digitales Fanerlebnis, KANO Studie, Fan Relationship Management, Fußball-Bundesliga, Erwartungen an digitale Club Services

Aim of Research

The digital transformation is spawning wide-reaching behavioral and environmental changes. This affects almost all areas of sport, as is also the case for the fan relationship management (FRM) of professional football clubs. The increasing demand of online products and services, changing information seeking and communication behavior and constantly upcoming new technology for connected stadiums are a few of many changes. The speed of technological innovation has drastically increased in recent years and experts generally agree that the importance of technology in football will continue to increase (Beiderbeck/Evans/Frevel/Schmidt 2023:122)

To gain customer satisfaction and to avoid malinvestments, it is important to understand the supporters' expectations towards digital services. Especially because many of the digital club offerings are still quite young, meaning that customer expectations have not yet been examined in detail (Nufer 2018: 39).

But, gathering and integrating the fans' opinion on digital services systematically to adapt digital strategies, is quite demanding for the clubs. More specifically the clubs meet the challenge of identifying the right level of services to satisfy fans without under- or overfulfilling their expectations. But this is of high importance as overfulfilling leads to not always fulfillable new expectations whereas underfulfilling causes dissatisfaction which, following the Customer Relationship Management (CRM) cause-effect-chain (Bruhn 2016), finally (could) leads to a lower economic success. The importance of a service offering that is independent of sporting success and generates strong sales (Greuel 2007) was once again made clear by the coronavirus pandemic, which, among other things, has led to restricted match operations and associated revenue losses in the Bundesliga.

In addition, there is another important and often underestimated aspect why requesting the fans' opinion is urgent: It creates participation by involving fans in the development of the clubs' digital products. Greater opportunities for participation in turn prevent fan dissatisfaction, which in turn reduces the fans' use of exit (turning away from the club) or voice options (using co-determination rights due to dissatisfaction) (Bauers et al. 2023: 43). And, a fan-oriented digital club infrastructure opens further characteristics of participation than (just) co-determination: The opportunity to participate in the association through digital channels may be relevant for the social well-being of a fan. Virtual general meetings (as it partly has been the case during the covid-19) enable fans from all over the world to have a direct influence or use a voting right. And, a modern digital service landscape allows information-based participation in general, as information can be transmitted understandable and as barrier-free as possible (Bauers et al. 2024: 86).