Acta Sci. Pol.
Oeconomia 17 (3) 2018, 43–51
acta_oeconomia.sggw.pl ISSN 1644-0757 eISSN 2450-047X DOI: 10.22630/ASPE.2018.17.3.36

ORIGINAL PAPER

Received: 01.08.2018
Accepted: 24.09.2018

THE ROLE OF SPORTS BROADCASTS IN GAINING COMPETITIVE ADVANTAGE BY TV STATIONS

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ABSTRACT

The aim of this paper is to explore the role of sports broadcasts in achieving competitive advantage by TV stations over their rivals on the basis of primary and secondary sources. Firstly, the study provides a review of the transformations of the television market in Poland resulting in more intense search for new content and sources of funding. Secondly, it presents analysis of viewership and advertising revenues of TV stations holding rights for sports broadcasts. Finally, it investigates what factors determine viewers' decision to pay for premium content. The conducted analysis covers broadcasts of selected sporting events, namely football matches played as part of championships and ski jumping. TV stations holding rights to broadcast important sports events have higher advertising revenues, bigger audience market shares and launch additional channels, special platforms and use social media to deliver their content to all segments of the audio-visual market.

Key words: television, audience, sports broadcasts, advertising revenue, premium content

INTRODUCTION

Nowadays, TV broadcasts of sporting events are most watched TV shows which attract large audiences. Content and viewership are obviously the basic tools of direct competition on the television market. The more viewers watch the show the bigger is the advertising revenue allowing for further investments in content and technologies.

The television market is currently undergoing major changes resulting from transformations in the broadcasting structure. The key factor influencing these changes is technological progress leading to an increase in the number of available broadcasting channels and an ever stronger competition for the viewer [Küng 2012]. Alongside the declining viewership of traditional television, sports along with TV series draw multimillion audiences. However, new technologies and the development of the Internet have made it necessary for the stations to attract viewers by offering new products in this area, for example – access to premium content. In the case of sports broadcasting premium content is digital content accessed by a fee through additional paid channels, pay-per-view services, special platforms and live video broadcasts in social media [Kosman 2014].

The aim of this paper is to explore the role of sports broadcasts in achieving competitive advantage by TV stations over their rivals. The study uses primary and secondary sources, in particular – television audience measurement (TAM) data. The results of the conducted analyzes are presented in graphical and descriptive form. The study focuses on selected sporting events, namely football matches played as part of the championships and ski jumping. The diagnostic survey method was used to identify the determinants of viewers' decision to purchase access to premium content.

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TELEVISION MARKET CHANGES DETERMINING THE SEARCH FOR NEW CONTENT AND FUNDING

As a result of the process of digitization and the emergence of the Internet the entire structure of media industry has been changed, including existing business models and new strategic relationships. In addition, technological progress has improved the prospects of wider dissemination of content and globalization has contributed to the benefits of the economies of scope.

According to Hjarvard [2008], the media is transforming forms, content and organization. With regard to form of communication, modern means of communication are used, enabling the viewer to follow events anywhere and at any time [Nosal 2010]. With regard to content, e.g. broadcasts of sporting events contain more and more graphics and visuals providing the viewer with additional information, e.g. on time, distance, statistics or other parameters of sports games.

Acquiring attractive content to draw a large audience is a key element of direct competition between television broadcasters. The size of the audience in the early phase of television was determined, in the first place, by the technically restricted reach of the station, which later changed with the emergence of cable, satellite and digital terrestrial television. A good example are the universal programs broadcast by TVP1 (Polish Public Television Channel 1), TVP2 (Polish Public Television Channel 2), Polsat and TVN called the Big Four. At the beginning of the 21st century the Big Four attracted the majority of the television audience but in recent years they have been losing viewers despite diversification of content and access [Kurdupski 2016]. In 2017, TVP1 had the largest audience market share in the 4+ age group (around 11.16%), followed by Polsat (11.07%). For comparison, in 2007 it was respectively 24.34 and 16.7%. In 2007, the share of the Big Four was 76.14%, and 10 years later it decreased almost twice to the level of 42.3%. This was the result of shifting the viewer's interests towards other channels because according to television audience measurement, in 2017 a statistical Pole spent an average of 4 hours, 18 minutes in front of a TV screen [Kurdupski 2018] and it was similar to previous years. In 2016, it was 4 hours 21 minutes, and 4 hours 23 minutes in 2015 [Jaska and Werenowska 2017].

In the analyzed period, commercial stations gradually began to attract more and more viewers in the age group of 16–49. In 2007 Polsat TV station had more viewers than TVP2 and in 2011, for the first time Polsat achieved higher audience market shares than TVP1. In 2017, public broadcaster's channels held the third and fourth positions. The audience of this station is older and therefore the ranking of shares differs from the one in the age group 4+. The TV market has changed dramatically in the last decade, and one of the changes is almost a fourfold increase in the number of speciality channels.

The first thematic channels on the Polish TV market were primarily news channels. Hence, in Table 1, if there is no data provided, it is because the channel was created later. The audience market shares of thematic channels are much lower than those for universal channels, but this is a phenomenon typical of television markets due to the fragmentation of the audience. Viewers' loyalty and regular use of a given channel is not as common as it used to be. Thanks to media with multi-channel systems, this rule is no longer valid. Nowadays, broadcasters offer new, more diverse forms of content delivery and the content itself is addressed to precisely selected target audiences. Big TV stations give way to much smaller but specialized media [Jaskiernia 2016].

The increasing market share of other than the Big Four channels resulted from the viewers interest in more diverse range of options, as well as from the development of audience measurement technologies, which the smaller broadcasters looked forward to. Broadening the scope of television audience measurement (TAM) was crucial for future broadcast programming and the expenses incurred on television advertising [Dzierżyńska-Mielczarek 2014].

Mobile TV is another factor shaping the potential viewer's attitude. This form of viewing is even called the third screen right next to a personal computer and a traditional television set. The recipients can personalize their own activity as a potential viewer, as well as control the provided content.

Nowadays, the use of audiovisual content delivered through on-demand services is gaining popularity, and is often referred to as post-TV [Bielak et al. 2011]. A few years ago video on demand (VoD) serv-

Table 1. The share of thematic channels in the audience market in 2010–2017 in the 16–49 age group

Channel	2010	2011	2012	2013	2014	2015	2016	2017
	SHR (%)							
TVP Info	2.81	2.22	2.01	1.16	1.11	1.37	1.24	1.40
TVN 24	3.40	3.60	2.29	2.35	2.38	2.45	2.31	2.09
TTV	–	–	0.64	1.05	1.45	1.61	1.91	2.42
TVP Seriale	–	0.61	0.76	1.34	1.55	1.43	1.79	1.61
TVP ABC	–	–	–	–	–	0.66	0.76	1.38
Polsat News	0.41	0.66	0.74	0.81	0.91	0.79	0.75	0.66
Fokus TV	–	–	–	–	-	0.67	0.95	0.91
Stopklatka	–	–	–	–	0.63	0.95	1.00	0.93
TVP3	–	–	–	–	–	0.57	0.56	0.45
TVP Rozrywka	–	–	–	0.46	0.87	1.15	0.95	0.77
ATM Rozrywka	–	–	0.52	0.82	0.85	0.83	0.86	0.77
TVN Style	0.77	0.48	0.72	0.91	0.90	0.92	0.92	0.93

Source: Own elaboration based on reports from wirtualnemedia.pl.

ices were viewed as not very competitive and with not much potential for growth. However, everything has changed after the success of video streaming services such as Netflix and Hulu [Jaskiernia 2016].

Video services can be divided into those offered by video file sharing platforms (such as YouTube or Dailymotion) and those that offer video on demand (e.g. player.pl, vod.pl or netflix.com). Video on demand services are offered by traditional television broadcasters, cable and satellite operators, as well as internet portals and telecommunications service providers.

An increasing number of Poles are opting for paid VoD subscriptions. By 2021, it is expected that there will be 3 million subscribers in our country. These forecasts were prepared by Digital TV Research as part of forecasts for the VoD market in Eastern Europe [Lemańska 2016]. Paid options are gradually being developed by such services as ipla.tv or player.pl. Undoubtedly, the growing popularity of online VoD services can be largely credited to Netflix, which debuted on the Polish market in September 2015.

The development of this segment of the audiovisual market is determined, among others, by investments in the production of films and TV series, which are most watched by those who use on-demand services. This, in turn, involves incurring considerable expenses and it is therefore necessary to use specific methods of monetization of video content and access platforms. The creator of video content has the opportunity to earn revenue from the publication of video materials, e.g. by placing information from the sponsor, testing or locating products or product lines. Many creators of video content provide, for a fee, a blog or vlog space for advertising purposes. It is also possible to place partner's links next to videos, i.e. redirecting to an online store that offers products shown on the video blog. Popular bloggers can also create so-called sponsored entries, provide direct links to online shops, use crowdfunding or raise money through integration with online payment services. Another form of monetization of the content of video files producers (especially the well-known ones), is to post videos on platforms that provide content from users, such as YouTube or cda.pl. Under the YouTube's partnership project the producer's channel is made part of the advert display system and ads are played before or during the video.

SPORTING EVENTS BROADCASTING RIGHTS AND THE SIZE OF AUDIENCE AND ADVERTISING REVENUES SIZE

Currently, media coverage to a greater extent determines many aspects of sports competition. The increasing number of broadcasting hours has significantly influenced the subordination of sports events to television requirements. The increased competitiveness and financial strain has forced media companies to put pressure on organizers of sports events to make them more attractive for TV viewers. This produced increased audience's interest, which in turn resulted in higher broadcasters' profits. Therefore, sport has considerably contributed to the process of mediatization [Kopecka-Piech 2013].

The sports broadcasting contracts in the television broadcaster's portfolio allows to build a larger audience and that is why the key Polish broadcasters compete strongly to be able to cover the biggest sporting events.

The ranking of the 10 most watched programs in 2017 (Table 2) is dominated by sports broadcasts (8 items). The list also includes a news program and TV series. The largest audience was drawn by the qualifying football match for the World Cup when Poland played Montenegro. It was broadcast by Polsat and drew an average of 8.5 million people (Polsat Sport 950,000). The share of the station at that time was 52.97% (Polsat Sport 6%). The second place is occupied by another qualifying match Poland–Romania, which was watched on Polsat channel by an average of 7.26 million people and it was a 50.26% share (Polsat Sport 726,000 people and 5% share) [Szewczyk 2018].

The young generation increasingly often declares that they have given up the traditional forms of accessing information in favour of using the content of the Internet. Online platforms can successfully complement the TV offer. The Polsat group (present on the ipla.pl platform) and the Eleven Sports group (offering Elevensports.pl) have the most extensive online sports content. Thanks to such platforms live broadcasts can be viewed via computer, mobile devices or on Smart TV. Internet sports broadcasts are also delivered by TVP and Eurosport, on sport.tvp.pl and Eurosport Player.

In the last decade, the most watched broadcasts of sporting events in Poland included: ski jumping, football and volleyball, especially the championships

Table 2. TV shows with the largest audience in 2017

No	Top 10			Group 4+	
	TV show	TV station	Date	AMR	SHR (%)
1	World Cup qualifying matches, Poland–Montenegro match	Polsat	07.08	8 496 385	52.97
2	World Cup qualifying matches, Poland–Romania match	Polsat	10.06	2 257 887	50.26
3	*Teleexpress* (TV news show)	TVP1	06.01	7 217 265	43.89
4	World Cup in ski jumping, 4-Hills-Tournament, Bischofshoffen	TVP1	06.01	6 910 749	41.27
5	World Cup qualifying matches, Poland–Montenegro match	Polsat	26.03	6 881 346	41.07
6	World Cup in ski jumping, individual competition, Zakopane	TVP1	22.01	6 793 411	45.78
7	*M jak miłość* (TV series)	TVP2	02.01	6 652 463	39.88
8	World Cup in ski jumping, individual competition in Willingen	TVP2	29.01	6 425 896	45.72
9	World Cup qualifying matches, Poland– Kazakhstan match	Polsat	04.09	6 265 747	40.10
10	World Cup qualifying matches, Denmark–Poland match	Polsat	01.09	5 921 097	39.78

Source: Kurdupski [2018].

and Olympics. The free-to-air channels still enjoy the highest viewing rates.

So far the most special sporting event in Poland was the European Football Championship in 2016, which for the first time in the history of Polish television was broadcast by two free-to-air TV channels, namely Polsat and TVP1. Polsat bought the championship broadcast rights for EUR 35 million from UEFA. For the period of the championships, they launched two dedicated channels (Polsat Sport 2 and Polsat Sport 3), which broadcast coded matches, among them the best group matches and games of the 1/8 finals. The station has prepared over 200 hours of direct live coverage, and the two new channels offered a set of 51 matches without advertising breaks and in the highest technological quality. Two months before the tournament in France, it turned out that the public broadcaster (TVP) did not give up and finally, on the sub-license basis, bought from their main competitor the right to show a few matches for PLN 40 million. TVP broadcast the events on TVP1 and on sport.tvp.pl.

The competition for the viewer was won by TVP and it was probably the result of viewers' habits, as earlier only the public broadcaster acquired rights to broadcast such important sports events, (the only exception was year 2008, when Polsat also had the rights to broadcast European Football Championship for the first time in the history of Polish TV market).

Broadcasts from Euro 2016 are also worth characterizing from the business perspective. Polsat's advertising revenues from Euro 2016 broadcasts amounted to approximately PLN 40 million while TVP 1 received PLN 19 million [Bugajski 2016]. TVP showed fewer matches, but had a larger audience (Table 3). When it comes to concrete broadcasts, the record-breaking viewership and the largest advertising revenues in history were recorded during the Poland–Portugal match. According to Starcom's calculations, Polsat's net profit for this broadcast amounted to PLN 5.8 million, and in the case of the public broadcaster, this amount was estimated at PLN 3.2 million [Telekabel.pl 2016].

During half-time and after the matches both stations had the opportunity to compete in the sphere of advertising revenues. The financial result estimated for the Romania–France opening match and the Poland–Northern Ireland match is better for Polsat. The analysis prepared by SMG media agency for the Business Insider Polska portal shows that Polsat's advertising revenues for both games amounted to PLN 3.6 million while the estimate for TVP was PLN 3.2 million (Table 4).

Table 3. Viewership of matches broadcast simultaneously by TVP and Polsat

Date	Football match	AMR 4+		
		TVP1	Polsat	Polsat Sport
10.06.2016	France–Romania	4 271 486	2 973 295	522 948
12.06.2016	Poland–Nothern Irland	7 018 506	4 117 575	868 804
16.06.2016	Germany–Poland	7 933 688	5 481 850	936 474
21.06.2016	Ukraine–Poland	6 734 874	5 169 434	734 720
25.06.2016	Switzerland–Poland	6 557 201	4 540 004	815 797
27.06.2016	Italy–Spain	1 897 958	2 406 983	483 856
30.06.2016	Poland–Portugal	8 071 256	6 884 811	1 018 755
02.07.2016	Germany–Italy	2 841 884	2 995 484	467 933
06.07.2016	Portugal–Wales	3 669 578	3 584 173	481 941
07.07-2016	Germany–France	4 339 647	3 365 701	612 394
10.07.2016	Portugal–France	5 183 538	4 450 167	598 839

Source: Own elaboration based on data from AGB Nielsen.

Table 4. Advertising revenues of TVP and Polsat for selected Euro 2016 matches[a]

TV station	Revenues based on price list	Net income	Advertising length	Number of spots
Advertising revenues from France–Romania football match				
TVP1	1 939 200	930 816	00:15:20	35
Polsat	1 424 400	762 766	00:39:10	103
Advertising revenues from Poland–Northern Ireland football match				
TVP1	4 697 850	2 254 968	00:18:50	45
Polsat	5 345 615	2 862 577	00:41:25	110

[a] Net estimates based on advertisements price list and the discount policy of TVP and Polsat.

Source: Own elaboration based on Pallus [2018].

There are three factors which explain the differences in advertising revenues presented above [Pallus 2018]:

- TVP charged high rates for broadcasting advertisements which resulted in significantly lower demand for spots. Polsat generated nearly three times as many ads, which length was more than double that of the public broadcaster's. TVP had problems with filling in the airtime surrounding the broadcasts from the studio;
- Polsat deliberately removed the broadcast from the studio at half-time, and thus the station could fit more spots in the slot with the largest audience;
- Polsat's viewership was about 20% higher because there were parallel match broadcasts on Polsat Sport.

Sports events involving the Polish national team draw the largest audiences and attract advertisers who are willing to pay more for the airtime. During Euro 2012, TVP exclusively broadcast 31 matches. The SMG report shows that about 30% of advertising revenues from matches come from the matches of the Polish national team and the finals. The remaining 27 games were the source of 70% of the advertising revenues [Telekabel.pl 2016].

Another example illustrating the importance of sports broadcasting in building the station's position on the advertising and audience market is the 2018 World Cup Russia. According to TVP, it was a great success of the broadcaster both in terms of record audience and advertising revenues. The net profit was estimated at PLN 10 million. TVP broadcast almost 900 hours of sports show, including over 50% of live broadcasts, 64 matches on free-to-air channels (TVP1 and TVP2), TVP Sport programming was dedicated only to this event and additionally there were 4K broadcasts on the new TVP 4K channel. There was an increase in the number of Internet users by over 40% visiting websites both dedicated to sports and providing news. A record online TV viewership was recorded during the Poland–Senegal match. All online channels (website, mobile applications like TVP Sport and vod.pl) attracted nearly 600,000 users. The Japan–Poland match (580,000 users) was almost equally popular. However, the largest online audience which used TVP Sport application was drawn by Poland–Senegal match – 81,000 viewers.

FACTORS DETERMINING THE CHOICE OF PREMIUM CONTENT IN THE OPINION OF THE RESPONDENTS

In order to identify the determinants of purchasing premium content, a survey was conducted in the first half of 2018, which involved 110 people. The empirical material was collected by Kuć. The respondents were mainly young people aged 19–24 (95%) with secondary education (45%) and higher education (55%). Half of the respondents lived in cities with over 250,000 residents, and about 40% of respondents declared monthly income per family member of PLN 801 to 1,500. The three most-chosen types of broadcasts include free-to-

-air channels (82.0%), thematic channels (54.5%) and Internet platforms (41%). Broadcasts on mobile applications and text services were indicated by 13.6% of respondents, while social media live broadcasts were watched by almost one in ten respondents. The very modern forms of communication still lag behind, namely pay-per-view options and mobile applications dedicated to specific events. About 73% of respondents never decided to pay a fee to access a service created for a specific sporting event. This form is little known in our country and is used mainly by Polsat TV station, especially for martial arts and volleyball broadcasts.

The factors that most determine viewers' choice of paid sports broadcasts include: viewing mobility (3.8 points on a Likert scale) and diverse content (3.89 points on a Likert scale). Premium channels are the ones which provide a wide range of broadcasts and services. The weakest factor that determines the choice of premium content is its presence in the service packages delivered by Internet or digital TV providers.

Lack of interest in premium content results from the lack of need to access a wider range of broadcasts (3.44 points). Secondly, the respondents pointed to a sufficient content of free-to-air channels (3.0 points) and too high access fees (2.91 points). A detailed distribution of responses is shown in the figure.

Access fees to online platforms and paid channels are one of the basic factors determining the clients' decision regarding their purchase. There is a relationship between the place of residence and the inclination to allocate additional financial resources for this purpose (Table 5). The rural population would not decide to spend more than PLN 250 annually on channels and platforms and 67% of this group would limit this expenditure to PLN 100. In cities of up to 50,000 residents, every fifth respondent would decide to pay from PLN 201 to 500. People who are prepared to pay more than PLN 500 are residents of cities over 250,000 inhabitants (9%).

The surveyed group was also asked to evaluate the quality of TVP and Polsat services provided via

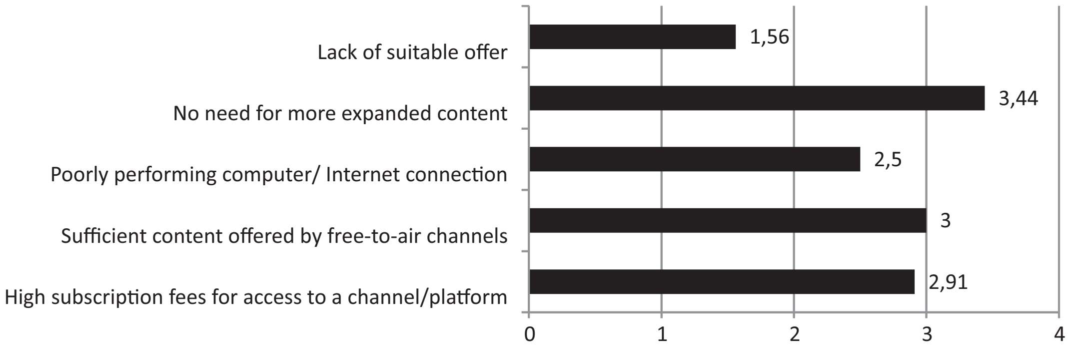

Fig. Determinants of resignation from premium content (Likert scale)
Source: Own research results.

Table 5. Declared expenditures on paid channels and platforms by place of residence (%)

Place of residence	Declared amount			
	up to PLN 100	PLN 101–250	PLN 201–500	more than PLN 500
Rural areas	66.7	33.3	0.0	0.0
City of up to 50 000 residents	40.0	40.0	20.0	0.0
City of 51 000–250 000 residents	0.0	33.3	66.7	0.0
City over 250 000 residents	18.2	27.2	45.5	9.1

Source: Own research results.

traditional TV channels and the Internet. The rating was again made on a Likert scale and it turned out that in both cases free-to-air TV channels were better assessed (TVP 3.82 points, Polsat 3.64 points) than the Internet services (sport.tvp.pl 3.59 points, Polsat platform 3.27 points).

CONCLUSIONS

On the Polish market TVP, Polsat, Eurosport, NC+, Eleven and SportKlub are sports channels that currently have the majority of broadcasting rights for sporting events and compete for such contracts in subsequent seasons. The competition among broadcasters to attract and retain viewers has a positive impact on improving the quality and form of broadcasts and maintaining their existing strengths. This is important due to the ongoing changes in the audiovisual content market, i.e. the fragmentation of the audience and new technological possibilities for disseminating content. However, according to the conducted survey, viewers are not willing to pay additional fees for access to online platforms and paid channels because the content delivered by free-to-air channels satisfies their needs. The viewers who use modern media appreciate their mobility and the range of content.

The presented viewing rates and advertising revenues confirm that the contract for sports event broadcasts in the television broadcaster's portfolio is a source of competitive advantage in the advertising and audience market, however, it is also important to launch additional channels and diversify forms of content dissemination.

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ZNACZENIE TRANSMISJI SPORTOWYCH W BUDOWANIU PRZEWAGI KONKURENCYJNEJ STACJI TELEWIZYJNYCH

STRESZCZENIE

Celem artykułu jest przedstawienie znaczenia transmisji sportowych w budowaniu przewagi konkurencyjnej stacji telewizyjnych na podstawie źródeł pierwotnych i wtórnych. Scharakteryzowano zmiany na rynku telewizyjnym determinujące poszukiwanie nowych treści i form finansowania, wielkość audytorium i wpływy reklamowe stacji posiadających prawa do transmisji sportowych, a także czynniki wyboru kontentu premium. Przeprowadzona analiza została ograniczona do meczów piłki nożnej rozgrywanych w ramach mistrzostw i skoków narciarskich. Stacje posiadające prawa do ważnych wydarzeń sportowych mają większe wpływy reklamowe, większe udziały w rynku widowni i uruchamiają dodatkowe kanały, specjalne platformy i social media do upowszechniania posiadanego kontentu. Tym samym wzrastają ich udziały w rynku widowni, reklamy i są oni obecni ze swoją ofertą w wielu segmentach rynku audiowizualnego.

Słowa kluczowe: telewizja, audytorium, transmisje sportowe, wpływy reklamowe, kontent Premium