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## **Pedagogical Case of Portuguese Football Federation – The impact of business expansion of Canal 11**

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**Master in Marketing**

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ISCTE Business School**

**November, 2020**



**BUSINESS  
SCHOOL**

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**Marketing, Operations and General Management Department**

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## **Abstract**

The present pedagogical case focuses on the market expansion of Portuguese Football Federation to the sports channel market in Portugal, with the creation of Canal 11. This case seeks to understand which were the main motivations that led to this expansion and how they managed to differentiate themselves from other channels already on the market. So, a market analysis was carried out to analyze the strategic processes and marketing tools for entering the market and the existing opportunities to do so.

Thus, with technological advances and digital platforms, it has become evident that the television market may suffer impacts from this. But currently in Portugal, it is possible to see that the television market and especially of sports channels that continues to evolve and has a growth and interest on the part of viewers. In this way, the results of solving this pedagogical case revealed that the business expansion process for sports channels in Portugal of Canal 11 was a positive strategy. Since, its values and content brought to this market showed that the marketing strategies and studies were adequate and may be one of the reasons that can lead to the success of the channel. However, because it is such a recent project that need to mark its position in the market, it needs to continue to evolve and follow technological and society advances with new content and innovate programs to engage the target audience.

**Keywords:** Market expansion, Sports channels, Sports marketing

**JEL Classification System:** M21 – Business Economics

M31 – Marketing

Z210 – Sports Economics: Industry Studies



## **Resumo**

O presente caso pedagógico tem como foco a expansão de mercado da Federação Portuguesa de Futebol para o mercado dos canais desportivos em Portugal, com a criação do Canal 11. Este caso procura perceber quais foram as principais motivações que levaram a essa expansão e de que forma se conseguiram diferenciar dos outros canais já existentes no mercado. Assim, realizou-se uma análise do mercado para analisar os processos e ferramentas estratégicas para entrada no mesmo e as oportunidades existentes para o fazerem.

Desta forma, com o avanço tecnológico e das plataformas digitais tornou-se evidente que a o mercado televisivo pode sofrer impactos com isso. Mas atualmente em Portugal, é possível ver que o mercado televisivo e principalmente o dos canais desportivos continuam a evoluir e a ter um elevado crescimento e interesse por parte dos telespectadores. Assim, os resultados de resolução deste caso pedagógico revelaram que o processo de expansão de negócio para os canais desportivos em Portugal com a criação do Canal 11 foi visto como uma estratégia positiva. Pois, os seus valores e conteúdos únicos trazidos para este mercado mostraram que as estratégias e estudos de marketing foram adequadas e pode ser uma das razões que levou ao sucesso atual do canal. No entanto, por ser um projeto tão recente e que precisa de marcar a sua posição no mercado, este precisa de continuar a evoluir e acompanhar os avanços tecnológicos e da sociedade com novos conteúdos e programas inovadores de forma a captar o público alvo.

**Palavras chaves:** Expansão de Mercado, Canais Desportivos, Marketing Desportivo

**JEL Classification System:** M21 – Business Economics

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# 1 CASE STUDY CONTEXT

## 1.1 PROBLEM PRESENTATION

Sports marketing is defined as “*the specific application of marketing principles and processes to sport products and to the marketing of non-sports products through association with sport*” and it’s an industry that demonstrates an increase which is very helped by sports marketing actions. It’s an industry that is not just based on promotions or sport agents, but something much more dynamic and complex (Shank & Lyberger, 2015, p.5). These actions could be extended to the next industry of this thesis, the media.

Since the beginning of the last decade, it has been increased the new media through strategies of marketing managers which want to reach their customers. For Winer (2009), the main features of these new media are digital and interaction since this impact are moved by four important factors. These are the emergence and enhancement of new technologies at homes and workplaces, the marketers wants to provide new experiences and interact more with their customers in order to differentiate their products and services from competitors, which become difficult to do that with the traditional media since tend to be just one form to communicate between firm and customer. Also, the marketers are increasingly interested in behavioral targeting which means that they need to focus on personalize messages for each customer based on what they are doing on web and where they are by GPS systems. As last factor is that the market nowadays is becoming fragmented, so the traditional demographics breakdowns are coming less and useful (Winer, 2009).

Also, has been talked a new tendency of multi-channel network (MCN), which is “*any entity or organization that partners with content creators or directly produces a variety of distinctive content and works to perform business and marketing functions via the platform whereby said content is released*” and was first coined by YouTube. The MCN allows support and guidance to their partners creating value in the form of knowledge, public access and resources. So, in exchange, partner channels share ad revenue with members, providing a virtually stable flow of income. In statistics studies of ad revenue on YouTube standardized with the channel, this one receives 55% of the money produced and the YouTube takes the rest of 45%. Furthermore, MCN can help to manage, place and target all of these ads, since is taken some of the burden off of content creators, so the 55% of ad revenue of content creator is then divided to MCN and the owner of that channel, since the value of this division varies from channel to channel. So, this tendency

allows them to focus on good strategies or create contents that can contribute to overall revenue growth and successful product and brand strategies (Gardner & Lehnert, 2016, p.294).

Since sports associations are more prestigious in their popularity and number of fans (Derbaix *et al.*, 2002, in Richardson, 2004), as they provide them with name and money, since they are also consumers (Richardson, 2004). So, with these new tendencies of new technologies, social media and more proximity with customer appearing in the context of sports communication, was concluded that all that interaction created can influence positively sport fans to use more social media during a television sport events (Tang & Cooper, 2011; Hull & Lewis, 2014; Lim, Hwang, Kim & Biocca, 2015).

Portugal, according to Anacom, remains one of the countries where most television is seen, and which people are willing to pay to watch TV. It was reported that there were 3.9 million pay-television service customers as of June 2018, 78.4% already have access to a hundred channels or more and 74.4% used the box's various features. More importantly, about 15% had access to premium television channels (Santos, 2018).

Nowadays, exists in Portugal channels already, until august of 2019, 13 sports channels, where included Sport TV, Benfica TV and Eleven Sports, which people need to pay to subscribe them (Marques, 2019). Using as example Benfica TV, because represents a team club, and it's a channel where is transmitted all the football games in their stadium, and other modalities of sports as other programs related to their sports, activities and athletes. So, from 2011 to 2019, the importance of media revenues increased from 30% to more than double (61%), clearly being the main operating revenue of Benfica SAD (Eagle, 2019).

## **1.2 SPORTS INDUSTRY IN PORTUGAL**

According to Daniel Sá, IPAM director and sports marketing specialist, sport in the last thirty years has gone from a substantially amateur model to an increasingly professional organization. Due to this growing professionalization, the sports industry ended up organizing in different areas of activity with three large groups clearly being noticed.

Firstly, it's possible to identify organizations that promote specific events formatted for the general public, via sports facilities or through the media. If the universe of football is seen it's possible to verify that in this group there are professional teams such as Sport Lisboa e Benfica,

Futebol Clube do Porto or Sporting Clube de Portugal, also professional competitions such as Liga NOS (first league of Portugal) or others organized by the various associations.

In a second level, there are all the entities that have a primary objective in common, which is create a specific offer that the market segments to which they target can acquire, either live or through the media. Entities that include sports clubs and associations, sports facilities and summer camps, public or private organizations such as sports events companies, sports equipment companies like Nike or Adidas, or any other type of companies that focus their business around the sport, taking games and consoles or merchandising as an example.

Finally, the third one, there are numerous organizations whose existence is justified by their role as suppliers of administrative, general, regulation, control, inspection, consultancy, management or advertising of institutions and people. It's possible to find agencies for regulation, organization, supervision and control such as the Portuguese Football Federation or the Portuguese Professional Football League. Also, exists the media such as the TV channel Sport TV, or the newspaper A Bola, or sponsors as Vodafone, NOS or Sagres, as well as all kinds of sports support companies of security or consultancy like Deloitte or KPMG.

### **1.2.1 FOOTBALL INDUSTRY**

Daniel Sá, IPAM director and sports marketing specialist, says that society is used to thinking of football as just the most recognized sport in the country, but it's essential to look at football as a product, generalizing including futsal and beach football in football. Thus, it can be grouped into 4 dimensions, social, sport, economic and image.

In social terms, it appears that around 170,000 federated practitioners are registered, it is estimated that nowadays there are approximately 1,000 Portuguese identified as members of Liga NOS clubs and Portugal appears in the 10<sup>th</sup> European place in the ranking of spectators per game with an average of 11,000 spectators.

Sportily, it should be noted that the national team currently occupies the 7<sup>rd</sup> place in FIFA World ranking and appears in 6<sup>th</sup> place in the European ranking of UEFA clubs. Portugal international history at the club level is remarkable, with 3 times European champion, 1 cup of the cups, 1 UEFA cup, 1 Europe league, 2 international cups and 1 European super cap. In terms of national teams, 7 participations in World Cups (a 3<sup>rd</sup> place in one and other in 4<sup>th</sup> place), 7 participations in Europeans (one victory, a 2<sup>nd</sup> place and two 4<sup>th</sup> places), first edition of the League

of Nations that achieved victory and several times world champion and European in youth championship. Furthermore, Portugal was the organizer of Euro 2004. But not looking only for football in specific, the others modalities that accompany the level of success which beach soccer has 10 world cups and 14 European conquests and in futsal has a 3<sup>rd</sup> place and a 4<sup>th</sup> place in world cups and achieve one 1<sup>st</sup> place, one 2<sup>nd</sup> place and two 4<sup>th</sup> places in European cups.

These modalities then become important for the country's economy as in the case of a game between major Portuguese clubs, it is estimated that nowadays it will be watched by more than 50,000 spectators on the spot and with approximately 3.5 to 4 million Portuguese through television generating on average estimated direct revenues of 3 million euros, which includes box office, transmissions rights, advertising and promotional actions at the stadium, security, hospitality or catering, and indirect revenues estimated of 20 million euros which refers to advertising, subscriptions to television channels, newspapers, online betting, merchandising, supporter travel, consumption at home and catering.

Finally, football is a huge advertising vehicle carrying the image of Portugal to the whole world. As the case of Cristiano Ronaldo brand value is valued at more than 100 million euros annually, investments in sponsorships and transmissions rights reach hundreds of millions of euros annually and involve different sectors of activity.

### **1.3 TELEVISION IN PORTUGAL**

Television in Portugal appeared on December 15 of 1955 with the constitution of RTP, the public television station in Portugal. The first experimental emissions were carried out in 1956 and in March of 1957 regular emissions merged as a major national phenomenon, first in the metropolitan area of Lisbon and then in area of Porto in the end of the year, and only in 1960 the emission was processed to a Nacional level.

In this way, over the 63 years of regular transmissions, generalist television in Portugal has undergone several changes in its evolution, starting in 2009 with the gradual replacement of analogue broadcasting with the new digital signal broadcasting (DTT – Digital Terrestrial Television) technology. Expanding also to the online universe and to mobile platforms increasingly used by new generations. This is an evolution story in which it witnesses the emergence of different channels and other modes of distribution and consumption. According to Obercom (Lima, 2011,

in Sobral, 2012), both internet and mobile television are products with an ever-increasing evolution in Portuguese consumption in 2012.

So, over the years of Portuguese television, after overcoming a public monopolist transmission, the television system in Portugal entered in a competitive era with a greater supply of transmissions channels and, consequently, a dispersion of the receiving public. Thus, SIC, a private operator, came to the forefront the hearings in 1995 shortly after starting to transmit, dethroning RTP1, a position that was again won by TVI, another private operator in 2000 in prime time and in 2005 in an absolute manner.

In 2008, according to data from Marktest (2011), TVI managed to have the leadership of television audiences in all months of the years, with SIC and RTP1 always disputing the second and third place very close. In 2009, the same happened with TVI being the leader, but with RTP1 being in second place and then SIC, confirming the fact that Portuguese prefer the generalist channels over the other cable channels. Thus, in 2010 this preference was maintained, TVI with 27.4% of audience share, RTP1 with 24.2%, SIC with 23.4% and cable or other channels with 19.7% (Sobral, 2012).

Also, it was analyzed that at that time the TVI audience was mostly female, more intergenerational and with a lower percentage of individuals with higher education, The one from SIC was the most educated, the youngest and the one that was more balanced in gender and the spectator of RTP1 was the least educated, the oldest and mostly male (Rebelo, 2008, in Sobral, 2012). Regarding the profile of the viewer, it was also seen that the largest consumers of television in Portugal in 2010 were mainly inhabitants of the south of the country of low social class, female and over 64 years old, and especially housewives (Marktest, 2011, in Sobral, 2012).

Between 2010 and 2019, there was always a constant dispute for the leadership of audiences, mainly between SIC and TVI and the top 3 channels continue to belong to SIC, TVI and RTP1, with the difference that SIC becomes the leader since 2019 and ended the year at leadership with TVI being the only television station to fall among the generalist channels in year-on-year comparison. In the end of 2019, SIC had a 21.7% share of audiences with an increase of 3.1 percentage points in relation to 2018 and TVI closed the year with 17.6% with a decrease of 4.8 percentage points compared to previous year and 4.1 percentage points away from SIC. So, it can be concluded that SIC was seen on average by 373 thousand viewers, 70 thousand more than TVI. In relation to the rest of the top 15 channels in 2019, CMTV stood out as the leader in cable channels



with 4.6% share of audiences, thus being in the fourth position. Next comes Globo with 3.1% share followed by Hollywood with 2.2% audience share, the latter three being the most viewed channels on cable. The seventh most viewed channel is SIC Notícias, leading the information channels with a share of 2.1%, while TVI24 retreated positions to the tenth with a share of 1.7% (See Table 1).

**Table 1 - TOP 15 CHANNELS IN PORTUGAL IN 2019**

<i>RNK</i>	Channel	Average audience (‘000)	Share (%)	Percentage point variation 2019 vs. 2018
1	SIC	373	21.7	3.1
2	TVI	303	17.6	-4.8
3	RTP1	244	14.2	0.5
4	CMTV	80	4.6	0.5
5	Globo	54	3.1	0.6
6	Hollywood	37	2.2	0.2
7	SIC Notícias	36	2.1	0.0
8	Disney Channel	34	2	-0.2
9	Fox	31	1.8	0.0
10	TVI24	30	1.7	-0.3
11	RTP2	29	1.7	0.1
12	Cartoon Network Portugal	22	1.3	-0.1
13	Fox Movies Portugal	21	1.2	0.2
14	Fox Life	19	1.1	0.0
15	Panda	19	1.1	-0.2

**Source:** Dinheiro vivo (2019)

Furthermore, the Fox that dominates the series channels is in the ninth position having an average of 30.8 thousand viewers with a share of 1.8% ahead of Fox Life with an average of 19.2 thousand viewers and 1.1% of share and AXN with an average of 18.6 thousand viewers and 1.1% of share (See Table 2).

**Table 2 - TOP 10 CHANNELS OF SERIES IN PORTUGAL IN 2019**

<i>RNK</i>	Channel	Average audience (‘000)	Share (%)	Percentage point variation 2019 vs. 2018
1	Fox	30.8	1.8%	0
2	Fox Life	19.2	1.1%	0
3	AXN	18.6	1.1%	-0.1
4	Fox Comedy	11.1	0.6%	-0.1
5	AXN Black	10.1	0.6%	0.1
6	Fox Crime	9.4	0.5%	0.1
7	AXN WHITE	7.5	0.4%	0
8	AMC	7.5	0.4%	0
9	SyFy	6	0.4%	0.2

10	TV Séries	0.8	0%	0
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**Source:** Dinheiro vivo (2019)

In the year of 2020, a little atypical due to the pandemic situation of Covid-19, television consumption increased by 28% compared to the previous week, with a growth that provoked the highest audiences of the year in the first week in that the country declared a state of emergency with the assistance of 5.1 million Portuguese and, in the same way, a general increase in all types of channels, as well as an increase in the consumption of streaming and console services.

Also, in the following week, in the week between March 30 and April 4, television consumption in Portugal increased by 32% over the same week last year, according to data from GfK/CAEM. It was registered that the channels with the highest increases in audiences were religious with over 55-7%, national news with over 52.9% and movies with over 52.9% and movies with over 44.9%. In relation to the open signal channels available on the DTT network, there was an increase of 26.1%, showing that the list of the most viewed channels remained unchanged with a further 67.8%, RTP3 with a further 59.3% and Fox Movies with a further 56.1%.

### 1.3.1 SPORTS CHANNEL INDUSTRY

Regarding to sports in Portugal, football has always had a great weight in the war of television audiences, since 2007, as it was not only present in three positions of the 25 most viewed programs in Portugal. As well in the year 2015, when football games with a percentage of 30 to 75 percent in the list of the most viewed programs, just being won by some soap operas, information programs or special events. So, according to Paula Martins, general director of the Executive Media agency in 2007, she states that any station that transmit this type of content as a programming strategy can increase the chances of a larger audience and mostly male audiences, which is one of the most difficult to reach and create a relationship on television.

The sports channel market in Portugal in 2018 according to the non-director of Eleven Sports Portugal, Pedro Mendonça Pinto, was in an old-fashioned and conservative way, with a philosophy of treating sport too serious, controversial and complicated, and which should be seen from an entertainment perspective. Thus, with the entry of a new channel it could move the market, which really happened, as Sport TV lost the monopoly of rights in some of the main football competition and Eleven Sports enters the market with programs that were different from the themes already discussed on other channels with sports programs. Thus, in the following year, Eleven

Sports was distinguished with the prize in the category of Best Sports Channel in the Meios & Publicidade awards of 2019 due to the prominence they had in which they marked for its innovation and with new terms of sports broadcasting in Portugal, with more than 1910 live events in a total of 4618 hours of live sporting events. As stated by Nuno Miranda, Marketing and Communication Director at Eleven Sports in Portugal, *“When we started, we promised all Portuguese that we would bring innovation in the transmission of sports content and we did so. We changed the paradigm in Portugal and, therefore, the feedback was very positive. This award is another motivating factor for us to continue to do more and better, in a differentiated way, with new approaches to sport and the focus of our action on fan”* (Eleven Sports, n.d.).

Also, it's important to emphasize that although there are channels directly related only to sport, the other open and generalist channels in some competitions end up buying those transmissions and with that it was viewed again that football was the most content viewed by Portuguese on generalist television on the year of 2019. Thus, the League of Nations game between Portugal and Netherlands concentrated the largest number of Portuguese viewers in 2019, with the post-match as the most viewed program with an average audience of 2.699 million viewers and the final between two teams with an average audience of 2.669 million.

As can be seen in the Table 3, these transmissions were carried out by the RTP1 station and managed to place nine programs in the top 15 most viewed programs in 2019. It is also noted that in the first four positions of the ranking are transmissions of football matches of the Portuguese selection by that same television station. In the fifth position, TVI managed to place the transmission of the game of the Allianz Cup League final between FC Porto and Sporting CP with 2.163 million viewers and the same television station was also in seventh position with the transmission of the game of the Champions League between SL Benfica and Lyon with an average audience of 2.137 million. Also, the competitor SIC placed one format in the top 15 most viewed of the year, in the ninth position with the game of SL Benfica's Europe League with E. Frankfurt with an average audience of 2.134 million viewers.

**Table 3 - TOP 15 PROGRAMS IN PORTUGAL IN 2019**

RNK	Date	Channel	Start Time	Description	Average audience ('000)	Average audience (%)	Share (%)
1	09-06-2019	RTP1	21:36:59	Football – League of Nations: Post-Match – Portugal X Netherlands	2.699	27,9%	60,3%

2	09-06-2019	RTP1	19:33:41	Football – League of Nations: Final – Portugal X Netherlands	2.669	27,6%	65%
3	14-10-2019	RTP1	19:36:36	Football – Euro 2020: Qualification – Ukraine X Portugal	2.415	25,5%	50,4%
4	05-06-2019	RTP1	19:32:59	Football – League of Nations – Portugal X Switzerland	2.415	24,2%	56,7%
5	26-01-2019	TVI	19:41:03	Football – Allianz Cup League (Final) – FC Porto X Sporting	2.163	22,3%	47,9%
6	06-02-2019	RTP1	20:42:27	Football – Portugal Cup – Benfica X Sporting	2.160	22,3%	44%
7	23-10-2019	TVI	19:53:33	Champions League – Benfica X Lyon	2.137	22,6%	44,9%
8	04-08-2019	RTP1	20:29:51	Football – Candido de Oliveira Supercup – Benfica X Sporting	2.134	22,5%	49,7%
9	11-04-2019	SIC	19:53:16	Football – Europe League – Benfica X E. Frankfurt	2.134	22%	48,6%
10	25-05-2019	RTP1	20:26:06	Sporting 2019 Portugal Cup winner	1.994	20,6%	53,4%
11	25-05-2019	RTP1	17:06:39	Football – Portugal Cup: Final – Sporting X FC Porto	1.875	19,4%	62,1%
12	31-01-2019	SIC	20:54:25	Night news – A Rede	1.715	17,7%	35,4%
13	18-12-2019	RTP1	20:42:58	Football – Portugal Cup Placard – Benfica X Sp. Braga	1.582	16,7%	34,6%
14	19-11-2019	SIC	21:40:17	Nazaré	1.582	16,2%	34,3%
15	09-09-2019	SIC	22:16:21	Golpe de Sorte II	1.506	15,9%	35,5%

**Source:** Dinheiro vivo (2019)

However, the telecommunications sector was largely affected by the greatest impact due to the loss of revenue on premium channels, particularly on sports channels such as Sport TV, BTV and Eleven Sports, which are now available to customers free of charge and revenues from international roaming. According to data from the operator NOS, they showed a loss of 10.4 million euros in the first quarter of 2019, which compared to the same period last year, showed profits of 42.5 million euros, thus having a decrease of 3% in revenue compared to the 2019 counterpart. Residential revenues in the consumer segment fell by 1.8% due to decreases in premium sports channels.

So, analyzing and exploring all the sector and operators exists 13 sports channels in Portugal and some of them are deployed in more channels. Therefore, the channels that are most connected to football and other club modalities are A Bola TV, Sport TV, Sporting TV, BTV, Eleven Sports, PFC and Canal 11. Then, exists others that transmit general sports like Eurosport

other transmit fighting sports like Kombat Sport, Fight Box and Fight network, other transmit basketball the NBA TV and at last the Fuel Tv that transmit action sports and skate sports.

In relation to the channels that are most related to the football them, a Marktest analysis was carried out between January and October of 2020, in which it's possible to find which of the channels has the highest share, rating and which of its audience profile. So, in relation to the average audience in viewers, obtained through the weighting of each individual in relation to the time of contact with the channel, it can be seen that within the open channels, Sport TV + is the channel with the highest rating over all the months immediately followed by Canal 11 as the second channel with the highest rating in that period except for the month of August marked by the teams' pre-season period. Then there is Sporting TV, Bola TV and EuroSport dividing the remaining positions with Eurosport standing out in more months with a higher rating than the other two channels. Regarding premium channels, what stands out is Sport TV1 with a high profile in all months except the months of March, April, May and August, due to the suspension and stop of the football championships as mentioned above in this chapter. Then, in order of highest rating of premium sports channel, respectively, the Sport TV2, BTV, Sport TV3, Eleven Sports 1, Sport TV4, Sport TV5, Eleven Sports 2, Eleven Sports 3 and Eleven Sports4. So, it's possible to see from the audience share, calculated from the total time spent watching that channel in relation to the total time spent watching television, that the largest share of the year 2020 between January and October belongs to Sport TV + in the month of October with 0.9, and the channel also has a higher percentage of audience share in all months analyzed. Furthermore, the two other channels that stand out most with the highest percentage of audience share are also Canal 11 and Sport TV1. (**Exhibit 1**)

Finally, analyzing the audience profile of the 3 channels with the highest share, audience profile that measures the proportion of individuals of a certain target in the channel's total audience, Canal 11 and Sport TV + present the same type of consumer profile, in that the viewers are mainly from, respectively, the Lisbon region (41.6% e 40.5%) and after the North (29,7% e 37.3%), male (72.1% e 70.4%), with an age group above 24 years old and social status D (37.8% e 40.8%) and E (27.2% e 22.3%). In relation to Sport TV1, most viewers are from the North and Lisbon region (43.5% e 43.1% respectively), male (68.9%), between 15 and 74 years old and with social status D (41.8%). Furthermore, it's important to note that the channels that most attract female viewers are

Bola TV (36.7%) from open channels and Sport TV4 from premium channels (34.3%). (**Exhibit 1**)

### **1.3.2 THE COMPETITORS**

This analysis is attentive to the competitors of Channel 11 of the Portuguese Football Federation, considering its nature and its objectives performed in the market.

According to the Portuguese Federation all channels are competitors of Canal 11, insofar as they compete for the viewer's attention. But, in their perspective, their channel is complementary in relation to the offer that already existed, since they give team games and competitions that were not shown on television before. In addition to the entire offer of the channel, the exclusivity of game content from all National Teams of football, futsal and beach football, which sometimes sell the transmissions rights to other channels.

With this, and seen in the market analysis, it is increasingly fragmented, since more and more small channels with similar content are appearing and which seek to make a difference, which makes it difficult to identify which are direct competitors. As such, it was analyzed and differentiated into premium channels and open channels, with the open channels being the closest to the type of services on Canal 11, so, these will be the direct competitors and the premium channels will be the indirect ones.

#### **1.3.2.1 PREMIUM CHANNELS**

- **SPORTTV**

SPORT TV was the first Portuguese television channel exclusively dedicated to transmissions of sports contents founded in September of 1998. Already in 2006 with half a million subscribers, it showed its diversity and launching the second channel, SPORT TV 2.

On the channel's tenth anniversary in 2008, they adopted a channel rebranding strategy, presenting themselves with more appealing, modern and closer image to the consumer. The channel also presented SPORT TV 3 and SPORT TV Africa going beyond borders. In addition, in the same year, was tested the transmission in high definition with a NBA game and proved that investment with the introduction of SPORT TV HD the following year, becoming the first and only channel at that time in Portugal that transmits in high resolution sports. Also, in 2010, it launched the channels SPORT TV Golfe, SPORT TV Américas and SPORT TV Liga Inglesa, in order to meet the needs

of consumers. In following year SPORT TV 4 appeared and took on new format and 24 hours and high definition transmission on all channels.

With the technological evolution, in 2013, the channel optimize itself and create a multiple SPORT TV screen, which allows its customers to access the release through any device and the SPORT TV multiroom that allowed to access SPORT TV in two rooms of the house with only one subscription. Also, in 2016, it was created the SPORT TV+, the only open channel with sports content created to update the other customers that doesn't have subscription.

Nowadays there is the channel SPORT TV 1 to 5, SPORT TV Africa and SPORT TV+, with it channel with option of high definition, and SPORT TV 1 in 4k UHD. Its available on the operators NOS, MEO and Vodafone and their sports contents than football, it transmits the most important national and international competitions in basketball, golf, surfing, rugby, athletics, volleyball, handball, gymnastics, swimming, motorized competitions such as MotoGP and Formula 1 and two of the four major leagues in United States, the NBA and NHL.

- Eleven Sports

Eleven Sports is an operator of sports television channels founded in 2015 in the United Kingdom. However, having opened doors to Portugal in 2018 with the purchase of rights to the UEFA Champions League and La Liga. In this way the channel presents itself as a paid channel in Portugal with live and exclusive transmissions of some of the main international sports competitions, such as football, futsal, American football, motor sports, basketball, tennis, MMA, kickboxing, NFL and Formula 1.

The channel already offers 6 channels in high definition, 4 of which are with daily transmissions and 2 pop-up channels in the case there are moments with several contents simultaneously. Eleven Sports is available for subscription through television operators MEO, NOS, Vodafone and NOWO and in addition the customer can access it through the website or the mobile application or even by IPTV channels like Chromecast, Samsung Smart TV, Android TV and Amazon Fire TV.

- Benfica TV

Benfica TV is Sport Lisboa e Benfica's television channel founded on December 10 of 2008, being a pioneer since it was the first channel belonging to a Portuguese club and the only one to this day that transmits live and exclusive matches from its professional football team at Estádio da Luz.

Initially the transmissions were on an open channel and Benfica TV's first experimental was on October 2 of 2008 in a game between Benfica and Naples for the UEFA Cup, that emitted to Angola, Mozambique, Cape Verde, São Tomé and Príncipe, United States, Canada, Brazil, Middle East, France, Italy and North Africa, managing to cover the universe of 44 million Portuguese speakers.

On July 1 of 2013, the channel became a paid monthly subscription channel and on August 25 it broadcasted the first transmission of an official Benfica game at his stadium. Also, with the celebration of the tenth anniversary of the new stadium on October 25 of 2013, Benfica TV's graphics were renewed, and a second channel was created, Benfica TV2 with the Premier League games. On July 1 of 2014, the screen logo was shortened and simplified to a smaller version, instead of Benfica TV it became BTV. In 2016, the channel decided to close BTV2 and BTV1 changed its name to BTV only, thus having one high definition and the other not, with the same name.

The contents of the channel included transmissions of the matches of team B, the football training teams of the club and the matches of the pavilion modalities especially those held at Sport Lisboa e Benfica stadium, but Benfica TV also seeks a diversification of contents, from news, comments, debates, interviews to satisfy all different fans. The channel is available on the operators MEO, NOS Vodafone and NOWO and for computer, tablet or smartphone with the application of Benfica TV.

- PFC Internacional

PFC is an operator of sports television channels founded in 1997 in the Brazil which and brought to Portugal as PFC Internacional in 2007 and also expanded to other 14 countries around the world.

It's a channel produced especially for football fans and fans and Brazilians living abroad and Brazilian football fans. It is the first channel with 100% export model football, entirely broadcast in Portuguese where you can watch 24 hours of exclusive games live and that inform you of everything that happens with the best football in the world, from Brazil. The channel is available to subscribe on the operators MEO, NOS and Vodafone and transmit more than 600 live games each year.



### **1.3.2.2 OPEN CHANNELS**

- Eurosport

Eurosport is one of Europe's largest sports television network by satellite, cable and IPTV launched in 1989. Its channel is available in 59 countries, in 20 different languages and Portuguese is one of the official languages of the channel.

In Portugal, the Eurosport1 and Eurosport2 channels can be found on NOS, MEO, Vodafone and NOWO in an open channel. These second channel was only launched in 2005 and only in 2011 was available for 47 of the countries and in 16 different languages. In addition, in 2008, Eurosport invested in technological innovation with the creation of the Eurosport Player platform, which allows customers to view their content from the internet. Its sport content is the most diversified, as it does not bet on single major, but on all world sports.

- Sporting TV

Sporting TV is the official television channel of Sporting Clube de Portugal, which broadcasts started on July 1 of 2014 through the club's website and on 17<sup>th</sup> broadcasts started on open signal on MEO and NOS operators. This channel is not only available in Portugal, but also in Angola, Mozambique, Cape Verde and Luxembourg. Also, since July 1 of 2017, the channel became available on the NOWO and Vodafone operators.

The channel broadcasts for 24 hours a day, with transmissions of games of modalities and training levels, as well as pf team B, with interviews of the main protagonists, rubrics on the daily life and history of the club.

- A Bola TV

A Bola TV is a Portuguese television channel, open and dedicated to sport that belongs to the group of the sports newspaper A Bola. This channel emerged on October 12 of 2012 after an agreement between the founder Sociedade Vicra Desportiva and MEO with an exclusive contract with this operator. Also, this channel broadcasts to Portugal, but is available in Angola, Mozambique, Cape Verde and Canada.

Nowadays, it's possible to find A Bola TV on MEO and Vodafone operators with the possibility of high definition channel. In it, it's possible to find mostly football content, but also about other sports like futsal, handball, basketball, motor sports and poker.

## **1.4 PORTUGUESE FOOTBALL FEDERATION**

### **1.4.1 HISTORY AND BUSINESS MODEL**

On March 31 of 1914, was founded the Portuguese Football Union, predecessor of the current Portuguese Football Federation by the three previous existing regional regions – Lisbon, Portalegre and Porto. The first president of the Portuguese Football Union, between 1914 and 1922, was Sá e Oliveira. His first objective was officially founded the National Team, since that *Fédération Internationale de Football Association* (FIFA) only accepted the selected national federated groups organized and affiliated with FIFA. This is exactly what happened in August 26 of 1914.

Thus, on December 17 of 1921, a collective passport was issued for the first National Team. On December 18 of 1921, the first game of the National Team was held against the Spanish counterpart and in 1922 Luís Peixoto Guimarães was elected President of the Portuguese Football Union, position that would occupy until 1925.

Furthermore, in 1922, the first football championship organized by the UPF was created. The winners of this competition were considered the champions of the sport in Portugal. FC Porto won the first edition after beating Sporting by three to one in the final on June 18 of 1922.

Portugal's bid for FIFA was later accepted at the XII FIFA Congress, organized in Geneva in May of 1923. From this date, Portugal became a full member of that body. Becoming the current Portuguese Football Federation. Between 1923 and 2011, 28 presidents were elected to the Portuguese Football Federation (FPF initials in Portuguese), in which the first on was Major João Luís de Moura until 1927 and the current president, Dr. Fernando Gomes since 2011.

After seven changes of headquarters, between 1914 and 1968, the highest governing body of National Football was finally able to acquire a building for its own headquarters in Praça da Alegria, No. 25. Thus, began a 36-year-old connection to a place that became of great symbolism for the institution. However, in 2004 the Portuguese Football Federation moved from 'arms and luggage' to the Alexandre Herculano building. The official inauguration of the new headquarters took place on October 12 of the same year.

Already 2016 was a milestone year for the Portuguese Football Federation, which inaugurated the City of Football on March 31, on its 102<sup>nd</sup> anniversary. The City of Football is inaugurated at Alto da Boa Viagem, in Oeiras, and was attended by the President of the Republic, Marcelo Rebelo de Sousa. Moreover, it was a year full of achievements. These include the achievement of the European under-17 youth title in May and the qualification for the European

female in October. In addition, Fernando Gomes' re-election as head of the Portuguese Football Federation in June and the biggest achievement of 2016, Portugal became European Champion on July 10 of that year in France, winning the Portugal's first senior international title. Already the second senior international title was won in 2019, with the first edition of League of Nations.

With all this past history and the possibility of a great future, the Portuguese Football Federation aims to increasingly strengthen its role as a reference in the development of football in Portugal, so that it has a growth as one of the most relevant in the project of Portugal in Europe and the world. In this way, it assumes itself as the dynamic entity of football as a sport, economic, social, educational and leisure activity, taking into account the gradual growth in the formation of youth, in the economy and in the international image of the country and ensuring all this evolution, so that they increasingly position themselves as one of the most competitive in international terms.

For all of this to be possible, the Portuguese Football Federation is governed by a set of values that enable the best way to reach its goals: *"1. FPF believes that it will only be successful if all its partners are equally successful, so it will always be supportive, transparent and loyal to them in pursuing their goals. 2. FPF is governed by principles that allow sustainable development and always promotes compliance with the highest ethical, social and environmental responsibility standards. 3. The FPF guarantees sporting truth at the heart of its decisions, through the democratic functioning of its structure and dialogue with its partners. 4. The FPF encourages inclusion, the acquisition of knowledge and a healthy lifestyle, without prejudice to safeguarding the entertainment and economic activity of football. 5. The FPF defends 'ZERO TOLERANCE' in relation to racism, discrimination, violence in football and match-fixing or results. 6. FPF defends the rationality and economic success of Football, guaranteeing transparency, integrity, loyalty and honesty, even in the absence of legal obligations."* (FPF, n.d.)

- Licensing and Merchandising

Moreover, to its business model, Portuguese Football Federation also has the licensing and merchandising, which started a new phase in 2017 with the change in the external responsibility of sales actions during 2017 and the search to increase the potential for selling products, as the Nike products and FPF textile creation. In this way, they wanted to improve their presence and means in sales actions, thus achieving growth in results. This new phase sought to launch a new Online Shop under the full management of FPF, development and marketing of the new FPF textile products, development of the retail business in its own stores and distribution with third parties,

growth in the FPF brand licensing business and increased quality and diversification of FPF products. **(Exhibit 2)**

With all the developments in this business, it was found that in the last quarter of 2019 they developed several campaigns dedicated to special seasons such as Halloween, Back to school, Black Friday, Euro 20+20 and Christmas made in Portugal. Additionally, in this quarter the top 5 best-selling products included the signature white ball, the signature scarf, the stadium 1<sup>st</sup> jersey, the home jersey-stadium, the Christmas selection sweater and away jersey-stadium, with Portugal having the highest percentage of sales followed by France, Switzerland, United States of America and Germany in descending order. In relation to the following quarter, the first of 2020, new campaigns were created, such as Valentine's Day, Father's Day and due to the pandemic situation Play at home appeared with the free delivery service, changing some of the items that find in the top 5 of best sellers including the away jersey-stadium, home jersey-stadium, signature white ball and two different types of lanyards. However, what did not change were the percentages of sales by country, in which Portugal with 66% followed by France with 8%, Switzerland and United States of America with 4% each, Germany with 3%, Canada, United Kingdom, Belgium and Luxembourg with 2% each, Spain and China with 1% each and the remaining 5% corresponds to others. **(Exhibit 1)**

- Portugal Football School

In addition to these businesses, FPF launched on April 18 of 2017 the Portugal Football School in order to prepare managers and members to the future in these businesses of football. At the end of these three years, it already has more than 190 courses distributed among the different areas of directors and partners, health, media, facilities, other participants, research projects and students, publications and conferences. Therefore, the courses with the largest number of trainees are the Initial Training of Managers with 913 trainees, the Training of Directors of Training Entities with 598, the Basic Life Support course with 493, the Training of Team Managers with 474 and the Seminar on Ethics, Integrity and Non-Violence in Sport with 300 trainees. **(Exhibit 3)**

- FPF eSports

Portuguese Football Federation decided to create an eSports division that seeks to form a community of virtual football players with the clear and unambiguous objective of enhancing an online gaming culture that favors participation, respect and competition between players. With this measure, FPF wants national gaming to have more and better conditions for the development of

talent, create new and more competitive forms and give more impetus for the practice to continue to develop. Thus, in order to create competitive spaces suitable for this evolution in national terms, on September 29, FPF joined to EA Sports and FIFA in order to promote and develop in international events, to organize events eSports in Cidade do Futebol and making a licensing of the National Team in FIFA 18.

Therefore, in October 2018 they already had more than 100 clubs and over 6.000 athletes on the gaming platform and until January 2018 they only counted with one competition, the Allianz Cup. So, the first quarter of 2018 was marked by the beginning of new competitions with the Portuguese League (3 divisions), National Championship (2 divisions), National Cup (2 divisions), League Cup, Portuguese Cup and Super Cup, managing to surpass the 7.000 athletes registered on the FPF eSports website. Also, In June 2018, one year after the inauguration of FPF eSports, they already had more than 7.500 players, more than 115 clubs, more than 5.000 games with more than 500.000 views and over 40.000 prizes awarded in 16 competitions and present in 6 events.

In March 2019, Portugal entered in the draw for the FIFA eNations Cup, the first virtual football competition organized by FIFA, which leads to the first eSports internship at the home of the selections of the National Virtual Football Team in Cidade do Futebol where were present eight athletes pre-summoned to the FIFA eNations Cup. The balance of that was very positive, contribute to team spirit in which two of the eight pre-summoned participated and achieved the first place of the group in which Portugal was and managed to place Portugal was as the third best selection of virtual football world. In addition to this news, in August 2019, the first open signal transmission of an eSports competition on Canal 11 took place, in the same month of its inauguration. Furthermore, in February 2020, the Masters Challenge begins with the presence of the best national players, where Portugal marks the 3<sup>rd</sup> position in the world ranking of virtual football. **(Exhibit 4)**

As such, over the past few years, they have always been present at eSports events, at Lisbon Games Week the biggest game market in Portugal, at COMI COM the biggest POP culture market and at Moche XL eSports in Altice Arena, always counting on thousands of visitors, several competitions and prizes delivered and the presence of well-known faces of the football at events.

#### 1.4.2 EXPANSION PROCESS – CANAL 11

Canal 11 debuted on August 1 of 2019 as the new FPF content platform that aims to democratize the less visible side of football. Thus, it is present not only on television but also on social networks (Facebook, Instagram, Youtube and Whatsapp).

It's a channel that is part of the basic package of all Portuguese who have one of the three operators with which FPF signed a contract on July 10 of 2019, Altice, NOS and Vodafone. This contract came to facilitate the dissemination of the message that FPF intended to convey in relation to its modalities. In addition, the FPF in April of 2019 made an agreement with UEFA in order to seek help in the creation of this new business, which paid the entire investment made. The entity that governs football in Europe provided this financing to contribute to the construction costs of the building made for Canal 11 in Cidade do Futebol, as well as the equipment costs for the television studio. This budget amount, which was around 1.5 million euros and which the channel seeks to earn more through advertising.

So, according to Nuno Santos in 2019, the first director of Canal 11, *“the channel will bet a lot on the direct. It will be a Portuguese channel that will better accompany Portuguese players and coaches in the world and also one that will have more female sport”*. Since the channel's goal is to increase the number of federated players, boys and girls, wanting to *“demonstrate that football is an element of development, that football is good”* (Calheiros, 2019).

In this way, Canal 11 have content not only from the main selection but also from the other 25 national teams and from the Taça de Portugal, Liga Revelação (under-23), Liga Sportzone (Futsal) and Liga BPI (women's football) which are responsible for FPF. In addition, they intend to reach four million homes and have 600 live streams per year, which include information, debate, analysis and entertainment with the inclusion of an evening program with guests outside the football field, also thinking of an audience not so connected to the soccer. So, as Nuno Santos said, the program is *“designed according to different audiences that watch television throughout the day”* (Calheiros, 2019).

In the first months of transmission, they followed a path of success, and by the end of January they had 522 matches broadcast in 15 different competitions and 110 clubs including 22 foreign teams and 12 national teams. This is because it's also a channel that presents a new way of communicating football. In addition to broadcasting football, futsal and beach soccer games, it also intends to treat the game fairly, bet on those who know football and show what other channels have

not yet shown in this sector. Also, managed to reach the fourth place in the top programs in the week of October 7 to 13 in 2019, two months after its debut with the broadcast of the Brazilian championship game by the team of a Portuguese coach with the viewing of 182,200 viewers, your best result so far.

Also, in January 2020, Pedro Sousa took over as the new director of Canal 11, thus leaving his role as coordinator of content for the channel.

### **1.4.3 TARGET**

According to the director of People and Media Division, António Magalhães, first they seek to reach the football family, which is more than 260 thousand practitioners and sports agents, as well as the families of all these people. In addition, they seek to attract fans from all clubs, and this does not include only fans from larger clubs.

Another sector that intends to attract attention is naturally the public that tends to be present, accompany and follow the national teams, those who are residents in Portugal and the emigrants and Portuguese descendants.

Finally, the director also says that the Portuguese Football Federation wants to attract the general public, attract more people who are usually less attentive to the world of football, but that they can find some specific programs on Canal 11 that interest them. Since the objective of introducing Canal 11 to the market is also to attract more people to football and above all to make that more boys and girls play football.

### **1.4.4 SOCIAL RESPONSIBILITY**

The Portuguese Football Federation seeks to develop several responsibility initiatives that contribute to an increase in the quality of life and well-being of Portuguese society. As such, it seeks on three distinct areas, diversity and inclusion, health and the environment.

- **Diversity and Inclusion**

The promotion of diversity and social inclusion are considered with high relevance by FPF since football can be an important engine for the development of a more inclusive society. In this way, the objective and commitment of this is that everyone has the possibility to play football in Portugal, fight discrimination and ensure that the values of this sport inspire generations with passion to build a better future. So, the most important projects in development are Futebol Para Todos (Football for all) and 23 Bolseiros (23 Scholarship holders).

Futebol Para Todos was created by FPF in 2018 in which its prize can be given to non-profit institutions and is based on the presentation of projects in which practice of football is considered as a way to combat discrimination and promote the social integration of children, youth, adults and people with any type of disability. Until today 6 projects of institutions with a total value of one hundred thousand euros have been awarded.

Regarding the project 23 Bolseiros includes scholarships also launched by FPF in which it seeks to develop education through the promotion of academic merit and progressively, develop this sport through the promotion of sports participation and develop citizenship through participation in projects in the scope citizenship that the student is in or intends to develop. These scholarships are intended for students who are attending the 10<sup>th</sup> grade and can extend to the 12<sup>th</sup> grade and thus 23 students from 10 different districts are chosen. Also, this scholarship includes a pedagogical kit in which it includes a personal computer, tablet, material and school support books and annual subscription access to various cultural events at Serralves Foundation and the Calouste Gulbenkian Foundation. In addition, they received sports equipment and an offer by MEO-Altice with passes for the MEO Marés Vivas music festival.

- Health

FPF seeks to use the practice of football as a way of promoting engagement actions with society for health promotion initiatives, with the promotion of healthy lifestyle habits, such as the practice of physical exercise and sustainable eating behaviors through the development of partnerships with stakeholders that allow the realization of several initiatives for different audiences in the country. As two main projects, have been developed EUROFIT and Football is Medicine.

EUROFIT – European Fans in Training -, is the result of a protocol between the FPF, the DGS (Direção Geral de Saúde – General Directorate of Health) and FMH (Faculdade Motricidade Humana – Human Motricity Faculty) within the scope of the National Physical Activity Plan, with a program that seeks to implement healthy lifestyle habits through the social strength of the soccer. Thus, the project wants to create synergies between investors, health professionals, clubs, coaches and supporters to increase awareness of a healthier life. In 2017, they managed to develop training who supported the National Team had the opportunity to try the project and managed to start with the spread of it in two more clubs, SC Braga and Rio Ave.



Regarding the second project that started in 2017 by FPF, it has been recognized nationally and internationally since it led to an international congress of Football is Medicine at the end of January 2018 in Cidade do Futebol. The idea of the project is to show the health benefits that recreational football has, as it can be effective in preventing diseases associated with the lifestyle of middle-aged women and young people such as hypertension, diabetes type 2 and osteopenia.

- Environment

For FPF it is important to reduce the impact of its activity on the environment and in this way in 2017 took important and innovative steps to promote responsible attitudes to defense of a better planet. Therefore, as its own projects in Cidade do Futebol, it applied sustainable practices like the use of 39 solar panels for the production of domestic hot water, the adoption of a filtered water purification system, a partnership with the NGO Re-Food in which all wastes of meals in its facilities are collected by volunteers for delivery to families having managed in 2017 to donate 8,385 meals. Implemented as a rule in the company the reduction of prints and double-sided and black-and-white prints as a measure, implementation of recycling containers in all divisions and departments of the Cidade do Futebol and also installed energy chargers for vehicles in its car parks for hybrid and electric cars.

In addition to these 3 main strands, the Portuguese Football Federation develops other solidarity projects and initiatives like solidarity dinners and fraternization, revenue from tickets of final cups for solidarity, ‘Estádio Solidário’ using the revenue from tickets of games in which it has already raised 24,890 euros to help the homeless community and a solidarity call center to gather money to help rebuild houses destroyed by fires in Portugal in 2017. Also, took advantage of the launch of Canal 11 and the ‘Gala das Quinas de Ouro de 2019’ to launch the #DEIXAJOGAR movement to promote fair play inside and outside the four lines in order to combat episodes of bad behavior in the stands, promoting good practices and examples to be made by the public and parents.

In the most recent pandemic situation that happened in all planet, Federation Portuguese of Football participate at ‘Unidos por Portugal’ together with SIC with the objective of raising funds for hospital equipment and personal protection for hospitals and IPSS in order to help fight Covid-19, which managed to raise 594,567.58 euros and at #NUNCADESISTIR in partnership with TVI and Missão Continente with the objective of raising funds to distribute for Cruz Vermelha and

Rede de Emergência Alimentar to help the neediest families, which raise 639,241.13 euros plus 150 tons of food.

#### **1.4.5 SOCIAL MEDIA**

Regarding the official pages of the Portuguese teams belonging to the Portuguese Football Federation, they have been showing progressive growth over the years. In a homologous comparison of the first quarters between 2016 and 2020, in relation to Facebook with 1,168,672 followers in 2016, increasing to 3,486,200 followers in 2017, with a marked growth due to the success of the Portuguese Football Team in winning the European Cup in 2016. In the following years, it presented a growth continuous over the years with 3,711,806 followers in 2018, 4,233,806 in 2019 and 4,294,894 in 2020. In the same analysis, the same happened with the social network Twitter, where in 2016 it had 165,864 followers and in 2020 it already had 810,190 followers. Already with Instagram, a social network that has evolved a lot in recent years and as such it went from 69,563 followers in 2016 to 853,824 in 2017, in 2018 it already had 1,623,841 followers, in 2019 3,542,366 and in 2020 it got 5,524,273 followers.

In relation to Canal 11, before the debut they already had 115,218 followers on the same page in the month of July and with the debut they reached 140,143 which quickly went to 156,896 followers in September. In addition, they managed to reach 54,832,334 views from that same Facebook page. At the end of the first quarter of 2020, Canal 11 already had 189,622 followers on Facebook, 196,396 on the Instagram page and 34,479 on Twitter.

In addition to the three main social networks, FPF also invests in its website where it seeks to promote its content, as such, over the past few years it has required to increase the news it made available to fans, and in the first quarter of 2017 it had 912 news items, while in 2018 it made 1,351 new items obtaining 3,499,307 page views in the first quarter total, 21% of which correspond to women's teams. In 2019, they managed to obtain 4,427,121 page views in the first quarter with 1,291 news items and 44% of these were related to women's teams, thus showing the intended equity in the sector between men and women. In the first quarter of 2020, they obtained 3,625,172 page views with 1063 news reports and 33% of these related to women's teams.

Furthermore, inside of website, The Portugal + was officially launched on May 23 of 2018 having managed to collect fan data since that date, and on that day they already had 12,003 fans and on July 32 of 2018 they already had 90,494 fans in which 66% are male and 34% female, and

from those 61% are Portuguese nationals and the rest are foreigners, with the French being the most representative of fans. Also, the most representative age group was between 18 and 24 years old with 30%, followed by the groups between 25 and 34 with 20% and between 35 and 44 with 19%. Furthermore, the fans who joined were asked to respond to optional data and of the 75,8% who responded their sporting interests, 60% reported football and 19% answered football and futsal and another 19% answered all of them. Of these, only 57,8% answered if they play or had already played football, and the majority answered that played recreational with 48%, 23% never played and the others play or had already played federated. So, when they join to, they have access to exclusive content about the team and players, exclusive official products, exciting experiences like visiting Cidade do Futebol and watch trainings, priority in purchasing tickets, special discounts and the Portugal+ newsletter. In 2018, they count with 150 exclusive contents, 1.5 million newsletters sent, and 16,508 vouchers distributed with discounts on Portugal store. **(Exhibit 5)**

In 2019, from the first to the second quarter existed an increase in accession in Portugal + from 21,914 to 23,995 fans, keeping some majority of male fans, but in both times the age group with most representative was between 35 to 44 years old. But, in the third quarter a little decrease in the number of accessions to the number of 19,673 fans, with the age group from 45 to 54 years old with the most representative. So, at September 30 of 2019, Portugal + count with 195,799 fans in total. At this year, Portuguese Football Federation through Portugal + distributed more than 2 thousand gifts in Lisbon during the games of Portugal in the Final Four of the League Nations, had more than 1,600 presence of fans who bought tickets for the games of Portugal in the League of Nations, with 30 fans who could to take their children to the field with the players in the two games of Portugal and put 1600 fans to test knowledge in a Quiz about the Selections of Portugal. Also, in the first quarter of 2020 only counts with more 5,658 number of fans.

## **2 QUESTIONS**

- 2.1 Study the potentiality of sports channel market and the need for a change. Remember the key success factors.
- 2.2 Develop a SWOT Analysis for Football Portuguese Federation and reflect on some of the evidences that reinforces the expansion to Canal 11.
- 2.3 Considering the literature review, develop a succinct path and strategies for market expansion based on the framework by Joseph Pickens at chapter 4.3.1 MARKET EXPANSION STRATEGY that help Portuguese Football Federation to choose which best strategy should use to this business expansion process.
- 2.4 Develop marketing strategies and actions to attract and engage customers that could help Canal 11 to reinforce their position and visibility in the market? (Suggestion: use information from chapter 4.3.2 NEW TECHNOLOGY, MEDIA AND COMMUNICATION CHANNELS)
- 2.5 Summarizing the main conclusions from the case, how can Canal 11 differentiate itself from the competition?



### 3 APENDIXES

#### 3.1 EXHIBIT 1 – AUDIENCE DATA OF SPORTS CHANNELS

**Table 4 - AVERAGE AND SHARE AUDIENCE**

Universe: 9,466,000 individuals																
Month/Year	Canal 11	Sporting TV	BTV1	EuroSport (PT+ENG)	EUROSPORT 2	Bola TV	SportTV	SportTV2	SportTV3	SportTV4	SportTV5	Sport TV+	Eleven Sports 1	Eleven Sports 2	Eleven Sports 3	Eleven Sports 4
<b>rat% [average audience]</b>																
January 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
February 2020	0,1	0,0	0,0	0,1	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
March 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
April 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0
May 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0
June 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
July 2020	0,1	0,0	0,0	0,0	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
August 2020	0,1	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
September 2020	0,1	0,0	0,0	0,1	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
October 2020	0,1	0,0	0,0	0,1	0,1	0,0	0,1	0,0	0,0	0,0	0,0	0,2	0,0	0,0	0,0	0,0
<b>rat(000) [average audience in viewers]</b>																
January 2020	12,3	2,1	4,6	3,8	1,7	2,9	10,6	2,6	1,4	0,4	0,8	17,2	0,6	0,2	0,0	0,0
February 2020	11,8	2,5	3,5	7,4	2,4	2,4	11,3	3,5	1,1	0,4	0,7	19,5	1,2	0,3	0,1	0,0
March 2020	13,3	1,8	2,3	2,6	1,5	2,6	3,7	1,9	0,3	0,2	0,3	14,5	0,8	0,1	0,1	0,0
April 2020	10,4	1,3	1,0	4,4	2,2	1,6	0,8	1,0	0,0	0,0	0,0	11,8	0,1	0,1	0,0	0,0
May 2020	10,0	0,7	1,3	3,0	2,3	1,3	0,8	0,3	0,0	0,0	0,0	8,7	0,8	0,1	0,1	0,0
June 2020	6,6	1,0	2,8	3,4	1,4	1,8	10,6	1,7	0,5	0,4	0,2	15,0	1,0	0,2	0,2	0,0
July 2020	5,9	1,5	2,8	3,4	1,6	1,8	9,9	2,1	0,8	0,6	0,9	16,4	0,3	0,1	0,4	0,0
August 2020	7,3	1,5	2,2	10,2	3,6	3,6	3,6	0,5	0,3	0,1	0,4	15,0	3,2	0,2	0,7	0,0
September 2020	10,3	1,8	3,6	8,4	2,9	3,3	6,0	2,4	0,8	0,2	0,6	14,8	0,7	0,3	0,6	0,0
October 2020	12,4	2,1	4,2	12,8	4,8	3,3	11,0	2,9	0,8	0,3	0,4	20,4	1,1	0,4	0,4	0,0
<b>shr% [audience share]</b>																
January 2020	0,6	0,1	0,2	0,2	0,1	0,1	0,5	0,1	0,1	0,0	0,0	0,8	0,0	0,0	0,0	0,0
February 2020	0,6	0,1	0,2	0,4	0,1	0,1	0,6	0,2	0,1	0,0	0,0	1,0	0,1	0,0	0,0	0,0
March 2020	0,5	0,1	0,1	0,1	0,1	0,1	0,2	0,1	0,0	0,0	0,0	0,6	0,0	0,0	0,0	0,0
April 2020	0,4	0,0	0,0	0,2	0,1	0,1	0,0	0,0	0,0	0,0	0,0	0,4	0,0	0,0	0,0	0,0
May 2020	0,4	0,0	0,1	0,1	0,1	0,1	0,0	0,0	0,0	0,0	0,0	0,4	0,0	0,0	0,0	0,0
June 2020	0,3	0,0	0,1	0,2	0,1	0,1	0,5	0,1	0,0	0,0	0,0	0,7	0,0	0,0	0,0	0,0
July 2020	0,3	0,1	0,1	0,2	0,1	0,1	0,5	0,1	0,0	0,0	0,0	0,8	0,0	0,0	0,0	0,0
August 2020	0,3	0,1	0,1	0,5	0,2	0,2	0,2	0,0	0,0	0,0	0,0	0,7	0,1	0,0	0,0	0,0
September 2020	0,5	0,1	0,2	0,4	0,1	0,2	0,3	0,1	0,0	0,0	0,0	0,7	0,0	0,0	0,0	0,0
October 2020	0,6	0,1	0,2	0,6	0,2	0,2	0,5	0,1	0,0	0,0	0,0	0,9	0,0	0,0	0,0	0,0

Source: Marktest (2020)

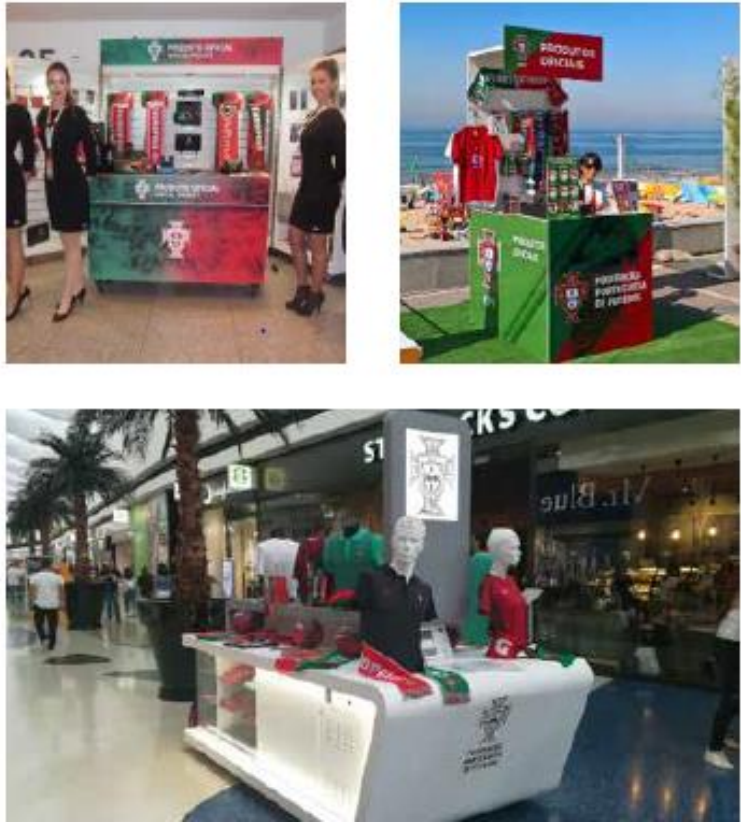
**Table 5 – AUDIENCE PROFILE**

		Canal 11	Sporting TV	BTV1	EuroSport (PT+ENG)	EUROSPORT 2	Bola TV	SportTV	SportTV2	SportTV3	SportTV4	SportTV5	Sport TV+	Eleven Sports 1	Eleven Sports 2	Eleven Sports 3	Eleven Sports 4
<b>Region</b>	North	29,7	9,2	42,4	49,5	49,5	31,3	43,5	39,3	42,6	41,7	39,2	37,3	40,8	37,2	12,7	71,2
	Center	19,7	18,1	17,6	12,1	14,4	19,4	4,4	3,5	4,3	1,7	2,2	13,4	9,1	11,1	16,5	2,6
	Lisbon	41,6	70,3	28,5	28,4	24,6	30,6	43,1	50,9	43,5	49,9	53,3	40,5	33,3	31,3	68,7	16,2
	Alentejo	6,3	1,6	11,0	5,4	5,4	12,6	6,7	5,3	7,4	5,1	3,5	4,6	16,2	20,3	2,1	10,0
	Algarve	2,6	0,7	0,5	4,7	6,1	6,0	2,3	1,0	2,2	1,7	1,8	4,1	0,6	0,1	0,0	0,0
<b>Gender</b>	Male	72,1	71,4	71,8	69,8	64,8	63,3	68,9	69,6	67,9	65,7	74,7	70,4	72,8	80,7	86,3	68,4
	Female	27,9	28,6	28,2	30,2	35,2	36,7	31,1	30,4	32,1	34,3	25,3	29,6	27,2	19,3	13,7	31,6
<b>Age</b>	Age 4-14 years	5,1	3,5	3,9	2,3	2,6	5,9	4,0	4,0	4,9	3,6	9,1	4,4	5,5	4,5	0,2	5,8
	Age 15-24 years	7,2	5,9	7,4	8,9	12,8	9,4	11,0	12,9	11,0	8,9	8,3	8,9	22,1	23,0	4,1	38,2
	Age 25-34 years	11,9	3,3	9,5	10,4	12,6	11,1	11,4	11,9	14,1	18,3	16,3	10,8	22,2	28,7	40,3	10,9
	Age 35-44 years	13,5	9,7	8,3	10,5	8,6	15,4	8,3	10,6	9,3	8,4	6,0	17,7	11,4	10,8	11,3	7,5
	Age 45-54 years	13,6	32,6	17,2	15,6	13,6	21,3	19,1	17,8	20,3	14,1	15,0	13,7	17,6	20,8	8,5	29,0
	Age 55-64 years	17,6	11,5	15,7	20,9	24,8	17,2	15,4	15,4	13,9	15,0	22,6	16,4	10,6	7,3	30,0	7,9
	Age 65-74 years	16,4	25,2	22,4	18,6	17,0	13,4	20,9	20,4	19,0	23,8	16,0	16,5	8,3	4,1	2,1	0,7
	Age +75 years	14,7	8,2	15,6	12,9	8,0	6,4	9,9	7,0	7,5	7,9	6,7	11,5	2,3	0,7	3,5	0,1
<b>Social Status</b>	Status A	2,0	3,2	0,7	2,7	3,4	2,6	7,2	10,8	5,3	7,9	9,5	2,1	6,1	1,4	14,6	0,1
	Status B	11,4	12,6	10,8	17,3	15,5	16,4	19,4	20,1	21,6	22,7	27,0	13,0	22,2	25,5	12,2	8,9
	Status C	21,6	6,5	10,5	24,8	27,7	13,9	20,8	19,3	19,6	18,3	19,2	21,7	24,0	24,9	4,1	12,3
	Status D	37,8	67,8	54,6	37,0	32,4	41,7	41,8	39,1	42,2	38,8	34,4	40,8	38,6	42,5	60,0	73,4
	Status E	27,2	9,9	23,4	18,1	21,0	25,4	10,8	10,7	11,4	12,3	9,9	22,3	9,0	5,6	9,1	5,3

Source: Marktest (2020)

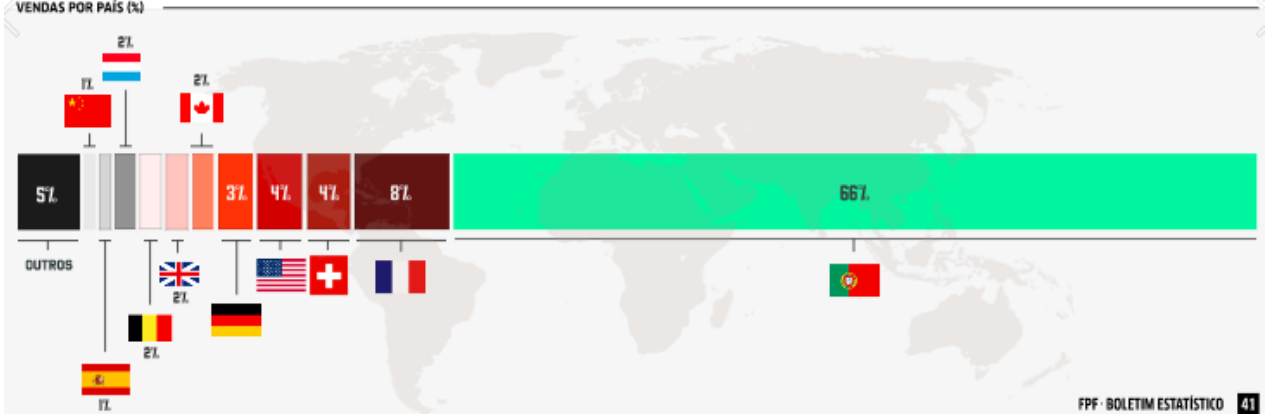
3.2 EXHIBIT 2 – LICENSING AND MERCHANDISING

Figure 1 – OWN STORES AND DISTRIBUTION WITH THIRD PARTIES



Source: FPF (2019)

Figure 2 – TOP COUNTRIES SALES IN FIRST QUARTER OF 2020



Source: FPF (2020)

### 3.3 EXHIBIT 2 – RESUME FRAMEWORK OF PORTUGAL FOOTBALL SCHOOL

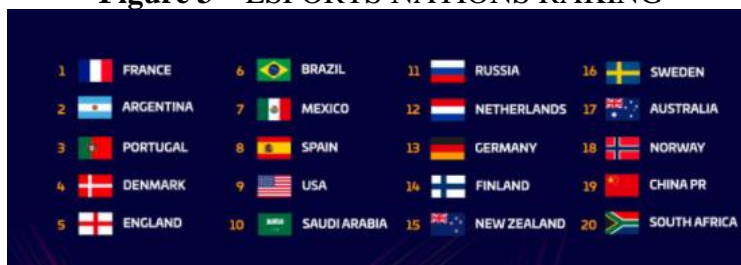
**Table 6 – SUMMARY TABLE OF TRAINING, RESEARCH AND KNOWLEDGE TRANSFER**

<b>Directors and Partners</b>	<b>No. of courses</b>	<b>No. of hours</b>	<b>No. of trainees</b>
Training of general secretaries	2	6	24
Initial training of managers	24	45	913
training of directors of training entities	10	24	598
training of sports directors	1	70	48
Training of team managers	4	24	474
Executive training in football management	2	96	50
Executive training in female leadership	1	24	25
Executive training in football law	2	24	60
Executive marketing training in football	1	24	25
Executive training of associate offers	1	12	20
<b>Healthy</b>			
Medical course in football	3	95	94
Medical course and rehabilitation course in football	3	95	105
Basic Life support course	81	7	493
Basic health care course	1	12	168
<b>Media</b>			
Football narration and commentary course	1	16	25
Television course and new platforms	1	16	42
Seminar ‘O Futebol Nacional e a sua Regulamentação’	1	6	32
<b>Services</b>			
Management and maintenance training in sports facilities	1	21	100
<b>Others</b>			
Summer School ‘Futebol é muito mais que 90 minutos’	1	60	50
Easter School ‘Não há grandes táticas sem grandes talentos’	1	24	25
Seminars ‘Ética, Integridade e não Violência no Desporto’	5	3	300
<b>Research projects and students</b>			
FIFA Research Scholarship	2	-	-
ERASMUS Projects	2	-	-
PhD students doing works with PFS	9	-	-
Master students doing works with PFS	3		
<b>Conferences</b>			
Football is Medicine International Conference	-	-	232
International Conference on Football Refereeing	-	-	105
Nutrition and performance conference in football	-	-	153

**Source:** FPF (2020)

### 3.4 EXHIBIT 3 – ESPORTS RAKING

**Figure 3 – ESPORTS NATIONS RAKING**

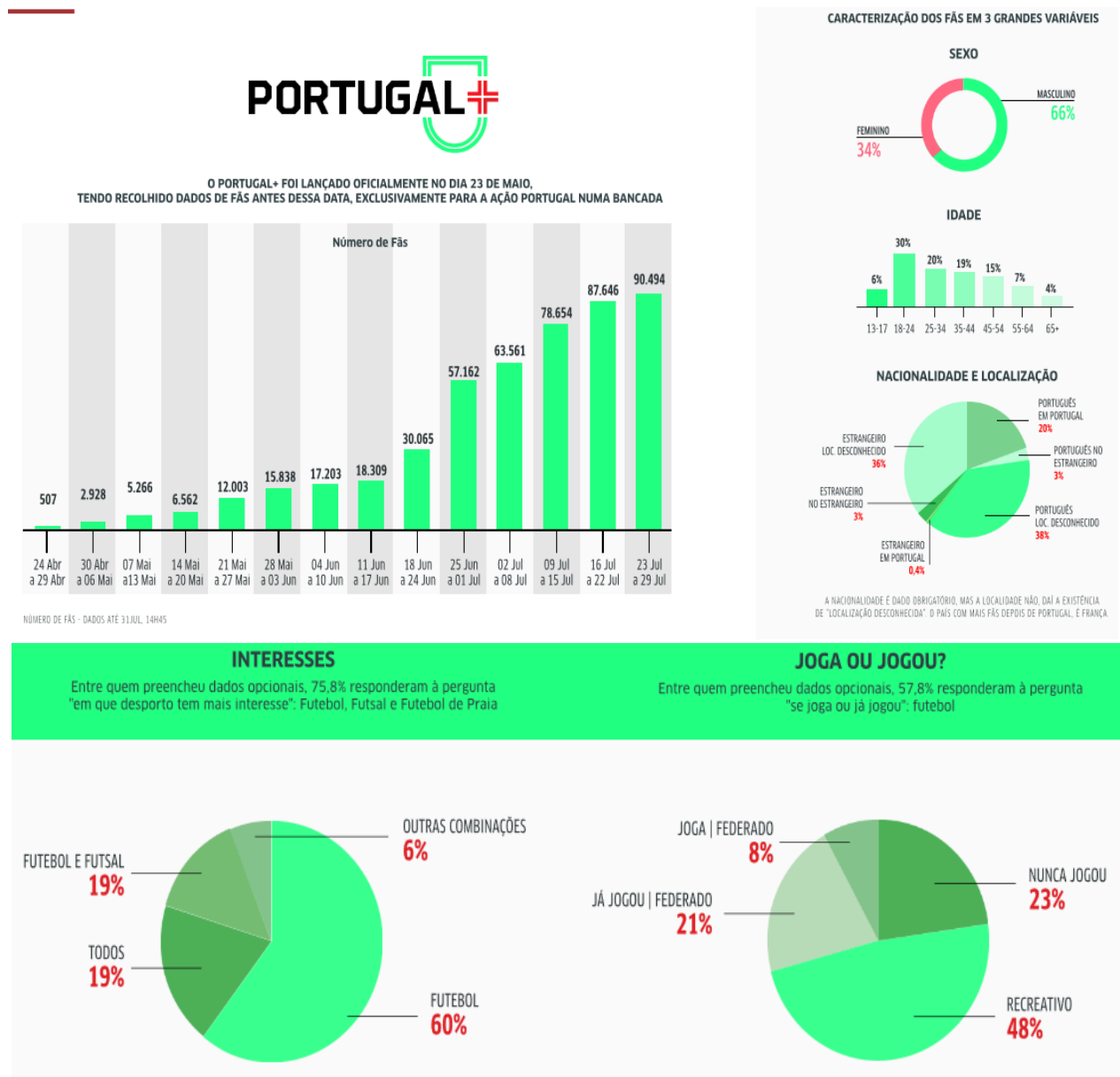


**Source:** FPF (2019)



### 3.5 EXHIBIT 4 – PORTUGAL +

**Figure 4 – DATA FROM THOSE REGISTERED IN PORTUGAL +**



Source: FPF (2018)

## **4 TEACHING NOTES**

### **4.1 CASE STUDY TARGET**

This case study was developed for undergraduate and master students in Management, Marketing and Business Administrations areas, who pretends to expand and develop their knowledge in expansion markets area and more deeply inside of a sports association market and sports channel market. In this way, also the professors are the main target of this, since they are the ones that can apply the present case study for their students.

Additionally, was developed for entrepreneurs and marketers that wants to get insights and see the example of market expansion and the necessary tools for do that, which they can adapt to change or leverage their business.

### **4.2 PEDAGOGICAL OBJECTIVES**

The main aim of this pedagogical case study is to access and recovering the knowledge how a sports association company as Portuguese Football Federation can leverage and improve their business. In this way, this case study was developed with the following educational objectives:

1. Understand the concepts used in the case study and the business environment of the specific market;
2. Make a deep analysis of the market where the study company operates;
3. Know how to use the different strategic analytical frameworks to be able to fully develop a marketing analysis, as the case of SWOT;
4. Understand the importance of technological and digital evolution in a company's strategic decisions;
5. Develop student's critical sense and the ability to perceive and solve problems, using for example creativity.

### **4.3 LITERATURE REVIEW**

#### **4.3.1 MARKET EXPANSION STRATEGY**

Market expansion, in literature theorems of strategy, has been defined by different ways and different authors, like Ansoff (1975) that defined that in his product-market growth matrix, which explains the difference between market extension strategy and market penetration strategy. As

Bang and Joshi (2008) said, the extension of the market urge “*to new market segment leads to an primary demand for the product category*” while penetration need to “*converting non-customers into customers of the industry’s products, it leads to an increase in the primary demand*” or to attract “*competitor’s customers, it lead to an increase in the selective demand for a specific brand*” (Bang & Joshi, 2012, p.87). In this view, the market expansion strategy is the one that can increase both previous strategies and that could increase “*the usage rate of the category’s marginal users (Bang & Joshi, 2008)*” (Bang & Joshi, 2012, p.87).

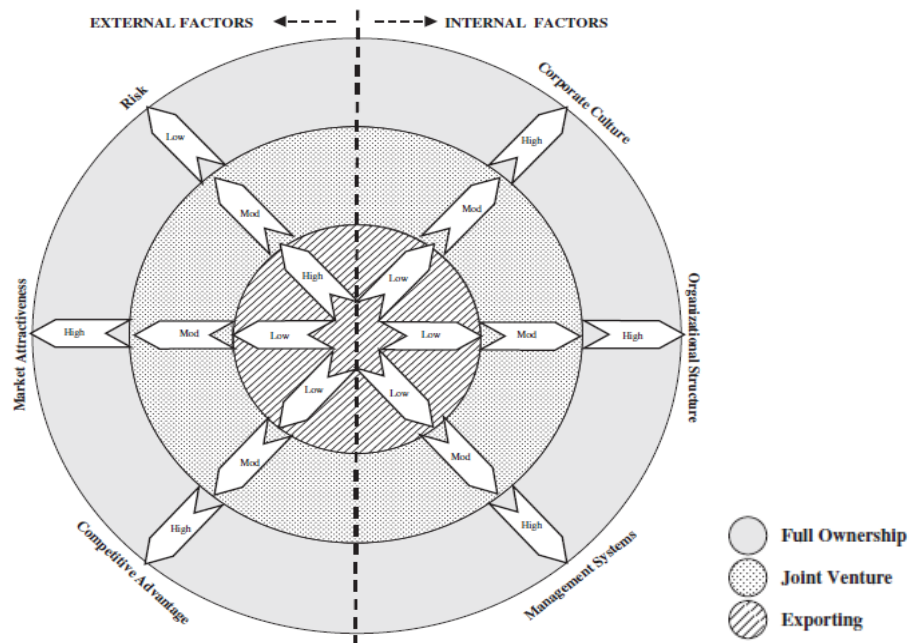
In other view, some scholars describe that “*in the context of geographic (domestic or foreign) business expansion of a company (e.g. Ayal & Zif, 1979; Haydu & Hodges, 2001; Robinson & Lundstrom, 2003)*” (Bang & Joshi, 2012, p.86). According to Ayal and Zif, it’s possible to define two main and different strategies. Market diversification which has a fast penetration into a large amount of markets and dispersion of efforts among them and market concentration that implies a high focus on the resources in some markets and have a continuing expansion to new ones (Ayal & Zif, 1979).

In major of the last previous theories, they stimulate that the best combination between external factors and organization’s strategy can develop the best plan of market expansion. But, some researchers advised that organizations should not forget to include on that choice the internal factors, which could have considerably impact on the success of the plan and leads them to defend the term of strategic fit (Chorn, 1991; Nath & Sudharshan, 1994, in Robinson & Lundstrom, 2003). In the concept of strategic fit are defined the three modes of market expansion, the full ownership related to new target market, licensing or entering into a joint venture related to cooperative expansion arrangements which will make available the access to new markets and exporting that provides the increased of distribution products to markets where they are not produced. So, this concept is used to have a better alignment of organization resources in order to increase opportunities and decrease the threats (Venkatraman & Camillus, 1984; Porter, 1985, in Robinson & Lundstrom, 2003).

In order to development this concept was presented the conceptual framework of market expansion mode model, which was presented in figure 1. There exist the concentric circles which correspond to different modes of market expansion starting with the exporting mode in inmost circle, the joint venture in the middle and the other is the full ownership. Besides this, the framework was divided vertically in two parts, external and internal factors. The external factors

in the left side are the competitive advantage, market attractiveness and risk and the internal factors in the right side are management systems, organizational structure and corporate culture. So, by this framework it's possible to make a decision, if the organization was positioned towards the outmost of the model the decision should be a full ownership, although if the organization was positioned in the center of the model the export should be the best option. In the case of was positioned in the center, the organization should not follow that opportunity at all (Robinson & Lundstrom, 2003).

**Figure 5 - MARKET OF EXPANSION MODE (MEM) MODEL**



**Source:** Robinson & Lundstrom (2003)

Furthermore, more recently Joseph Picken (2018) developed a framework in order to help the organization's choice and decision, since he considered that entry for a new market is real challenge but this new markets or untapped markets also provides exclusive opportunities competing against non-consumption and get new customers and can approach the barriers of skills, access, wealth and awareness. In figure 2 the framework represents a path to lead to make the best market entry strategy choice which starts to identify and define the target market and that the author consider that was a critical point that could simplify the solution's definition needs for the correct target. Then, should be done assess the stage of market development and the definition of objectives and assess the firm's capabilities and finally assess of competitive environment to know if opted

for challenging the incumbents or competing against non-consumption. This last decision will be helped in the next step that the organization should evaluate the options and select the market entry strategy most appropriate taking into account five important topics which are the offering versus customer needs, barriers to entry, resources, investment and returns required and experience of others. With a realistic analyze to these previous topics it's possible to eliminate some options and choose one of four strategic categories, attack the incumbent market leader, change the rules of the game, introduce something entirely new and enter for a new market with an existing solution. Although, this is a critical step in the process of entry in new market beyond implementation and execution, but as the author said no market entry strategy is infallible but with this framework it's possible to risks be predicted and improve the odds of success (Joseph Picken, 2018).

**Figure 6 - FRAMEWORK FOR CHOICE AND DECISION**



**Source:** Joseph Picken (2018)

#### 4.3.2 TELEVISION INDUSTRY

Television has undergone several processes of transformation in its own nature and evolution over the years, but it has always been possible to describe it as the *“entertainment or information that entered one's home through antenna or the airwaves, and was available in real-time channels for viewing on a dedicated television set. Even when the VCR loosened the restrictions of the television schedule, the conditions of viewing still remained fundamentally the same: television was the audio-visual content that you watched on a television set, most often in your living room, and audiences knew it.”* (Askwith, 2007, p.15).

Ivan Askwith (2007) argues that in this television world it's necessary to create engagement from different approaches and adapted to the target that is to be reached. As such, it proposes and has developed a structure that seeks to organize all of these approaches that exist to create connection and attract audiences in eight different in which each has a different potential where viewers can be involved, in which these are:

1. Formal Program Qualities, with the objective of creating engagement from the programmatic content of the television text in order to build the program's narrative, premise, etc.;
2. Expanded Access, with the aim of creating engagement with the main program resulting from the distribution of content across multiple platforms, devices and business models;
3. Repackaged Content, with the objective of creating engagement in the variations of the most produced and distributed program as reorganized or repackaged content;
4. Ancillary Content, with the objective of engaging with the creation of additional content in order to expand, improve, contextualize, complement or give information about the television text, as well as extratextual information and textual extensions;
5. Branded Content, with the objective of engagement in which they highlight the practices of ownership and acquisition of the viewer made by the production of objects related to the show;
6. Related Activities, with the objective of engagement by positioning the viewer with an active role in the program, both in thematic terms and in terms of experience, production and challenging activities;
7. Social Interaction, with the aim of engaging to position the television text as a basis or excuse to interact with other viewers, the narrative's characters or the creative professionals;
8. Interactivity, with the objective of engagement in which creates direct interaction between the viewer and the television program.

Also, the author emphasizes that this strategy structure should not be comprehensive and that the categories described should not be mutually exclusive. Rather, they should aim to function as an initial set of initiatives and practices that should appeal to and capture media consumers and the set of opportunities for interaction and engagement that currently exists.

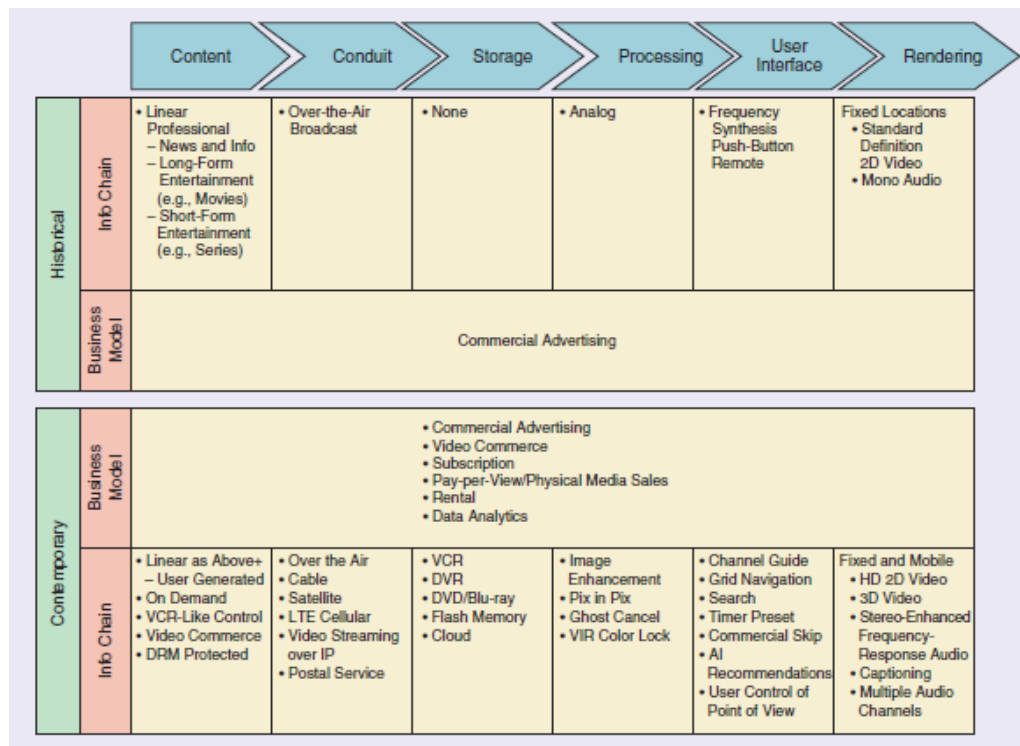
So, the viewer engagement process is likely to transform a small and dedicated audience into a more valuable and large audience. Thus, with the emergence of new revenue models, there will be different degrees of benefits for other parts of the business. As this author mentioned, it's very likely that television will evolve from its current model, as it highlights the fact that it's a medium

with a high potential to attract audiences to advertisers and in the same way begin to move towards a business model more and more similar to that of cinema and games in which its entertainment content, functions as the profit generator and main commodity with several advertising contracts for products and ads in order to collect additional revenue sources for your business. This evolution and business model are thus capable of allowing new experiences and innovations that, at the same time, enable new forms and opportunities for engagement with the viewers.

Moreover, according to Stuart Lipoff (2019) it's important to see the possibilities of the future in television in order to be able to compare with what it was and what is today (figure x), since from there it's possible to derive insights on where we might be in future and how fast this evolution can happen. Thus, based on the figure x, was found some clear trends in each category of television. The *“Content grows beyond professionally high-production-value linear video to adding various forms of interactivity and user-generated clips with greatly expanded channels and program choices. The conduit expands beyond over the-air analog broadcast to digital wired and Internet Protocol (IP) wireless enabling two-way return interactivity. Storage comes on the scene to allow delayed playback and, with digital video recorders (DVRs), the ability to effectively craft your own personal channel. Processing beyond simple analog now includes digital but still only very early concepts, such as 2D to derived 3D processing. User interface is starting to show some interesting signs of life evolving beyond keypad based remote controls to add channel guides with point-and-click selection and elements of artificial intelligence (AI). Perhaps rendering is the category with greater change, from standard definition 4:3 formats to high-definition (HD) widescreen video paired with audio-quality improvements and into small-screen tablets and cell phones as delivery platforms.”* (Lipoff, 2019, p.76).

In addition, in the framework developed for information chains in figure x, current business models were also compared with historical ones. In this way, it was possible to verify that with the constant evolution and new developments in each of the explicit segments previously boosted the activation of new business models, among which most visible, the emergence of new business models with par-per-view and the content rental. Thus, with this comparison analysis, the author understands that all the described development enables new business models as well as new model concept businesses that may be able to interact with other categories in order to accelerate progress or create more additions.

**Figure 7 – THE TV HISTORICAL CONTEMPORARY INFO CHAIN**



**Source:** Stuart Lipoff (2019)

Besides that, according to the study of Lee, Loucks, Stewart, Jarvis and Arkenberg (2020), the future of television will have a mixture of several business models, since around one tenth of the population residing in developed countries is less and less attending the ad and paying for that desire. However, there are others who want this continuous ad assistance and thus no longer pay for it by watching television by antenna. Thus, it's clear that the expected number of viewers per antenna varies depending on the region and between countries, for example between European countries the difference between the upper and lower of television antenna watchers is greater than 90%. Thus, with this general lack of viewers by antenna, a number that is increasingly approaching zero, it is possible that there will be a greater impact on the existing generation of antenna television, not in the advertising and television industries, but in companies wireless telecommunications, regulatory authorities and governments. Managing to transform digital transmission into a win/win position, having a better signal and images with higher definition than analog, with less static and interference giving a better television to the consumer and using a narrower spectrum than the analog, allowing governments to reallocate this spectrum by auctioning



them off to networks operator, thus earning thousands of gains, called the digital dividend, and allowing operator to improve their coverage and increase the speed of data transmission.

#### **4.3.3 NEW TECHNOLOGY, MEDIA AND COMMUNICATION CHANNELS**

The new tendency and growth of communication that includes wireless mobile communication and web 2.0 is altering the manner that people receive and share information, which demonstrate that this new channels are basically different from the traditional media in way that information is processed, exchanged and accessed (Bernhardt, Mays, Eroğğlu & Daniel, 2009). Furthermore, in other authors' opinion, the growth of B2C channel and the lack of customer satisfaction influenced by traditional forms of sales leads to an increase of a new becoming, the electronic distribution channel, the internet and the increasing of e-commerce. They explained that exist advantages with that, like the decrease of distribution costs and sales, the reduction of time wasted and the more flexibility in data processing, although as principal disadvantages of this distribution type are the increased of costs on orders transportation and the late payment date. (Szopa & Pekala, 2012).

Also, it's considered a good time if someone pretends to be a new media entrepreneur because, since the mid 90's that rise rapidly of online marketing on internet, the advertising become the fastest growing ad expense category exceeding TV, radio and other traditional media formats (Gardner & Lehnert, 2016). But, as Winer (2009, p.108) said, "*These traditional media are not disappearing*" and for other authors must be programmed these new media in order to integrate the traditional (Bernhardt, Mays, Eroğğlu & Daniel, 2009). Following this thought is advocated that these traditional media can work mutually beneficially with the new media if the media companies use their products made for some formats but use multi-channel networks. Because, nowadays, what happen is the using of that media products made for television and movie studios networks on the YouTube or Netflix, for example, to promote their contents in short advertising form on music videos, web series and not only on television or movies breaks. In this way, new media were created through lucrative new agreements between traditional networks and online content providers (Gardner & Lehnert, 2016).

Although, this growth of new media and advanced of technology allows to create a new system of consumption and enables content creators to build and protect the brand without depending of traditional media to create, defines and promote the product as it is designed in their minds (Gardner & Lehnert, 2016).

More recently appeared the phenomenon of eSports, which is large and growing since it allows to traditional broadcasters an opportunity to contact a young population of digital natives who are less engaged with TV and professional sports than the previous generations. In the same study, it is stated that by adding the main eSports events to their programming contents, broadcasters can have a better sense of how much of their present audience will be engage with this new form of entertainment, as well as adding new advertising revenue, despite broadcast executives may not see the positive side they associate that with professional sports content. So, when making inroads into e Sports, broadcast should find a way to minimize production costs to allow for lighter experimentation and reduce risk exposure, trying more things quickly, so that they can better learn what works and doesn't and with this approach being reinforced by better modeling, a more global view of niche programming and a stronger market forecast. Furthermore, broadcasters when joining this type of enterprise must see it as a way to digitize better customer engagement, selling in a more direct way to viewers, moving from a more passive mentality of linear TV to a more active and involved digital mentality creating a greater connection and engagement (Lee, Stewart, Loucks & Arkenberg, 2019).

Therefore, with the emergence of social networks, social streaming presents a profound human need, because most people want to be entertained together, whether in a physical or virtual way. This is the only reason why there is a migration way from subscription TV by young digital natives mostly. In this way, in order for and cable TV to reach these generations better, they must become more social, building network streaming services that allow them to keep traditional players but allow them to connect with others and share their content. (Lee, Stewart, Loucks & Arkenberg, 2019). So, for the authors and their studies, *"For better or for worse, media entertainment is becoming a participatory social experience, less something that is consumed and more than something that is done. It looks like it's time for traditional media companies to embark on going online"* (Lee, Stewart, Loucks & Arkenberg, 2019, p.56).

#### **4.3.4 CONSUMER BEHAVIOR IN SPORT FANS COMMUNITIES**

Inside of sport communities, the main source of pleasure for sports fans is that they reflect on glory of the association, or how other authors call that, the BIRGing (Madrigal, 1995; End *et al.*, 2002; Richardson, 2004). BIRGing was defined as the try to elevate the levels of social esteem and at the same time increasing association with others high successful levels, like using team clothes or using

the word ‘we’ to describe the team (Madrigal, 1995, in Richardson, 2004). So, this tendency to BIRG propose that the motivation to increase self-esteem makes individuals strongly identified with a successful group, or in this case a team. If the team have failures along the time, the individual will look for protection to that self-esteem by a process of reflected failure cutting, or how was called CORFing, which was related to a disassociating himself from loser team. These tendencies can help to explain why pessimists’ fans avoid assist matches when the team was in unsuccessful time and in case inverse the assistances growth (Madrigal, 1995; End *et al.*, 2002; Richardson, 2004).

Although the individual’s level of team identification can help mitigate these tendencies (Richardson, 2004). Sports team identification is related to “*the extent to which individuals perceive themselves as fans of the team, are involved with the team, are concerned with the team’s performance, and view the team as a representation of themselves*” (Wann, 2006, in Bodet & Bernache-Assolant, 2011, p.783), in resume, refers to the psychological connection and individual’s involvement to a sport team (Wann & Schrader, 2000, in Richardson, 2004). In this view it’s interested to understand the different behaviors between the high and low identifiers. The high identifiers presents a higher propensity for self-serving bias because when the team wins they justify by internal factors like team capacities and fans’ supporters, but when defeats happens they justify with external factors like cheating or bad arbitration (Wann & Schrader, 2000, in Richardson, 2004). Also, they present higher pre-game expectative, a stronger emotional reaction during a match and believe more in positives thoughts than less realistic results, than the low identifiers (Madrigal, 1995, 2003, in Richardson, 2004). So, by studies it’s possible to say that high identifiers have less tendency to CORF than others, because for them CORFing could be perceived as disloyalty (Madrigal, 1995; End *et al.*, 2002; Matsuoka *et al.*, 2003, in Richardson, 2004).

#### **4.3.4.1 CONSUMER ENGAGEMENT**

Since nowadays the globalization of markets and communication technology are constantly changing, it makes that people act like a community and not isolated, so the companies should be finding new forms to create and maintain an emotional connectional between customers and the brand through innovation and new or updating design (MSI, 2006, in Vivek, Beatty & Morgan, 2012). This tendency is called as costumer engagement, which is defined as the level of intensity of participation and connection of the individual with the company’s products and services, which

can be done cognitively or affectively through experiences and behaviorally or socially through everyday situations (Vivek, Beatty & Morgan, 2012).

These individuals can be customer as potential customers. Furthermore in authors' view, the engagement should not only focused on purchasing moment but on those who interact with the brand, without having to buy or plan to buy anything, or on activities and events that are not directly linked to research, alternative solution and decision making to choose the brand. Besides that, it's defended that this focus should be also in buyer post-purchase activities (Vivek, Beatty & Morgan, 2012).

In the case of innovation and more properly about new media, other authors developed a theoretical framework about the three dimensions of social media engagement because the customers engagement is higher as higher is the increasing of technology on user interaction. The first dimension is functional engagement related to online users' interaction in real time with other users in the process of co-creating, talking and sharing the content and this could be the an important and required key performance indicator to understand the effectiveness of an organization's activities to get engage with social media users (Neiger *et al.*, 2012, in Lim, Hwang, Kim & Biocca, 2015). In case of sports communication that interaction it was the most incentive to make sport fans use social media while they view the television sport events (Tang & Cooper, 2011; Hull & Lewis, 2014; Lim, Hwang, Kim & Biocca, 2015). Secondly, they explain the emotional engagement, it's when occurs emotional feelings with others in social media and in case of sports events occurs because people pretend to sharing their feelings of frustration or excitement of games with others, and in this way a viewer can emotionally engaged with other with amity or animosity feelings with others' posts and opinions or even like or dislike comments of others (Johns, 2012; Hull & Lewis, 2012, in Lim, Hwang, Kim & Biocca, 2015). At least, the communal engagement, the second most usual reason for social TV's users get engagement with other fans and TV shows at the same time, using the same media, like in sports events that users feels that sense of community while communicate with each other because at least they are all supporting the same team (Hull & Lewis, 2014; Oeldorf-Hirsch & Sundar, 2015, in Lim, Hwang, Kim & Biocca, 2015).

Also, they refers that the best engagement observed via social TV happens during the sports viewing due to sports events have a lot of "*downtime and drama*" that stimulates viewers of TV

sports events to interest to know more information and share their feelings creating a connection with others sports fans (Proulx & Shepatin, 2012, in Lim, Hwang, Kim & Biocca, 2015, p.159).

#### **4.3.4.2 CONSUMER EXPERIENCE**

Customer experience is represented as “*the product of a two-way interaction between a customer and product attributes, including tangible and intangible services, an organization offers from the start to the completion of the journey*” (Pullman & Gross, 2004; Rawson, Duncan & Jones, 2013, in Funk, 2017, p.150). As other authors say individual’s experiences is one of the basis of customer engagement, with organizations offering unique activities and products or services in order to build and maintain a relationship between them (Vivek, Beatty & Morgan, 2012).

Following this thought, if an organization can focus on effective management and optimization in these interactions, it will be able to improve customer satisfaction, loyalty and increase engagement, revenue and future purchases, (Pullman & Gross, 2004; Rawson, Duncan & Jones, 2013, in Funk, 2017). So, with this it’s possible to create a competitive advantage over previous dependence on traditional elements like price, promotion and product quality (Gupta & Vajic, 2000; Pullman & Gross, 2004, in Funk 2017).

In relation of sports, that experience could have multiple interactions if was considered all the moments of contact and interaction of sports consumer during a live sports event from the start to finish. All of them could be “*searching for information about a game, purchasing tickets online, traveling to the game, enjoying pre-game activities, listening to music and announcements, watching the game and digital content on the jumbotron, doing the wave, using a mobile device to tweet or Instagram pictures from the game, interacting with other spectators, purchasing concessions and merchandise, using restrooms, participating in rituals, and finally leaving the venue*”. (Funk, 2017, p.151)

#### **4.4 ANALYTICAL FRAMEWORK PRESENTATION**

This case study was develop based on information by Federation Portuguese Football Federation through two ways: data available from their website and social media, interviews and contact with Paulo Cintra, Merchandising and Licensing Manager, and António Magalhães, People and Media Division Director, From Portuguese Football Federation ball, as well through quantitative and qualitative analysis to the television and sports channel markets in Portugal.

So, for a complete and better analysis, this resolution considers two different approaches: quantitative approach and qualitative approach, which are supported by key strategic and marketing tools. In this way, the union of those allows a better perception of the market under analysis and the performance measurement of the company, so that students can solve the case and improve their knowledges and critical spirit during the process.

The quantitative analysis will help students to better understand the company's contextualization and its national market, such as external indicator, market evolution and internal indicators. In this sense, this one has its base on the following secondary data sources:

1. Sports Industry data;
2. Football industry in Portugal data;
3. Television and Sports channel industry data:
  - Evolution and growth of the market;
  - Television audiences and shares;
  - Top national programs seen;
  - Biggest competitors of sports channel market;
  - Sports channel audiences and shares.
4. Portuguese Football Federation's internal data:
  - Portuguese Football Federation international brand awareness;
  - Portuguese Football Federation insights on sports channel market;
  - Programs of Canal 11 in Portugal and in the other competitors.

The qualitative analysis will help to complete the quantitative analysis, and will emphasize the case study analysis and recommendations, as well as sustenance strategic decisions by the students. So, it is expected that students based on:

- A broad analysis of Portuguese Football Federation completes, including their history, business idea, operating model, expansion process of Canal 11 and social media. Also, the focus is on marketing department, the tools and digital marketing platforms used in the business and all that it involves;
- Best practices on the topic: strategies choice described in reports, scientific articles and books;
- Literature review on this topic.

#### 4.5 ANIMATION PLAN

Session	Objectives	Action Plan	Time
1 <sup>st</sup> Session	-Develop the students' interest on the case study	<ul style="list-style-type: none"> <li>• Animation Questions to get students attention and enthusiasm;</li> <li>• Distribution of the case to the students;</li> <li>• Case presentation and summary of the topic;</li> <li>• Introducing Canal 11 of Portuguese Football Federation to the students with presentation of brand videos;</li> <li>• Creation of work groups.</li> </ul>	90''
Out of Session	-Know the Case Study	<ul style="list-style-type: none"> <li>• Reading, diagnosis and comprehension of the case study individually;</li> <li>• Beginning of the case study analysis and group discussion.</li> </ul>	60''
2 <sup>nd</sup> Session	-Understand the case study -Questions and Doubts -Answer the first two questions	<ul style="list-style-type: none"> <li>• Discussion about tv channel market and sports channel market;</li> <li>• Discussion on Canal 11 current situation;</li> <li>• Understanding Canal 11 differentiating factors related to their competitors, as well as its weaknesses;</li> <li>• Answer the first two questions.</li> </ul>	90''
Out of Session	-Resolution of the remaining questions	<ul style="list-style-type: none"> <li>• Deep case study analysis and discussion by the group;</li> <li>• Additional research and deep understanding on expansion process and of sports channel market;</li> <li>• Development questions resolution and presentation slides.</li> </ul>	240''
3 <sup>rd</sup> Session	-Case study presentation of each group and ideas discussion -Explanation of doubts	<ul style="list-style-type: none"> <li>• Case resolution presentation with 20 minutes for each group;</li> <li>• Evaluation at the end of each presentation by the teacher and colleagues around 10 minutes;</li> <li>• Recommendations for improvement.</li> </ul>	180''
Out of Session	-Score work groups	<ul style="list-style-type: none"> <li>• Case Resolution (50%) + Presentation (30%) + Discussion (20%)</li> </ul>	
Final Session	-Overall feedback	<ul style="list-style-type: none"> <li>• Distribution of the best answers for better study;</li> <li>• Final recommendations to each group;</li> <li>• Questions and general feedback</li> </ul>	45''

#### 4.6 ANIMATION QUESTIONS

- Do you usually see sports channel?
- Consider important a change in sports channel content?
- How do you see the evolution of the sports channel market in Portugal since Eleven Sports came into this market?
- Are you familiar to Canal 11? How?
- What was the main challenge and difficulty found in the present case? What data should be provided in order to better understand the topic and help the resolution of the case?

#### 4.7 CASE STUDY RESOLUTION PROPOSAL

##### 4.7.1 Study the potentiality of sports channel market and the need for a change. Remember the key success factors.

Firstly, in order to study the potential of sports channels, it is important to understand what the current state of television in Portugal is where these channels fit. Although there are more and more new forms of entertainment such as eSports, IPTVs and Streaming channels, it was noted that in Portugal television continues to be an integral part of the life of the Portuguese, having thus grown in the year 2020, even with the pandemic situation. Covid-19, 28% compared to the previous week when the state of emergency was declared in the country, as well as the following week, with an increase of 32% compared to the same week of the previous year, according to data from GFK / CAEM.

Thus, realizing that the television market in Portugal is stabilized, one can move on to the potential of the sports channel market. Since the greatest sport represented on sports channels is essentially based on football and its modalities, this as television content has been shown to be a power force in the strategies of capturing audiences for television channels. Since 2007 it has been present in the top of most viewed programs in Portugal, and since then until today the contents that are in the top are the broadcasts of live games and the most viewed are those of the Portuguese team.

Even though this type of television programs was at its peak, in Portugal programs devoted to football, other than the transmission of games, were becoming old-fashioned and conservative and frowned upon since football commentary on television was controversial and malicious. But it's argued that these should be viewed and commented on in a lighter way and in the perspective



of entertainment with greater inclusion and interaction with viewers, as was advocated by the non-executive director of Eleven Sports.

Thus, there is a need here for a turning point in how football is treated and viewed in Portugal, hence one of the opportunities for creating new types of content and values for football.

So, as critical factors of success of this market are the knowledge of the market, the capacity for innovation, the unique television content and the interaction with viewers.

#### 4.7.2 Develop a swot analysis for Portuguese Football Federation and reflect on some of the evidences that reinforces the expansion of Canal 11.

Opportunities	Threats
Increasing importance of sports content on TV	High competition on sports channel market
Football always on the top of viewed programs	Other channels have the transmissions of the principal championships in Europe
National Team games as favorites of all games in Portugal	Decrease in TV consumption due to digital habits
Sports channel market in Portugal seen as old-fashioned and controversial	Difficulty creating connection and engagement with millennials
Increase on mobile and social media used by population	New platforms that transmit eSports and streaming games
Need for greater interaction with viewers	

Strengths	Weaknesses
Unique concept of sports channel market	Broader audience which implies the creation of content that engage everyone
Defends equality of gender in sports	As a new channel, it has low positioning linked in viewers
Defends fair-play and respect, no racism and discrimination, integrity and honesty in sports	Channel that explores and transmit more football than futsal and beach football
High credibility of FPF with the best players of each football modalities (Ronaldo, Ricardinho and Madjer)	
Canal 11 broadcast team games and competitions in Portugal that no other channel shown before	
Canal 11 broadcast entertainment contents besides football	
Concern with environmental sustainability	
Strong presence on social networks	

With all this, it can be concluded that Canal 11 presents several and consistent opportunities that are validated in the contextualization chapter, highlighting the growth of sports content on television among those of most football, as well as the fact the market for sports channels and their programs is in need of change. However, it's clear that these opportunities are also used by other sports channels on the market, using their positioning in the market.

In addition, there is a growing need for interaction with the public and viewers, due also to the growth and influence that social networks increasingly have, and that Canal 11 can take advantage of that due to the already existing high reputation and recognition of FPF that helped to have a strong presence in different social networks where they can get closer to the viewer.

Therefore, with this SWOT analysis it is possible to corroborate and solidify the market expansion of FPF with the creation of Canal 11 since it was a market that was in need of change with unique and different contents from the usual and that at the same time is concerned with the problems of the current reality, with social and environmental responsibility, including new values in the football world.

**4.7.3 Considering the literature review, develop a succinct path of strategies for market expansion based on the framework by Joseph Pickens at chapter 4.3.1 MARKET EXPANSION STRATEGY that help Portuguese Football Federation to choose which best strategy should use to this business expansion process.**

**1) Identify and define Target Market**

- Football family which are more than 260 thousand including practitioners, sports agents and family members of the previous;
- Football fans;
- Portuguese and Portuguese descendants residing in Portugal and abroad;
- People less attentive to football who appreciate other program topics.

In other words, the target market is quite vast, including any gender and age, and with the objective of reaching other types of tastes of people away from football.

**2) Assess the stage of Market Development**

- Football as television content increasingly seen as a strategy to gain audiences;
- Market is in a period when football as it is transmitted and commented in Portugal is seen in an old-fashioned way and with negative principles and values;

- Football channel market suffered a negative impact at the time of the pandemic with the losses in the sports channels due to the leagues and football in the world having stopped and the risk of being able to happen again.
- 3) Definition objectives and assess the Firm's Capabilities
- Implement better values of respect and honesty in sports, especially in football modalities;
  - Defend gender equality in this sport by showing games from male and female competitions and defending any type of racism;
  - Democratize and show the less visible side of football;
  - Show and follow Portuguese players and coaches around the world, making interviews and transmit games of them;
  - Object to reach four million homes and have 600 live broadcasts per year, with information, debate, analysis and entertainment programs for the inclusion of all audiences connected and not completely connected to football.
- 4) Assess the competition Environment
- Wide range of sports channels in Portugal;
  - 13 sports channels in Portugal;
  - 8 sports channels mostly dedicated to football modalities in Portugal;
  - Channels that typically stream live games are premium channels that pay for a subscription;
  - High competition as everyone fights for the attention of viewers, with the same content.
- In this way, the first choice of this path is directed to the Challenge of the incumbents, since it's a market with various direct competitors.
- 5) Strategy chosen
- So, analyzing the firm's objectives for entering this new market, it is decided to choose the Change the Rules of the Game strategy, since it seeks to redefine the limits of the industry with new values and culture, re-segment an existing market by changing the competition bases with new content for programs in this industry, also managed to provoke a change of the economics or perceptions of the market.

#### **4.7.4 Develop marketing strategies and actions to attract and engage customers that could help Canal 11 to reinforce their position and visibility in the market? (suggestion: use information from chapter 4.3.2 NEW TECHNOLOGY, MEDIA AND COMMUNICATION CHANNELS)**

As mentioned in this chapter by Winer (2009), traditional media, such as the case of TV, will not disappear and according to Bernhardt, Mays, Eroğğlu and Daniel (2009) to reach their maximum potential, new media and traditional media should be combined. Thus, the main strategies should focus on this factor in being able to enter the more digital world and with more events in this medium.

Therefore, one can add to its strong presence on social networks the creation of an application that consists of having:

- Associated with Portugal + to register or login
- Notifications to followers about news and information
- Information on the classification of Portuguese football championships and a list of club matches and statistics for those matches
- Live streams of the channel and repetition of channel contents
- Quizzes about National teams, clubs, players and coaches, so that they acquire points and if they stay in the top 5, monthly, they win prizes or discounts to use in FPF products
- Purchase and advertising of merchandising through the app
- Purchase of tickets for Portuguese national team matches

With this, it is possible to leverage one of the opportunities in this market, which is one of the most valued today, which is the interaction with viewers and their followers, by making them interact more with the FPF bilaterally and not just unilaterally.

Furthermore, nowadays, with the generation of digital natives becoming more and more pronounced in society, they must give importance to the new phenomenon of eSports as explained in that same chapter by Lee, Stewart, Loucks and Arkenberg (2019). With the introduction of the transmission of eSports games on Canal 11, since they already have several leagues and championships and a national team in this new digital sport, they were able to expand their target and manage to attract new viewers to their channel who would not normally see the themes of

football modalities, thus achieving greater engagement with this new generation who are less and less appreciative of watching television.

#### **4.7.5 Summarizing the main conclusions from the case, how can Canal 11 differentiate itself from the competition?**

In Portugal, it is crucial that Canal 11 stands out for the difference between the various sports channels, whether direct or indirect. Thus, in order to increase the viewers' knowledge and increase their loyalty, it is essential that Canal 11 is able to know its target and to establish specific marketing strategies and different communication actions in order to reach that target and the while being able to differentiate themselves from their competitors.

By itself the name given to the TV channel, Canal 11, stands out for its positioning on the Portuguese televisions because it is in position 11 on all operators and the fact that its sport that is most broadcast is football and is composed of 11 players field of each team.

In addition, it stands out for being the first to target and bet on the broadcast of women's football championships as well as women's futsal, with the female audience being one of the biggest television viewers in Portugal.

Based on these factors, the Portuguese Football Federation enters the market for sports channels with Canal 11 with the idea of changing the current paradigm in which it found itself with new ideas, values and content. Values that defend above all respect, equality and honesty on and off the field towards players, fans and referees and content that demonstrates diversity, some that portray more the modalities, others more entertaining and others more intimate with interviews with Portuguese players and coaches.

Thus, in order to increase loyalty and impose greater differentiation, you can:

- Bet on a deeper relationship with viewers and that can involve them at all times on television. To do this, you need to stay active and attentive to digital and social media platforms and use the strong presence on them for that.

- Bet on striking, captivating and even funny / humorous marketing actions that lead followers to connect with the channel and to be interested in seeing programs with unique content on the communication platforms.

- To be able to establish a greater representativeness of beach and futsal sports even though football is one of the main sports in Portugal and the channel, thus showing diversity of content and differentiation with competitors since they do not have this type of content.

## 4.8 CASE STUDY RESOLUTION SLIDES

# CASE STUDY

## MARKET EXPANSION OF PORTUGUESE FOOTBALL FEDERATION - CANAL 11

### INDEX

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2. CASE STUDY RESOLUTION:

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Q2. DEVELOP A SWOT ANALYSIS FOR FEDERATION FOOTBALL FEDERATION AND REFLECT ON SOME EVIDENCES THAT REINFORCES THE EXPANSION OF CANAL 11.

Q3. DEVELOP A SUCCINCT PATH OF STRATEGIES FOR MARKET EXPANSION THAT HELP FPF TO CHOOSE WHICH BEST STRATEGY SHOULD USE TO THIS BUSINESS EXPANSION PROCESS.

Q4. MARKETING STRATEGIES AND ACTIONS TO ATTRACT AND ENGAGE CUSTOMERS TO REINFORCE CANAL 11 POSITION AND VISIBILITY

Q5. HOW CAN CANAL 11 DIFFERENTIATE FROM THE COMPETITION

### 1.CASE STUDY PRESENTATION

THIS CASE STUDY AIMS TO ACCESS WHY PORTUGUESE FOOTBALL FEDERATION DECIDED TO EXPAND ITS BUSINESS TO SPORTS CHANNEL MARKET.

CASE STUDY MAIN OBJECTIVES:

- ANALYSE THE MARKET
- STUDY THE IMPORTANCE OF INNOVATION AND DIGITAL EVOLUTION IN A COMPANY
- DEFINE MARKETING STRATEGIES TO ATTRACT AND ENGAGE CUSTOMERS



## 2.CASE STUDY RESOLUTION

### QUESTION 1. POTENTIALITY OF SPORTS CHANNEL MARKET AND THE NEED FOR A CHANGE

IN SPORTS CHANNELS MARKET THERE ARE MORE AND MORE NEW FORMS OF ENTERTAINMENT SUCH AS ESPORTS, IPTVS AND STREAMING CHANNELS, IT WAS NOTED THAT IN PORTUGAL TELEVISION CONTINUES TO BE AN INTEGRAL PART OF THE LIFE OF THE PORTUGUESE. IN THE YEAR 2020, EVEN DURING PANDEMIC SITUATION, COVID-19, AN INCREASE OF 32% COMPARED TO THE SAME WEEK OF THE PREVIOUS YEAR, ACCORDING TO DATA FROM GFK / CAEM

SINCE THE GREATEST SPORT REPRESENTED ON SPORTS CHANNELS IS ESSENTIALLY BASED ON FOOTBALL, THIS AS TELEVISION CONTENT HAS BEEN SHOWN TO BE A POWER FORCE IN THE STRATEGIES OF CAPTURING AUDIENCES FOR TELEVISION CHANNELS, SINCE 2007 IT HAS BEEN PRESENT IN THE TOP OF MOST VIEWED PROGRAMS IN PORTUGAL, AND SINCE THEN UNTIL TODAY THE CONTENTS THAT ARE IN THE TOP ARE THE BROADCASTS OF LIVE GAMES AND THE MOST VIEWED ARE THOSE OF THE PORTUGUESE TEAM

IN PORTUGAL PROGRAMS DEVOTED TO FOOTBALL OTHER THAN THE TRANSMISSION OF GAMES WERE BECOMING OLD-FASHIONED AND CONSERVATIVE AND FROWNED UPON SINCE FOOTBALL COMMENTARY ON TELEVISION WAS CONTROVERSIAL AND MALICIOUS, WHAT SHOULD BE SEEN IN A LIGHTER WAY AND IN THE PERSPECTIVE OF ENTERTAINMENT WITH GREATER INCLUSION AND INTERACTION WITH VIEWERS, AS WAS ADVOCATED BY THE NON-EXECUTIVE DIRECTOR OF ELEVEN SPORTS SO, THERE IS A NEED HERE FOR A TURNING POINT IN HOW FOOTBALL IS TREATED AND VIEWED IN PORTUGAL, HENCE ONE OF THE OPPORTUNITIES FOR CREATING NEW TYPES OF CONTENT AND VALUES FOR FOOTBALL

SO, AS CRITICAL FACTORS OF SUCCESS OF THIS MARKET ARE THE KNOWLEDGE OF THE MARKET, THE CAPACITY FOR INNOVATION, THE UNIQUE TELEVISION CONTENT, THE INTERACTION WITH VIEWERS.

## 2.CASE STUDY RESOLUTION

### QUESTION 2. DEVELOP A SWOT ANALYSIS FOR FEDERATION FOOTBALL FEDERATION AND REFLECT ON SOME EVIDENCES THAT REINFORCES THE EXPANSION OF CANAL 11.

#### OPPORTUNITIES

- INCREASING IMPORTANCE OF SPORTS CONTENT ON TV
- FOOTBALL ON THE TOP OF VIEWED PROGRAMS
- NATIONAL TEAM GAMES AS THE FAVORITES ON TV
- SPORTS CHANNEL MARKET IN PORTUGAL VIEWED AS CONTROVERSIAL AND OLD-FASHIONED
- INCREASE ON MOBILE AND SOCIAL MEDIA USING
- NEED FOR GREATER INTERACTION WITH VIEWERS

#### THREATS

- HIGH COMPETITION ON THE MARKET
- OTHER CHANNELS HAVE THE TRANSMISSIONS OF THE PRINCIPAL CHAMPIONSHIPS IN EUROPE
- DECREASE IN TV CONSUMPTION DUE TO DIGITAL HABITS
- DIFFICULTY TO CREATE CONNECTION AND ENGAGEMENT WITH MILLENNIALS
- NEW PLATFORMS THAT TRANSMIT ESPORTS AND STREAMING GAMES

#### STRENGTHS

- UNIQUE CONCEPTS FOR THE MARKET
- DEFENDS EQUALITY OF GENDER, FAIR-PLAY, RESPECT, NO RACISM AND DISCRIMINATION IN SPORTS
- HIGH CREDIBILITY OF FPF WITH THE BEST PLAYER OF EACH FOOTBALL MODALITIES
- CANAL 11 TRANSMIT ENTERTAINMENT CONTENTS BESIDES FOOTBALL
- CONCERN WITH ENVIRONMENTAL SUSTAINABILITY
- STRONG PRESENCE ON SOCIAL NETWORKS

#### WEAKNESSES

- LARGE AUDIENCE WHICH IMPLIES THE CREATION OF CONTENT THAT ENGAGE EVERYONE
- AS A NEW CHANNEL, IT HAS LOW POSITIONING LINKED IN VIEWERS
- CHANNEL THAT EXPLORES AND TRANSMIT MORE FOOTBALL THAN FUTSAL AND BEACH FOOTBALL

## 2.CASE STUDY RESOLUTION

### QUESTION 2. DEVELOP A SWOT ANALYSIS FOR FEDERATION FOOTBALL FEDERATION AND REFLECT ON SOME EVIDENCES THAT REINFORCES THE EXPANSION OF CANAL 11.

- WITH THE HIGHLIGHTING THE GROWTH OF SPORTS CONTENT ON TELEVISION AMONG THOSE OF MOST FOOTBALL, AS WELL AS THE FACT THE MARKET FOR SPORTS CHANNELS AND THEIR PROGRAMS IS IN NEED OF CHANGE. HOWEVER, IT'S CLEAR THAT THESE OPPORTUNITIES ARE ALSO USED BY OTHER SPORTS CHANNELS ON THE MARKET, USING THEIR POSITIONING IN THE MARKET
- A GROWING NEED FOR INTERACTION WITH THE PUBLIC AND VIEWERS, DUE ALSO TO THE GROWTH AND INFLUENCE THAT SOCIAL NETWORKS INCREASINGLY HAVE, AND THAT CANAL 11 CAN TAKE ADVANTAGE OF THAT DUE TO THE ALREADY EXISTING HIGH REPUTATION AND RECOGNITION OF FPF THAT HELPED TO HAVE A STRONG PRESENCE IN DIFFERENT SOCIAL NETWORKS WHERE THEY CAN GET CLOSER TO THE VIEWER
- WITH THE CREATION OF CANAL 11 SINCE IT WAS A MARKET THAT WAS IN NEED OF CHANGE WITH UNIQUE AND DIFFERENT CONTENTS FROM THE USUAL AND THAT AT THE SAME TIME IS CONCERNED WITH THE PROBLEMS OF THE CURRENT REALITY, WITH SOCIAL AND ENVIRONMENTAL RESPONSIBILITY, INCLUDING NEW VALUES IN THE FOOTBALL WORLD



## 2. CASE STUDY RESOLUTION

**QUESTION 3.** DEVELOP A SUCCINCT PATH OF STRATEGIES FOR MARKET EXPANSION THAT HELP PPF TO CHOOSE WHICH BEST STRATEGY SHOULD USE TO THIS BUSINESS EXPANSION PROCESS.

1. VAST TARGET MARKET, INCLUDING ANY GENDER AND AGE
2. REACH OTHER TYPES OF TASTES OF PEOPLE WAY FROM FOOTBALL
3. IMPLEMENT BETTER VALUES OF RESPECT AND HONESTY IN SPORTS
4. DEFEND GENDER EQUALITY AND ANY TYPE OF DISCRIMINATION
5. DEMOCRATIZE AND SHOW THE LESS VISIBLE SIDE OF FOOTBALL
6. SHOW AND FOLLOW PORTUGUESE PLAYERS AND COACHES AROUND THE WORLD
7. FOOTBALL AS A STRATEGY TO GAIN AUDIENCES
8. FOOTBALL WHEN IT'S TRANSMITTED AND COMMENTED IN PORTUGAL IS SEEN AS OLD-FASHIONED AND WITH NEGATIVE PRINCIPLES
9. COVID 19 HAS A NEGATIVE IMPACT ON THE MARKET
10. 13 SPORTS CHANNELS IN PORTUGAL WITH 8 MORE DEDICATED TO FOOTBALL MODALITIES
11. CHANNELS THAT USUALLY STREAM LIVE GAMES ARE PREMIUM CHANNELS SO, MUST CHOOSE THE CHALLENGE OF THE INCUMBENTS DUE TO VARIOUS DIRECT COMPETITORS
12. CHOOSE THE CHANGE THE RULES OF THE GAME STRATEGY
13. REDEFINE THE LIMITS OF THE INDUSTRY WITH NEW VALUES AND CULTURE
14. RE-SEGMENT AN EXISTING MARKET BY CHANGING THE COMPETITION BASES WITH NEW CONTENT
15. PROVOKE A CHANGE OF THE ECONOMICS OR PERCEPTIONS OF THE MARKET

## 2. CASE STUDY RESOLUTION

**QUESTION 4.** MARKETING STRATEGIES AND ACTIONS TO ATTRACT AND ENGAGE CUSTOMERS TO REINFORCE CANAL 11 POSITION AND VISIBILITY



POTENTIAL MAXIMUM WITH THE COMBINATION BETWEEN TRADITIONAL MEDIA AND NEW MEDIA



NEW PHENOMENON OF ESPORTS BECOMING MORE AND MORE USED IN SOCIETY:

- USE THE FACT THAT ALREADY EXISTS NATIONAL TEAM AND CHAMPIONSHIPS DURING THE YEAR OF ESPORTS TO TRANSMIT THEIR GAMES ON LIVE ON CANAL 11

USE STRONG PRESENCE ON SOCIAL NETWORKS AND CREATE AN APP WITH TO INCREASE THE INTERACTION:

- LOGIN BY PORTUGAL +
- NOTIFICATIONS WITH NEWS AND INFORMATION
- INFORMATION OF PORTUGAL CHAMPIONSHIPS
- LIVE STREAMS AND REPETITIONS OF THE CHANNEL CONTENTS
- QUIZZES ABOUT NATIONAL TEAMS, CLUBS, PLAYERS AND COACHES WITH AWARDS
- PURCHASE OF MERCHANDISING AND TICKETS

## 2. CASE STUDY RESOLUTION

**QUESTION 5.** HOW CAN CANAL 11 DIFFERENTIATE FROM THE COMPETITION

BY ITSELF THE NAME GIVEN TO CANAL 11 STANDS OUT FOR ITS POSITIONING DUE TO THE:

- POSITION 11 ON ALL OPERATORS OF TV
- SPORT THAT IS MOST BROADCAST IS FOOTBALL AND IS COMPOSED OF 11 PLAYERS FIELD OF EACH TEAM

FIRST CHANNEL TO BET ON THE TRANSMISSIONS OF WOMEN'S FOOTBALL CHAMPIONSHIPS AND WOMEN'S FUTSAL CHAMPIONSHIPS TO CATCH ALSO WOMEN AUDIENCE

NEW VALUES, IDEAS AND CONTENTS BRINGS TO THE MARKET. VALUES THAT DEFEND RESPECT, EQUALITY AND HONESTY ON AND OFF THE FIELD TOWARDS PLAYERS, FANS AND REFEREES.

TO INCREASE LOYALTY AND IMPOSE GREATER DIFFERENTIATION:

- STAY ACTIVE AND ATTENTIVE ON DIGITAL AND SOCIAL MEDIA PLATFORMS AND USE THE STRONG PRESENCE ON THEM FOR CREATE A DEEPER RELATIONSHIP WITH VIEWERS
- BET ON STRIKING, CAPTIVATING AND EVEN FUNNY/HUMOROUS MARKETING ACTIONS THAT CREATE CONNECTION WITH VIEWERS TO PROVOKE INTEREST TO VIEW THE CHANNEL
- BE ABLE TO ESTABLISH GREATER REPRESENTATIVENESS OF BEACH AND FUTSAL SPORTS THAN MORE FOOTBALL TO SHOW MORE DIVERSITY AND DIFFERENTIATION





## **5 MANAGEMENT LESSONS AND CONCLUSIONS**

The present pedagogical case aims to contribute and add value in two different ways. First in relation to the literature review, since the market expansion process was guided and supported by a set of research oriented to companies with the same strategic intention. In this way, some insights were collected that help companies in general to know what the best strategy is to follow depending on their problems and causes and to analyze and evaluate the best reasons and motivations for the market expansion process. Secondly, the pedagogical case is also intended for these companies to be able to change and leverage their business, in order to be able to understand the history and evolution of the business and to recognize the constant changes in the market and the preferences of their consumers. And so, recognizing all this, it is essential that this company has the capacity to adapt and evolve in the face of these changes in order to move towards success and remain competitive.

Thus, through the analysis carried out on the market expansion process of the Portuguese Football Federation of Canal 11, it was concluded that the main focus was mainly the marketing and communication strategies after the information of the market in which it intended to enter was known. Because, when it comes to business expansion, it implies that the company brings some diversity and innovation to the market.

A market that, even with the advancement of digital platforms, it was found that it continues to evolve and that it will not disappear or be replaced, because as in the pandemic and quarantine times when people spent more time at home, it was registered that growth of audiences over than 28% compared to last year. In addition, it was possible to verify that the market for sports channels presents a great opportunity for growth since soccer, one of the most practiced and broadcast sports in Portugal, is also the one that is always in the top of most viewed programs, even in generalist channels.

In this way, it is perceived that it is a market that is changing and growing and it is precisely because of this need for change that Canal 11 saw this as an opportunity to enter and change the contents and values within this market and the world of sport. Despite all the advantages and opportunities that Canal 11 saw in the market and the target and to bring value to the market due to its charisma and difference, there is an increasingly digital world where they must mark their position and which must be invested, with innovative programs and following the trends of its target, reaching more to the digital native population.

So, with all the analysis and conclusions drawn it's possible to say that this business expansion of Portuguese Football Federation to sports channel market allows them to show their ability to adapt and innovate to the new market and that at the same time allowed them to leverage and recognize their position as a strong brand present in multiple businesses, all seen as a success in the markets where they are located.

Finally, after the conclusions drawn and recognized the limitation of this study, it's possible to mention that the in a future research must be studied the best strategies and trends of this market, as well as the role, motivations and expectations of consumers with this type of channels of television. All of this, always bearing in mind that the best and innovative communication from these channels is an important role for greater engagement and experience in consumers.

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