A Work Project, presented as part of the requirements for the Award of a Master´s Degree in Management from the Nova School of Business and Economics

Designing a sports platform for RTP, to increase sports' content offer
Providing a wide and diversified offer through on demand and live content

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Abstract

The project focuses on RTP´s sports offer with the purpose of understanding how can the company increase the content offer, by developing a digital sports platform. In order to reach this goal, several analyses were performed, addressing the external and internal environment, by identifying the opportunities and threats of media and sports industries and pointing the strengths and weaknesses of RTP. In order to answer the overriding question, five major recommendations were developed regarding product, placement, promotion, and people.

Keywords: RTP, Sports Broadcasting, Public Service Media, Interactivity, Product, Promotion, Organizational Structure

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	Definition
AI	Artificial Intelligence
AR/VR	Augmented Reality / Virtual Reality
AS	Amateur Sport
CPM	Cost per thousand impressions (Cost per mile)
EBU	European Broadcast Union
ERC	Entidade Reguladora de Comunicação Social
EU	European Union
F1	Formula one - High speed races involving the most aerodynamic cars on the planet
Free-to-air	Non-paid TV channels
GDP	Gross Domestic Product
GVA	Gross Value Added
HDR	High Dynamic Range
Home Run	Culmination of a baseball game
IP	Internet Protocol
IPDJ	Instituto Português de Desporto e Juventude
KPI	Key Performance Indicator

	Definition
OTT	Over the top
Non-linear content	On-demand content
PSM	Public Service Media
QR Code	Quick Response Code
RTMP	Real Time Messaging Protocol
RTP	Rádio e Televisão de Portugal
Scrum	Restart of the game in Rugby
SDI	Serial Digital Interface
SRT	Secure Realiable Transport
SVOD	Subscription Video-on-Demand
TDT	Televisão Digital Terrestre
TV	Television
TVI	Televisão Independente
URL	Uniform Resource Locator
VOD	Video On-Demand
VRIO	Valuable Rare Inimitable Organized

Table 1: Glossary with key acronyms and initials and respective definition

AGENDA

Executive Summary

Methodology: This consulting project was conducted in partnership with RTP, with the aim of developing valuable strategic options. In order to better address the client's challenge, the project started with an external analysis of the industry's landscape, followed by an internal analysis of the company. The external analysis of the industry where RTP is inserted, comprised of the PESTLE framework, as well as competitor analysis and a profound consumer habits study. On the other hand, the internal analysis combined three frameworks such as the Resource-Based View Model, the SWOT Analysis, and the TOWS Analysis. **External Analysis:** The media landscape provides clear opportunities to the sports broadcasting industry, mostly due to the technological innovations expected in the next years, as well as the ones already changing the picture. Also, the shift in consumption habits, as consumers prefer a more convenient and interactive digital service. As a Public Service Media, RTP's Political, Economical, Social, Technological, Legal, and Environmental dimensions are truly affected by its rights and duties to offer diversified content with a high level of quality. Despite the fierce competition in the sports broadcasting industry, several best practices found around the world are successful examples of innovation integration following the consumption trends, while still offering quality content. **Internal Analysis:** In fact, RTP is a reference as a global communication platform, offering relevant content on radio, television, and online, with a huge and heterogenous audience, which brings complex challenges to satisfy so many target audiences at the same time. Undoubtedly, RTP has a trusty and reliable brand reputation, that combined with its international presence and other VRIO resources, grants the company's sustainable competitive advantage. **Recommendations:** to increase the sports content offer, through a digital platform, RTP should use the Scenario Planning Framework, foresee different future scenarios, and anticipate the best strategic options for the correspondent predicted scenario, while adopting a Blue Ocean Strategy and explore a new uncontested market space. Focused on creating value for the consumer, RTP should develop RTP Desporto and create new factors based on the marketing 7P's Framework. Aligned with the strategic approach suggested and based on a comprehensive analysis, five recommendations were developed: providing a broader and more diverse content offer; develop a digital sports platform; offer a variety of features and a better consumer experience; develop a successful promotion strategy and define an organizational strategy.

In a real context, the Consulting Lab is a project developed in constant alignment with the client and with its needs, in order to add value to students and companies, simultaneously

RTP benefits from this project by having a **consulting service with high-level students,** accessing a **talent recruitment source** with prestige.

This partnership is also an opportunity for RTP to contact with a younger generation, with a **new approach** to business reality and with a **strong creative profile and problem-solving skills.** By being present at the Academia, RTP **can also benefit from other synergies**, provided by other projects and agents.

Simultaneously, Nova SBE students have the opportunity to put into practice all the theoretical knowledge acquired during the academic career, with openness to embrace the challenges proposed by the client and its context.

Students experience an authentic consulting project applied to a real client, understanding the proper meaning of management consulting in the business world, and learning **new methodologies** that prepare the future of their career.

With the aim of defining effective strategic options, several academic frameworks, models and authors were considered. The resulting methodology that supports the project's recommendations is reflected in a Literature Review

Literature Review

In order to address the Client's issue, and according to Minto, B. (1987), the consulting role starts with critical reasoning and structured communication by using McKinsey's **"Pyramid Principal".** To ensure that the message is perceived as clear as possible, this methodology takes its first step into the overriding question and its answer by grouping and summarizing the supporting arguments. Thus, applying the **deductive reasoning**, it is crucial to start by analysing the Client's internal environment and then the Industry's landscape, in order to answer **why** the overriding question should be confirmed. Nevertheless, to understand **how** the Client's challenge can be tackled, the **inductive reasoning** must be performed.

To better understand the macro-environmental factors that may have a profound impact on the company's performance, a **PESTLE** analysis was conducted. This analysis, first mentioned by Francis Aguilar (1967) as ETPS, allowed to identify the **Political, Economic, Social, Technological, Legal and Environmental** factors that can become opportunities to be tackled by the company.

In order to divide the large broadcasting sports market into clearly defined segments, where consumers present the same behaviour towards the sports broadcasted content consumption, the team followed Keller, K and developed **qualitative and quantitative research methods**. Thus, according to Minichiello, V; Madison, J; Hays, T and Parmenter, G (2003), it is crucial to conduct qualitative **in-depth interviews** to openly understand consumer's behaviour and collect quality data regarding their consumption patterns. Moreover, to complete the consumer analysis, **quantitative research methods** are fundamental to assemble statistically valid information about consumers, by measuring and analyzing variables that allow making future predictions in a more viable way.

When analysing the Client's internal environment, it was possible to define the resources platform that allows the company to offer the service. By using the **Resource-Based View Model**, developed by Jay Barney (1991), it is possible to identify the firm's competencies and resources that leverage its sustainable competitive advantage.

(Cont.) With the aim of defining effective strategic options, several academic frameworks, models and authors were taken into consideration. The resulting methodology that supports the project's recommendations is reflected in a Literature Review

Literature Review

Those key resources are classified as being **Valuable, Rare, Inimitable, and Organized**, even though the company should not underestimate the importance of the other resources, as they are also fundamental for the company's functioning.

After analysing the external landscape and the company's activities and resources, according to Kotler, P. and Armstrong, G. (2008), the team performed a **SWOT Analysis** that identified the company's strengths and weaknesses, and the industry's opportunities and threats, as proposed by the Albert Humphrey's framework (1960). With aim of creating business strategies that leverage the company's strengths and weaknesses and exploit the opportunities and threats of the market, a **TOWS analysis** was developed.

In order to tackle the client's challenge and suggest more effective decisions, it is fundamental to look out to the broadcasting ecosystem in the near future and structure a disciplined approach to think constructively about it, as Wilkinson, L. (1995) suggests. **The Scenario Planning framework** was applied to the company's project, and four scenarios were created, regarding the driving forces and the critical uncertainties identified, as well as four different personas, who illustrate each scenario and enable a better and deeper understanding of it. This way, in the future, the company is better prepared to take advantage of it, in a faster and more structured way than its competitors.

 According to W. Chan Kim and Renée Mauborgne (2015), the **Blue Ocean strategy** focuses on pursuing differentiation and ensuring a low-cost approach, in order to explore a new market space, create a new demand, and avoid the contested market space in a Red Ocean. The **strategy canvas** captures the current state of play in the known market space, by identifying the factors that an industry competes on and invests in, considering the strategic profiles of the major players. The **Four Actions Framework** is a leading tool of Blue Ocean Strategy also developed by W. Chan Kim and Renée Mauborgne, that allows organizations to focus not only on **Eliminating** and **Reducing** but also on **Raising** and **Creating**, while unlocking a new Blue Ocean. After analysing the Current Strategy Canvas and develop an **ERRC Grid**, a **Future Strategy Canvas** was performed. The company should create new factors and compete in the unexplored market.

After a deep internal and external analysis, and following the marketing 7Ps framework, five recommendations were developed in order to meet the client's needs

Methodology

	Analysis	**Recommendations**
Objectives	• Understand the **Portuguese sports environment** and **international trends** in order to identify **potential opportunities, scenarios and market gaps.** • Understand the **consumer's perspective** and needs and the response of the **current players**. • Understand the **organization's business model** and current vulnerabilities.	• **Formulation and selection of diverse strategic options**: content definition and development of production models; development of potential partnerships; selection of distribution and communication channels; adjustment of the organizational structure. • **Prioritization of the strategic options** according to the easiness of and feasibility of implementation. • Design the **potential impact of the project.** • Definition of the **project implementation timeframe and required investment.**
Method	• A preliminary research was conducted in order to distinguish amateur and professional sports and the **relevance of the sports industry**. Moreover, **several academic researches and studies** regarding media, sports and technology industries were analyzed. Following this reasoning, other secondary research was conducted based on **best practices**, in order to support the hypothesis. • Quantitative research was developed based on a **survey.** • In order to better understand RTP's *status quo*, several **internal interviews** were performed leading to the identification of crucial key issues.	• Based on primary and secondary research and taking into consideration the challenge proposed, **five recommendations** were developed following the **Marketing 7Ps**, which was adjusted to the project. Thus, **product, placement, promotion and people** were addressed.
Main Activities	• Literature review • Industry analysis • Best practices • Competition analysis • In-depth interviews • Survey • Internal interviews	• Survey • Internal and external interviews • Implementation plan and KPIs • Project mapping • Limitations and risks • Syndication with RTP • Experts guidance

Table 2: Methodology performed in terms of analysis and recommendations

To ensure the constant alignment of expectations, it is essential to communicate regularly with the client during all three phases of the project, which lasted for about 13 weeks

Methodology I Timeline and Scope

Table 3: Project's timeline

KOD

Steering Commitee I

Steering Commitee II

Final Recommendations

Project Scope

In
- Best practices and external environment analysis
- Company overview
- Content definition: sports content
- State digital platforms as the distribution channel
- Analysis of production and broadcasting processes
- Definition of the promotion strategy
- Organizational restructuring
- Project impact assessment

Out
- Analysis of other RTP channels
- Human resources training
- Project implementation
- Impact on the P&L
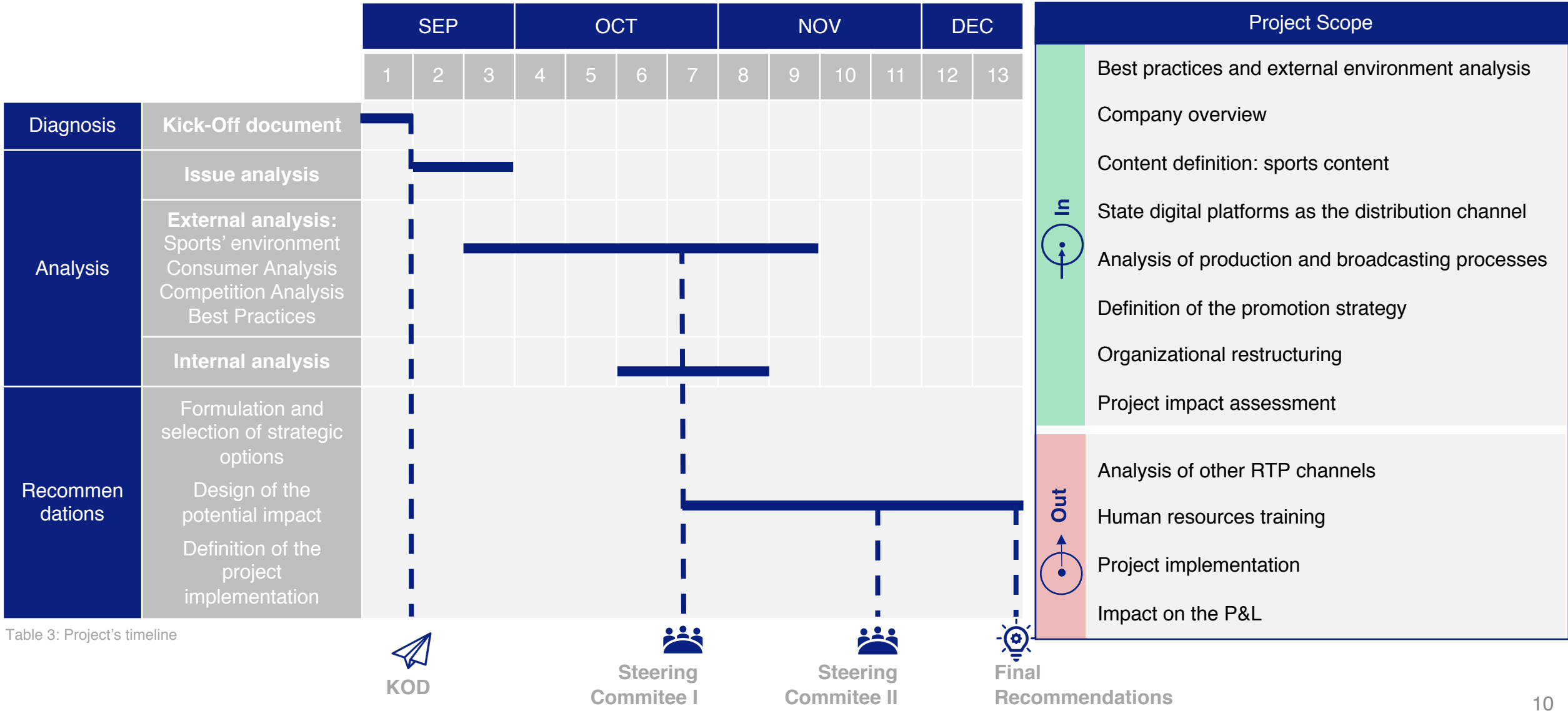
Deductive reasoning clarifies the motivations that explain why RTP should expand its portfolio of sports broadcast content

Methodology I Problem Definition

Should RTP develop a sports platform?

YES

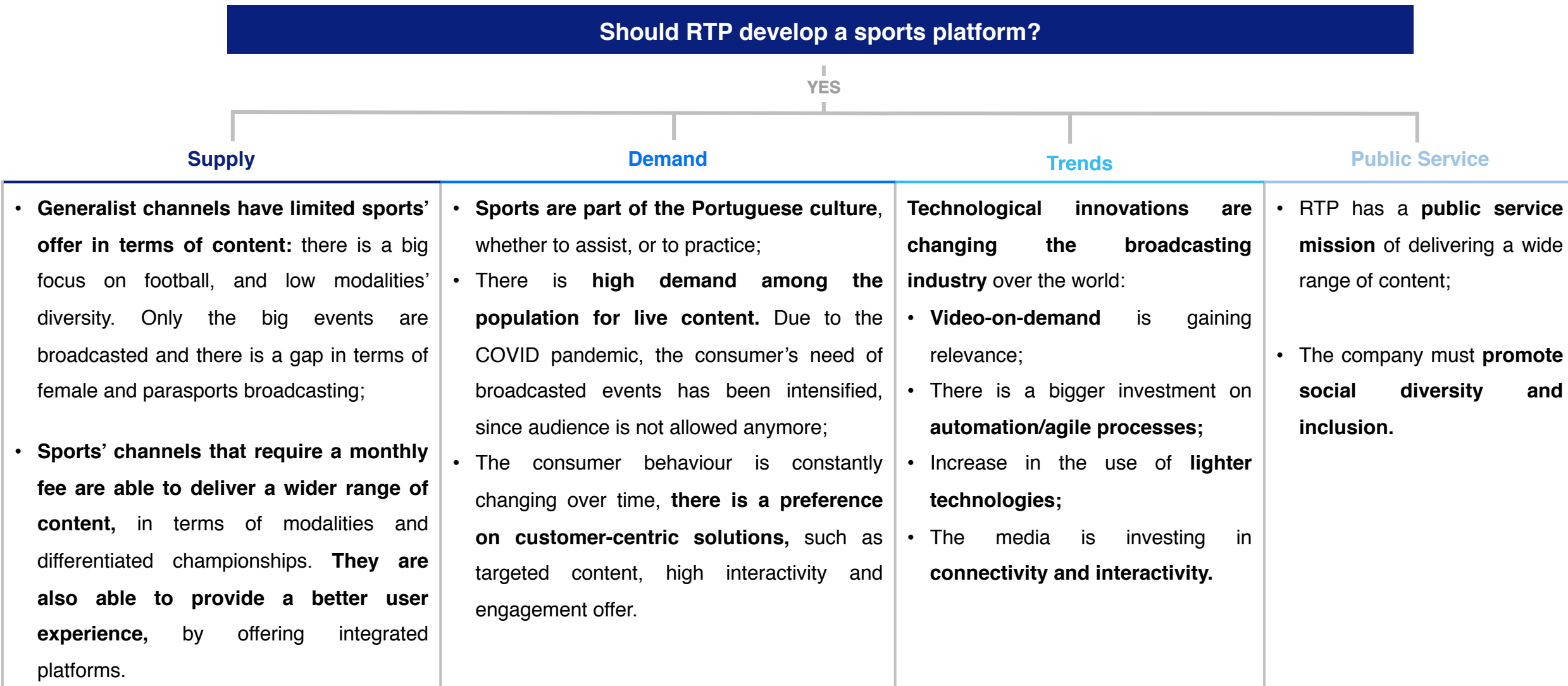| Supply	Demand	Trends	Public Service
• **Generalist channels have limited sports' offer in terms of content:** there is a big focus on football, and low modalities' diversity. Only the big events are broadcasted and there is a gap in terms of female and parasports broadcasting; • **Sports' channels that require a monthly fee are able to deliver a wider range of content,** in terms of modalities and differentiated championships. **They are also able to provide a better user experience,** by offering integrated platforms.	• **Sports are part of the Portuguese culture**, whether to assist, or to practice; • There is **high demand among the population for live content.** Due to the COVID pandemic, the consumer's need of broadcasted events has been intensified, since audience is not allowed anymore; • The consumer behaviour is constantly changing over time, **there is a preference on customer-centric solutions,** such as targeted content, high interactivity and engagement offer.	**Technological innovations are changing the broadcasting industry** over the world: • **Video-on-demand** is gaining relevance; • There is a bigger investment on **automation/agile processes;** • Increase in the use of **lighter technologies;** • The media is investing in **connectivity and interactivity.**	• RTP has a **public service mission** of delivering a wide range of content; • The company must **promote social diversity and inclusion.**

Table 4: Problem definition as deductive reasoning

The inductive reasoning was conducted for a deeper understanding of how should RTP expand sports broadcasting content through a digital platform

Methodology I Problem Definition

Should RTP develop a sports platform?

YES

Therefore, RTP should adopt a Blue Ocean Strategy, targeting a new market opportunity in the sports market industry

HOW

Product

Offering **diversified content**, considering **multiple modalities** through partnerships with federations and becoming more **inclusive** in terms of gender and disabilities. Offering an **interactive** and **personalized** customer experience.

Distribution

Offering a **new digital sports platform** by developing an **integrated** (**website and mobile application**) and independent platform, with an intuitive and functional layout, with main focus on a tech-driven audience.

Promotion

Investing in a **successful promotion strategy**, by focusing on new and innovative communication channels for RTP. Each initiative must target **specific audiences** and thus raise **awareness** for the new platform.
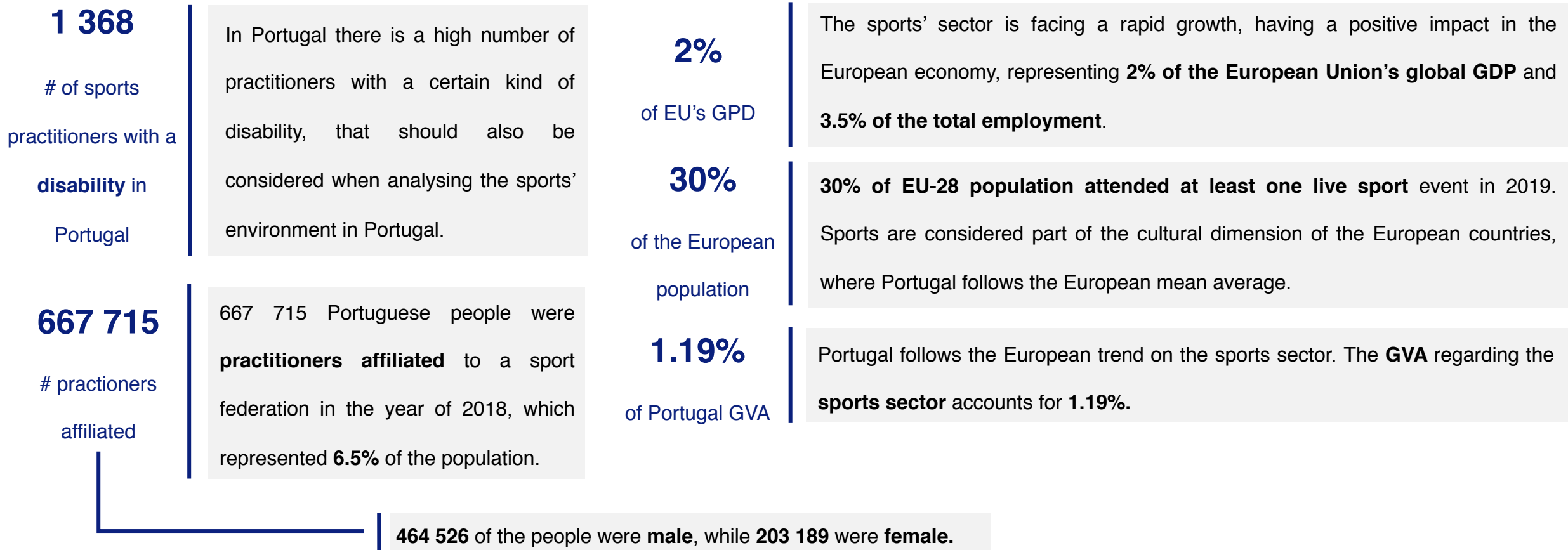
People

For the success of the platform, it is crucial to **adapt the current organizational structure**, developing a new sports department that aggregates the main tasks of broadcasting sports.

More information on Appendix 2

In the Portuguese sport's environment, there are 1368 practitioners with a physical or mental disability. In European countries, the sports sector have a great impact on both cultural and economical dimensions

Sports Overview | Europe

Professional Sport: Sports in which the practitioner **receives a fixed salary** for the time he/she spends competing and training, from a club or sponsor.
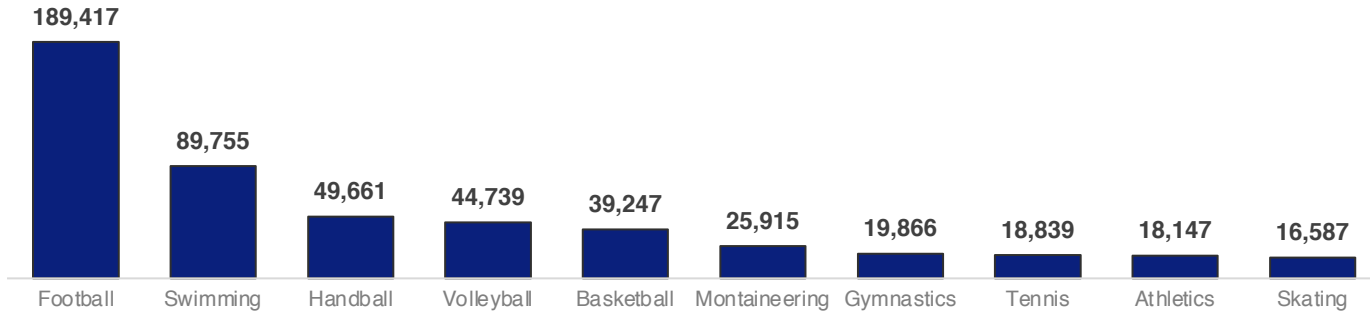
Amateur Sport: Sports in which practitioners do **not receive any fixed salary** for what they are competing or training.

1 368

# of sports practitioners with a **disability** in Portugal

In Portugal there is a high number of practitioners with a certain kind of disability, that should also be considered when analysing the sports' environment in Portugal.

2%

of EU's GPD

The sports' sector is facing a rapid growth, having a positive impact in the European economy, representing **2% of the European Union's global GDP** and **3.5% of the total employment**.

30%

of the European population

30% of EU-28 population attended at least one live sport event in 2019. Sports are considered part of the cultural dimension of the European countries, where Portugal follows the European mean average.

667 715

practioners affiliated

667 715 Portuguese people were **practitioners affiliated** to a sport federation in the year of 2018, which represented **6.5%** of the population.

1.19%

of Portugal GVA

Portugal follows the European trend on the sports sector. The **GVA** regarding the **sports sector** accounts for **1.19%.**

464 526 of the people were **male**, while **203 189** were **female.**

Sources: INE, PORDATA

Football is the most played sport, which goes along with the country's culture and media exposure of events. The importance given to the sports dimension in Portugal is represented by the distribution of clubs

Sports Overview | Portugal

Graphic 1: Number of Portuguese sport practitioners by modality

Modality	Number
Football	189,417
Swimming	89,755
Handball	49,661
Volleyball	44,739
Basketball	39,247
Montaineering	25,915
Gymnastics	19,866
Tennis	18,839
Athletics	18,147
Skating	16,587

28%

of the practitioners play football

In Portugal, **football** is definitely the most played sport. It is followed by swimming, handball, volleyball and basketball.

Graphic 2: IPDJ'S annual financial participation | 2015 – 2017 (in euros)

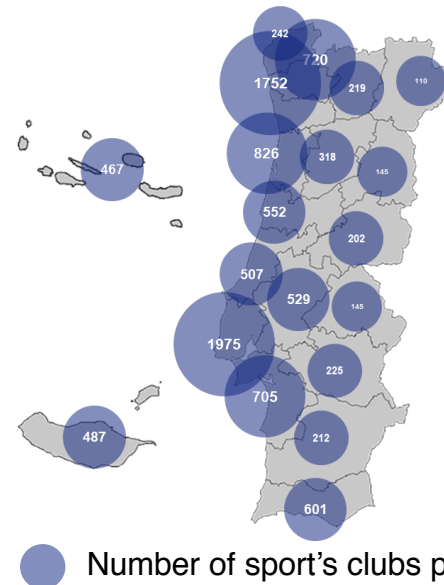| 2015	2016	2017
35 034 592	37 985 235	36 594 217
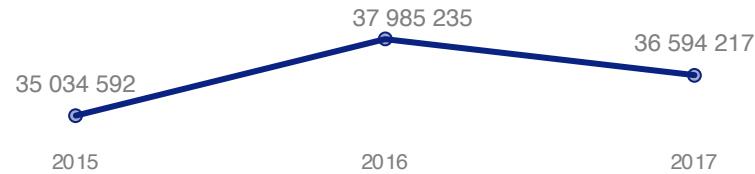
36 million €

were attributed by the IPDJ in 2017

There is a division amongst the diverse sports modalities. **Football** represents the **biggest co-funding with 21%,** followed by **athletics with 17%.**

Graphic 3: Sports' clubs demographic distribution in Portugal

10 939

clubs in Portugal

The club distribution follows the demographic distribution, since **Lisbon** and **Porto** are the most populated areas.

🔵 Number of sport's clubs per district

Sources: Eurostat, FPDD, Comité Olímpico
More information on Appendix 4

The broadcasting environment is technologically evolving, to become more cost-efficient and provide the best experience to the audience

Broadcasting Trends Overview

Traditional TV and non-linear content coexistence: the relevance of **Video-on-demand** is expected to increase among all generations, although **linear TV** might remain significant, in what concerns live content, especially **sports and major events.**

5G: this technology allows high connectivity and lower latency, increasing the ability to engage with consumers. This way, devices can communicate with one another more efficiently, and thus, it is possible to transfer data instantaneously.

Target advertising: local TVs will be able to identify and segmented customers, thus providing the advertisers more targeted audiences, offering tailored content aligned with a **customer-centric strategy.**

AI: the technological advancements will allow **cost reduction** and optimization in the supply chain management.

From SDI to IP: IP networks, through **internet technology** ecosystems are able to provide to broadcasters more **agility** and **flexibility**. As a consequence broadcasters can **decrease costs**, and improve bandwidth consumption at higher bit rates.

AR/VR: the technology is changing the broadcasting environment, allowing viewers to have access to **extra information** and **functionalities** when watching broadcasted content. As a consequence, viewers feel **more engaged** and hence, **more satisfied**.

Sources: Deloitte, IBM, Globecast, Aveco, Kantar

The sports broadcasting industry has been following media trends, enabling digital platforms to boost the creation of engagement strategies and enhance the viewer´s experience

Broadcasting Sports – Worldwide Trends and Technology Innovation

89 of top 100 of US broadcasts in 2019 were live sports

Sports is one of the few remaining content types that many consumers believe they **must consume live**. Consumers' viewership preferences are **shifting** from traditional to digital platforms, that is driven by streaming services, over-the-top providers, and companies like *Amazon* and *Facebook.*

11.5%⬆

In the next years, worldwide **revenues from sports digital media rights is expected to grow 11.5%,** faster than most industries.

OTT emerges as a driver of fan engagement

Over-the-top (OTT) platforms require a **mobile-centric strategy,** driving engagement by proving **extra data**, by adding the ability to **engage in conversations**, and by **offering highlight pieces of content** during or after a game. Sports content OTT may optimize not only marketing, but also content strategies, since it allows to identify **audience viewing trends** and **demographics.**

Remote production

In order to **produce more games more cost-efficiently,** some big broadcasters are using **remote production** which implies a multi-camera production occurring **outside of a studio context**.

AR/VR

According to Deloitte, fans' interest in watching a game increases with the presence of real-time augmented reality (AR) statistics on-screen, with the access to **more functionalities** and **information**, and with **VR front-row seats.**

5G and **8K**

With the development of 5G, the use of **mobile devices** for sports viewing will increase, since there will be an **improvement of wireless connectivity** and also the **devices screen quality**. Moreover, **8K live content** will allow tracking cams to **focus on single players** and other features.

Sources: Deloitte – *the future of sports broadcasting*, eMarketer, B&T

Political factors impact the media industry, especially Public Service Media since they must follow certain regulations to comply with their public service mission

PESTLE Analysis

P POLITICAL

The political environment is crucial for broadcasters, due to government legislation and licenses:

- Regarding agreements and content rights, the biggest sports clubs in Portugal have the power to pressure political entities and federations.

- The **regulation of media companies** in Portugal is taken care by an **official authority**, the ERC. This institution ensures that all norms and regulations are being followed and that there are no violations.

- In Portugal, as in many other countries, the **government must approve the channels** available on the free TV platform (TDT).

- In European Union, broadcasters must obey several regulations and meet specific **quotas regarding the origin of content.** In Portugal, TV channels must dedicate at least 50% of their emissions to the broadcasting of programs originally in Portuguese. Moreover, they must dedicate 20% of their time to the dissemination of creative works, which its original production is in Portuguese. There are also specific quotas for European content broadcasts.

- The **political instability of the European Union as a group and institution,** influences Public Service Media, especially in countries financially dependent on EU's funding.

Economical factors such as the crisis and funding cuts have a direct effect on the sports broadcasting industry. Other factors like the acquisition of sports rights, data monitoring, and cooperation between players also affect the broadcasters' content offering
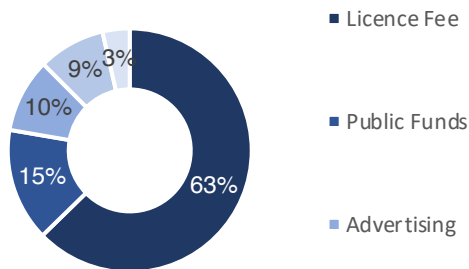
NOVA

PESTLE Analysis

(E) ECONOMICAL

1. ECONOMIC CRISIS

Due to the Covid19 pandemic, it is very likely **to occur an economic crisis** worldwide, affecting Portugal, and the **unemployment rate** has already started to **rise up.**

Graphic 4: PSM Funding Mix in the EBU Area

- Licence Fee
- Public Funds
- Advertising

63% · 15% · 10% · 9% · 3%

PSM are mainly **financed by Licence Fee funds**, supported by their citizens. The higher the unemployment rate, the lower the Licence Fee funds since there are special conditions for those who receive unemployment allowance.

2. FUNDING CUTS

Although it may seem that PSM's funding stagnated, a third of them suffered from **funding cuts** and some public broadcasters were not able to be fully compensated by efficiency gains.

3. SPORTS RIGHTS

Public Broadcasters cannot **compete** with the private ones on buying sports rights, since those represent a huge expense.

On the other hand, PSM may establish **agreements** with **federations** for broadcasting national sports events.

4. DATA MONITORING

In what concerns the Media Industry revenue, data monitoring potential **applications** are huge: **micro-target customer segments, improve product features, and turn distribution channels more effective**, leading to an increase in revenues.

5. COOPERATION BETWEEN PLAYERS

The cooperation between private and public broadcasters is not only important to **tackle competitive pressures, but also to pool budgets and resources** – synergies are created impacting not only costs but also revenues.

Sources: INE; Deco Proteste; EBU - Funding of Public Service Media 2019
More information on Appendix 5

Social factors, such as globalization, covid-19, media consumption, linear broadcasting, and length of the type of content, strongly impact the media industry

PESTLE Analysis

S SOCIAL

1. GLOBALIZATION

Portugal is in 15th place on the World Globalization Index 2019, reflecting its **high level of openness and connection** with other nations, which **strongly affects the Media industry** since there is a large flow of media, sports, and information.

2. SPORTS I COVID-19

Due to the Covid19 pandemic, most **sports events were canceled**, and there were **no broadcasts of sports events. Sports fans moved to eSports platforms**. **Online eSports streaming platforms recorded a 43% jump in viewership**, approximately 495 million hours in one week.

3. MEDIA CONSUMPTION

Since the beginning of the pandemic, **both screen time and media consumption have significantly increased,** since most people were forced to spend **more time at home** and **restrict social and outside activities**. The **consumption of TV on broadcast channels increased by 45% worldwide**, which is very significant and unique for the TV industry.

The **number of users** in the Video-On-Demand market in Portugal has been **increasing** in the past years and it is expected to grow even more. Apart from the **more variety of content** VOD services offer, consumers also appreciate **interactivity** and **customization.**

4. LINEAR BROADCASTING IMPORTANCE

Linear TV continues to play an important role focusing mostly **on 'event TV' content, live sports,** and to a slightly lesser extent, **drama series and soaps**. However, the **convenience** of consuming non-linear content **on-demand** is also an increasingly important factor.

5. LENGTH OF TYPE OF CONTENT

Younger and more tech engaged audiences give preference to online **short-form content**, such as user-generated content, music videos, and **SVOD** content services, providing users the ability to binge entire series most flexibly.

Sources: Statista
More information on Appendix 5

Technology is changing at a high pace, and in order to keep up, broadcasters must continuously invest in developing and adopting innovative tools and processes

PESTLE Analysis

T TECHNOLOGICAL

1. ARTIFICIAL INTELLIGENCE

Technological factors are crucial and have greater impact on the TV industry, and despite the required investment, **most innovations lead to cutting costs or service improvement**. **Artificial Intelligence** has been responsible for the reduction in the time spent by journalists doing repetitive tasks. **Segmentation and recommendation tools** on digital platforms are crucial, in order to deliver a better and more **customized service** to the audience. The great **capability of data analytics** leads to deep insights, making accurate predictions, and generating recommendations.

2. INTERNET 5G

The emergence of 5G allows **faster (up to 100x) and more secure connectivity**, **facilitating** the access and/or production of the content **"on the go"**.

3. MOBILE FEATURES

The **improvements** in mobile phone features (camera, audio, micro, and editing programs) allow **easy filming, editing, and posting of content with mobile devices.**

4. CLOUD BROADCASTING

The cloud enables broadcasters to **improve service availability and accessibility from any device, any time, and can** significantly **reduce the need for physical hardware, servers, and data center capacity, helping to reduce technology costs**. Broadcasters **can store vast amounts of data** in the Cloud, enabling the **generation of a more accurate and trustworthy analysis** of insights, that can lead to high personalization, a better service development, a more unique customer experience and promote one-to-one relationships.

Sources: Deloitte; Digital News Project
More information on Appendix 5

Legal and Environmental factors impact the media industry, especially Public Service Media, since they must bring attention to the environmental crisis topic, providing trustworthy information and implementing measures to address those issues

PESTLE Analysis

L LEGAL

Public broadcasters must provide fair and impartial news, educational programs, politics and sports content, cover special events, bearing in mind the diversity of society and developing the cinematographic art and the audiovisual sector.

There are **limits to advertising and sponsorships** and PSM are only allowed to advertise a few times per day, dedicating more time on the quality programming, rather than on advertising.

Broadcasting piracy has shown a marked increase over time, which includes technology abuses, unauthorized internet content meaning the consumers have access to the content through **illegal websites**.

E ENVIRONMENTAL

1. CLIMATE CHANGE

The **environmental crisis** is one of the biggest concerns of our time, and certainly impacts the broadcasting industry. Being the **climate change** such an urgent and hot topic, it is fundamental to ensure broadcasters are **fully transparent** and **deliver trustworthy information.** Public Service Media organizations have an incremental duty of addressing **environmental issues.**

2. ROLE OF PUBLIC SERVICE MEDIA

The PSM recognises its responsibility, and most of the General Directors have committed to **establish pledges and standards,** to take action and address environmental issues. PSM have been leading initiatives **to reduce carbon footprint**, **purchase renewable energy** and **to remove the single use plastics**. PSM organizations recognize the importance of bringing greater focus to the theme, by reporting and also including it on **content and programming**.

Sources: Projeto Estratégico RTP; EBU; World Intellectual Property Organization
More information on Appendix 5

By looking at RTP's competitors, it is possible to understand that most sport's channels broadcast more than seven modalities, but do not broadcast Amateur Sports in any format

Competition Analysis

	SIC	tvi	SPORT·TV	ELEVEN SPORTS	EUROSPORT	PORTO canal	BENFICA TV	Sporting TV	FUEL TV	11
Monthly Price	Free	Free	25,49 to 59,99€	9,99€	0 to 6,99€	Free	9,90€	Free	Free	Free
Sports Modalities	1	1	7+	12+	50	5	22	35	10	2
No. Channels	1	1	5	6	2	1	1	1	1	1
Amateur Sports	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓
Female Sports	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓
Parasports	✗	✗	✓	✗	✓	✗	✗	✓	✗	✗
Website	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Sports App	✗	✗	✓	✓	✓	✗	✓	✓	✓	✓

Table 5: Competition comparison analysis

To understand the structure of the supply dimension, it is essential to acknowledge the market's competition, where the emergence of new entrants is due to the market's evolution, regarding the upcoming business models and the disruptive technologies

Competition Analysis

- Sports broadcasting has evolved into a **private and internationally distributed asset**, whose rights are strongly subject to **regulation**. The monetary value tends to increase and there is **strong competition,** which generates innovation and technological progress.

- **Public broadcasters have fewer resources** than paid channels. The end of the partnership between the International Olympic Committee and the European Broadcasting Union (EBU) did not facilitate the latter's position in the sports broadcasting market.

- **Disruptive business models** significantly increase the **penetration rate of digital broadcast** and the emerging distribution of multi-platform, which is increasingly resource-efficient.

The media sports' consumption is changing due to the new emerging platforms:

Cable and telecommunications companies that offer a converged network;

Over-the-top services are online platforms operated by third parties, like streaming providers such as Netflix, that can be accessed through Internet-connected devices. Technological innovation-based companies are considered to be strong competitors for the established sports broadcasters;

The emergence of **direct-to-consumer models,** in which sports leagues establish proprietary media outlets and reach sports consumers through several platforms, may **decrease the market's entry barriers** since companies apply a price-based or customer-based strategies.

Sources: The Sports Broadcasting Market, *How cloud computing changes the game in media and entertainment,* Accenture

In order to understand who are RTP Desporto's consumers and their main needs and preferences, in-depth interviews, a segmentation hypothesis, and a quantitative survey were performed

Consumer Analysis | Methodology and goals

Goals

1 **Pre-Recruiting Interviews:** Selecting interviewees for the qualitative interview, based on their interest in sports (practice and watching sports).

Search and filter the **right interviewees** for In-Depth Interviews

2 **In-Depth Interviews:** Interviewing a sample of 33 Portuguese people, aged between 11 and 84 years old and both genders, regarding (1) sports practice, (2) sports viewership, (3) interest in sports and (4) subscription of sports channels.

Understanding the **behavior and attitudes** regarding sports interest

3 **Segmentation Hypothesis:** Based on the analysis of the interviews and syndication with the client, a segmentation hypothesis was formulated.

Understand who may be RTP Desporto's **most relevant consumers**

4 **Quantitative Survey:** Development of a quantitative survey in order to understand the consumer's preferences regarding sport's modalities and linear/non-linear platforms.

Confirmation of the **customer needs and most important preferences**

5 **Recommendations Validation:** Based on the survey's analysis, development of specific recommendations in order to meet the consumer's needs.

Definition of the **product** and **distribution channel** based on the previous analysis

24

The interviews allowed to articulate common interests and behaviors to each segment regarding the practice and visualization of sports, which is essential for the future performance of a survey

Consumer Analysis

LAZY TEAM

- Do **not have an interest** in practicing sports for lack of time or interest.
- **Do not watch sports.**
- Do not feel the need of having a broader offer of content but believe that would be very beneficial for athletes.

Sample from qualitative interviews : 5/33
Sample from quantitative interviews : 142/1000

SELF-MOTIVATED

- Like **practicing sports** to **have fun** and be **healthy.**
- **May watch the sports they practice.**
- Feel that the broadcast of **amateur sport is important** since they can only follow most of their practiced modalities on YouTube.

Sample from qualitative interviews : 5/33
Sample from quantitative interviews : 71/1000

FOLLOWER

- Do **not show much interest** in practicing sports for **lack of time or motivation**.
- Appreciate watching some **modalities live** or through **mobile notifications.**
- Interest in the culture, namely **Olympic Games**
- Believe that **some modalities should be broadcasted on open channels.**

Sample from qualitative interviews : 6/33
Sample from quantitative interviews : 115/1000

ATHLETES

- Passionate for the modality and **practice it very regularly.**
- Like to **follow professional sports through TV,** mostly **big events.**
- **Identify themselves with the effort** of the other athletes and teams, they highly appreciate the **competitive spirit.**

Sample from qualitative interviews : 5/33
Sample from quantitative interviews : 101/1000

SPORTS FANS

- **Not interested or motivated to practice a sport but** are **very enthusiastic about following** sports in general.
- **Watch diverse modalities daily** and can even **subscribe sports channels.** Main focus on **professional events.**
- **Interested in new functionalities** on the television or app.

Sample from qualitative interviews : 6/33
Sample from quantitative interviews : 151/1000

SPORTS ADDICTED

- **Sports are a big part of their lives since they practice and also watch sports** on a regular basis.
- Highly interested in **diverse modalities.**
- Interested in **feminine sports and parasports.**
- Use of different platforms such as **TV, mobile phone and computer.**

Sample from qualitative interviews : 6/33
Sample from quantitative interviews : 317/1000

Table 6: Consumer Analysis based on qualitative and quantitative interviews
More information on Appendix 6 and 7

After analysing both the in-depth interviews and the quantitative survey, six main conclusions were developed regarding age, education, female sports, parasports, the practice of sports, and preferred platform

Consumer Analysis | Main conclusions

Based on the in-dept interviews (33 people) and on the quantitative survey (1000 answers), the team was able to take away six main conclusions:

Age

According to the qualitative and quantitative interviews, **age does not impact the interest in watching sports.** On the other hand, **it influences the practice of sports.**

Education

According to the quantitative interviews, regardless of **having an academic degree, it does not impact the interest in watching sports on a weekly basis.**

Female Sports

According to the qualitative and quantitative interviews, **consumer's need of watching female sports is still not satisfied**. There is not enough offer for the demand required.

Parasport

According to the qualitative and quantitative interviews, **consumers do not watch parasports, mainly** because **they are not yet broadcasted.**

Practice of sports

According to the quantitative interviews, the majority of people **who practices a specific sport**, also **watch that specific sport**, regardless of watching and practicing others.

Preferred platform

According to the quantitative and quantitative interviews, the most **preferred platform** to watch sports is still **television**, although **digital platforms** are becoming more relevant.

Broadcasters and television operators are investing in innovative resources, becoming more interactive, increasing engagement and proximity to consumers

Best Practices | Portugal

RTP PALCO

PROCESS		
MISSION		Offer to all citizens free access to arts, fostering Portuguese culture, extending it in space and time
DISTRIBUTION		Digital platform, app and website, with independent access or through RTP Play
PARTNERSHIPS		Cultural centers, theatres, local authorities, foundations and independent productions
	Original Production & Content Acquisition	Production costs, signal transport costs, and distribution costs; Content acquisition
	Equipment	There are three production levels: (1) high-end: multi-cameras with high-definition; (2) Low-end: multi-cameras with lower image quality and capture; (3) Digital cinematography camera and high fidelity audio

Table 7: RTP Placo Benchmark Analysis

Added Value

SPORT·TV	Vote on the best players	Increased interactivity and consumer engagement
	Participation in debates	
	Facial recognition players	Allows access to players' statistics
	Live Chat	Promotes active participation, with the possibility of sending photos directly to the emission
	Sound Effects	Possibility of recreating the atmosphere of a stadium at home
ELEVEN SPORTS	E-Watch Together	Creating rooms promotes social interaction and makes the game more dynamic
	Live Chat	Allows conversations with players and commentators in real-time
	Hashtag	Boosts sharing, promotes the channel and conveys a sense of community to the user
tvi	QR Code	Allows access to more information
MEO	Interactive Button	Facilitates access to more than 70 apps, and allows to quickly distinguish content type by colour
	Multiview	Users can watch more than one game at the same time
	Timeline option	Selection of the best moments of the games

Sources: RTP Palco; Sport TV, Eleven Sports; TVI, Meo

Table 8: National Benchmark Analysis

(Cont.) Broadcasters and television operators are investing in innovative resources becoming more interactive, increasing engagement and proximity to consumers

Best Practices | International

		Added Value
Rai M4 SPORT TV2/SPORT TV2 SPXRT	Offer a channel exclusively dedicated to sport	They offer sports broadcasts, debates and interviews on television
		Fans can watch sports on a TV screen and on an open channel
		Since sport is the central area of the channel, a greater number of modalities and leagues are possible than in a generalist channel
Rai Sport	Sports Channel	Space to insert various sports modalities and content
	Mobile App	Consumers can review content and have access to games anytime, anywhere
	Integrated platform	Facilitates access to the various distribution channels and strengthens the presence of the brand
	Interactive button	Allows quick access to large event content
	Parasports	The inclusion of parasports reinforces the mission of the PSM
	Segmentation and customization	Youth segments and families are more satisfied with customized content
MAJOR LEAGUE BASEBALL	Augmented Reality	Ability to follow the movement of the ball from the beginning to the end of the play
		Allows viewers to choose modes and viewing angles
		Possibility to acquire extra information from athletes and important moments of the event
NHL	Virtual Reality	Offers consumers the ability to view the game from a front-row perspective
EUROSPORT	Augmented Reality at the 2018 Olympic Games	Possibility to customize the experience according to the preference of each consumer, choosing what and when they wanted to watch
TATA F1	360º live video	Fans' chance to watch the race as if they were inside the car
		Allows foreground observation of the technical team to perfect the car
MotoGP DORNA	OTT platform that combines traditional connectivity with IP	Allows the consumer to have access to content anywhere and through any equipment, with quality

Sources: RAI, M4 sport NHL; Eurosport, Tata Sports; MotogGP; Dorna

Table 9: International Benchmark Analysis

28

(Cont.) Broadcasters and television operators are investing in innovative resources becoming more interactive, increasing engagement and proximity to consumers

Best Practices | International

		Added Value
BBC iPlayer	Exclusive Sports Tab	Allows online viewing of on-demand and live content
		Allows users to find only sports-related content that they are looking for
		Increased available content offer covering any preference
		Promotes flexibility and convenience to the user experience
BBC / BBC Olympic - THE OLYMPIC BROADCASTER	BBC Sport - Olympic Games	Allows users to watch a wider content related to the 2012 Olympic Games
		Possibility to view at any time and place
	Interactive streaming service	Possibility to follow specific players closely, thus allowing a more complete and personalized experience
BBC RED BUTTON+	Augmented Reality	It allows access to additional information on television programming, the live broadcast of sports and cultural events, sports, lottery and weather results, but also the latest national and international news
MY CUJOO	Disruptive broadcast technology	Any user can live stream a game with their phone via the app
		Wide range of competitions
	Interactive digital platform	Promotes interaction between users
ESPN PLAYER	On-demand	Possibility to watch wherever and whenever is most convenient, both live streams and other sports content
	Live broadcasts	
formula-e / FAN BOOST	Voting on preferred athlete	Consumers interact and boost their favourite athletes, creating engagement
NFL	Remote Production	Cost reduction
		Makes the broadcast of leagues and modalities less profitable
		Fans have access to a wider offer
NBC Sports	Sports predictions app	Allows the audience to share their predictions and win prizes, improving their experience

Sources: BBC, BBC Sports; ESPN Player; Formula-e; Fan boost; NFL; NBC

RTP is the Portuguese public service broadcaster, assuming relevance by the quality and diversity of the offer in more than 24 different channels, capturing a wide and heterogeneous audience

Company Overview

Public Mission

- Portuguese Public Broadcaster
- TV + Radio + Online
- More than 24 channels
- More than 1800 employees

- RTP is the **Public Service Media** for radio and television in Portugal. RTP is a reference as a global communication platform. In its **public service mission**, RTP assumes relevance by the **quality and diversity** of the offer, both on **radio and television**, as well as in its available **online** content.

- RTP´s ability to reach a wide and **heterogeneous audience** and to **cover extended segments of population** reinforces **RTP´s contribution to the social, cultural, and economical development of the country.**

85 years of Experience

- RTP is the **largest media company** in Portugal, not only because of the number of **broadcasting channels**, and its wide **offer in audiovisual content**, but also due to its consistent **know-how.**

First regular emissions of Public Radio

First emission of RTP International

Radio, TV and the Online merge in one company: **Rádio Televisão de Portugal**

RTP Palco's launch

1935 **1957** **1992** **1997** **2003** **2011** **2020**

First emission of RTP Television

RTP Online launch

RTP Play's launch
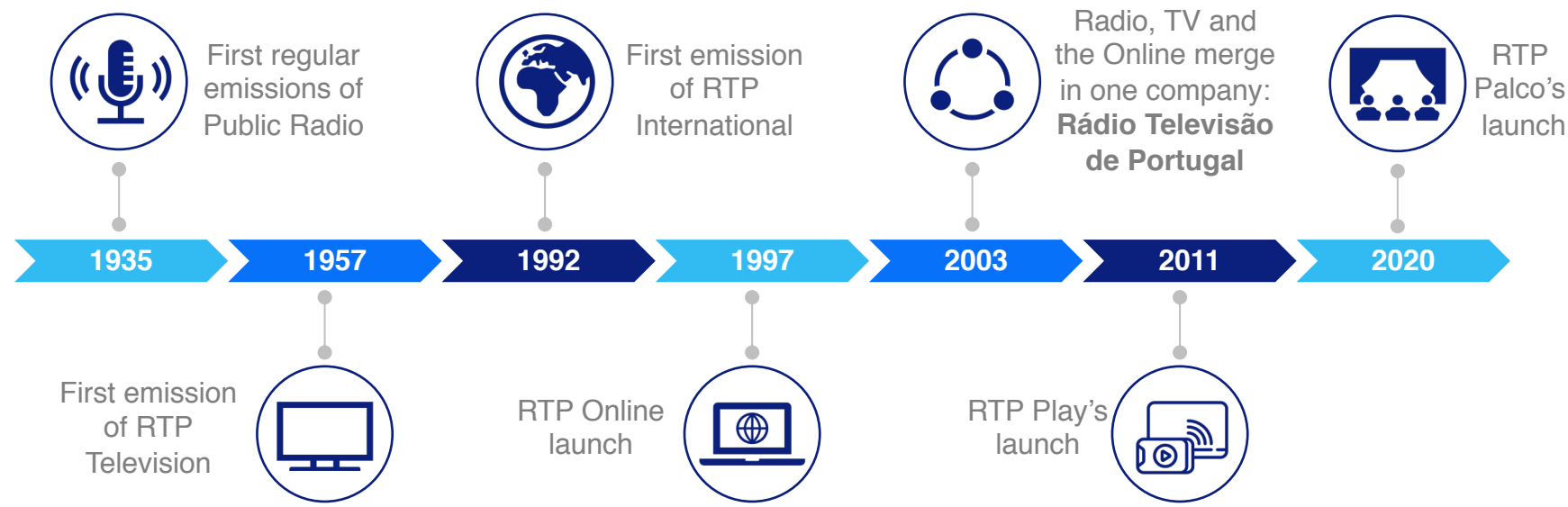
Figure 1: RTP´s Timeline

When the external environment is subject to rapid change, internal and idiosyncratic unique RTP's resources and capabilities offer a more secure basis for strategy, more than market /industry focus, contributing to a sustainable competitive advantage

Resource-Based View Model

The team applied the Resource-Based View Model intending to understand how can RTP leverage its competitive advantage on the market. Analysing both the resources and the capabilities it was possible to classify them regarding their ability to **create value,** their **scarcity** in the competitor's organizations, the difficulty to be **imitated** by the competitors and if the company is **organized**, in order to leverage them through business strategies.

Sustainable Competitive Advantage	Temporary Competitive Advantage	Competitive Parity	Competitive Disadvantage
COMPETENCIES			
Customer Service	Content Development	Financial Management	
	Multi-divisional coordination	Operational Management	
STRATEGIC RESOURCES			
Brand reputation Location Culture	Production and broadcast quality	Equipment	Brand awareness Marketing and communication
ARCHITECTURE OF RELATIONSHIPS			
European Broadcasting Union		Strategic partnerships with broadcasting experts	

Table 11: Resource-Based View Model Competitive Advantages

RTP's sustainable competitive advantage relies on the existence of resources such as: its **brand reputation** that conveys a reliable and trustworthy perception and reflects the quality of the content produced by RTP, as well as its **partnership with EBU,** which allows RTP to have access to exclusive content and to exploit important synergies with other public service media broadcasters in Europe. Therefore, these resources enable the company to **develop value** and **enhance strategies** that **differentiate RTP from its competitors**, allowing the company to boost its competitive advantage.

More information on Appendix 9

In order to capitalize on its strengths and weaknesses, RTP must potentialize the market opportunities and reduce the threats' impact

SWOT Analysis

S1) RTP is a reference as a global communication platform;

S2) RTP's relevance on **radio, television**, and **online** content;

S3) RTP is the **largest media company** in Portugal due to its **know-how;**

S4) RTP's positioning as a **credible** and **notorious** brand;

S5) Significant **international presence** due to its resources, mainly from **EBU.**

W1) The company's target is wide which increases the difficulty to create **content that satisfies everyone's needs, especially younger audiences;**

W2) **RTP's image is perceived as traditional** and the company's **brand awareness** especially on the digital as not reach its full potential;

W3) The company has **PSM's legal obligations** in terms of content and advertising limitations.

S W

O T

O1) **Technological factors** are crucial and have greater impact on the broadcasting industry, and despite the required investment, most innovations lead to cutting costs or service improvement;

O2) The **customer behavior** is evolving to a more digital viewership, valuing the live content broadcasting and an integrated experience.

T1) The **highly competitive environment** has an impact on sports rights acquisition since PSM are not able to compete with private sports broadcasters;

T2) The **customer preferences** are changing, and sports broadcaster may not be able to invest in **new and innovative technologies.**

More information on Appendix 10

The TOWS analysis is a tool to understand external threats and opportunities, while combining them with the company's strengths and weaknesses, providing a more strategic approach to become more competitive

TOWS Analysis

	S	**W**
O	(S2 and O1): The upcoming technological features lead to cutting costs that allow RTP to create more content and provide a better service on the company's channels (radio, television and online). (S4 and O2): As evolving to a more digital viewership, RTP can leverage its credibility and know-how, by investing in an integrated experience.	(W1 and O1): Following the technological trends with a greater impact on the broadcasting industry, RTP can improve its service towards a more digital and innovative service, while reaching the younger audiences. (W2 and O2): In order to keep up with the consumer behaviour, RTP must develop its presence and brand image on the digital platforms.
T	(T1 and S5): The sport's rights market is highly competitive, however, RTP can take advantage of its presence in EBU and have access to the exclusive sports' content. (T2 and S3): Even though customer preferences are changing at a high pace, RTP, being the largest media company, should exploit its know-how to invest in new and innovative technologies.	(W1 and T2): By developing a new promotion strategy, RTP is able to reach younger audiences and communicate its innovative service, while compensating the higher technological investment. (W3 and T1): Moving to the digital environment, RTP can get around its legal obligations and its grid constraints on the television, and fully exploit the sport's rights already acquired.

Table 12: TOWS analysis of RTP's sports broadcasting

Scenario design facilitates the planning horizon in the near future when developing strategies that designate potential future hypothesis

NOVA
NOVA SCHOOL OF
BUSINESS & ECONOMICS

Scenario Planning I 1. Focal Question I 2. Driving Forces

The Scenario Planning framework is structured in five phases. Once the central issue is defined, driving forces should be classified according to their possible impact and level of uncertainty. Subsequently, the two forces with the greatest impact and uncertainty will be chosen, which have no correlation between them. From these forces, four hypothetical scenarios are created.

1. How will the sports' broadcasting ecosystem be in the future?
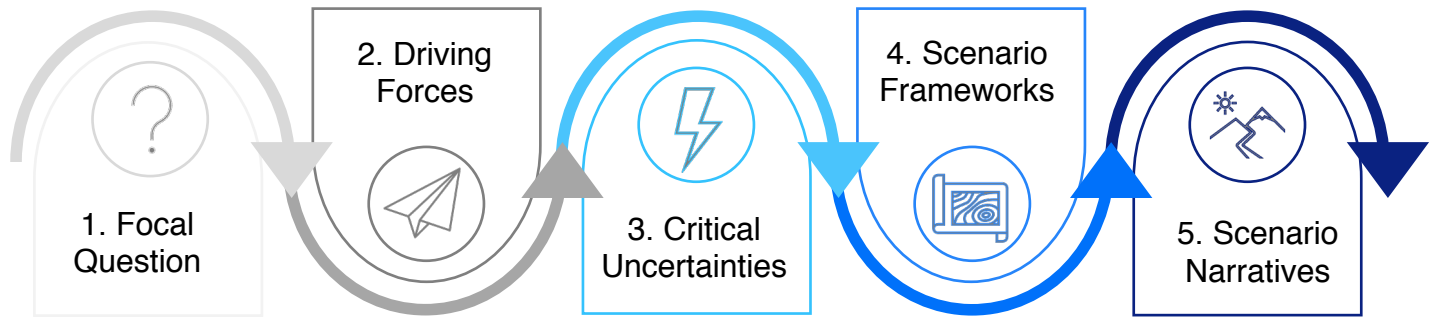
2. CRITICALITY MATRIX
Figure 2: Criticality Matrix

High

Top-left (light blue):
- Regulation of Media companies
- Economical Crisis
- Data monitoring
- Globalization
- Media Consumption
- Aging viewership
- Linear Sports broadcasting
- 5G
- Mobile features
- Legal obligations

Top-right (dark blue):
- EU Political Stability
- PSM Funding
- Federations agreement
- Consumption of TV on broadcast channels
- Broadcasters' Interactivity and engagement
- AI

Bottom-left (grey):
- Government approval of channels
- Quotas regarding original content
- User multitasking
- Length of type of content
- Climate change
- Role of PSM

Bottom-right (blue):
- Cooperation between players
- Video-on-demand
- Demand for in-home large screen entertainment
- Cloud broadcasting

IMPACT (vertical axis, **High** to **Low**)

UNCERTAINTY (horizontal axis, **Low** to **High**)

Flow diagram:
1. Focal Question
2. Driving Forces
3. Critical Uncertainties
4. Scenario Frameworks
5. Scenario Narratives

Source: Deloitte

The macro trends "Federation Agreements" and "Broadcasters interactivity and engagement" have high impact and uncertainty, and thus are the chosen ones for the scenario narratives analysis

Scenario Planning I 3. Critical Uncertainties I 4. Scenario Frameworks

3. CONTINUUM E EXTREMES

End of EU	EU Political Stability	Stable Union
No external funding	PSM Funding	Fully financed
No agreements	**Federation Agreements**	Strong Alliance
No consumption	Consumption of TV on broadcast channels	Consumption strict to broadcast channels
No interactivity nor engagement	**Broadcasters interactivity and engagement**	High Interactive and engagement
Low Adoption	Artificial Intelligence	High Adoption
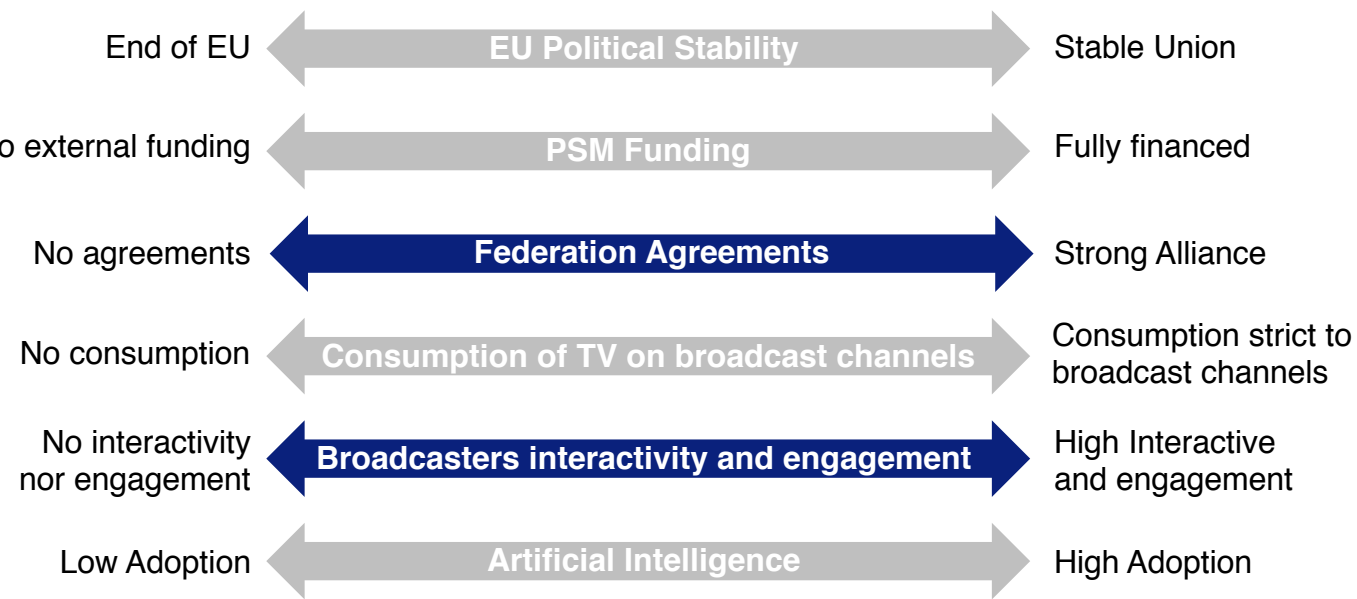
The macro trends **"Federation Agreements"** and **"Broadcasters interactivity and engagement"** were chosen due to their **level of impact and influence on the industry and their low correlation**.

4. SCENARIO FRAMEWORK

Figure 3: Scenario Framework
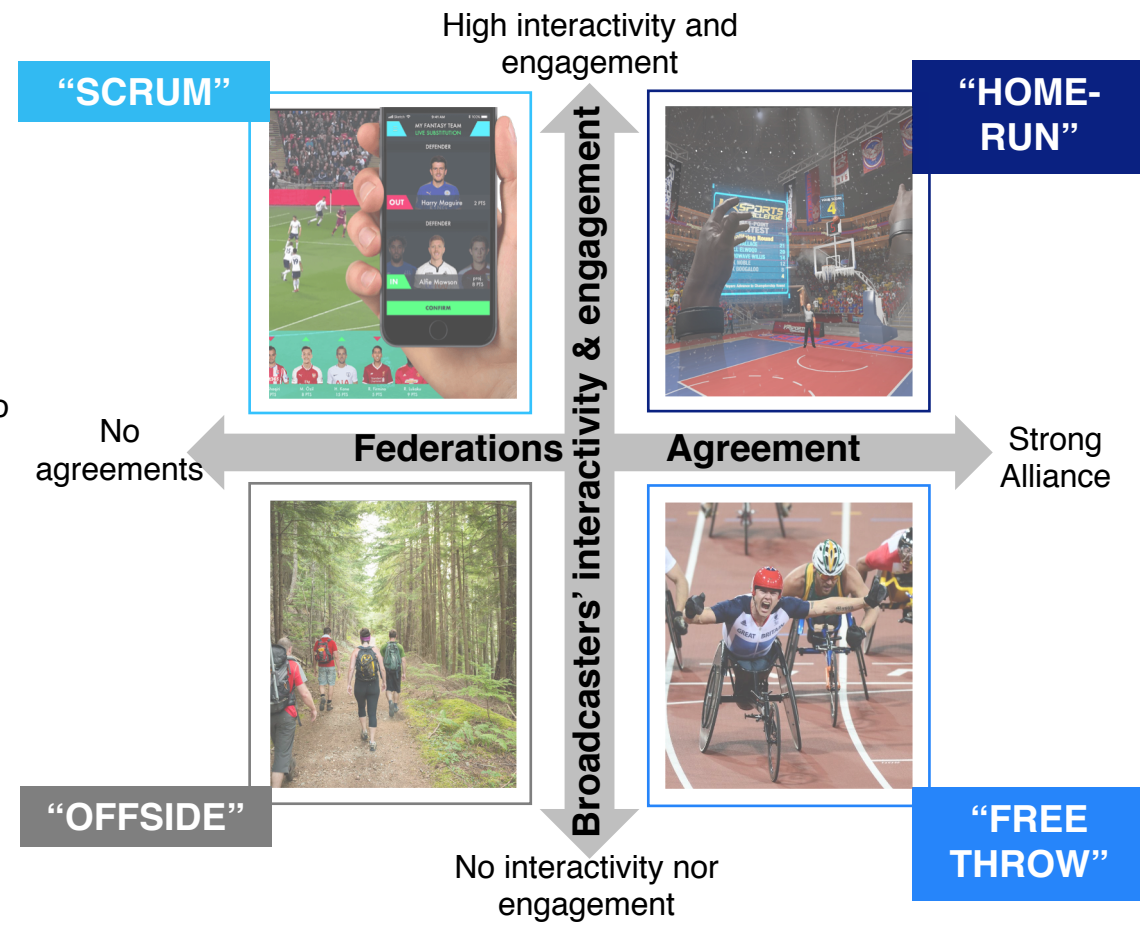
The creation of corresponding personas and narratives enables a better and deeper understanding of each scenario

Scenario Planning I 5. Scenario Narratives

"SCRUM"*

**Low Federation Agreement and
High Broadcasters' Interactivity & Engagement**

David, 20 years

David is a 20-year-old student, who was born in Guimarães. Two years ago, he moved to Oporto to study Engineering. He is a **football fan**, and **before the pandemic, he used to invite** his friends to **watch the game together.** David only **follows the big championships** and whenever it was possible **he would go to the stadium. Nowadays,** David and his friends **create rooms through the broadcaster platform, so they are able to virtually watch the game together,** even though being physically apart. In his free time, David **enjoys playing FIFA and other computer games related to football.**

"OFFSIDE"

**Low Federation Agreement and
No Broadcasters' Interactivity Nor Engagement**

Simone, 48 years

Simone is a 48-year-old woman who is a Portuguese chef and runs her own restaurant as a family business. Simone is a mother and **loves to do outdoor activities.** Simone has a healthy lifestyle, but **she never had a big passion for practicing nor watching sports.** She encourages her children to be active in order to establish good boundaries regarding physical and mental health. Being a typical Portuguese citizen, Simone really **enjoys watching the national football team playing in big competitions** since she can host a lot of friends and family in her house.

(Cont.) The creation of corresponding personas and narratives enables a better and deeper understanding of each scenario

Scenario Planning I 5. Scenario Narratives

"HOME-RUN"

**High Federation Agreement and
High Broadcasters' Interactivity & Engagement**

Serena, 25 years

Serena is a 25-year-old business analyst. During her childhood, Serena had the opportunity to play **volleyball, swimming and tennis** in her hometown, Coimbra. **Nowadays, she plays paddle,** but **she enjoys following other sports as well.** She is very attracted to channels that broadcast **female leagues, from different modalities.** Serena´s friends from her tennis club in Coimbra are competing professionally and since she is far away, she follows their games through an app**.** Serena **values social interactivity** and thus feeling closer to her friends and to her favourite athletes.

"FREE THROW"

**High Federation Agreement and
No Broadcasters' Interactivity Nor Engagement**

Paulo, 55 years

Paulo is a 55-year-old man who, due to a **physical disability**, had to retire sooner. Struggling to practice his favourite sport, Paulo became a **huge fan of sports broadcasting,** once he also finds it very hard to watch live sports' events at a venue. This way, Paulo recently subscribed a package that includes all the **sports broadcasters,** that reached even more **agreements with sports federations to broadcast them on TV**. **Interactivity and digital are not familiar words for Paulo,** and he **prefers the traditional distribution channels of sports content: the TV broadcasters.**

The Blue Ocean Strategy allows companies to explore new market space. In order to better understand how and where RTP Desporto must position itself, a strategy canvas and ERRC Grid were developed

Strategic Approach I Blue Ocean Strategy

The Blue ocean strategy focuses on **pursuing differentiation** and ensuring a **low-cost** approach, in order to explore a new market space and **creating a new demand**. Regarding competition, this approach turns it irrelevant in the short-term, since the organization can create and capture uncontested market space and growing markets.

Red Ocean Strategy	Blue Ocean Strategy
Compete in existing markets	Create uncontested market space
Beat the competition	Make the competition irrelevant
Exploit existing demand	Create and capture new demand
Make the value-cost trade-off	Break the value-cost trade-off
Align the whole system of a firm´s activities with its strategic choice of differentiation and low cost	Align the whole system of a firm´s activities in pursuit of differentiation and low cost

Sources: Blue Ocean by Chan Kim & Renée Mauborgne

Table 13: Red and Blue Ocean Framework

Blue Ocean Approach   1. Current Strategy Canvas   2. Four Actions Framework   3. Future Strategy Canvas

①

The **strategy canvas** captures the current state of play in the known market space, by identifying the factors that the industry competes on and invests in, considering the **strategic** profiles of the major players.

Graphic 5: Current Strategy Canvas

Price | # of Modalities | High Level Championships | Interactivity | Quality of Service | Post/Pre Match | National Representation

— Sports Channels — Free-to-air Channels — RTP
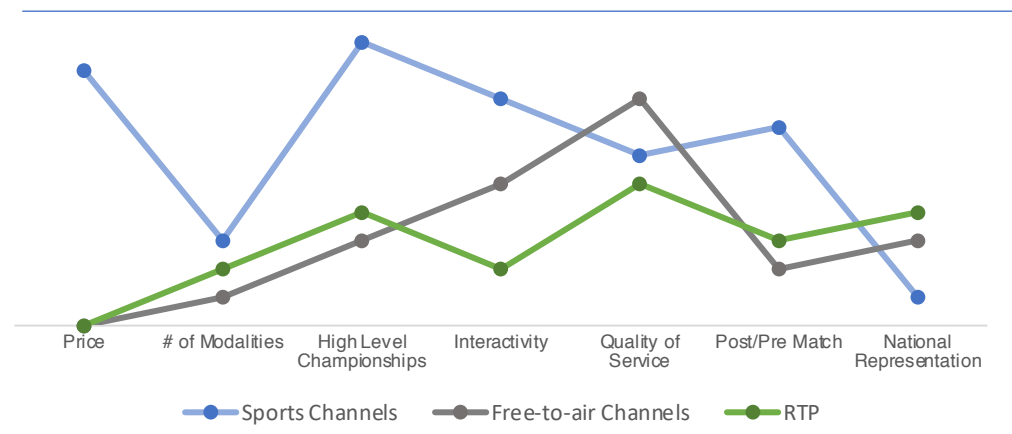
In order to draw the diagram of the current strategy canvas the following four steps were undertaken:

1. **Identification of the competition:** being RTP a free-to-air channel it is crucial to consider other generalist channels, nonetheless, sports channels must also be analysed;

2. **Selection of the factors of competition:** price, number of modalities, high-level championships, level of interactivity, quality of service, post/pre-match shows, and national representation;

3. **Evaluation of competition:** the players were placed according to each factor´s level;

4. **Own competitive strategy:** currently RTP does not have a competitive differentiation strategy.

After the current strategy canvas, the Four Actions Framework enabled to state the key factors to eliminate, raise, reduce and create in the new market. RTP Desporto will differentiate by broadcasting female and parasport, and on-demand content

Strategic Approach I Blue Ocean Strategy

2

The Four Actions Framework is an essential tool of Blue Ocean Strategy, that allows organizations to focus not only on eliminating and reducing but also on raising and creating while unlocking a new blue ocean.

Eliminate

Post/pre match shows
Waste of sports rights

Raise

Number of modalities
High level championships
User experience - interactivity
Quality of the service
National representation events

Reduce

Process complexity
Inequality (gender and disabilities)

Create

Broadcast female sport and parasport
On-demand sports content
Sports Integrated Platform (App and Website)
New interactive functionalities
Partnerships with federations

Sources: Blue Ocean by Chan Kim & Renée Mauborgne

Table 14: ERRC Grid

3

After analysing the Current Strategy Canvas and develop an ERRC grid, according to RTP´s main objectives regarding this project, a **Future Strategy Canvas** was performed. RTP Desporto will **create new factors** for RTP and will **start competing on the unexplored market of female sports**, **parasport** and **on-demand sports-related content**.

Graphic 6: Future Strategy Canvas

Graphic 6: Future Strategy Canvas — axis labels: Price, # of Modalities, High Level Championships, Interactivity, Quality of Service, Post/Pre Match, National Representation, Female Sports, Parasport, Sports related content on-demand. Legend: Sports Channels, Free-to-air Channels, RTP Desporto
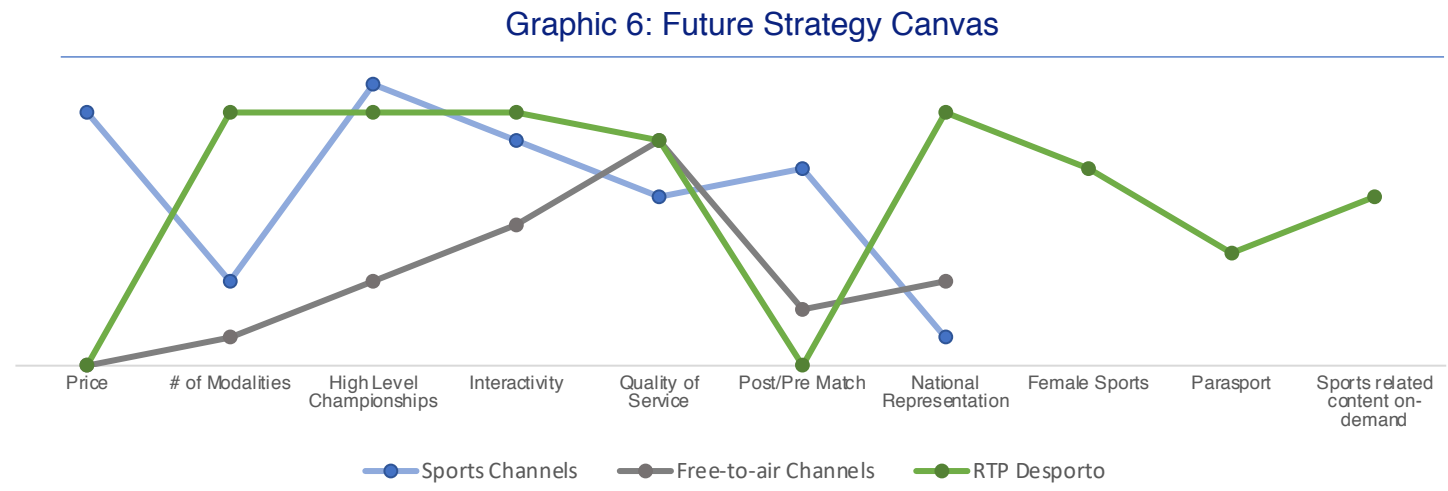
The priority matrix allows to identify the impact and ease of implementation of the proposed recommendations, being possible to highlight the quick-wins and the major projects

Priority Matrix: Ease of Implementation vs. Impact
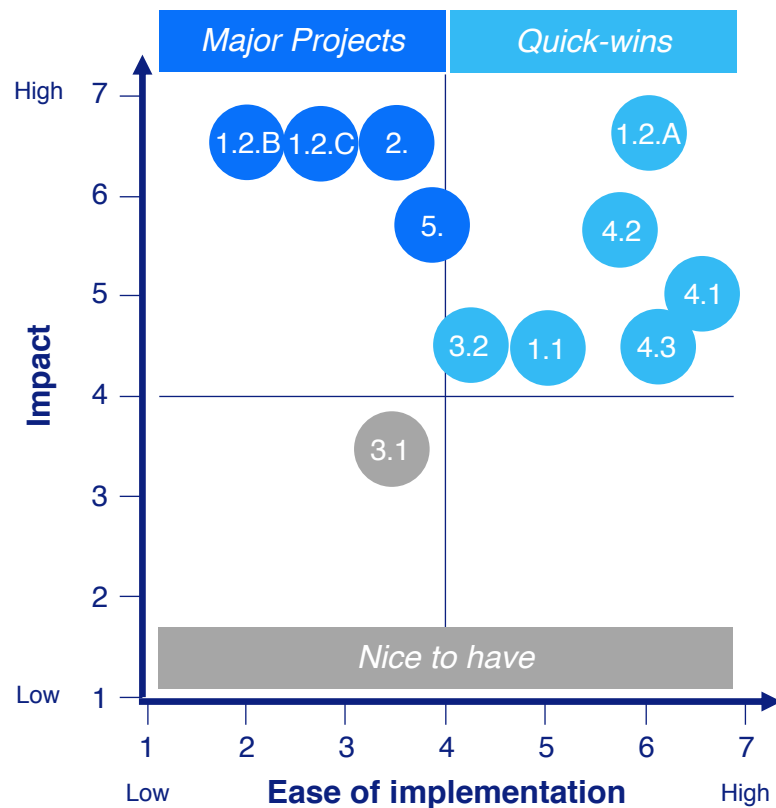
Recommendation	Product	Distribution	Promotion	People
1.1 On-Demand Content Streaming	●			
1.2.A. Live sports event broadcast - Model A	●			
1.2.B. Live sports event broadcast - Model B	●			
1.2.C. Live sports event broadcast - Model C	●			
2. Develop a digital sports platform		●		
3.1 Offer multiple features	●			
3.2 Deliver a personalized experience	●			
4.1 Investing in Digital Marketing			●	
4.2 Partnerships with Ambassadors and Influencers			●	
4.3 Investing in Advertising Spots			●	
5. Develop an organizational strategy				●

Table 15: Impact of the recommendations on the marketing-mix framework

● *Major Projects:* Actions that have high impact but require some effort to implement

● *Quick-Win*s: High-impact, easy-to-implement actions

● *Nice to have:* Less impact actions

Figure 4: Priority Matrix

40

In order to tackle the existing market gap in sports broadcasting, RTP must expand the content offer, partner with different entities, and thus, add value to both the consumer and the company

Recommendation 1: Provide a broader and more diverse content offer

Recommendation

Gap Assessment

- There is a lack of provision of certain modalities in open channels, and only paid channels can address this gap nowadays.

- There is a **significant gap** in the broadcast of **female, parasport and national representations events.**

Recommended Solution

- **Offer different modalities, including women's and parasports**, while representing **amateur sport**.

People

Partners

- The partnership with **federations** facilitates the reach of various **sports and events.**

- The creation of **contracts** benefits both parties, in terms of costs and return.

Consumers

- The **range of content is aimed to all segments** and includes **sports practitioners** who have more difficulty in watching the type and **modality they practice due the lack of offer.**

- The **most relevant segments** are **Sports Addicted** and **Sports Fans.**

Value Proposition

Consumers

- Have **access to wider sports offer**, that includes the broadcast of different modalities and relevant content on-demand.

- **Consumer's needs will be satisfied**.

RTP

- It allows the company to **underline the importance of sports** and to give relevance to less broadcasted modalities.

- It allows not only to **broadcast female and parasports**, based on the principle of **diversity** but also to **reach a broader audience,** becoming more relevant in the sports market.

The existing market gap is also focused on the broadcast of other levels of professionalism besides the professional, where RTP should as well focus on amateur sports, as it is proven by the consumer analysis

R1
R2
R3
R4
R5

Analysis: Broadcast of various professionalism levels

Survey

72% V/VaL documentaries with athletes

56,47% V/VaL documentaries with sports clubs

65,5% want to watch amateur sports

71% of those who watch sports daily or weekly, want to see amateur sports.

External Analysis

- The main focus of sports channels is **professional sports,** and thus RTP has the **opportunity** to broadcast new content, expanding its audience.

- Broadcasting different levels of professionalism **may impact younger generations**, motivating them to be more active and healthier.

- **Amateur sport faces great difficulties** due to the pandemic, and RTP must promote them.

- **No platform represents all national teams and representations of Portugal**.

Internal Analysis

- RTP's main focus is professional football, but also broadcast other professional modalities such as basketball, athletics and in the future handball, among others.

- **RTP believes that amateur sports are relevant**, and it must be broadcasted in documentary format.

Note: V/:VaL Values or Values a Lot

The principles of universality and diversity of RTP must also be applied in the sports broadcasting, with the inclusion of female sport, and consequently, give the possibility to RTP to expand its audience

Analysis: Female's sports broadcast

Survey

82,28% want to watch female sport

78,8% of men and **85,9%** of women want to watch female sport; from the ones who practice sports, **79,76%** of men and **94,77%** of women, want to watch female sport.

83,29% of respondents who watch sports weekly or daily want to watch female sport

External Analysis

- **1/3 of federated sports practitioners are women.**

- Since the main focus of sports channels is male sports, RTP has the **opportunity** to broadcast both genres.

- A greater emphasis on **female sport** allows the **destruction of cultural barriers**, mainly the distinction between female and male sports, and impacting the pay gap.

Internal Analysis

- **RTP** is already **starting to focus** more on the **broadcast of female sport.**

- A greater focus on female sport supports the **principle of universality**, by offering diversified content to its audience, and also the **principle of diversity**, since gender equality is addressed.

Sources: Pordata

In order to enhance the RTP´s offer of sports content, RTP must include the broadcasting of parasports, setting the stage for diversity and inclusion

Analysis: Broadcast parasports

Survey

80,7% want to watch sports practiced

by people with disabilities

83,3% of people who watch sports daily or weekly,

would like to watch parasport

External Analysis

- In Portugal, there are **1368 practitioners with a specific disability**, whether physical or mental.

- Most public broadcasters broadcast the Paralympic Games. However, broadcasters such as **RAI Sports** and the **BBC invest** more frequently in **parasport broadcasting, promoting equality.**

Internal Analysis

- RTP, as a public broadcaster, **meets the principles of universality equality**, when offering diversified and inclusive content to its audience, and promotes equal opportunities and exposure to parasports.

- **RTP is investing in including parasports** in its programming for the upcoming years.

In the universe of sports broadcasting, it is clear the priority given to football and the consumer's need to have access to a more diversified modalities' offer

Analysis: Broadcast of various modalities

Survey

Graphic 7: Most Viewed Modalities

Modality	Value
Rink Hockey	12
Rugby	14
Badminton	26
Swimming	29
Paddle	33
Combat Sports	40
Triathlon	47
None	53
Gymnastics	54
Volleyball	63
Athletics	66
Futsal	83
Surf	89
Handball	94
Cycling	119
Others	122
Basketball	145
Motor Sports	178
Tennis	186
Football	606
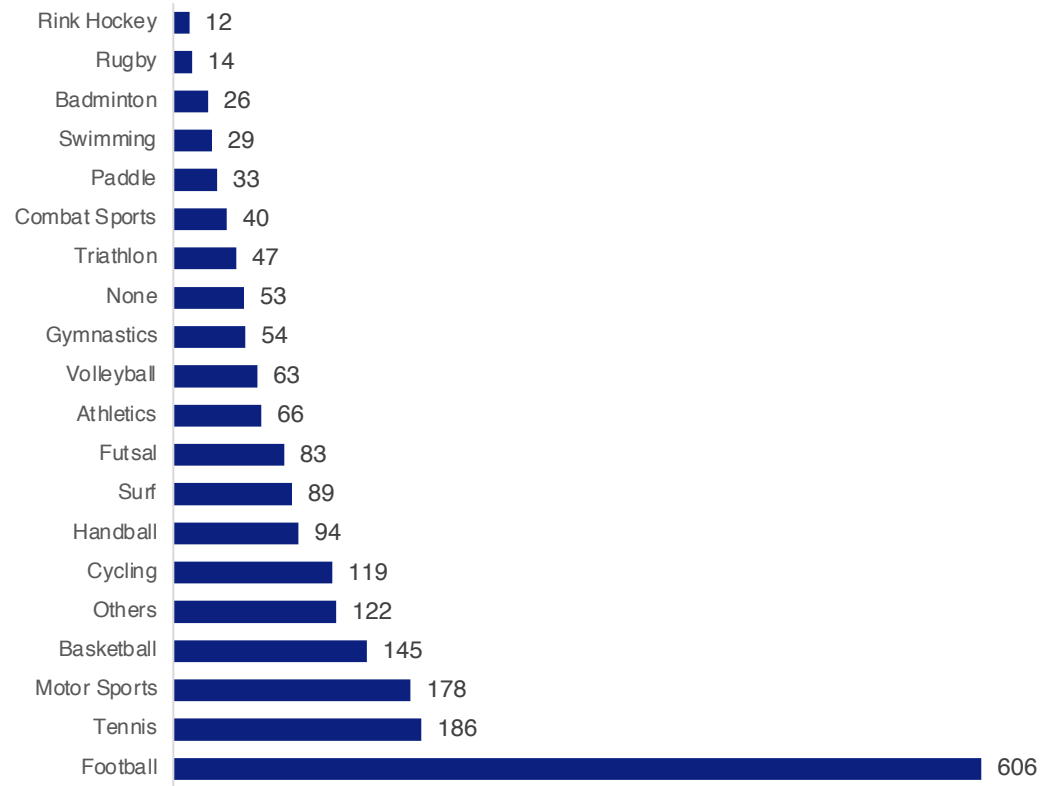
96% of the people who practice sport, watch sports

77,8% watch the sport he/she practices

60,6% watch football, being the most watched sport

17,6% want to watch a modality that no channel broadcasts

Modalities in which people expressed a **lack of offer**:

- Rugby
- Gymnastics
- Horse Riding
- Rink Hockey
- Triathlon
- Paddle
- Volleyball

45

The audiences' favourite modalities in the broadcasting of female sport and parasport are different. The practice of sports in Portugal is very relevant, and football is the most practiced modality

Analysis: Broadcast of various modalities

Survey

Graphic 8: Top 10 female sports modalities chosen

Modality	%
Paddle	10%
Triathlon	10%
Basketball	12%
Handball	14%
Swimming	17%
Surf	19%
Athletics	20%
Tennis	28%
Football	28%
Volleyball	32%
Gymnastics	38%
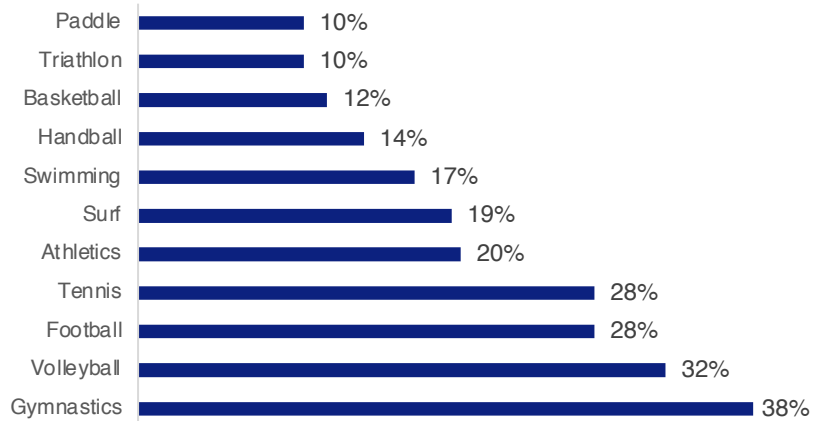
Graphic 9: Top 10 parasports modalities chosen

Modality	%
Voleyball	13%
Triathlon	16%
Boccia	16%
Handball	17%
Surf	19%
Football	19%
Gymnastics	19%
Swimming	27%
Basketball	28%
Athetics	28%
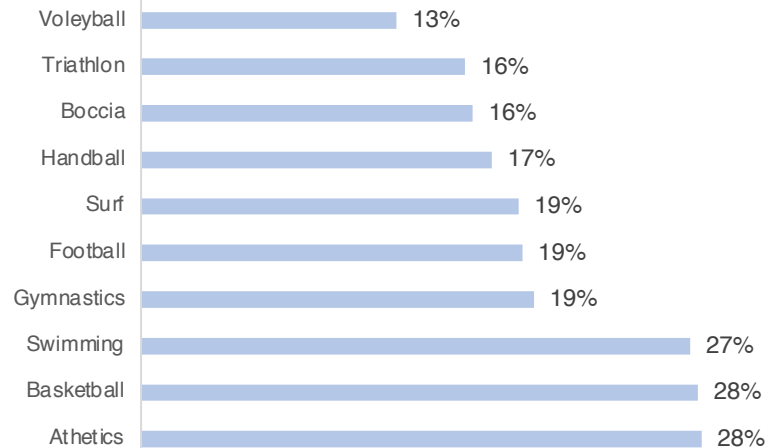
- The audience's preference for gymnastics, volleyball, football, and tennis over women's sport stands out.

- In parasport, the preferred sports are athletics, basketball, and swimming.

External Analysis

Graphic 10: Federated Sports Athletes in Portugal

Modality	Athletes
Football	189 417
Swimming	89 755
Handball	49 661
Volleyball	44 739
Basketball	39 247
Montain…	25 915
Gymnastics	19 866
Tennis	18 839
Athletics	18 147
Skating	16 587
Cycling	16 448
Golf	15 257
Judo	14 363
Karate	13 988
Rugby	6 573
Horse Riding	6 075
Paddle	4 332
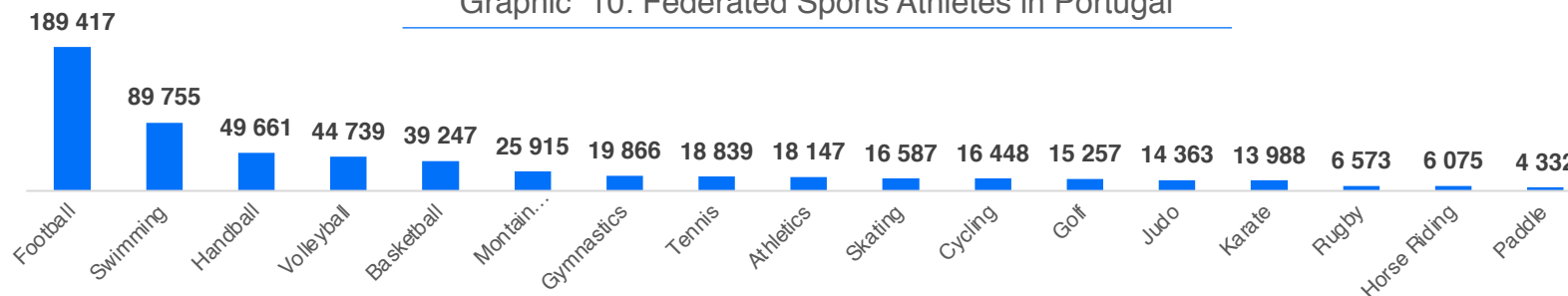
The predominance of football players is denoted, despite the significant number of practitioners of various modalities.

Source: Pordata

46

A partnership strategy between sports federations and broadcasters allows sport to reach a wider audience. RTP has already developed partnerships with federations, namely with Portuguese Basketball Federation

Analysis: Best Practices - Partnerships

External Analysis

- Partnership between **Sky Sport** and **International Paddle Federation**: one of the best-known sports broadcasters, Sky Sport, broadcast the European Paddle Championship. The main value proposition for the federation was to have the possibility to promote its **athletes, sponsors, and investors**. Since Paddle is not used to be broadcast live, this partnership has allowed offering a **different experience to consumers.**

- **BBC** established a partnership with the **English Rugby Federation**, where the production of the event was in charge of the BBC, broadcasting the content on the **iPlayer** digital platform.

Internal Analysis

RTP has already established a partnership with the **Portuguese Basketball Federation,** that can serve as an example for future partnerships. The partnership is stated as follows:

- RTP broadcasts the basketball sports competitions, whose broadcast **rights were ceased free of charge** by the Federation, although **RTP** assumes the **costs of editing and signal transport.**

- The Federation assumes the **production costs**: the production is external to the federation, ensuring the minimum production requirements and the production model is previously **validated by RTP**. In order to compensate the federations, RTP displays 4 **sponsorship cards** during each broadcasted event, as well as the **self-promotion** of the events' broadcast.

Source: Padel World Press; BBC

RTP Desporto will excel in the diversity of content including on-demand content, that will stage various athletes, clubs and stories in documentary and interview format

Recommendation 1.1: broadcast of On-Demand content

Investing in **on-demand content**, such as clubs and athlete's documentaries, and interviews will allow RTP to **offer content with high quality,** giving the opportunity to professionals to expose their talents, thus underlining its **public service mission** and **following the trend of on-demand content.**

These will be **produced by RTP** and **will be broadcasted on RTP Desporto**, in various formats considering the **relevance**, the **potential number of spectators,** and the **degree of professionalism**, being the main objective to be the **stage of amateur and parasport, both female and male.**

Added Value

- Sharing inspiring stories
- Public's identification with athletes
- Allows RTP to establish a closer relationship with the public
- Being the stage for amateur and professional sports
- Promoting a more active and healthy life
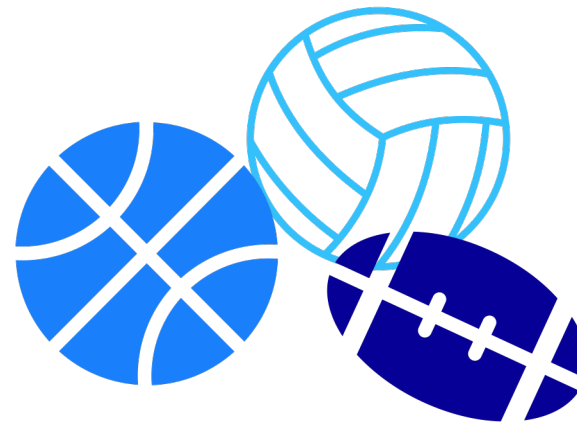
Format

- 3, 10 and 30 minutes documentaries
- Platform launch documentary
- Interviews with sports personalities

Content

- Stories of personal overcoming
- Pre-competition
- "A day with..."
- Moments of glory
- Clubs stories
- History of sport X

RTP Desporto should be the Selections' Home and the Federations' Stage, offering consumers a broadcasting service, which extends to a wide range of quality modalities and events

Recommendation 1.2: Broadcast of Sports Events

National Teams' Home

RTP Desporto should be the **National Teams' Home,** where consumers can find **high-quality sports** practiced by Portuguese and follow all **selections and Portuguese representations at the international level.**

Federations' Stage

RTP Desporto should be the **Federations' Stage**, where consumers can find **high-quality sport practiced in Portugal** as well as follow a range of modalities, and their most relevant events.

Value Proposition

RTP

- Gateway for all modalities
- Credibility
- Strong and impactful message
- High-quality content
- Public service mission fulfilled

National Teams

- Increased visibility
- More prestige for the sport
- Recognition of the dedication and work of athletes
- Inclusion of less exposed modalities
- Inclusion of parasport
- Inclusion of women's national teams

Consumers

- It will be easy to find Portugal representations' events
- Offer of high quality content, satisfying the core segments: Sport Addicted and Sports Fans

RTP should consider the three models for sports broadcasting, bearing in mind production, editing, comments, and costs

Recommendation 1.2: Live Sports Events Broadcast | Production Models

In order to offer more modalities and competitions, it is imperative to develop models that fit the **degree of relevance** of each specific event. Thus, three models were developed, taking into account **production**, **editing**, **comments,** and **costs**. The choice of each of these models must comply with the selection criteria, and be validated by RTP.

	Model A	**Model B**	**Model C**
Production	RTP is responsible for the production and international rights acquisition	External company, approved by RTP, is responsible for production with little equipment	The federation is responsible for the production in light format, approved by RTP
Editing	RTP and External	External	RTP´s responsibility when graphics are required
Comments	RTP Commentators	RTP commentators or advised by the federation and validated by RTP	RTP commentators or advised by the federation and validated by RTP
Costs	High and supported by RTP	Low, supported by RTP and federation or club	Very low, supported by RTP (comments) and federation or club

Table 16: Models A, B and C divided in terms of production, editing, comments and costs

Model A is suitable for live content with more relevance in terms of audience and quality of the sport practiced, taking into account television and digital broadcasting

Recommendation 1.2: Live Sports Events Broadcast l Production Models

Model A

- Suitable for sports of **extreme relevance** in terms of audience and quality of sport;

- Model used in **television broadcast** content;

- This model is mostly applied to **international competitions** whose rights are acquired by RTP and it must follow specific **broadcast protocols;**

- Characterized by the extreme **image quality**, **sound,** and **commentators;**

- **Several cameras** are required, in order to capture **different angles** and replays of the most important moments;

- It offers a **more complete** and **satisfying experience** to the consumer;

- Example: all content acquired from EBU must have this format, as well as competitions that justify the necessary investment.

Model B applies to the events broadcasting with a very significant relevance, and it is necessary to establish commercial counterparts that leverage the success of the RTP's contract with the federations

Recommendation 1.2: Live Sports Events Broadcast l Production Models

Model B

- It applies to sports and events with some relevance in terms of audience and quality of sport;

- Model already used in some RTP2 broadcasts, namely basketball;

- Since large parts of these costs will be in charge of the federations, it is necessary to establish a model of counterparts;

- It features an average image, sound, and commentator quality;

- Few cameras are required, however, the process is carefully designed.

Commercial Counterparts l Digital and Television

Based on the **federation's broadcast cost** and the **market value of the modality**, RTP can provide a customized offer of commercial counterparts focused on the

digital model, giving visibility to the sponsors of the sports events. Also, RTP can complete its offer of commercial counterparts to federations through **advertising**

visibility on television, namely sponsorship cards.

Takeover	Pre-roll video	Mrec/Mrec and Halfpage/Hp Expandable		Leaderboard

CPM = 190€ l 15"   CPM = 185€   CPM = 60€   CPM = 185€   CPM = 60€

Model C applies to the events broadcasting with less relevance, in which federations are in charge of the entire production taking in consideration RTP´s minimum conditions

Recommendation 1.2: Live Sports Events Broadcast l Production Models

Model C

- It applies to sport's events with **less relevance** in terms of **audience** and **quality of sport;**

- In order to ensure the **minimum conditions** of **image** and **sound quality**, RTP will have to provide a **best production practices handbook** in advance, and the federation or club must ensure the possession of a **tripod** and **mobile phone of good quality.**

Minimum Conditions for Production and broadcast

1 **Excellent quality mobile phone***

- Frame-per-second superior of 30
- Video setting never less than 4k
- Network type: 4G
- Mobile data

Huawei P30 Pro
≈ 700€

iPhone X
≈ 950€

Samsung Galaxy S20
≈ 950€

iPhone 12
≈ 980€

2 **Powerbank**

3 **Tripod**

Tripod Manfrotto Compact Action ≈ 80€

4 **Microphone**

Interface IK MULTIMEDIA iRig ≈ 46€

Lavalier microphone BOYA BY-M1DM ≈ 25€

5 **Gorilla Pod**

Tripod Joby Gorilla pod ≈ 17€

* The phones shown serve as an example of good quality equipment. Among those presented, the most recommended is the iPhone 12 since it is the most used phone by Mobile Journalism Experts.

Sources: Interviews to Mojo experts (Internal research); FNAC; Worten.

For model C, RTP must point out the conditions and tips for higher quality filming, as well as the digital protocols to be used

Recommendation 1.2: Live Sports Events Broadcast l Production Models

Filming Conditions and Tips	Digital protocols l SRT and RTMP

Space conditions

- Inside vs outside;

- Size of the enclosure;

- Number of athletes involved;

- Lighting conditions.

Shooting directions

1. Camera positioning;

2. Additional equipment required;

3. Need for artificial lighting;

4. Graphics:
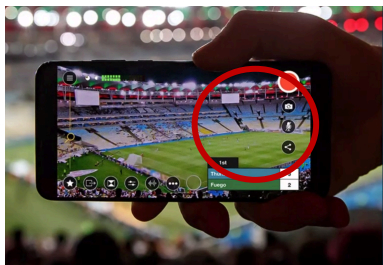
Solutions such as **Switcher** allow editing the broadcast at the moment, following a template created by RTP.

Sources: DaCast; WMSPanel; Switcher.

SRT: Step-by-step

1. Go to settings and create a new connection

2. Set the recipient URL and include the server address and SRT receiver

3. Enter the password provided by RTP

RTMP: Step-by-step

Recorder   RTMP Server

Clients
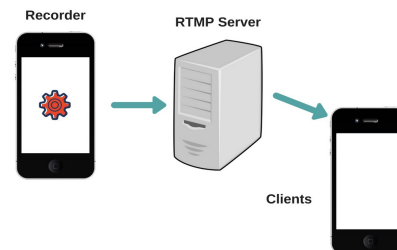
1. Record with the camera

2. Power RTMP encoder

3. Send the video to the online platform

4. Prepare video for delivery to consumers

In order to enable the efficient broadcasting of live sports events, RTP must establish partnerships with the federations of the various modalities, maintaining as a point of contact the Portuguese Sports Confederation

Recommendation 1.2: Live Sports Events Broadcast l Partnerships

- Both **RTP** and the federations will play a key role in the **Curatorship of Sport**, **identifying which competitions and clubs are relevant** and drawing up an **agenda.**

- Through the Portuguese Sports Confederation, **the federations are RTP's advisor**, allowing the channel to be aware of sports events.

- **RTP will always have to approve** all sports content, as well as the broadcast format, while ensuring that minimum conditions are guaranteed.

Confederação do Desporto de Portugal

In order to defend the sport's mission and to represent sports federations, CDP will facilitate the **contact between RTP and the associated federations**, encouraging the live broadcast of diversified modalities.

Federations

Each federation differs according to various criteria, from the size of its **budget,** the **type and relevance of the events**, as well as the **shape of their broadcast**. Thus, also considering the needs of RTP, it is essential to establish partnerships within the three models: A, B and C.

RTP

Exploiting synergies within institutions, the broadcast of sports events becomes **efficient**, **optimizing resources** from both RTP and federations. With the ultimate objective of **maximizing the offer of sports content**, it is essential to **establish specific contracts** for each case, in order to meet the **broadcasting needs of each modality.**

RTP must carefully select the modalities to be broadcasted live, in order to meet the interest of the Portuguese audience and to address the existing market gap

Recommendation 1.2: Live Sports Events Broadcast | Modalities and Events

The **modalities** will be chosen according to the following criteria:

Possibility of filming	RTP's Interest
Interest of the federation	Interest of respondents
More than 1000 practitioners in Portugal	

Events will be chosen according to the following criteria:*

Relevance of events	Sport quality of the event
Representation of parasport	Representation of both genders
The events of the top 3 to 5 clubs	

*A detailed list of sport´s competitions can be found on Appendix 13

Based on the criteria defined, RTP **shall include the following modalities** for the **broadcast of live sport's events on the digital platform:**

Individual Or Peer Sports

- Athletics
- Skating
- Boccia
- Tennis
- Cycling
- Table tennis
- Horse Riding
- Triathlon
- Gymnastics
- Motorsports
- Paddle

Team Sports

- Handball
- Goalball
- Basketball
- Hockey
- Sports Dance
- Rink Hockey
- Football
- Rugby
- Futsal
- Volleyball

Water Sports

- Bodyboard
- Canoeing
- Swimming
- Surf
- Rowing
- Sailing

Combat Sports

- Judo
- Karate
- Kickboxing
- Taekwondo

RTP should contact federations to introduce the live sports broadcast on the platform, and proceed to the selection and production of on-demand content. It shall maintain constant monitoring of the results

Implementation Plan

Implementation

Task	Areas
On-Demand Content	
Search and select interesting stories	RTP Desporto
Produce the various on-demand content formats	RTP or external production
Sports Broadcast, national teams and clubs	
Establish and maintain contact with federations	RTP Desporto
Develop partnership models	RTP Desporto
Select modalities, respective events to broadcast and production model	RTP Desporto
Establish of contracts - detail of each partnership in terms of processes and resources	RTP Desporto
Define a content schedule	RTP Desporto
Develop a Best Practices Handbook	RTP Desporto

Table 17: Recommendation 1 Implementation Roadmap

The schedule should be set at the beginning of each year together with federations. RTP should be prepared to update it regularly.

Monitoring

Key Performance Indicators
Number of views
Break-even Point – number of advertising campaigns views required of to cover the federations production costs
Number of documentaries and interviews broadcast over one year
Number of documentary views vs. interviews
Number of views of short-lived vs. long-lived documentary
Number of views of each modality
Number of final views vs. start/intermediate phases
Number of on-demand vs. live content views
Number of partnerships with federations (detail model)
Profitability of Model B partnerships - commercial counterparts
Reviews on the AppStore and PlayStore

Table 18: Recommendation 1 Monitoring Roadmap

To ensure that the launch of RTP Desporto will be 5 months after the approval of the project, it is necessary to follow the schedule of the tasks proposed up to that time

Timing

🚩 RTP Desporto's Launch

Task	Duration	1	2	3	4	5	6	7	8	9	10	11	12
Search and selection of exciting stories; Production of the various formats of on-demand content	Ongoing				▓	▓	▓	▓	▓	▓	▓	▓	▓
Establish and maintain contact with federations	2 to 3 months		▓	▓									
Development of partnership models	1 week			▓									
Select modalities, respective events to broadcast and production model	2 months				▓	▓							
Establishment of contracts - detail of each partnership in terms of processes and resources	2 months				▓	▓							
Define a content schedule	2 months				▓	▓							
Development of a Best Practice Handbook	2 months				▓	▓							
Creation of RTP Desporto's platforms (based on the RTP Play Framework)	3 to 5 months	▓	▓	▓									
Development of broadcast and second-screen features:													
Multi-view					▓	▓	▓	▓	▓	▓	▓	▓	▓
QR Code (Integration with linear TV system)	Ongoing				▓	▓	▓	▓	▓	▓	▓	▓	▓
Alert notifications	Ongoing				▓	▓	▓	▓	▓	▓	▓	▓	▓
Highlights	Ongoing					▓	▓	▓	▓	▓	▓	▓	▓
Multi-screen	Ongoing				▓	▓	▓	▓	▓	▓	▓	▓	▓
Login	Ongoing		▓	▓	▓	▓							

Table 40: Timing Recommendations 1, 2 and 3

(Cont.) To ensure that the launch of RTP Desporto will be 5 months after the approval of the project, it is necessary to follow the schedule of the tasks proposed up to that time

Timing

Table 41: Timing Recommendations 4 and 5   🚩 RTP Desporto's Launch

Task	Duration	1	2	3	4	5	6	7	8	9	10	11	12
Creating an Instagram account and strategy	1 month					■							
Development of launch content and first events to be published	2 months				■	■							
Paid posts on social media and Google Ads	Ongoing				■	■	■	■	■	■	■	■	■
Develop RTP Model – Ambassador	1 month					■							
Contact chosen ambassadors	2 months				■	■							
Ensure ambassadors share the content publicly	Ongoing					■	■	■	■	■	■	■	■
Establishment of the long-term contract	1 month					■							
Develop RTP Model - Influencer	1 month			■									
Establish contact and proposed objective with chosen influencers	2 months				■	■							
Development and deliver of the Press Kit	2 months				■	■							
Development of content to publish on television and radio channels	3 months			■	■	■							
Establish the programming of each content to be promoted	Ongoing				■	■	■	■	■	■	■	■	■
Promoting RTP Sport in existing programes	2 months					■	■						
Presentation of athletes and clubs' documentaries	Ongoing						■	■	■	■	■	■	■
Transfer the team of the previous direction of sports rights and production	2 months	■	■										
Recruit internally and externally to ensure all the functions of the new RTP Sport team in television and digital	2 months	■	■										
Ensure that the profiles of employees chosen for the various functions ensure the success of the platform	2 months	■	■										
Train new employees for the mission and vision of both the department and the digital platform itself	2 months			■	■								
Implement a new internal comunication system	3 months			■	■	■							

97

Some limitations were found during the project, being the lack of data availability related to the sports industry the greatest challenge faced

Limitations

Data availability: The analysis of the project's impact was hampered by the lack of data available regarding the sports industry in Portugal, the public's interest in digital sports content, whether on-demand or live. It is crucial to understand the interest of consumers for each specific modality and implicit events, which is one of the selection criteria for broadcast. Hence it is necessary to equate market value, which is not available in the database.

Contact with federations: To contact the federations of the various modalities, the team had to maintain the confidentiality inherent to the project, and therefore could not mention the name of RTP as the television station interested in the broadcasts. The team believes that not identifying RTP has made it difficult to get feedback. However, the Portuguese Sports Confederation was available to communicate with the federations.

Impact of the pandemic: The uncertainty adjacent to the possible course of the COVID-19 virus affects the sports agenda for 2021, making it difficult to carry out the programming proposal for live broadcasts of the previously chosen events.

Technical complexity: The team does not have enough expertise to design technical procedures: technology related to the creation of the platform, development of features to be included in it and the signal broadcast process related to models B and C recommended in the project. However, the client's presence was essential in mitigating this limitation.

Survey: The sample of 1000 respondents does not strictly follow the characteristics of the Portuguese population. Regarding age, there is little representation of the age groups up to 16 years and from 65 years onwards. However, further analysis was conducted, and it was possible to conclude that age does not impact the consumer behaviour in this subject. The possible impact of sports not specified in the survey is also a challenge and makes it complex for respondents to account and value these modalities in the sports industry.

The recommendations presented pose risks to RTP, so it is important to study its causes, its probability and impact on the organization and potential responses that mitigate those risks

Risks

🟢 Low 🟡 Medium 🔴 High

	RISK	CAUSES	PROBABILITY	IMPACT	POTENTIAL RESPONSE
General	Expected impact forecast failed	Lack of data on the potential number of digital viewers	🟡	🟢	After launching the platform, monitor the number of viewers and readjust the impact
	Implementation delay	Lack of internal resources	🟢	🟡	Readapt the timings of implementation plans and readjust required resources
	Budget error	Lack of financial data	🟡	🟡	Budget restructuring
I	Lack of collaboration with federations	Lack of resources on the federations' part	🟡	🟡	Adjust and offer better counterparts or strengthen the benefits of the partnership through CPD
		Lack of interest from federations in having their own channel	🟡	🟡	
	Cancellation of sports' events	The current pandemic situation may cause the cancellation of some competitions	🟡	🟡	Bet on on-demand content with greater relevance in order to replace major events
II	Not being able to offer a customized product	Inefficient data management	🟢	🟡	Make the algorithm more efficient
	Little impact of features	Audience does not value the features	🟢	🟢	Explore other features
	Inability to produce content that enhances the success of features	Lack of resources to produce content	🟢	🟡	Invest in human resources (internal or external) capable of producing

Table 42: Risk Analysis

99

(Cont.) The recommendations presented pose risks to RTP, so it is important to study its causes, its probability and impact on the organization and potential responses that mitigate those risks

Risks

🟢 Low 🟡 Medium 🔴 High

	RISKS	CAUSES	PROBABILITY	IMPACT	POTENTIAL RESPONSE
III	Higher costs than expected	External company may state a higher budget than expected	🟢	🟡	Analyze new partners in the market
	Delay in the platform development	External company may not be able to develop the platform in the expected time	🟢	🔴	Readapt timings or analyse new market partners
IV	Ambassadors and Influencers show no interest	Non-agreement of the contract Lack of identification with the product	🟢	🔴	Renegotiate partnership model or choose other personalities
	Low public engagement	The strategy on social networks does not have the expected impact	🟢	🟡	Readapt content and review digital strategy
V	Disapproval of recommended structure	Negative opinion of management and ERC	🟡	🔴	Keep sports in the information direction
	Failure of the coordinator proposed by the administration	Negative opinion of the ERC	🟢	🔴	Selection of someone else to perform the role
	Difficulty in adapting to the new organizational structure	Resistance on the part of the various departments	🟡	🔴	Improving internal communication systems

Table 43: Risk Analysis

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APPENDIX

The Nova SBE team will be fully available to meet client´s needs using the tools and methodologies developed during the academic life

The team

Beatriz Matoso

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"I was able to acknowledge the importance of syndication in order to build a trust relationship and to develop successful work with the client."

The team

B E A T R I Z   M A T O S O

EDUCATION I EXPERIENCE

- Bachelor in Economics at Nova SBE
- Masters in Management at Nova SBE
- Intern at the Permanent Mission of Portugal to the United Nations (2018)
- Finance Trainee at Siemens (2019)

TETRAMAP

Fire: "Like the sun is bright". This element always look at the positive side of work, and never excludes a possibility

Water: "Help us acknowledge diversity for our caring and wellbeing". Always holding the team together

KEY LEARNINGS

The Consulting Lab with RTP allowed me to experience a real-life consulting project. I was able to acknowledge the importance of syndication in order to build a trust relationship and to develop successful work with the client. Moreover, for the past months, I had the chance to work with brilliant team workers and learn from them.

BELBIN
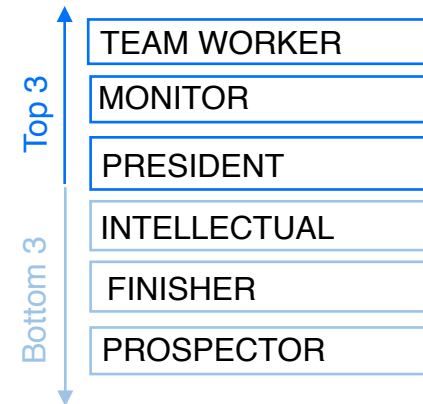
Top 3
- TEAM WORKER
- MONITOR
- PRESIDENT

Bottom 3
- INTELLECTUAL
- FINISHER
- PROSPECTOR

Team Worker: Team workers are not only good listeners but are also characterized by having an effective internal communication, always supporting team members.

Monitor: Monitors carefully consider all angles and possibilities and then devise an insightful solution.

President: Delegates tasks effectively and clarifies the goals of the project.

114

"I am thankful to everyone who was a part of this consulting lab for allowing me to grow, to become a better listener and to develop my "syndication" skills with the client"

The team

C A T A R I N A   C A R V A L H O

EDUCATION I EXPERIENCE

- Bachelor in Business Administration at Faculdade de Economia do Porto
- International Masters in Management at Nova SBE
- Hotel management trainee (2019)

TETRAMAP

Fire: "Like the sun is bright". This element always look at the positive side of work, and never excludes a possibility

Water: "Help us acknowledge diversity for our caring and wellbeing". Always holding the team together

KEY LEARNINGS

This project showed me, once more in my life, that teamwork is essential for the success of a project. I am thankful to everyone who was a part of this consulting lab for allowing me to grow, to become a better listener and to develop my "syndication" skills with the client. Having a "hands-on experience" with a real consulting project made me realize that this is the path I want to pursue in the future.

BELBIN
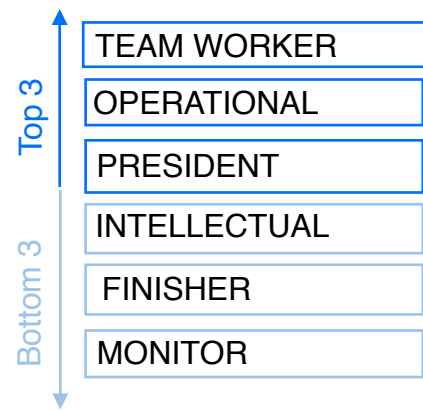
Top 3:
- TEAM WORKER
- OPERATIONAL
- PRESIDENT

Bottom 3:
- INTELLECTUAL
- FINISHER
- MONITOR

Team Worker: Team workers are not only good listeners but are also characterized by having an effective internal communication, always supporting team members.

Operational: always prepared for putting in practice the team's projects and ideas.

President: Delegates tasks effectively and clarifies the goals of the project.

"Collaboration and syndication with the client were the key to the project's success and communication is essential when working in a real-life consulting project. "

The team

JOANA VALENTE

EDUCATION I EXPERIENCE

- Bachelor in Management at ISCTE Business School
- International Masters in Management at Nova SBE
- Digital Channels Intern at NOS (2020)

TETRAMAP

Fire: "Like the sun is bright". This element always look at the positive side of work, and never excludes a possibility."

Earth: "Take us forward to achieve goals."

KEY LEARNINGS

Having the opportunity to develop the Master's Project with a distinguished company like RTP was a memorable learning experience. Collaboration and syndication with the client were the key to the project's success and communication is essential when working in a real-life consulting project. Also, being surrounded with extraordinary team-players endorsed the importance of learning with each other and maximizing every one's potential.

BELBIN
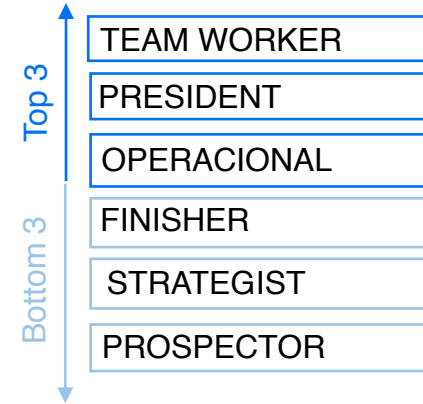
Top 3
- TEAM WORKER
- PRESIDENT
- OPERACIONAL

Bottom 3
- FINISHER
- STRATEGIST
- PROSPECTOR

Team Worker: Team workers are not only good listeners but are also characterized by having an effective internal communication, always supporting team members.

President: Delegates tasks effectively and clarifies the goals of the project.

Operational: always prepared for putting in practice the team's projects and ideas.

116

"Besides the splendid team I worked with, this experience gave me the opportunity to work with the client and not for the client, to be creative, but also resilient, in order to drive success for RTP"

The team

M A R I A   M A T E U S

EDUCATION I EXPERIENCE

- Bachelor in Economics at Nova SBE
- Masters in Management at Nova SBE
- Business Consultant at Glintt (2018-2019)
- Retail Intern at NOS (2020)

TETRAMAP

Fire: "Like the sun is bright". This element always look at the positive side of work, and never excludes a possibility

Water: "Help us acknowledge diversity for our caring and wellbeing". Always holding the team together

KEY LEARNINGS

During this Work Project, I had an extraordinary opportunity of working in a consulting project, with a renown client as RTP, and I couldn't be more grateful for how much I have grown and learnt from it, in professional and personal levels. Besides the splendid team I worked with, this experience gave me the opportunity to work with the client and not for the client, to be creative but also resilient, in order to drive success for RTP.

BELBIN
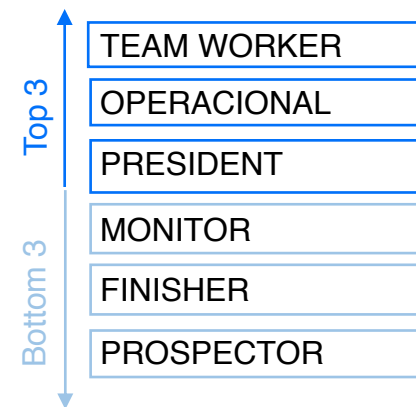
Top 3

| TEAM WORKER |
| OPERACIONAL |
| PRESIDENT |

Bottom 3

| MONITOR |
| FINISHER |
| PROSPECTOR |

Team Worker: Team workers are not only good listeners but are also characterized by having an effective internal communication, always supporting team members.

Operational: always prepared for putting in practice the team's projects and ideas.

President: Delegates tasks effectively and clarifies the goals of the project.

117

Deductive reasoning clarifies the motivations that explain why RTP should expand its portfolio of sports broadcast content

Deductive Analysis

Should RTP develop a sports platform?

WHY?

Supply | **Demand** | **Trends** | **Public Service Media**

In Portugal, generalist channels have a limited sports content offer
- Limited Modalities
- Mainly focus on football
- Only big events broadcasts
- Lack of female sports
- No amateur sports
- Lack of parasports

Sports channels that require a monthly fee, are able to deliver a wider range of sports content and a better user experience
- Content
  - Different Modalities
  - Some female sports
  - Only big championships
- User Experience
  - Omnichannel distribution

Due to the pandemic situation, audience is not allowed. Broadcasting is the only solution to enable people to follow sports

Sports are part of the cultural dimension of the Portuguese population
- Football is the most preferred sport for the Portuguese audience
- There is a significant number of practitioners affiliated to a certain sport's federation

Consumers prefer customer-centric solutions
- Targeted content and recommendations
- High interactivity and engagement
- High quality content

Technological innovations are changing the broadcasting industry
- Video-on-demand content is gaining relevance
- Advancements in augmented reality and virtual reality
- Investment in automation/agile processes
- Broadcast using lighter technologies
- Media industry is investing in connectivity and interactivity

PSM mission of delivering a wide range of contents

Promote social diversity and inclusion

The inductive reasoning was conducted for a deeper understanding of how can RTP power RTP Desporto by expanding sports broadcasting content

Inductive Analysis

Should RTP develop a sports platform?

HOW?

Product

Distribution

Promotion

People

Content

Partnerships Model

Consumer Experience

TV

App

Website

Physical Marketing

Ambassador and Influencers

TV

Marketing Online

Ownership

Degree

Gender

Modalities

Physical/ mental disability

Federations

Interactivity

Customization

RTP 1

RTP 2

RTP Play

New Platform

Social Media

Profissional

Amador

Individual/ pair

Group

Aquatic

Combat

Augmented Reality

QR Code

Live Chat

Suggestions

The definition of recommendations in the product dimension is subsequent to the study of the hypotheses formulated, taking into account the survey, internal and external analyses and also benchmark

		Hypothesis	Recommendation	Validation	Criteria
PRODUCT	Content	Broadcast sport of various **levels of professionalism**	Professional is broadcast and amateur in documentary format	✓	Survey External interviews Internal Analysis Market Analysis
		Broadcast sport of **various genres**	Broadcast women's and men's sport	✓	Survey External interviews Internal Analysis Benchmark Market Analysis
		Broadcast sport of people **with disabilities**	Broadcast parasport	✓	Survey Internal interviews Internal Analysis Benchmark Market Analysis
		Broadcast sport of **various modalities**	Broascast certain modalities	✓	Survey Internal Analysis Benchmark Market Analysis
	Experience	Offer multiple features	Stream certain features	✓	Survey Benchmark Internal Analysis
		Offer personalized experience	Allow login, specific alerts	✓	
	Partnerships	Establish partnerships with federations	Develop a strategy for the production and broadcast of federation events	✓	Benchmark Internal Interviews and to federations

Considering the same selection criteria, certain assumptions in the distribution and promotion dimensions were eliminated, while the remainder were approved for recommendation

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		Hypothesis	Recommendation	Validation	Criteria
DISTRIBUTION	Television	Stream more sports content on RTP 1 and RTP 2	-	❌	Internal Analysis Internal interviews Benchmark
		Own sports channel	-		
	App	Develop a sports content streaming app	Create the RTP Desporto app	✅	Questionnaire Internal Analysis Benchmark Market analysis
		Add a sports strand on RTP Play	-	🕐	Internal Analysis
	Website	Develop a website for the broadcast of sports content	Create RTP Desporto website connected with RTP Play	✅	Questionnaire Internal Analysis Benchmark Market analysis
PROMOTION	Physical Marketing	Invest in physical marketing to promote the platform	-	❌	
	Embaixadores e *influencers*	Invest in ambassadors and influencers to promote the platform	Establish a model of ambassadors	✅	Internal Analysis Market Analysis Benchmark
	TV Channel	Promote the platform on the station's own channels	Develop advertising spots on channels	✅	
	Digital Marketing	Invest in digital marketing to promote the platform	Investing in social networks and online ads	✅	

121

The definition of recommendations in the dimension of people is subsequent to the study of the hypotheses formulated, considering internal analyses, best practices and internal interviews

		Hypothesis	Recommendation	Validation	Criteria
PEOPLE	People	Establish platform ownership and workflow	Develop a Sports Department	✅	Internal Analysis Internal Interviews Best Practices

The participation given by the IPDJ is distributed by the various sports federations, however they are given different values

Sports' Sector Analysis l Europe and Portugal

Financing by sports federation l 2017

Football 21%
Athletics 19%
Handball 17%
Skating 7%
Cycling 7%
Tennis 6%
Basketball 6%
Rugby 6%
Swimming 6%
Voleyball 5%
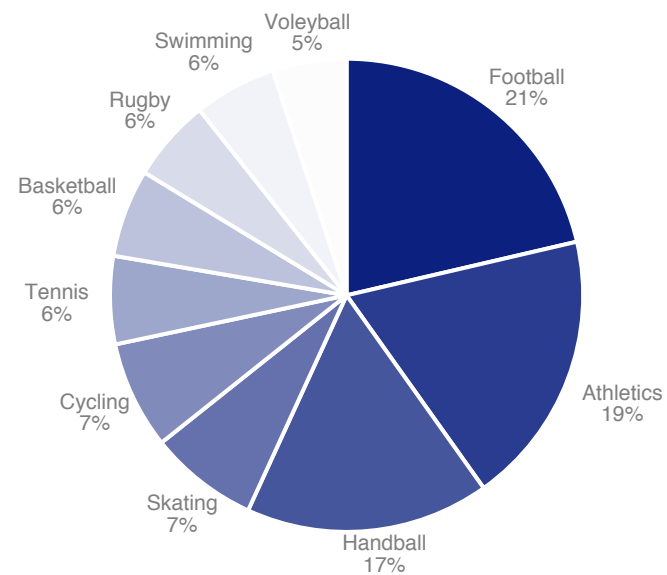
The IPDJ provides financial, technical and human resources. There is a division amongst the diverse sports modalities.

Football represents the **biggest co-funding with 21%,** followed by **athletics with 17%.**

Sources: IPDJ

123

Covid19 Pandemic led to an economic crisis and due to that, the unemployment rate is expected to continue to grow until the end of the year, impacting the Licence Fee Funds of PSM

PESTLE ANALYSIS

E   **ECONOMICAL**

1. ECONOMIC CRISIS

Due to Covid19 pandemic, it is very likely **to occur an economic crisis** worldwide, especially in Portugal.

Evolution of the Portuguese Unemployment Rate
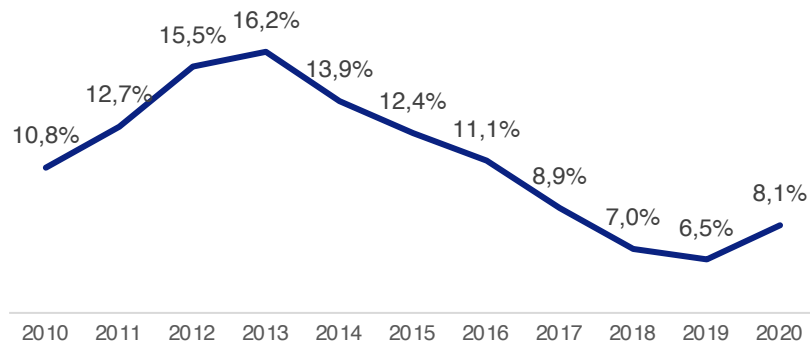
- Therefore, the **unemployment rate** has already started to **rise up** and it is expected to continue to grow on the last trimester of the year.

PSM Funding Mix in the EBU Area
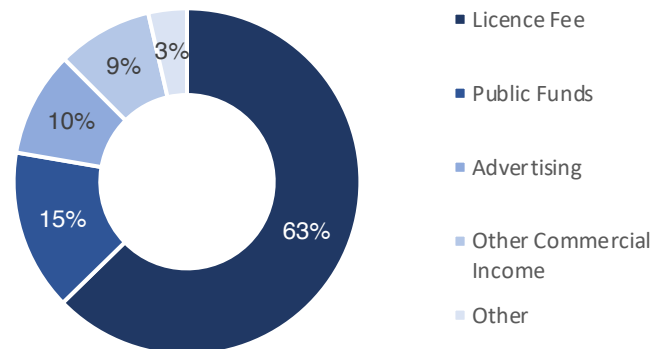
- Licence Fee
- Public Funds
- Advertising
- Other Commercial Income
- Other

- PSM are mainly **financed by Licence Fee funds**, supported by their citizens.

- The higher the unemployment rate, the lower Licence Fee funds. There are special conditions for those who receive unemployment allowance.

- As a consequence, PSM may have **less funds for buying content such as sports rights** and develop innovative platforms.

Sources: INE; Deco Proteste; EBU - Funding of Public Service Media 2019

Some PSM are facing funding cuts which can compromise their ability to ensure innovative content and processes and the purchase of sports rights

PESTLE ANALYSIS

E **ECONOMICAL**

2. FUNDING CUTS

> • Although it may seem that Public Service Media' funding stagnated, a third of them suffered from **funding cuts**. Due to this, some public broadcasters were not able to be fully compensate by efficiency gains.

Evolution of PSM Funding by Organizations (% 2017-2018)

- 34%
- 34%
- 32%

- Funding Increase
- Funding Cut
- Funding Stagnation
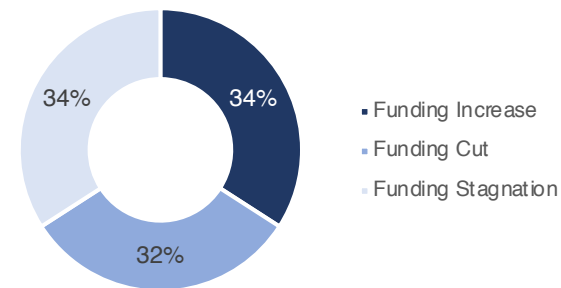
3. SPORTS RIGHTS

> • Public Broadcasters cannot **compete** with the private ones regarding the purchase of sports rights, since those represent a huge expense.
>
> • On the other hand, PSM may establish **agreements** with **federations** for broadcasting national sports events.

Sources: EBU - Funding of Public Service Media 2019; Federação Portuguesa de Futebol

Data analytics and monitoring allow TV broadcasters to be more efficient. Cooperation with players may create synergies and thus, decrease costs and rise up revenues

PESTLE ANALYSIS

E **ECONOMICAL**

4. DATA MONITORING

Data is a crucial corporate asset, however, only a small fraction of its value is captured. The EU public sector is only able to capture 10 to **20% of the potential value**, thus not only their services could be more efficient but they were also able to **reduce fraud** and potentially **increase annual savings**. In what concerns the Media Industry revenue, data monitoring potential **applications** are huge: **micro-target customer segments, improve product features and turn distribution channels more effective**, leading to an increase in revenues.

5. COOPERATION BETWEEN PLAYERS

Cooperation, collaboration and co-productions between **private** and **public broadcaster** are essential to ensure the survival of the latter. The cooperation is not only important to **tackle competitive pressures but also to pool budgets and resources** – synergies are created impacting not only costs but also revenues.

Sources: McKinsey; Public Media Alliance

The world is becoming more connected and globalization facilitates the access to international sports, news and other content

PESTLE ANALYSIS

S **SOCIAL**

1. GLOBALIZATION

Globalization is a process of **creating networks** of connections among **people**, **companies**, **organizations** and **governments** of different nations. The globalization index considers flows of people, information and ideas, capital and goods. Globalization leads to a growing and complex **interdependence** of **economies, cultures, technologies** and **governance.**

- Portugal is in the 15th place of the World Globalization Index 2019, reflecting its **high level of openness and connection** with other nations.

- The **globalization** level of Portugal **strongly affects the Media industry,** since there is a large flow of media, sports and information.

Top 50 countries in the Globalization Index 2019

Series1

91,19

72,47
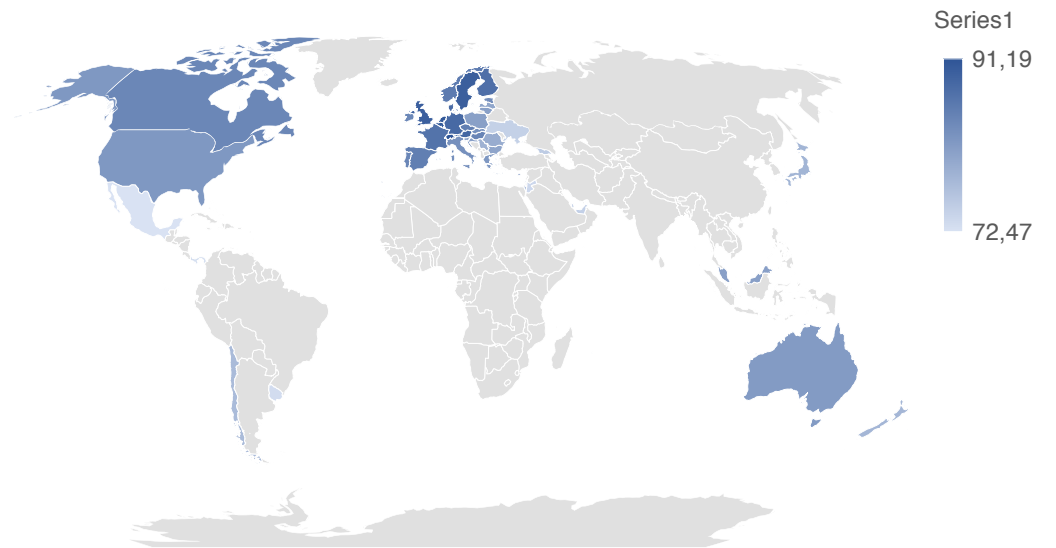
Com tecnologia Bing
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Sources: Statista

Due to Covid19, sports events were cancelled, there was no sports events broadcasting and consequently the demand for eSports rose up. TV can also play an important role bringing sports to the audience

PESTLE ANALYSIS

S SOCIAL

2. SPORTS | COVID-19

- Due to Covid19 pandemic most of **sport events were canceled** for weeks, and consequently there were **no broadcasts of sports events**, affecting the programming of media services.

- **Sports fans were frustrated** during Covid19 since all matches were cancelled, and as an alternative, **they moved for eSports platforms** like Twitch, YouTube Gaming where they could also connect with their friends.

- **Online eSports streaming platforms recorded a 43% jump in viewership**, approximately 495 million hours in one week.

- Even though the games are already happening, no audience is allowed, being the **tv the only way for sports fans to follow their teams**.

Sources: Reuters

Due to Covid19, people were forced to stay at home and consequently, there was an increase in the media consumption

PESTLE ANALYSIS

S **SOCIAL**

3. MEDIA CONSUMPTION I COVID-19

- Since the beginning of the pandemic, **both screen time and media consumption have significantly increased,** which can be explained by the fact that most of the people were forced to spend **more time at home** and **restrict social and outside activities**.

- The **consumption of TV on broadcast channels increased by 45% worldwide**, which is very significant and unique for the TV industry.

Consuming Media at Home Due to the Coronavirus 2020

Legend: Worldwide, Italy, Spain, France, Germany, United States, United Kingdom

Sources: Statista; Deloitte

129
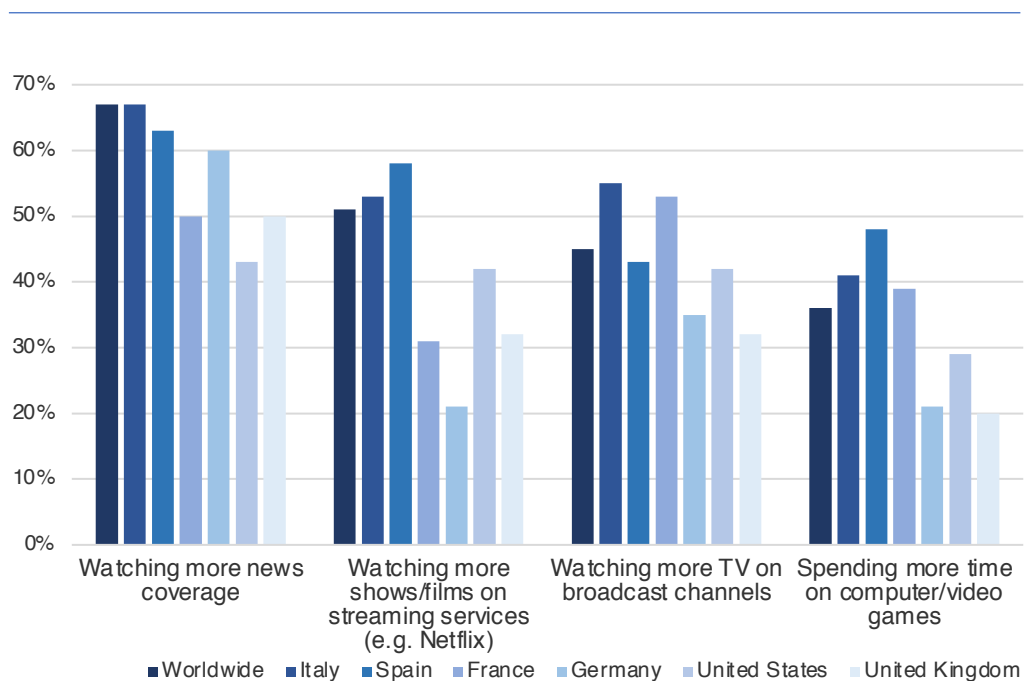
The rising demand for Video-On-Demand content is justified by the increasing number of users, as well as the emergence of VoD players, which are changing the media consumption environment

PESTLE ANALYSIS

S SOCIAL

3. MEDIA CONSUMPTION I DEMAND FOR VOD CONTENT

- Consumers have been moving from **traditional video consumption**, like television, to **Video-On-Demand services**, as they value a lot the **convenience** of choosing freely when and/or where to watch the content.

- Apart from the **more variety of content** Video-On-Demand services offer, consumers also appreciate a more **interactive** and **customized experience**.

- The number of **Netflix** and **Amazon Prime Video** subscribers are constantly rising, and the amount of **time customers spend watching** videos has grown too.

Users in Video-On-Demand market in Portugal
(in millions)
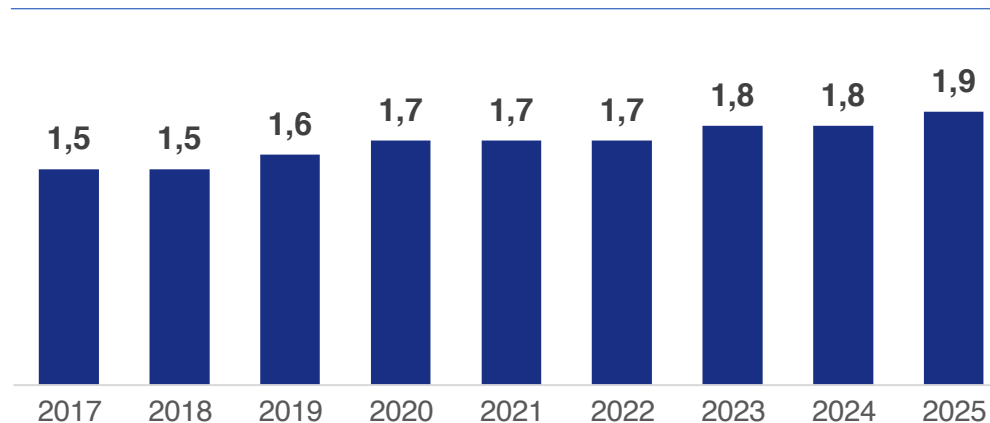
2017	2018	2019	2020	2021	2022	2023	2024	2025
1,5	1,5	1,6	1,7	1,7	1,7	1,8	1,8	1,9

The **number of users** in the Video-On-Demand market in Portugal has been **increasing** in the past years and it is expected to grow even more in the next years.

Sources: Statista; Deloitte

The media consumption has been affected by the emergence of several social behaviour trends such as the user multitasking, the influence of aging viewership and the demand for in home large screen entertainment

PESTLE ANALYSIS

S **SOCIAL**

3. MEDIA CONSUMPTION I USER MULTITASKING

- Consumers are not only spending more time online engaged with apps overall, but also **using multiple apps** during a single session.

3. MEDIA CONSUMPTION I INFLUENCE OF AGING VIEWERSHIP

Streaming services' users by age

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years

8,90% 14,40% 23% 27% 26,70%
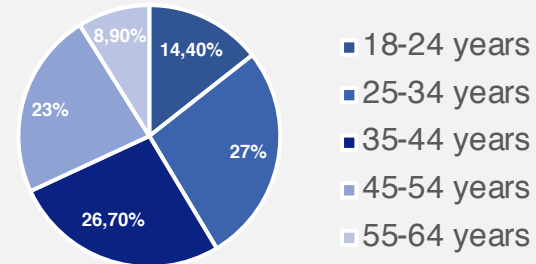
- In 2019, **27%** of streaming services' users are **25-34 years old.**

3. MEDIA CONSUMPTION I DEMAND FOR IN HOME LARGE SCREEN ENTERTAINMENT

- **Home entertainment devices** are still a first choice among consumers due to its **convenience and cost-efficiency**. By increasing consumer **spending on household leisure** activities, it is likely to occur a growth in the market size in a near future.

Sources: Statista

The consumer viewing habits are constantly evolving due to the expansion of non-linear and on-demand consumption and also type and length of content

PESTLE ANALYSIS

S **SOCIAL**

4. LINEAR BROADCASTING IMPORTANCE

Linear TV continues to be relevant in the consumer's viewing habits, focusing mostly **on live shows and live sports**. However, the **convenience** of consuming non-linear content **on-demand** is also an increasingly important factor. Viewing habits and preferences are different across generations: **younger** audiences are more likely to favor **non-linear** viewing and **older** ones continue to prefer **linear** consumption. Across the age range, most viewers prefer both linear and non-linear content on TV sets, since consumers are used to watch TV accompanied by other people.

5. LENGTH OF TYPE OF CONTENT

- **Younger** and more tech engaged audience gives preference to online services such as YouTube that are focused on **short-form content**, such as user-generated content and music videos and also to **SVOD** content services that allows access to a **high volume of content and exclusive items**, providing users the ability to binge entire series in the most flexible way.

- The **older audience** prefers to watch linear TV reflecting general lower tech engagement, also being more familiar with **day-to-day TV content**, preferentially sports' broadcast, entertainment & fiction and factual content.

Sources: *Linear vs non-linear viewing* – Ofcom, *Media Nations 2019 UK*

Technology is changing very fast, and in order to keep up, broadcasters have to continuously invest in developing and adopting innovative tools and processes

PESTLE ANALYSIS

T **TECHNOLOGICAL**

1. ARTIFICIAL INTELLIGENCE

- Technological factors are crucial and have greater impact on the TV industry, and despite the required investment, **most innovations lead to cutting costs or service improvement**. **AI** has been responsible for the reduce in time spent by journalists doing repetitive tasks (such as transcription, machine translation, speech-to-text/text-to-speech).

- **Segmentation and recommendation tools** on digital platforms are crucial, in order to deliver a better and more **customized service** to the audience. The great **capability of data analytics** leads to deep insights, making accurate predictions and generating recommendations.

2. INTERNET 5G

- The emergence of 5G allows **faster (up to 100x) and more secure connectivity**, **facilitating** the access and/or production of the content **"on the go"**.

3. MOBILE FEATURES

- The **improvements** of mobile phone features (camera, audio, micro, and editing programs) allow **easy filming, editing, and posting of contents with mobile devices.**

Sources: Accenture

133

Technology is changing very fast, and in order to keep up, broadcasters have to continuously invest in developing and adopting innovative tools and processes

PESTLE ANALYSIS

TECHNOLOGICAL

4. CLOUD BROADCASTING

Cloud broadcasting is a **cloud-based content delivery model** in which OTT television services are distributed through a cloud platform. Instead of streaming everything through satellite, **audios and videos are stored on cloud for further distribution**.

- The cloud enables broadcasters to **improve service availability and accessibility from any device, any time.**

- The cloud can significantly **reduce the need of physical hardware, servers, and data center capacity, helping to reduce technology costs**.

- Cloud allows broadcasters to **be faster** and consequently respond to the faster service delivery cycle of OTT entrants.

- Broadcasters **can store vast amounts of data** in the Cloud, enabling the **generation of a more accurate and trustworthy analysis** of insights that can lead to high personalization, a better service development, a more unique customer experience and promote one-to-one relationships.

Sources: Accenture

Legal factors impact the media industry, especially Public Service Media since they have to follow certain norms to accomplish their public service mission

PESTLE ANALYSIS

L LEGAL

Public Service Media are **obligated by law to follow specific regulations** and rules such as:

- By focusing on the **public service mission**, public broadcasters have the duty to provide fair and impartial news, educational programs, politics and sports content, cover special events bearing in mind the diversity of society.

- There are **limits to advertising and sponsorships;** PSM are only allowed to advertise a few times per day, dedicating more time on the quality programming rather than on advertising.

- They are obligated to develop the cinematographic art and the audiovisual sector.

- **Broadcasting piracy** has shown a marked increase over time, which includes technology abuses, unauthorized internet content meaning the consumers have access to the content through **illegal websites**.

Sources: Projeto Estratégico RTP; EBU; World Intellectual Property Organization

PSM have an incremental duty on bringing attention to the environmental crisis topic, providing trustworthy information and implementing internal measures to address those issues

PESTLE ANALYSIS

E   **ENVIRONMENTAL**

1. CLIMATE CHANGE

- The **environmental crisis** is one of the biggest concerns of our time, and certainly impacts the broadcasting industry.

- Being the **climate change** such an urgent and hot topic, it is crucial to ensure that broadcasters are **fully transparent** and **deliver trustworthy information** regarding this matter. Public Service Media organizations have an incremental duty of addressing **environmental issues**, attached to its mission to serve their audiences and help them to live more sustainable lives

2. ROLE OF PUBLIC SERVICE MEDIA

- The PSM recognises its responsibility, and most of the General Directors have committed to **establish pledges and standards** in order to take action and address environmental issues.

- PSM have been leading initiatives **to reduce carbon footprint**, **purchase renewable energy** and **to remove the single use plastics**.

- PSM organizations recognize the importance of bringing greater focus to the theme, by reporting and also including it on **content and programming**.

Sources: EBU Environmental Sustainability at Public Service Media

In order to analyze all consumers, a segmentation hypothesis was defined based on sports' practice and viewership

Consumer Analysis | Segmentation hypothesis

	Lazy Team	Self-Motivated	Follower	Athletes	Sports Fans	Sports Addicted
Sports' Practice	Does not practice	Practices	Does not practice	Practices	Does not practice	Practices
Sports' viewership	Does not watch	Does not watch	Only watches big events	Only watches big events	Follows one or more modalities regularly	Follows one or more modalities regularly
Interest in Sports	Does not show any interest	Only interested in practising sports	Not a priority	Not a priority	Only interest in watching sports	Shows a lot of interest
Sports channels' subscription	Not willing to pay a sport´s channel	Not willing to pay a sport´s channel	May not be willing to pay a sport´s channel	May not be willing to pay a sport´s channel	Likely to pay a sports channel	Likely to pay a sports channel

The quantitative Survey conducted had 1000 responses. The sample is distributed by geography, gender, age, academic degree and occupation, in order to draw statistical inferences

Survey Sample

GENDER

46,39%   52,61%

ACADEMIC DEGREE

- 0,36%
- 1%
- 5.19% Basic
- 19,84% Masters
- 23,20% High School
- 7,19% PhD
- 4,82% Professional course
- 38.13% Bachelors

AREA OF RESIDENCE

- NORTH 25,88%
- AZORES 0,2%
- CENTER 25,58%
- AML 47,04%
- ALENTEJO 0,5%
- MADEIRA 0,3%
- ALGARVE 0,5%

AGE

- 2,5% < 16
- 35,3% 16 - 23
- 18,7% 24 - 32
- 18,4% 33 - 45
- 22,7% 46 - 65
- 2,4% > 65

OCCUPATION

- 2.18% Unemployed
- 2.46% Other
- 31,03% Estudante
- 3,18% Retired
- 7,92% Student and worker
- 53.23% Worker

138
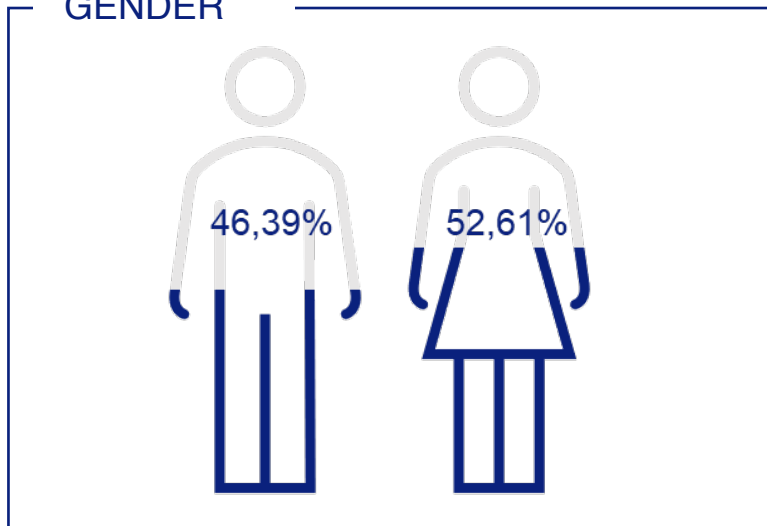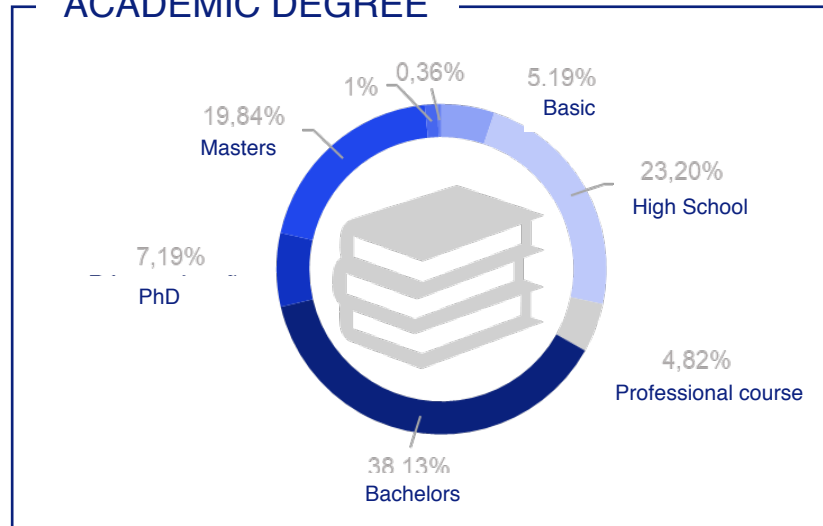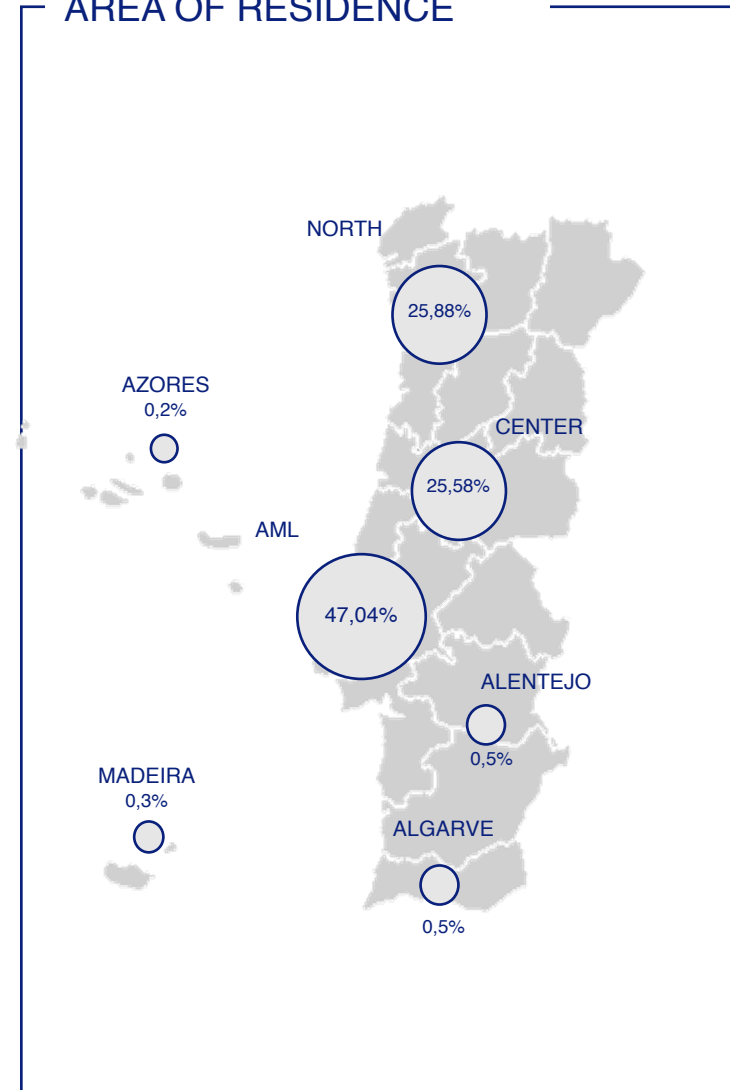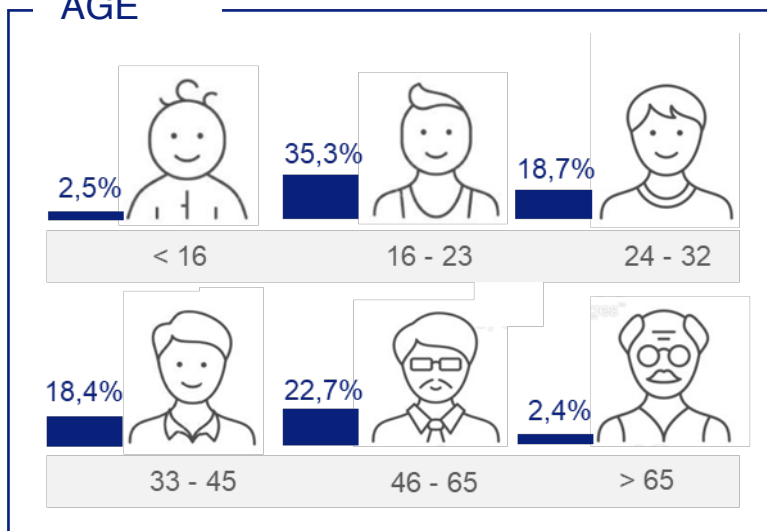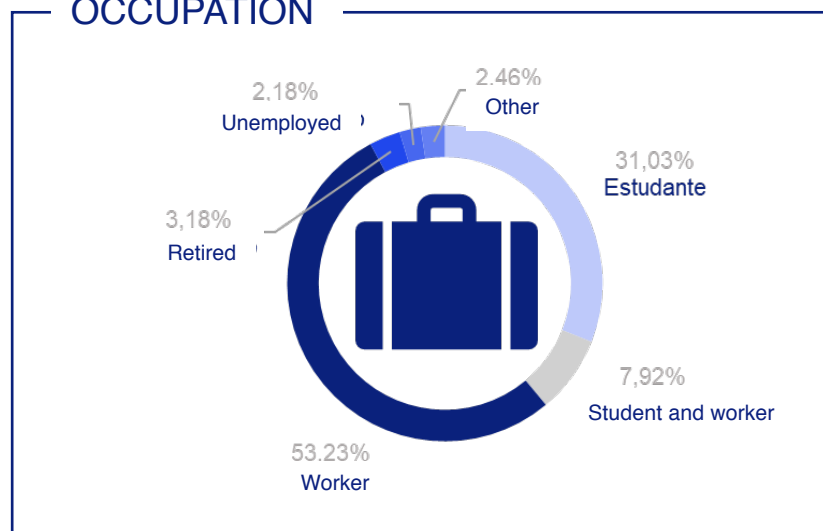
Analysing best practices at product, distribution, partnerships and processes allows a deep understanding of the overview in order to establish a possible strategy for the broadcast of sport in RTP

Best Practices I *Overview*

PRODUCT

- Sports channels, including PSM, **offer parasport and a more gender-diverse** range of content.

- **Interactive features and customized solutions add the most value to the consumer experience:** offering **short videos** with relevant moments, being able to **vote** for the best players, participation in **live-chats and virtual rooms**, use of **virtual reality** and choice of viewing modes.

DISTRIBUTION

- PSM such as RAI or MédiaKlikk have **television channels exclusively dedicated to sport.**

- **Integrated offer**, allowing access through **tv, app or website.**

- Great **focus on live content** distribution and also **on-demand** distribution.

PARTNERSHIPS

- **Partnerships** of television channels **with major events** such as BBC and Eurosport with the Olympic Games.

- Streaming platforms begin to establish **partnerships with sports events/leagues, making their broadcast.**

PROCESSES

- **RTP Palco** content production is mostly done through **digital cinematography camera and high fidelity audio**.

- **Remote production as a solution** for less profitable.

- Independent production where any viewer can stream content.

The organizational resources were evaluated as Valuable, Rare, Inimitable and Organized, determining the competitive implication for the company

Resource-Based View Model

Organization's Resource Platform	Strategic Importance	Relative Strenght			Competitive Implications
	Valuable	Rare	Inimitable	Organized	
Competencies					
Content Development	Yes	Yes	No	Yes	Temporary Competitive Advantage
Customer Service	Yes	Yes	Yes	Yes	**Sustainable Competitive Advantage**
Financial Management	Yes	No	No	Yes	Competitive Parity
Operations Management	Yes	No	No	Yes	Competitive Parity
Human Resources Management	Yes	No	No	No	**Competitive Disadvantage**
Multi-divisional coordination	Yes	Yes	Yes	No	Temporary Competitive Advantage
Strategic Resources					
Brand reputation	Yes	Yes	Yes	Yes	**Sustainable Competitive Advantage**
Brand awareness	Yes	No	No	No	**Competitive Disadvantage**
Product and broadcast quality	Yes	Yes	No	Yes	Temporary Competitive Advantage
Equipment	Yes	No	No	Yes	Competitive Parity
Location	Yes	Yes	Yes	Yes	**Sustainable Competitive Advantage**
Culture	Yes	Yes	Yes	Yes	**Sustainable Competitive Advantage**
Marketing and communications	Yes	No	No	No	**Competitive Disadvantage**
Intellectual property	Yes	Yes	No	Yes	Temporary Competitive Advantage
Architecture of Relations					
European Broadcasting Union	Yes	Yes	Yes	Yes	**Sustainable Competitive Advantage**
Strategic partnerships with broadcasting experts	Yes	No	No	Yes	Competitive Parity

Regarding an internal analysis, the company presents a consistent and remarkable experience in the media industry, however it still has to improve brand awareness and age gap weaknesses

SWOT Analysis

- RTP is a reference as a global communication platform with **85 years of experience;**

- RTP assumes relevance by the **quality and diversity** of the offer, on **radio, television**, and **online** content;

- RTP is the **largest media company** in Portugal **with about 1800 employees** with an extraordinary **know-how;**

- RTP is positioned in its customers minds as a **credible** and **notorious** brand, whose content is reliable and trusty;

- RTP covers not only the Portuguese territory, as it is also present **all over the world** with its **correspondents**. This way RTP can offer more accurate and updated content. At the same time, RTP has access to international content from EBU.

- The company's target audience is wide which increases the difficulty to create **content that satisfies everyone's needs;**

- **RTP's image is perceived as traditional**, that could be more adapted to the present days;

- RTP's audience presents an age gap regarding **younger audiences;**

- The **brand awareness of RTP's digital platforms** among the population has not reach its potential;

- Due to **legal obligations of a public service media channel,** RTP has advertising limits and content duties which can pose obstacles to reach wider audiences and be more profitable.

S   **W**

Looking into the external background of RTP, it is possible to conclude that technological trends are moving into a digital and innovative experience that leads to high levels of investment

SWOT Analysis

O **T**

- The combination of remote production , all-IP workflows and live direct-to-consumer services are **upcoming cost-effective approaches** that can unlock local and niche sports;

- **Emergence of technologies** such as augmented and virtual reality in broadcasting and trends like live chats and virtual rooms allow the creation of a more interactive relationship between broadcaster and the viewer;

- Strong shifting **viewership from traditional platforms onto digital ones**;

- Due to Covid19, both **screen time and media consumption have significantly increased**, and it is expected to continue;

- The deliver of an **integrated experience** leverages the presence in all channels enhancing the viewer engagement;

- **Partnerships and agreements** are viable in order to produce synergies.

- **Strong competition in sports broadcasting;**

- Consumer's preferences are **changing from cable to streaming services;**

- Due to Covid19, **consumers moved to eSports** platforms;

- Public broadcasters are not able to **compete for buying sports rights;**

- Sports rights **are not only expensive but imply high legislation ;**

- **High levels of piracy;**

- Political instability has an impact o **PSM that are financially dependent on EU funding;**

- Media industry is not able **to capture efficiently and take advantage of new disruptive technologies.**

142

In order to create RTP Desporto, recommendations were developed based on product development, distribution channel, consumer's experience, promotion and people

Recommendations Overview

The recommendations are based on product development, distribution channel, consumer's experience, promotion and people

Analysis	Analysis	Analysis	Analysis	Analysis
Recommendation I Provide a broader and more diverse content offer	**Recommendation II** Develop a digital sports platform	**Recommendation III** Offer a variety of features and a better consumer experience	**Recommendation IV** Develop a successful promotion strategy	**Recommendation V** Define an organizational strategy
Implementation Plan	**Implementation Plan**	**Implementation Plan**	**Implementation Plan**	**Implementation Plan**

Based on consumer analysis, although television is still the preferred distribution channel for watching sports, many respondents use apps and websites to watch certain modalities

Analysis: Distribution channels

Survey

Platforms used in the most followed modalities

Swimming — 7% — 20%
Paddle — 5% — 12%
Combat Sports — 10% — 19%
Triathlon — 5% — 21%
Gymnastics — 2% — 10%
Volleyball — 4% — 11%
Athletics — 10% — 9%
Futsal — 9% — 11%
Surf — 14% — 21%
Handball — 12% — 14%
Cycling — 7% — 14%
Basketball — 15% — 17%
Motorsports — 14% — 19%
Tennis — 11% — 14%
Football — 11% — 13%

■ on site ■ television ■ app ■ website ■ youtube ■ radio ■ others
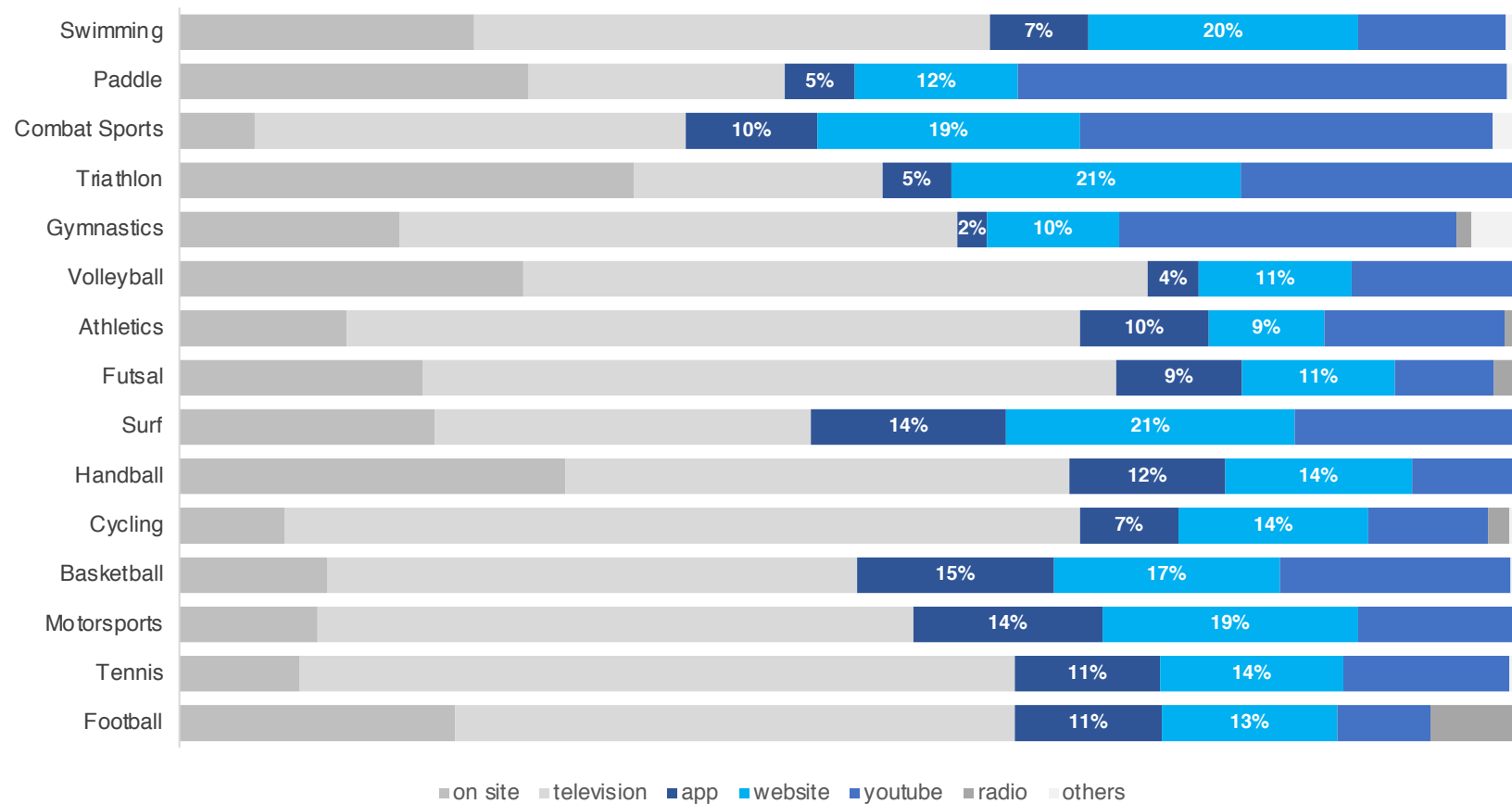
Apps and websites are mainly relevant in some sports such as:

- o Basketball
- o Motorsports
- o Surf
- o Triathlon
- o Swimming
- o Combat Sports

144

144

The selection criteria mentioned were applied to 44 modalities, from which came 30 modalities with potential for being broadcasted in RTP Desporto

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Modalities Selection

Federation	+1000 federated practitioners (2018)	Shooting Possibility	Federation's Interest	RTP's Interest	Respondents' Interest
Aikido	1343				
Handbal	49661				
Chinese Martial Arts	576				No information
Underwater Activities	1533				No information
Athletics	18147				
Motorsport and Karting	3790				
Badminton	1847				
Basketballl	39247				
Boccia	No information				
Bodyboard	Included in surf				
Billiards	2543				No information
Boxing	387				No information
Canoeing	2641				
Cycling	16448				
Korfball	950				
Sports Dance	1265				
Equestrian	6075				
Fencing	793				
Football	189417				
Gymnastics	19866				
Goalball	No information				
Golf	15257				

Note: Since there has been no response from most federations regarding the interest in being part of RTP Desporto, their interest is not yet defined and, for this reason, it is blank. Thus, RTP together with CDP should act to the extent that it perceives its interest.

(Cont.) The selection criteria mentioned were applied to 44 modalities, from which came 30 modalities with potential for being broadcasted in RTP Desporto

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Modalities Selection

Federation	+1000 federated practitioners (2018)	Shooting Possibility	Federation's Interest	RTP's Interest	Respondents' Interest
Hockey	2135				
Roller Hockey	Included in skating				
Judo	14363				
Karate	13988				No information
Kickboxing	3551				No information
Motorcycling	1378				
Motorboating	208				
Swimming	89755				
Padel	4332				
Skating	16587				
Modern Pentathlon	1097				
Rowing	1616				
Rugby	6573				
Surf	2084				
Taekwondo*	4497				No information
Tennis	18839				
Table tennis	3710				No information
Shooting	4108				
Triathlon	3178				
Sailing	1649				
Volleyball	44739				
Chess	4000				No information

Note: Since there has been no response from most federations regarding the interest in being part of RTP Desporto, their interest is not yet defined and, for this reason, it is blank. Thus, RTP together with CDP should act to the extent that it perceives its interest.

Being the Home of national teams means covering quality events with Portuguese practitioners, in the most different modalities, responding to the broadcast needs of each event with an efficient production model for both parties

Recommendation 1.2: Live Sports Events Broadcast | National Representation

MODEL A B C

R1
R2
R3
R4
R5

Federation	Championship	Gender	Parasports	RTP Contract
	Jogos Olímpicos e Paraolímpicos	Both	Yes	Yes
Handball	EHF Women's Euro 2022 Qualifiers	F		
	EHF Men's Euro 2022 Qualifiers	M		Yes
	IHF Handball Men's World Cup	M		Yes
	IHF Tokyo 2020 Men's Olympic Tournament Qualifiers	M		Yes
Athletics	Campeonato do Mundo de Atletismo	Both		
	European Athletics Team Championships Super League	Both		Yes
Motorsport	WRC Vodafone Rally de Portugal	Both		Yes
Basketball	FIBA World Cup European Pre Qualifiers	M	Yes	
Boccia	Campeonato Mundo Boccia	Both	Yes	
	Campeonato Europeu Boccia	Both	Yes	
	Open Mundial Boccia	Both	Yes	
Canoeing	Campeonato Internacional de Canoagem	Both		
	ICF Canoe Sprint e Slalom World Championships			
	ICF World Extreme Slalom Championships 2021			
Cycling	Tour de France TV	M		Yes
Equestrian	Concurso Salto Internacional	Both		
	Concurso Salto Internacional Cascais	Both		
Football	UEFA European Under-21 Championship 2021	M		Yes
	UEFA Women's Under-17 Championship 2021	F		Yes
	UEFA European Under-17 Championship 2021	M		Yes
	UEFA Women's Under-19 Championship 2021	F		Yes
	UEFA European Under-19 Championship 2021	M		Yes
	UEFA Futsal U19 EURO 2021	M		Yes
	FIFA U-20 World Cup 2021	M		Yes
	FIFA Futsal World Cup 2020	M		Yes
	FIFA Beach Soccer World Cup 2021	M		Yes
	FIFA U-17 World Cup 2021	M		Yes
	FIFA Club World Cup 2020	M		Yes
	FIFA World Cup 2022 - European Qualifiers/Fase Final	M		Yes
	UEFA Friendly Matches	M		Yes
	UEFA Nations League 2020-2021 Final	M		Yes
	Campeonato Europa Futebol Feminino	F		

Federation	Championship	Gender	Parasports	RTP Contract
Gymnastics	Campeonato Europeu Ginástica Artística Individual	Both		Yes
	Campeonato Europeu Ginástica Rítmica	F		Yes
	Campeonato Mundial de Ginástica Rítmica	F		Yes
	50th FIG Campeonato Mundial de Ginástica Artística	Both		Yes
	35th FIG Campeonato Mundial de Trampolim	Both		Yes
Goalball	Campeonato Europeu de Goalball	Both	Yes	
Hockey	Campeonato Europeu Hóquei em Patins	M		Yes
Judo	UEJ Judo European Championships 2021	Both		Yes
Kickboxing	Campeonato Mundo Seniores – Muaythai	M		
	Campeonato Europa – Muaythai	M		
	Campeonato Mundo Seniores – Kickboxing	M		
Swimming	European Championships - Natação Artística, Pura, Águas Abertas, Pólo	Both		
	FINA Swimming World Cup 2021	Both		
Paddle	Final Liga dos Clubes	Both		
	Campeonato Nacional Absoluto de Padel	Both		
Skating	Jogos Mundiais de Patinagem	Both		
Rugby	SEVENS Sub18 e Seleção Nacional	M		
	Qualificações de Portugal p/ o Campeonato do Mundo	Both		
Taekwondo	Open European Club Championships	Both		
	Campeonato Mundial de Taekwondo	Both		
Tennis	Taça Davis	Both		
	ATP Challenger Tour	Both		
	Vilamoura Open	Both	Yes	
	BNP Campeonato do Mundo em Cadeira de Rodas	Both	Yes	
	International Wheelchair CTP	Both	Yes	
	Open Baís de Setúbal	Both	Yes	
	Circuito TCR	Both	Yes	
Sailing	Prada Cup	Both	No	Yes
	America's Cup Match	Both	No	Yes
Volleyball	Apuramento Campeonato da Europa	Both		

147

Giving visibility to national federations involves the broadcast of multiple quality competitions held in Portugal. broadcast must be efficient and meet the needs implicit in each event, optimizing the resources of RTP and the Federation concerned

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Recommendation 1.2 - Live Sports Events Broadcast I National Competitions

MODEL   A   B   C

R1
R2
R3
R4
R5

Federation	Championship	Gender	Parasport	RTP Contract
Handball	Campeonato Placard Andebol	M		
	Campeonato 1ª Divisão Feminino	F		
Athletics	Campeonato Nacional de Corta Mato	Both		
	Campeonato Nacional de Pista Coberta – clubes	Both		
	Campeonatos de Portugal e de Pista Coberta	Both		
	Campeonato de Portugal de Pista Coberta – individual	Both		
Basketball	Campeonato LCB Placard	M		Yes
	Taça de Portugal – Final Four	M		Yes
	Supertaça	M		Yes
Bodyboard	Campeonato Nacional	Both		
Canoeing	Taças do Mundo	Both		
Cycling*	Volta a Portugal	M		
	Volta ao Algarve	M		
Sports Dance	Final da Taça de Portugal	Both		
	Campeonato Nacional Standards e Latinas	Both		
	Campeonato Nacional Solo e Grupos	Both		
Equestrian	Campeonato Nacional de Saltos	Both		
	Campeonato Nacional de Equitação Adaptada	Both	Yes	
Gymnastics	Campeonato Nacional	Both		
Hockey	Taça de Portugal - Final Four	M		
	Taça de Portugal - Final	F		
	Campeonato nacional de Hóquei em campo - Meia final e final	M		
Roller Hockey	Taça de Portugal	Both		
Judo	Campeonato Nacional Judo	Both		
Karate	Campeonato Nacional de Cadetes e Juniores	Both		
	Campeonato Nacional de Seniores	Both		
Kickboxing	Campeonato Nacional KickBoxing	M		
	Campeonato Nacional Muaythai	M		
	Ladies Open & Jovem Promessa do Futuro	F		
	Taça de Portugal	M		

Federation	Championship	Gender	Parasports	RTP Contract
Swimming	Campeonato Nacional de Inverno de Natação Adaptada	Both	Yes	
	Campeonato Nacional de Verão de Natação Adaptada	Both	Yes	
	Campeonato Nacional de Clubes 1ª Divisão - Natação Pura	Both		
	Campeonato Nacional Absoluto	Both		
	Open de Portugal - Natação Pura	Both		
	Taça de Portugal - Pólo	M		
	Taça de Portugal - Pólo	F		
Skating	Taça de Portugal Jovens Absoluto	Both		
Rowing	Campeonato Nacional de Velocidade de Shell			
Rugby	Campeonato Nacional Honra	M		
	CN DIVISÃO DE HONRA - XV Feminino	F		
Surf	Surf Esperanças	Both		
	Surf Open - Liga MEO	Both		
	Surf Masters	Both		
	Surf Grand Masters	Both		
	Surf Kahuma	Both		
	Surf Grand Kahuma	Both		
Tennis	Campeonato Nacional Absoluto	Both		
	Braga Open	Both		
Table tennis	Campeonato Nacional Masculino 1ªDiv	M		
	Campeonato Nacional Feminino 1ªDiv	F		
	Campeonato Nacional de Equipas	Both		
	Taça de Portugal - Jogos Santa Casa	Both		
Triathlon	Campeonato N Individual Masculino	M	Yes	
	Campeonato N Individual Feminino	F	Yes	
	Campeonato Nacional de Clubes	Both		
	Taça de Portugal	Both		
	Campeonato Nacional de Estafetas Mistas	Both		
	Campeonato Nacional Triatlo Longo	Both		
Volleyball	Campeonato Nacional Masculino	M		
	Campeonato Nacional Feminino	F		
	Taça de Portugal Masculino	M		
	Taça de Portugal Feminino	F		
	Supertaça Masculino	M		
	Supertaça Feminino	F		

* Cycling will be broadcast on the optimal second-screen digital platform, supporting what is broadcast on television.
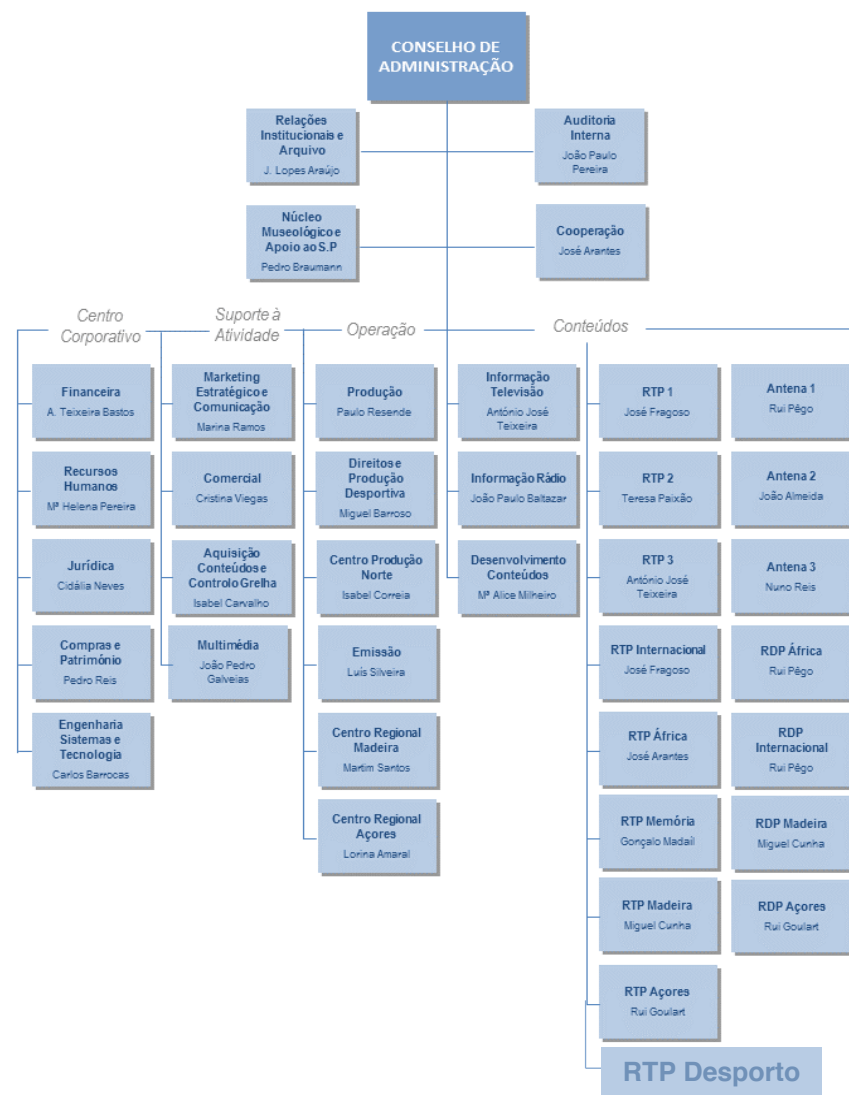
Note: Although football is the king sport in Portugal, the national championships were not considered, since they are already broadcasted by other channels and there is a lot of supply in the market.

In the new organizational structure, the sports department will be allocated to the area of contents
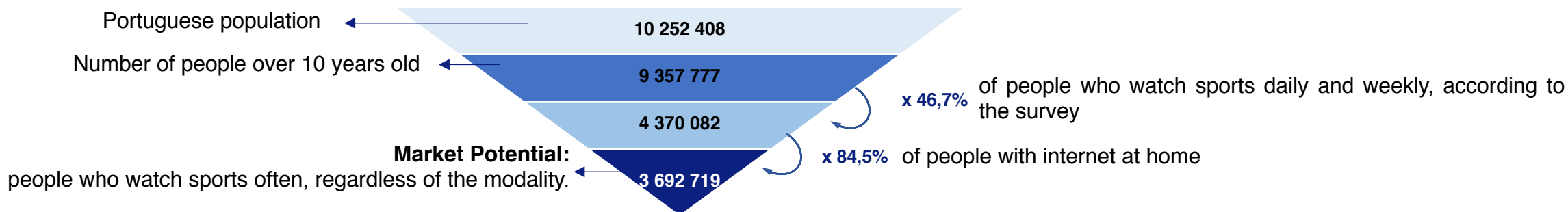
Organization chart

In order to understand the predicted number of spectators of each modality, an impact study was conducted, taking into account data from the Portuguese population and the questionnaire conducted

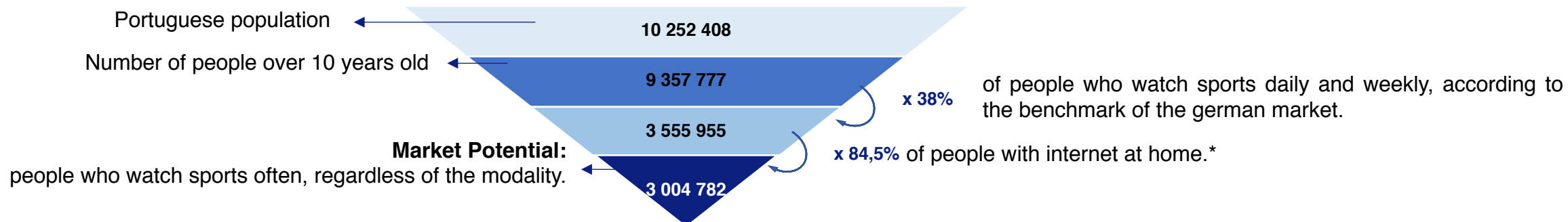**Impact: Market Sizing I** Survey Data

Portuguese population → **10 252 408**

Number of people over 10 years old → **9 357 777**

x 46,7% of people who watch sports daily and weekly, according to the survey

4 370 082

Market Potential:
people who watch sports often, regardless of the modality. → **3 692 719**

x 84,5% of people with internet at home

	HANDBALL	ATHLETICS	AUTOMOBILISM	BASKETBALL	CYCLING	FOOTBALL	FUTSAL	GYMNASTICS	COMBAT SPORTS	SWIMMING	PADEL	SURF	TENNIS	TRIATHLON	SAILING	VOLLEYBALL
Number of federated athelets	49 661	18 147	3 790	39 247	16 448	153 955	35 462	19 866	36 399	89 755	4 332	2 084	18 839	3 178	1 649	44 739
% of people who practice and watch	92%	72%	72%	84%	54%	99%	45%	72%	72%	16%	29%	75%	70%	96%	72%	72%
1. PRACTITIONERS WHO WATCH	**45 607**	**13 117**	**2 740**	**32 967**	**8 857**	**152 100**	**15 865**	**14 360**	**26 310**	**14 361**	**1 260**	**1 563**	**13 105**	**3 040**	**1 192**	**32 339**
% of people who do not practice but watch	9%	8%	27%	21%	17%	86%	12%	3%	5%	2%	1%	6%	23%	1%	0%	7%
2. NON-PRACTICING PEOPLE WHO WATCH	**326 867**	**277 771**	**985 259**	**793 684**	**621 205**	**3 173 431**	**438 995**	**122 275**	**170 809**	**83 546**	**53 777**	**220 714**	**850 817**	**49 902**	**16 020**	**270 199**
POTENTIAL PRACTITIONERS + NON-PRACTITIONERS	**372 475**	**290 888**	**987 999**	**826 651**	**630 062**	**3 325 531**	**454 859**	**136 635**	**197 119**	**97 906**	**55 038**	**222 277**	**863 922**	**52 941**	**17 212**	**302 537**
% of people who watch sport X through an app and/or website	51,2%	28,9%	50,0%	50,0%	31,2%	48,3%	32,4%	25,0%	48,1%	50,0%	31,8%	62,0%	33,3%	42,9%	20,0%	27,3%
MAXIMUM POTENTIAL CUSTOMERS	**190 780**	**84 204**	**493 999**	**413 326**	**196 471**	**1 606 264**	**147 160**	**34 159**	**94 909**	**48 953**	**17 512**	**137 812**	**287 974**	**22 689**	**3 442**	**82 510**
% of people who only watch sport X through an app and/or website	4,88%	5,26%	14,84%	17,24%	3,23%	3,16%	4,41%	0,00%	18,52%	28,57%	9,09%	30,00%	7,75%	10,71%	40,00%	4,55%
MINIMUM POTENTIAL CUSTOMERS	**18 169**	**15 310**	**146 656**	**142 526**	**20 325**	**104 932**	**20 067**	**0**	**36 503**	**27 973**	**5 003**	**66 683**	**66 971**	**5 672**	**6 885**	**13 752**

In order to understand the expected number of spectators of each modality, an impact study was conducted, taking into account data from the Portuguese population, the questionnaire and the German market

Impact: Market Sizing I Survey Data + Germany Benchmark

Portuguese population → **10 252 408**

Number of people over 10 years old → **9 357 777**

x 38% of people who watch sports daily and weekly, according to the benchmark of the german market.

3 555 955

x 84,5% of people with internet at home.*

Market Potential:
people who watch sports often, regardless of the modality. → **3 004 782**

	HANDBALL	ATHLETICS	AUTOMOBILISM	BASKETBALL	CYCLING	FOOTBALL	FUTSAL	GYMNASTICS	COMBAT SPORTS	SWIMMING	PADEL	SURF	TENNIS	TRIATHLON	SAILING	VOLLEYBALL
Number of federated athelets	49 661	18 147	3 790	39 247	16 448	153 955	35 462	19 866	36 399	89 755	4 332	2 084	18 839	3 178	1 649	44 739
% of people who practice and watch	92%	72%	72%	84%	54%	99%	45%	72%	72%	16%	29%	75%	70%	96%	72%	72%
1. PRACTITIONERS WHO WATCH	**45 607**	**13 117**	**2 740**	**32 967**	**8 857**	**152 100**	**15 865**	**14 360**	**26 310**	**14 361**	**1 260**	**1 563**	**13 105**	**3 040**	**1 192**	**32 339**
% of people who do not practice but watch	9%	8%	27%	21%	17%	86%	12%	3%	5%	2%	1%	6%	23%	1%	0%	7%
2. NON-PRACTICING PEOPLE WHO WATCH	**265 974**	**226 023**	**801 710**	**645 824**	**505 477**	**2 582 235**	**357 212**	**99 496**	**138 988**	**67 981**	**43 759**	**179 596**	**692 313**	**40 605**	**13 036**	**219 862**
POTENTIAL PRACTITIONERS + NON-PRACTITIONERS	**311 581**	**239 141**	**804 449**	**678 792**	**514 334**	**2 734 335**	**373 076**	**113 856**	**165 298**	**82 342**	**45 019**	**181 159**	**705 419**	**43 645**	**14 228**	**252 201**
% of people who watch sport X through an app and/or website	51,2%	28,9%	50,0%	50,0%	31,2%	48,3%	32,4%	25,0%	48,1%	50,0%	31,8%	62,0%	33,3%	42,9%	20,0%	27,3%
MAXIMUM POTENTIAL CUSTOMERS	**159 590**	**69 225**	**402 225**	**339 396**	**160 384**	**1 320 710**	**120 701**	**28 464**	**79 588**	**41 171**	**14 324**	**112 319**	**235 140**	**18 705**	**2 846**	**68 782**
% of people who only watch sport X through an app and/or website	4,88%	5,26%	14,84%	17,24%	3,23%	3,16%	4,41%	0,00%	18,52%	28,57%	9,09%	30,00%	7,75%	10,71%	40,00%	4,55%
MINIMUM POTENTIAL CUSTOMERS	**15 199**	**12 586**	**119 410**	**117 033**	**16 591**	**86 278**	**16 459**	**0**	**30 611**	**23 526**	**4 093**	**54 348**	**54 684**	**4 676**	**5 691**	**11 464**

151

The investment analysis of the project implied a detailed analysis of human resources costs, as well as the items included in the Press Kit that will allow the promotion of the digital platform

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Costs

Aditional Human Resources

2B-Boletim do Trabalho e Emprego, n.º 36, 29/9/2015	Monthly remuneration	Anual remuneratio w/ allowances
Técnico de planeamento e gestão de meios Nível desenvolvimento III	€1 634,00	€25 490,00
Realizador Nível de desenvolvimento III	€2 124,00	€31 134,00
Técnico de gestão de emissão Nível de desenvolvimento III	€2 124,00	€31 134,00
Técnico de promoção de programas Nível de desenvolvimento III	€1 782,00	€27 799,00
TOTAL HR	**€13 003,00**	**€119 558,00**

*the amount of allowances corresponds to 30% of the monthly remuneration

Press Kit

Whistle	€0,17
Ribbon	€1,00
Socks	€0,50
Sports bag	€2,00
200g of peanuts	€0,45
Beer mug	€0,47
Net, rackets and ping pong ball	€10,00
TOTAL per Press Kit	**€14,59**
5 presenters RTP	€72,95
8 ambassadors	€116,72
17 influencers	€248,03
TOTAL	**€437,70**
Total shipping costs	€52,50
TOTAL w/Shipping Costs	**€490,20**

Sources: RTP's internal files