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SPORT, MEDIA AND BUSINESS IN SOUTHEAST EUROPE IN THE 21ST CENTURY: RECOMMENDATIONS FOR PROFESSIONALS AND SCHOLARS

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Abstract: Despite the shift from socialist to market economy and the proliferation of media outlets and opportunities, sport and media organizations in Southeast Europe have not kept up with global trends. Most teams and fixtures have become feeders for top leagues rather than remaining aspirational destinations in their own right. This phenomenon has manifested across all former Yugoslav republics. Yet, political divergences have hindered learning from neighboring countries' mistakes and experiences.

This paper outlines the broadcasting presence of selected leagues from Southeast Europe, describes the most common motivations for mediated sport consumption, and introduces the concept of mediatization of sport. Media professionals should develop contents designed to satisfy all motivations for sport spectatorship. Scholars should study such content, the professional situation of journalists and broadcasters, and the representation of foreign athletes and women in sport. Collaboration among scholars and professionals is vital for the continued development of sport, media and business in the region.

Keywords: sport broadcasting, mediatization, motivations, audience, Former Socialist states

Introduction

When preparing this keynote lecture for the inaugural "Sporticopedia" Sport, Media and Business conference, I drew content and ideas from my academic knowledge, diverse

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background, and professional experiences in both mass media and sport industries, in an effort to ultimately establish connections that are not immediately obvious.

My vantage point is that of an individual born in Yugoslavia, who was then educated in Slovenia, where I acquired initial academic and professional experiences as the country transitioned from socialism to market economy. Since 2013, I have lived in – and learned from – the market economy and society of the United States. In some ways, when presenting in Southeast Europe, I come from a metaphorical future – more specifically, from the future societal and economic context this region is aspiring to become.

In this chapter, let us examine some characteristics of the intersection of sport, media and business in Southeast Europe in the early 21st century. These will inform the recommendations for professionals and scholars offered in the conclusion of the article.

A shared history

A group of countries in Southeast Europe shared a history and a polity for most of the 20th century. While the shared polity started disintegrating in 1990, the shared history remains, and after a turbulent and regrettable decade, all former Yugoslav republics and entities embarked on a path towards a new European political, economic and social integration. (We already were an established and contributing part of European sport and culture.) On this path, each country encountered a series of obstacles and challenges. These were, of course, very similar in nature: after all, each new country originated from the same geographic, cultural and political space, and all were – and still are – heading in the same direction around the same time, differing in their starting points only by a few years.

And yet, as each country embarked on the same journey, leaders and decision-makers in the newly-independent countries only focused on the destination and listened to Western European and North American politicians, economists, and experts, rather than studying and talking to each other, and learning from each other's mistakes. Along with leaders, members of the general population drifted apart, as well: only thirty years after the shared country disintegrated, the younger generation, for the most part, does not even speak the same language anymore.

Former Yugoslav countries share an economic history, as well. This includes the hosting of many elite sporting events — most notably the 1984 Winter Olympic Games in Sarajevo and the men's basketball World Championship in 1970, but also countless European championships and World Cup races in many sports — as well as vibrant ancillary industries. For example, Table 1 shows an incomplete list of Yugoslav sports apparel and footwear brands. Some are still active as of 2023.

Table 1. Selected Yugoslav sports apparel and footwear brands

Brand	Headquarters	Product category	Active (2023)	
Alpina	Žiri (SLO)	Footwear	Yes	
Borovo	Vukovar (CRO)	Footwear	Yes	
Elan	Begunje (SLO)	Equipment	Yes	
Mont	Kozje (SLO)	Apparel	No	
MTČ (Međimurska trikotaža Čakovec)	Čakovec (CRO)	Apparel	No	
NAAI	Belgrade (SER)	Apparel	Yes	
Planika	Turnišče (SLO)	Alpine footwear	Yes	
Rašica	Ljubljana (SLO)	Apparel	Yes	
Toper	Celje (SLO)	Apparel	Yes	
Yassa	Varaždin (CRO)	Apparel	No	

Source: Own research

Note: Brands are listed in alphabetical order; generic clothing and footwear brands are not included

Even though most brands listed in Table 1 still exist, foreign multinationals in the sector (e.g., Nike, Adidas) have become regional leaders in sales. A study of consumer purchase behavior in Bosnia and Herzegovina, Croatia, Serbia, and Montenegro showed that consumer ethnocentrism and "consumer worldliness" both affect direct and indirect domestic purchase behavior (Dmitrović, Vida, Reardon, 2009). While support for the European Union in the Western Balkans, as a proxy for "worldliness," is fluctuating (Belloni, 2016), a sizable portion of the population is in favor of European integration, thus arguably driving up the sales of foreign brands over domestic and "formerly domestic" ones. This is problematic for several reasons: domestic brands create more domestic jobs than foreign ones. They also create an opportunity to generate sales on foreign markets. Finally, profits are retained and potentially reinvested into the domestic economy rather than being shifted to other countries.

Brands and corporations can invest profits directly into sport – for example, by sponsoring clubs or governing bodies. They can also invest indirectly, by advertising in sport media and during sport broadcasts. For brands, advertising creates exposure, potentially improves brand image, and drives sales. When advertising inventory is purchased during television sport broadcasts, these ads generate revenue for broadcasting corporations and support the acquisition of electronic media rights to show international and domestic competitions. Thus, advertising during sport broadcasts also benefits sport.

Media rights, media revenues, and their role for sport

This takes us to the main part of our presentation and article. Despite the perceptions of many (students, members of the public, even junior marketing professionals) that ticket sales or perhaps sponsorships generate the most revenue for sport organizations, the single largest source of income for major professional sport organizations are electronic media rights. These near or even exceed half of the annual revenues of governing bodies and leagues such as the International Olympic Committee, FIFA, UEFA, NBA and NFL leagues, and many more (e.g., Deloitte, 2023; FIFA, 2022; IOC, n.d.; UEFA, 2023). Governing bodies and leagues then redistribute most of these revenues to member teams or national federations (e.g., Football Benchmark, 2019). This is true not only for the world's largest sporting events and fixtures, but also for mid-sized professional outfits: for example, the Department of Athletics at Washington State University earned US\$38.7 million from electronic media rights in fiscal year 2022, good for 51.6 percent of its annual revenues (Brunelli, Chun, 2023).

A necessary precursor to generating substantial media rights revenues is to start conceiving and presenting professional sports competitions as a media product and an entertainment product. This is often not the case in countries in Southeast Europe. Table 2 shows licensed TV broadcasters and streaming offerings of national football and basketball championships in former Yugoslav countries (missing are entries from leagues and governing bodies that did not respond to our inquiries). Football and basketball were selected as the most popular team sports in the region.

Table 2. Broadcast partners of national football and basketball championships in former Yugoslavia

	Football			Basketball		
	Domestic broad- caster(s)	International broadcaster(s)	Strea- ming option	Domestic broad- caster(s)	International broad- caster(s)	Streaming option
Bosnia-Herzegovina (BIH)	Arena Sport	None	Yes	None	None	Yes
Croatia	MAX TV, HRT	Arena Sport (in SER, BIH)	Yes	MAX TV, Sportska TV	None	Yes
Serbia (SER)	Arena Sport	Arena Sport	Yes	Arena Sport	None	Yes
Slovenia	?	?	?	Sportklub, Šport TV, TV Celje	None	Yes

Montenegro	Arena Sport,	Arena Sport	Yes	?	?	?
	RTCG, MNE	(in SER)				
	Sport					
Northern	?	?	?	?	?	?
Macedonia						
Kosovo	?	?	?	Art Motion,	None	Yes
				Kujtesa TV		

Source: Respective national governing bodies or leagues, via email, September-December 2023.

Note: Question marks denote lack of response from league or governing body

Information presented in Table 2 was obtained via email from the governing bodies (national federations) of the two sports in each country. Only basic identification of (domestic and international) broadcasting partners was requested: we did not solicit information about the value of such agreements.

Responses show only two (out of nine) national leagues, both in football, are shown (also, but not exclusively) on public television channels. From an audience standpoint, this is not ideal: a study of ski jumping has shown that broadcasting on public television increases audience size by 300-750% compared to commercial television (Ličen, Mir, 2023). Also, only three fixtures — also all in football — have licensed broadcasting rights internationally; more specifically, men's national leagues in Croatia, Serbia and Montenegro have licensed rights to Arena Sport, a regional pay TV sports network owned by Telekom Srbija, to be shown in neighboring countries. Meanwhile, none of the national basketball leagues are shown beyond their current national borders. Granted, these leagues are de facto second-tier competitions as the ABA (Adriatic) Basketball League serves as the top-flight fixture in the region; ABA League is broadcast primarily on Arena Sport, while selected games are broadcast on national commercial channels, as well. All leagues who responded to our survey stream games online: some do so through the broadcaster's streaming service, while others simply use YouTube.

As of late 2023, former Yugoslavia is home to the third-best men's national football team in the world (Croatia); the second-best, seventh-best, and eleventh-best men's basketball teams in the world (Serbia, Slovenia, and Montenegro, respectively); two qualifiers to the women's basketball World Cup (Bosnia-Herzegovina, Serbia); and some of the world's best players and talents in both sports. However, as far as national championships are concerned, these *sports and entertainment products* have minimal appeal beyond current national borders. This may well be the "Land of Basketball," as stated in the title of a popular movie; but at the most interconnected time in human history, when communicative, social and even sports processes change and adapt to our increased

reliance on mediation as part of the process of mediatization (Ličen, Frandsen, Horky, Onwumechili, Wei, 2022), its national competitions have no mainstream visibility beyond its national borders.

In 1990, Yugoslavia and its sport entities had a market base of over 23 million potential spectators, fans, and customers. This generated correspondingly high appeal for prospective sponsors. Today, as all its former constituent republics pursue European integration, they undoubtedly enter a potential market of nearly 450 million. But realistically, sport organizations' audience and, thus, market bases are mostly limited to the population of each republic or entity. There is limited reach and appeal even in the large regional diasporas in other countries in Europe and beyond. And since national populations in the region are declining – some quite significantly (Judah, 2020) – primarily due to migration, diasporas could actually form a viable base for market expansion of national leagues.

Motivations for sport spectatorship

A key consideration to develop a sport competition – or rather, sport property – into a *spectator sport and entertainment product* is, what attracts spectators to sport to begin with. A frequent mistake among professionals and scholars is to assume that everyone watches sports for the same reasons. However, reasons for watching and consuming sports are multifaceted. Media psychologist Arthur Raney (2006) determined that people tend to watch sports to satisfy emotional, cognitive, and/or behavioral and social needs.

One of the *emotional* motivations that spectators aim to fulfill when watching sports is the need for *entertainment*, which indicates the enjoyment and satisfaction that comes from cheering on a favorite team as it follows an undetermined yet aspired path to victory. Then, *euphoric stress* indicates the arousal and controlled excitement that can be achieved when watching close games, rivalries, and otherwise dramatic contests or narratives. The *self-esteem* motivation recognizes that some watch sport in an effort to feel better about themselves, for example by boosting their self-confidence as a result of a mental association with a winning team. Finally, *escape* motivates people with an emotional need to flee the stress of daily living; interestingly, this motivation is comparatively less dependent upon fanship and competitive outcome of the game or contest: people watching sport to escape are less particular about the team or even sport being shown (Raney, 2006).

A second cluster are *cognitive* motivations for mediated sport consumption. One of the two aspects that attract spectators in this cluster is *learning* – facts about athletes and teams, information on the game and how it is (or should be) played, as well as statistical data, trivia, and similar. The second aspect are *aesthetics*, which please some viewers

attracted by the beauty found in movement and expression in sports such as gymnastics and figure skating, or even the novelty, riskiness, or unexpectedness of play that can be found in any sport (Raney, 2006).

The third cluster comprises five behavioral and social motivations. One of them is release, which indicates the need to dissipate pent-up emotions that can be accomplished through activities such as watching sports in communal settings or other leisure activities. Another is companionship, whereby some watch sports primarily to spend time with others, either at home or in public places ranging from bars to public viewings. The group affiliation motivation is named after the sense of belonging that some people seek to satisfy by watching sports and associating with a city or national team or comparable entity. The family motivation acknowledges that some people watch primarily to spend time or have something to do as a family. The final motivation is economic and groups people who watch sports due to a financial stake in the outcome of games, usually because of betting and wagering (Raney, 2006).

Motivations are not mutually exclusive: indeed, many and perhaps most people watch sports for more than one reason. Also, the specific ways in which people enjoy content differs among individuals: for example, viewers attracted by the aesthetics of sport might vary widely in their perception of what constitutes a beautiful play or move.

Applications for spectatorship motivations: Recommendations for professionals

Media producers and content producers should take into account **all** motivations for sport spectatorship and develop content designed to satisfy each of them. Specific applications include the presentation of sports, the commentary and dialogue surrounding sport, theme shows and features, and other contents still. Since sport organizations including governing bodies, leagues, and even individual teams increasingly engage in content production and publication, they should take note of this typology, as well. One way to take advantage of it is to identify the aspects of a sport that satisfy the different motivations, and then produce content that showcases these aspects.

Indeed, this approach is at the heart of the concept of mediatization introduced earlier. This term indicates "all the transformations of communicative and social processes (...) which follow from our increasing reliance on technologically and institutionally based processes of mediation" (Couldry, Hepp, 2017, pp. 3-4). A recent study of public service broadcasting coverage of sport in Slovenia and Croatia showed that mediatization in this region is delayed (Ličen, Antunovic, Bartoluci, 2022). Even during the Olympic Games, which are the greatest regularly-scheduled show on television, media-rights holders

produced minimal content beyond what is televised, and virtually no content designed specifically for social media. The same seems to be true for the content streamed by the national leagues listed in Table 2: while offering games online is undoubtedly positive and makes them more accessible, few creative solutions designed primarily for the online setting seem to be offered. In an economic, social and technological environment where national borders are becoming evanescent, national leagues are no longer competing for spectators just with other sports in the country (for example, basketball Admiral Bet Košarkaška liga Srbije with handball ARKUS Liga and volleyball Wiener Städtische Superliga). Rather, they also compete with the world's largest leagues such as the Premier League and La Liga in football, the National Basketball Association (NBA) in basketball, and other fixtures which are mediatized sport and entertainment products and, thus, among the world's largest sports brands. Indeed, media rights expenditures in the region have risen considerably (SportBusiness, 2022) – alas, not to the benefit of national leagues or indeed national sport.

Currently, national leagues in former Yugoslavia/Southeast Europe are peripheral sport products and secure limited national and very limited regional TV coverage. They gain minimal, if any, exposure and market share in neighboring countries. As a result, they do not maximize the revenue they earn from the licensing of their media and, thus, marketing rights. However, there is enough social and historical continuity, enduring familiarity, and even existing competitive ties – for example, the Adriatic Basketball League – to suggest younger fans domestically and in neighboring countries might be interested in following these leagues if offered content that is presented interestingly and engagingly. In its annual report for the year 2022, the Slovenian football federation acknowledged the "full implementation" of a weekly football-themed show on the commercial cable channel that secured the rights to broadcast its men's championship, and added: "To the satisfaction of not only the football, but also the general sports public, we can confidently write that everyone yearned for such a talk-analytical football show, where the creators of the show cover not only the [premier league], but also the federation's other products" (NZS, 2022, 104). The production of a weekly themed show seems like a relatively low bar to clear in the realm of the sport's media presence, especially when considering the development of technology and proliferation of sports production characteristic of the aforementioned mediatization process. Still, the Slovenian football federation generates a comparatively high share of its revenues from media rights, as these accounted for 29.8% of the governing body's total revenues in 2022 (NZS, 2022, 126), compared to 21.7% of the Croatian federation's revenues in the same year (this figure did not include distributions from Croatia's participation in the EURO 2020 and 2022 FIFA World Cup tournaments, which accounted for 42% of their 2022 revenues; PWC, 2022, 21).

Based on these opportunities and limitations, let us offer several recommendations meant to strengthen sport business and grow national leagues in countries of former Yugoslavia.

These recommendations can be expanded upon in an effort to increase market shares and enhance the appeal of sports media properties for advertisers, which could in turn be leveraged to negotiate more valuable media rights licensing contracts.

As spectators turn to sport for a variety of motivations (Raney, 2006), it is time to abandon, or at least significantly reduce nationalistic imagery. While some find this difficult to embrace or even conceive, it is important to acknowledge nationalistic imagery turns away more fans than many think. The popularity of foreign football and basketball competitions indicates nationalism is not a top priority among fans in the region. That many follow these leagues due to successful performances by "our" players such as Luka Dončić, Luka Modrić, Nikola Jokić, Edin Džeko and others actually shows that leagues from neighboring countries could very well appeal to fans across borders. Yugoslav boxing giant Mate Parlov is often quoted as saying that "you cannot be a nationalist if you are a world champion" (orig. "Kako ja mogu biti nacionalist ako sam svjetski prvak?"). By analogy, one cannot be exclusionary if they want to attract broad audiences. A one-question survey of sportscasting preferences conducted in collaboration with the Slovenian public service showed that only a minority of spectators (15%) expressed a preference for biased announcing in favor of the nation's "own" team. Factual announcing combined with relevant related facts (24%), technical and tactical insight (22%), and even mere objective commentary (16%) all ranked higher among viewers than commentators supporting "our" team (Jerič, 2011). This suggests media organizations and sport governing bodies should be encouraged and supported in the development and creation of contents designed to fulfill all the different motivations for sport spectatorship (Raney, 2006). Such content will help grow the popularity of domestic leagues and support their expansion into foreign markets.

Enduring dominance of television: Recommendations for scholars

Television continues to be a dominant media outlet in the region. It is still the number one source of information for people in Croatia and Slovenia, ahead of online news platforms or social media, for all age groups, including the 15-to-24-year-olds (Eurobarometer, 2023). Television also continues to be a leading media format world-wide, its status largely influenced by sports content (Nielsen, 2023). While the rise of social media is indisputable, the media market has not shifted as much as it has expanded. This creates new opportunities for professionals, as well as scholars. After offering recommendations for sport media professionals, let us offer several research topics and questions worth pursuing by scholars of sport, media and business in the region.

As noted earlier, motivations for sport spectatorship are multifaceted (Raney, 2006). Studies in the region (e.g., Antunovic, 2021; Ličen, Billings, 2013) suggest that broadcasters

tend to focus on fulfilling only some of them. Scholars studying sport journalism, sport media and sport management in Southeast Europe should examine whether **public media**, **commercial media**, and media owned and controlled by teams and governing bodies fulfill all the different motivations for sport spectatorship, as well as study how fans engage with these different types of content.

Society is changing rapidly as a result of economic liberalization, political transformations, and technological advancements. These changes influence professional practices and the very professional status of people working in sport media. To map these changes and identify their consequences, it is important to comprehensively examine who produces sport media content in former Yugoslavia and how sound is their training. A related important challenge is determining the extent to which journalists, reporters, and broadcasters are independent from sport organizations — and how common are hybrid arrangements whereby "journalists" and "broadcasters" hold part-time positions with sports teams, clubs, or even governing bodies. Such arrangements infringe one of the foundational canons of journalism, mainly objectivity and impartiality, which is inherently unattainable if the reporter is also employed by the entities and organizations they are supposed to report about. Sport journalists in such precarious contractual arrangements are also prone to exert self-censorship, which is another ramification worth examining.

An enduring topic of research remains the representation of individuals in sport media. How are domestic athletes, foreign athletes, and nationals from former Yugoslav republics represented in mass and digital media? From a societal standpoint, media representation of home and foreign nationals shapes their perception in broader society (e.g., Bartoluci, Doupona, 2020; Ličen, Billings, 2013). In turn, from a marketing and managerial standpoint, favorable representation can be leveraged to secure promotional and endorsement opportunities for both sport and sponsored products in the former common market.

And finally, despite post-war promotion of gender equality, mass media coverage of women's sport remains low (Antunovic, 2021; Antunovic, Bartoluci, 2023; Ličen, Bejek, 2019). Articles about women's sport tend to be less detailed, and the coverage bump observed during the Olympic Games is insufficient. Scholars should continue studying media representation of women's sport in former Yugoslav countries, identify discrepancies, and develop solutions for stronger coverage. When this recommendation was presented at the "Sporticopedia" conference in Belgrade, several male audience members scoffed or shook their heads in apparent dissent, while several women nodded in agreement. While only anecdotal, this noticeable rift confirms the relevance of this research thread, today perhaps even more than before 1990.

Conclusion: A call for collaboration

Sport, media, and societies in Southeast Europe/former Yugoslavia would benefit from greater collaboration among scholars, as well as from collaboration between scholars and professionals in these fields. As discussed earlier, the country borders that emerged after 1990 often became hard boundaries that stifled collaboration. While understandable and perhaps unavoidable at the time, scholars today, along with their institutions and state research funding agencies should proactively engage in forging and supporting crossnational collaborations.

Conferences such as "Sporticopedia" should become regular appointments in the region's academic calendar. Ideally, they should attract participants from all countries and regions of former Yugoslavia, as well as from the growing academic diaspora comprised by scholars who study business and communication in sport at universities in Europe or the United States. Such conferences would foster collaboration between scholars from the region and catalyze cross-national comparative research projects examining mass media and social media coverage of sport. Findings from these projects could, in turn, be presented at subsequent editions of these conferences. Collaboration with foreign colleagues is precious; collaboration with regional colleagues familiar with regional peculiarities and able to translate challenges to local particularities is vital.

Former Yugoslavia has long been home to strong teams, inspirational athletic figures, excellent brands, and skilled sports administrators. It has the potential to continue being influential — and become first a regional, and then a continental leader in sport management. For the region's sport industry to thrive, it is vital to strengthen national competitions and events, and present them as appealing media content. This will create interest among viewers and advertisers alike — an interest that will result in revenue to be reinvested in national sport (and perhaps curb the outpouring of athletic talent to other European countries or North America). A strengthened media presentation of local sport will stimulate not only competitions, but the sport and media industries more widely, and ultimately enhance social cohesion. These are outcomes worth pursuing.

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