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Sport Content in Spanish Television Programming (1993-2010): an analysis from the audience ratings perspective

Abstract

The importance of televised sports content in Spain, chiefly football, has led to a growth in research in recent last years. Many studies have addressed this phenomenon from a variety of perspectives, including television-programming strategy, the business management relationship between television and sports, the battle for broadcasting rights or the elaboration of a television message through different broadcasting techniques. This paper seeks to add to the debate on this topic through a detailed analysis of the audience ratings of sports content aired on Spanish television channels with a nationwide coverage. To this end, we analyse the complete audience measurement data from the first period of private commercial television in Spain (1993-2010) in order to determine the most important characteristics of sports content and their true impact on audience ratings. To achieve this aim, we analysed 4,000 statistical entries from Sofres/Kantar Media's "*Anuario de audiencias de television*" [Audience Yearbook] and cross referenced and studied information from more than 2,300 sport broadcasts. The results of this research underpin the role of live football broadcasts, which accounted for more than 50% of the most successful television content during that period.

Keywords

Sport, Television, TV ratings, Broadcast Programming, Spain, football.

1. Introduction

1.1. *The role of sports content during the monopoly public service television*

Sports content was hugely influential in the birth and development of television in Spain, where the two channels of the state-run public service broadcaster, Televisión Española (TVE), and the country's regional stations, used sport to create a direct link with the audience on a massive scale (Bonaut, 2018a, p. 169).

Whether through the broadcasts of football events such as the World Cup, global athletics events such as the Olympic Games, or magazine shows or specialised news programmes (Díaz, 2017, p. 154-155), the permanent presence of sports programming had a role in consolidating Spanish television over its first 30 years of existence.

Ever since the dawn of the age of Spanish television, the thrill of the uncertain outcome to a sports event and the huge interest in its protagonists –the sports heroes– has made sports

a television genre with very distinctive peculiarities. Live weekend sports broadcasts, usually football matches, had a clearly international component, drawing large and diverse audiences as well as commercial firms. The live broadcast was also a source of technological experimentation and, essentially, an emotion-filled spectacle (Bonaut, 2014, p. 93)¹.

The spectacular and emotional side of televised sports has transformed athletes and players alike into household names. It also has bolstered national and regional identities. Sports coverage allows fans to revel in the victories of both their national teams and the clubs they support or the individual talents they follow. Televised sports has also transformed people's sports preferences through the popularisation of disciplines rarely known previously in Spain (Whannel, 1992, p. 2).

Sports programming was the driving force behind the first broadcasts in Spain's principal cities, exemplified by Barcelona in 1959. The introduction of outside broadcast units enabled television cameras to venture beyond the confines of the television studio to transmit some of Spain's first live football matches in 1957 and 1958. The immense interest in sports, be it the great European matches involving Real Madrid or the Tour de France, paved the way for linkups with European television stations and later with the entire globe. In short, sports internationalised Spanish television (Baget, 1993, p. 64–65).

Over its first two decades of life, television was put through its technological paces: with live coverage via satellite of the Tokyo Olympic Games in 1964, the first video recordings of Spanish football league matches, the first test transmissions in colour of international boxing events (Muhammad Ali against Joe Frazier, in 1971), and the 1972 Munich Olympic Games. Television also offered the first early-morning programming, with a transmission of the Davis Cup tennis final between Australia and Spain in 1965, and it pioneered simulcasts of two matches played simultaneously at the 1974 World Cup in Germany (Pérez, 1989, p. 324).

Sports programming also became a key element in the strategic development of public service television, which found in this content an excellent vehicle through which to strike an emotional chord with its audience. Thus, TVE took advantage of the World Cup in Spain in 1982 to expand the signal of its second channel (TV2) across the length and breadth of the country in order to devote it to sports content during the eighties. Similarly, Spain's regional television stations harnessed the popularity of football to promote themselves (Munsó, 2001, p. 168).

Of all sports, football, and its omnipresence on the television schedule over the last 30 years of the medium's life, best summarises the role of sports programming on Spanish television: the thrill of live coverage, the passion for victory, the viewers' identification with sports heroes and the brand loyalty of advertisers and audiences.

1.2. *The arrival of television competition in Spain: the paradigm shift*

The advent, almost 30 years ago, of the first private commercial television channels with national coverage, Antena 3, Telecinco and Canal Plus, was a milestone in the history of the Spanish broadcasting. Their launch brought unprecedented change to the television landscape by establishing a competitive system in a market shared by both public and private agents that, for the first time, battled for the audience (Bustamante, 2008, p. 213–215).

This new era of television was in stark contrast to the period of the state broadcaster's monopoly, characterised by its basic television offer, political control, and no clear programming strategy (Orza, 2002, p. 22).

The new competitive system led the way for a true programme strategy, called *neo-television*, in which the schedule was geared towards drawing as many viewers as possible to watch programmes all week long (Bruno, 1994, p. 19).

¹ With live broadcasts and programmes showing the highlights as the main examples.

The content formed a “flow” around the viewer’s life, appealing to their particular interests and needs at each moment (Williams, 2003, p. 77-120). Naturally, audience support allowed for financial backing from the advertisers, which, during the period under study, were considered the television channels’ main “clients” (Militi, 2012, p. 113-114).

The new television system’s reliance on audience ratings led to the establishment of a consolidated quantitative measurement procedure in 1993, which provided the market with a reference for establishing economic relations between broadcasters, producers and advertising agents. In other words, audience ratings made it possible to adapt programmes to audience tastes and maximise economic returns, with success determined by audience ratings and shares (Jauset, 2000, p. 32).

The new rules of competition established in the early nineties radically transformed television content, promoted spectacularisation and specialisation, and triggered a gradual process of audience fragmentation, which was exacerbated by the launch of new television platforms such as satellite and cable and the arrival in 2010 of DTT (Digital Terrestrial Television) (Álvarez Monzoncillo, 2011, p. 83-101).

From 1990 until the “analogue switch-off” in 2010, Spanish television underwent a dramatic metamorphosis, turning the broadcast industry into a lucrative business, a driving force for economic and social change, a generator of new habits and forms of consumption. It likewise became a faithful companion to audiences throughout their lives (24 hours a day, 7 days a week), and it was a clear demonstration of Spain’s path to modernisation between the late 20th century and early 21st century (Bustamante, 2013).

This change of panorama directly affected sports programming, since for the first time, the competing channels broke TVE’s broadcast monopoly and hegemony. In addition, the television landscape became more complex and heterogeneous over time following the emergence of open channels, pay-per-subscription channels, satellite television platforms, pay-per-view options for events, programmes or films, and the nascent video-on-demand (VOD). Thus, viewers found themselves transformed from a passive role to an active one, in which they were able to choose among multiple options and pay for specific content (Delgado, 2007, p. 127-136).

The pressure for profitability, driven primarily by audience ratings, sent broadcasters into a mad scurry to acquire broadcasting rights to the top sports events, particularly football matches, which they used as flagship programmes to draw viewers and future consumers, as borne out by the new patterns of television consumption (Boyle & Haynes, 2004).

A description of this scenario is key to understanding the fierce rivalry for the acquisition of sports content. To promote and disseminate these new consumer experiences, as well as to publicise new operators and channels, programme strategies gravitated around the exclusivity of major football events (Alcolea-Díaz & García-Santamaría, 2019, p. 421). This led to a sharp rise in purchases and acquisitions that oversized the market and unleashed a veritable commercial “war” among channels for Spanish football broadcast rights, mirroring what was happening in the rest of Europe (Millward, 2011).

2. Methodology and objectives

This paper studies the content aired by the new generalist channels with nationwide coverage in their efforts to attract the largest possible audiences and, more specifically, seeks to ascertain the role of, and impact on, this content in what we term “successful programmes,” those enjoyed by large audiences (Gitlin, 1994, p. 19-85).

It seems appropriate therefore to calibrate the relevance and true role of sports content of the period under study from the perspective of the audience by taking into account the following objectives:

1. Determine the profile of sports content within the parameters of audience ratings.

2. Describe the presence of sports in the most successful programmes.
3. Define the role of sports in the channels' competitive strategies over time.
4. Specify the type of sports disciplines and competitions that were most relevant within the audience parameters.

In order to respond to these initial considerations, our study focused on the analysis of audience shares for the period 1993-2010. Although the first audience measurement methods emerged in the mid-eighties, and the first commercial channels were launched in 1990, it was not until 1993 that a unified and coherent audience analysis method was established allowing a correct comparison of a sample of the population, households, etc. The company Sofres Audiencia de Medios (Sofres A.M.), later renamed Kantar Media, was charged with conducting audience research on a panel of households representative of the population, whose television sets were attached to electronic devices (the famous "audimeters") that automatically measured the television audience (Jauset, 2014, pp. 74-84).

The cut-off date of the timeframe under study was set at 2010, the year of the "analogue switch-off" and the launch of DDT, heralding a new era in Spanish television, in which audiences became fragmented by the generalist and thematic channels (García, 2018).

The first phase of our research consisted of collecting data published in the Sofres/Kantar Media *Yearbook of Television Audiences* for the period 1993-2010, with an emphasis on the following categories and variables:

- Evolution of television channels' consumption and audience share (1990-2010): year, channel, share².
- Proportion of time give over by each channel's to each genre (1994-2010): year, genre, channel and average amount of time³.
- Daily minutes of airtime by genre (1994-2010): year, genre, channel, daily minutes of airtime.⁴
- Each genre's percentage of contribution to the audience of each channel (1994-2010): year, gender, channel and percentage of audience share.
- Annual ranking of the 100 most watched programmes in Spain (1993-2010): year, ranking, programme name, channel, date, average duration in minutes, maximum audience, average audience, minimum audience and share.
- Annual ranking of the 100 most watched sports broadcasts in Spain (1993-2010): year, ranking, programme name, channel, date, start time, average duration in minutes, share (average) and share (total).

With the information on these categories, we compiled a statistical database of more than 4,000 entries, from which we selected 2,322 on sports programmes with the highest audience ratings for the generalist channels with national coverage (TVE 1, La 2, Antena 3, Telecinco, Canal Plus, Cuatro, La Sexta). Only programmes that were generically categorised as "sports" or those where a sports speciality was specified (football or basketball, to give two examples) were analysed. These included traditional sports programmes, which usually take the form of "broadcasts" (both live and deferred), "specialised sports news programmes," "sports magazines programmes," "sports blocks" and "educational programmes."

In order to obtain greater precision of sports content, the database was complemented with variables referring to sports disciplines, competitions and qualifiers (if any).

² Standardised information from 1990.

³ This category was introduced into audience measurement in 1994.

⁴ This category was introduced into audience measurement in 1994.

Lastly, all this information was compared and analysed to generate the tables, figures and statistical comments that address the objectives of this study.

3. Results

3.1. General context of the period (1990-2010)

Sports content was an important element in the new television landscape, which began in 1990 with the launch of the first private commercial channels: Antena 3, Telecinco and Canal Plus. Subsequent changes, with the departure of Canal Plus (2005) and the arrival of Cuatro (2005) and La Sexta (2006), only served to highlight one defining characteristic of this period: the fierce competitive rivalry among the national television broadcasters, albeit with a certain degree of corporate control akin to an oligopoly (Artero, 2008, p. 12).

This new competitive scenario triggered two important phenomena: the need to create “successful programmes” that would impact on the audience in the most viewed time slots (essentially prime time) and the strategic commitment to specific content that would help to attract large audiences (Lotz, 2009, p. 2).

The national channels made clear decisions in their strategic approach by focusing on fiction content, bolstering news coverage, expanding the broadcaster’s programme catalogue to provide seamless 24-hour programming, and prioritise the airing of major events or special programmes that attract audiences (Prado, Huertas & Perona, 1992, p. 72). This was where sports content was to emerge with strength, especially football,

Television competition became reliant on audience ratings, the measures of success and economic performance, and this also affected the public service channels. This competition saw the consolidation of two trends in this period: the distribution of forces between the channels in audience terms and the progressive fragmentation of audiences aimed at specialisation, where sports would also play a key role (Martín-Huart, López-González & Fernández-Cavia, 2017, p. 1027-1039).

The period began with a standard programming schedule of fiction, news and top entertainment shows, and ended with a programme offer aimed at specific audiences or dominated by specific television formats and genres (reality TV, fiction, infotainment) (García, 2012, p. 76-89).

As shown in Table 1, the period 1993-2010 began with TV1, the public broadcaster’s first channel, having the largest share of the audience. However, the new channels steadily gained ground until, in 2004, they were on a par with the first channel’s share. In 2005, Telecinco and Antena 3 overtook TVE1’s audience share for the first time. From then until the end of the period (2010), the three broadcasters had roughly equal audience shares⁵.

Table 1: Evolution of percentage share by channel (1990-2010).

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
TVE1	52.3	43	32.6	29.8	27.6	27.6	26.9	25.1	25.5	24.9	24.5	24.9	24.7	23.4	21.4	19.6	18.2	17.2	16.9	16.3	16
TVE2	20.2	14.2	12.9	9.6	9.8	9.2	9	8.9	8.8	8	7.9	7.8	7.7	7.2	6.9	5.8	4.9	4.6	4.5	3.8	3.1
Antena 3	3.8	10.1	14.7	21.1	25.7	26	25	22.7	22.7	22.6	21.4	20.3	20.2	19.5	20.8	21.3	19.4	17.4	16	14.7	11.7
Canal +	0.3	0.9	1.7	1.9	1.9	2.3	2.2	2.5	2.3	2.3	2.1	2.3	2	2.4	2.1	1.6	-	-	-	-	-
Cuatro	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.8	7.7	8.6	8.2	7
Telecinco	6.5	15.9	20.8	21.4	19	18.5	20.2	21.5	20.3	21	22.3	21	20.2	21.4	22.1	22.3	21.3	20.3	18.1	15	14.6
La Sexta	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1.8	4	5.5	6.8	6.6

Source: Own elaboration based on data provided by Kantar Media.

⁵ All the information presented here is based on the analysis of audience and consumption data from 1993 to 2010, provided by Sofres and Kantar Media.

In addition, it is important to consider the process of audience fragmentation, which began and ended with TVE's hegemony of the audience. However, its audience share of 52.3% in 1990 had fallen to 16% by 2010. Table 1 perfectly describes the evolution of Spanish television towards audience diversification among broadcasters and other forms of consumption⁶.

In terms of the content of this period, we observe the predominance of three main genres: fiction (34%), miscellaneous programmes (19%), which include top variety shows, live events, New Year's specials and comedy programmes, and newscasts (13.3%). The other content is evenly distributed, led mainly by cultural programmes (9.6%), contests (7.5%) and sports (7.5%). This generic presence continues when examining the daily amount of airtime (minutes) given to each type of content on the different national channels.

On the other hand, the allocation of time to a genre on the small screen only offers information about its relevance in terms of time on screen. A detailed examination of each genre's contribution to the audience share shows that some genres were more successful even though they were televised for less time. Fiction (35.8%) and sports programmes (13.4%) were more lucrative in terms of audience, while miscellaneous content (17%), news (12.9%) and culture (8.8%) lost audience in relation to viewing time.

3.2. The relevance of sports content in the programming of the period

Focusing on sports content, we can observe the way in which these programmes were adapted to this new commercial broadcasting context and the primacy of the audiences. During the period of the state broadcasting monopoly, sports programmes had an average time on screen of 10%, divided into 6% during the Franco regime (1956–1975), 9% during the transition to democracy (1975–1981) and 14% between 1982 and 1989 (Bonaut, 2018a, p. 176; 2018b, p. 449; 2018c, p. 704).

The advent of private television competition saw the consolidation of four phenomena in relation to sports programming: a steady reduction in both the amount of time on screen and daily minutes of sports programming; a drop in the audience share of sports programmes; a specialisation in sports content by TVE2, Canal Plus and La Sexta. On the other hand, their more successful counterparts, TVE1, Antena 3 and Telecinco, specialised in football broadcasts as a "success-related" programme, which prevailed over other genres in the audience rankings.

In first place, an average of 7.5% of broadcast time was given over to sports content, as opposed to 10% in the period of the state broadcasting monopoly. In addition, the trend was clearly downward, in a process exacerbated by the specialisation of the thematic channels set up by the national channels (Teledeporte, for example, which began in 1994), and by pay-TV platforms (Digital Satellite Channel, Vía Digital, and the result of its merger: Digital Plus) (Arrojo, 2008, p. 118). Thus, in 2010 it fell to its historic low (4.7%).

This trend is borne out by the evolution of daily broadcast time devoted to sports in the period, which also reached its all-time low in 2010, with just over 66 minutes/day (compared to over 300 minutes/day for fiction). However, significant upward fluctuations are observed in the years when major sporting events took place, such as the World Cup competitions in 1994, 1998, 2002, 2006 and 2010, as well as the Olympic Games and the European Football Championships in 1996, 2000, 2004 and 2008.

The evolution of the percentage of audience share, although above time on screen (and continuing to be a cost-effective programme) was also negative, reaching its all-time low in 2010 (7.6%). On the other hand, the difference in the audience share for fiction was notable (30.3%). Similar to the case of time on screen, considerable fluctuations are observed in the years in which major sporting events took place.

⁶ The study does not include audience and consumption data for other television platforms, such as satellite or cable television, or those with no national coverage (regional television stations).

The sharp decline in the programming of sports content has to be contrasted with the specific data from the channels. It is worth remembering that there were only two national television channels during the state television monopoly (TVE1 and TVE 2); therefore, the figures regarding the importance of sports content were relative for determining the channels' strategy, although there was a marked specialisation of sports content in the second channel in the eighties.

Following the arrival of television competition, each channel adopted its own programming strategies, opting for one type of content over another, in order to differentiate their business model. For this reason, we can see how sports content was strategic for many television channels, even though it cannot be grasped from the total numbers.

First, the time on screen variable demonstrates how sports was central to TVE2 (17%), Canal Plus (16%) and La Sexta (10%). TVE2 continued its strategy of specialization, which began in the eighties, while Canal Plus and La Sexta adopted a strategy to set themselves apart from the other channels, above all by focusing on football broadcasts.

Thus, there is a huge difference in time devoted to sport between the three aforementioned channels and the rest of the competing broadcasters (TVE1, 3.5%; Antena 3, 0.8%; and Telecinco, 1.3%). Canal Plus continued thus until its disappearance in 2005; La Sexta aired abundant sports in its early years (as an example of a market launch); whereas TVE2's strategy remained more consistent over time. Although it can be said that this constant is repeated in all cases during the period, with a sharp fall in 2010 due to the specialized thematic offer by other platforms of consumption and the subsequent launch of digital terrestrial television.

The different strategies adopted to sport by television channels are best observed in audience share, with Canal Plus (29%), TVE2 (23%) and La Sexta (30%) taking the lion's share, while the rest of the channels' share does not exceed 10%.

The evolution of these same data during the period shows this difference in detail, as well as the steady decline in importance and the aforementioned fragmentation of the audience. TVE2 and La Sexta are most striking for their sharp reduction until 2010 (TVE2, from 19.6% to 8.8%; La Sexta, from 47.4% to 22.8%).

The public service channel, for its part, transferred most of its sports programming to its thematic channel Teledporte. La Sexta's decline in its share of sports content was the result of the channel's move to other genres and formats, in addition to the absence of major sporting events, unlike in 2006, when it broadcasted the World Cup in Germany and basketball in Japan.

As already mentioned, sports content received less airtime as compared with the period of the state broadcaster's monopoly. The decline in relevance occurred parallel to the audience fragmentation, while Canal Plus and the recent arrival La Sexta, with a different business model, both focused their offer on sports broadcasts.

However, this period reveals a phenomenon that was pivotal for sports programming. Given the competition and the need to find programmes and events that were both sufficiently attractive for the audience and lucrative for audience shares, most of the channels opted for football broadcasts as a successful television formula.

This situation led to the "football war," which saw fierce rivalry among the channels to acquire the broadcasting rights to the top international competitions, including the World Cup, the Eurocup or the Champions League, as well as the major Spanish national tournaments: the Spanish league and the "La Copa del Rey" (the King's Cup) (García & Alcolea, 2013, p. 115–124).

The channels televised football for different reasons, either as a means of promotion (as was the case of Canal Plus or La Sexta), or to draw maximum audiences (TVE1, Antena 3 or Telecinco) (García, 2011, p. 132). Whatever the reason, the investment in broadcasting rights

saw Spanish clubs' income multiply by 25 between 1989 and 2018 (LaLiga, 2018) while, on the other hand, the television channels found their flagship product.

3.3. *The dominance of football as a flagship product*

The importance of football, particularly live football broadcasts, was key to the period of state television monopoly (1956–1989). From the birth of television, football had been instrumental in the development of live broadcasts; indeed, the first live broadcasts were of football matches. Football also had a role in linkups with other stations as well as in the creation of an international broadcasting structure (the result of transmission of European Cup matches in 1959 and 1960). Likewise, the “beautiful game” was also key to establishing a consolidated weekend programme schedule thanks to the weekly broadcasts of the Spanish League Championship. In short, football was essential for live broadcasts, viewed as great events that drew vast audiences (Bonaut, 2010, p. 81).

Although there was no audience measurement system of the kind developed in the late eighties and early nineties, the general opinion polls on programming of the time (such as those of the Instituto de la Opinión Pública and Televisión Española in 1965), suggest that football broadcasts were extremely popular with the audience.

Of particular relevance was the top football tournaments aired during the period of the state television monopoly, such as the World Cup, the European Championships, the Spanish League, in addition to international club competitions, most notably the European Cup.

Therefore, a considerable amount of airtime was allocated to televised football during that period. Indeed, an average of 180 hours of football a year was being broadcast, accounting for 15 to 20% of all televised sports programmes of the time: 28% from 1956 to 1975, 26% from 1975 to 1981, and 13% from 1982 to 1989 (Bonaut, 2018a).

Yet, the core factor of these programmes during the period of the state broadcasting monopoly was that they constituted the model of a “television event,” the so-called media event (Dayan & Katz, 1994, p. 4-5), which made it possible for television channels to attract huge audiences to extraordinary sports events, as well as use them for promotional ends and, essentially, establish an emotional link between the viewer, the channel and the athletes (Creeber, 2015, p. 200).

One key aspect to the marriage of television and sport was to foster adherence to and exaltation of national, cultural and sporting values based on the idea of success (Whannel, 1992, p. 114–140). Thus, most of the football match broadcasts were built around the audience's emotional attraction to teams and players, either for their proximity (a Spanish club, team or player), or for their victories (such as Real Madrid's five consecutive wins in the late fifties).

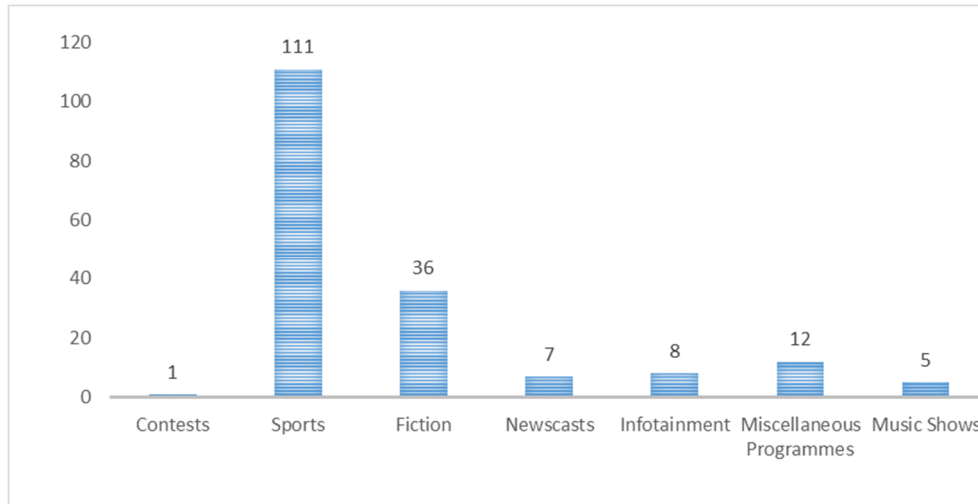
The football matches televised during the state television's broadcasting monopoly provide a perfect example of media events rested on the idea of success, the concept of “sports hero” (Wenner & Billings, 2017; Roche, 2000) and of a national and cultural association (or disassociation, in certain circumstances) with the audience (Holt, Mangan & Lanfranchi, 1996).

As regards the period of private television competition, sports programmes, in general, were never central to the television schedule in terms of time and audience success, except televised football, which ranked among the most successful programmes of the period, as borne out in the ranking of the year's top 10 of audiences. A review of the data of the most popular programmes between 1993 and 2010 shows that of the 180 most successful programmes of the period, 111 were sports broadcasts and 105 football broadcasts⁷ (Figure 1). Far behind, in second position was fiction (36 programmes) followed, in third position, by the

⁷ The top ten audience ranking includes only one other sports discipline, Formula 1, largely due to the success of Spanish F1 driver Fernando Alonso.

miscellaneous category with only 12 programmes. Over the 18 years of the period under study, the most viewed programme on 14 occasions was a football broadcast.

Figure 1: Number of programmes in the Top 10 audiences by genre (1993-2010).



Source: Own elaboration based on data provided by Kantar Media.

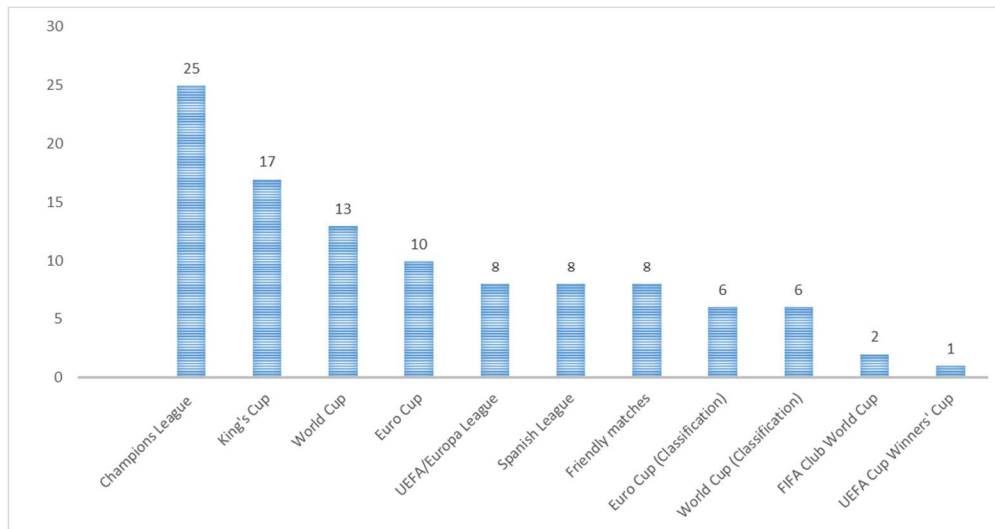
The evolution of these data within the period shows the continued dominance of sports programming, mostly football broadcasts. By contrast, successful broadcasts in the rest of the genres corresponded to live broadcasts of events (the Eurovision Song Contest), special fiction episodes (end of season, end of series, such as *Médico de familia* [Family Doctor] or *Farmacia de Guardia* [All-night Chemist]), or special live news coverage (such as the general elections and interviews/questions of interest, *Tengo una pregunta para usted* [I Have a Question For You]). This nuance is relevant in that it explains a type of successful programme, usually built around an event or an exceptional news story that attracts viewers. Hence, sports broadcasts (essentially football) stand out from the rest of the programmes.

It is particularly significant to note which channels broadcast these successful programmes. Whereas the bulk of sports output was broadcast by the minority channels (La Sexta, Canal Plus and TVE2), which sought to set themselves apart from their more successful rivals channels (TVE1, Antena 3 and Telecinco), we observe how the successful sports programmes in the annual Top 10 are concentrated in the channels with the largest audiences (TVE1, 72; Antena 3, 16; and Telecinco, 14). It is equally remarkable that despite TV1's steady decline in audiences during the whole period, it retains its leadership in this genre.

Thus, we see the relevance of the successful sports programmes of the period, which were defined parallel to "model" successful programme in audience terms, that is, one that lasts about 90 minutes with an average audience of 22% that is a live broadcast of a major, mainly international, football competition.

Figure 2, on the other hand, shows the importance of international football competitions within the ten programmes with the highest audience ratings. The dominance of the European Cup / Champions League is very relevant, along with other international tournaments such as the World Cup, the Euro Cup, or the club competitions including the UEFA Cup / Europa League, European Cup Winners' Cup or FIFA Club World Cup.

Figure 2: Number of football broadcasts in the Top 10 audiences per competition (1993-2010).



Source: Own elaboration based on data provided by Kantar Media.

Most national television channels, whether public or private, fought to air these events during the period under study. However, it is relevant to note that these broadcasts did not necessarily have to be finals or last stages of tournaments, only that they had to include the presence of a Spanish team.

Of the 105 televised football matches that dominated the Top 10 audiences, 102 of them had a Spanish presence, and only three broadcasts included a game with non-Spanish teams. This aspect highlights the national identity nature of sports broadcasts, and specifically football.

By expanding the focus to the 100 most watched broadcasts each year, we find a similar trend, with an almost equally number of fiction and sports programmes in the Top 100, with 536 and 528 broadcasts respectively.

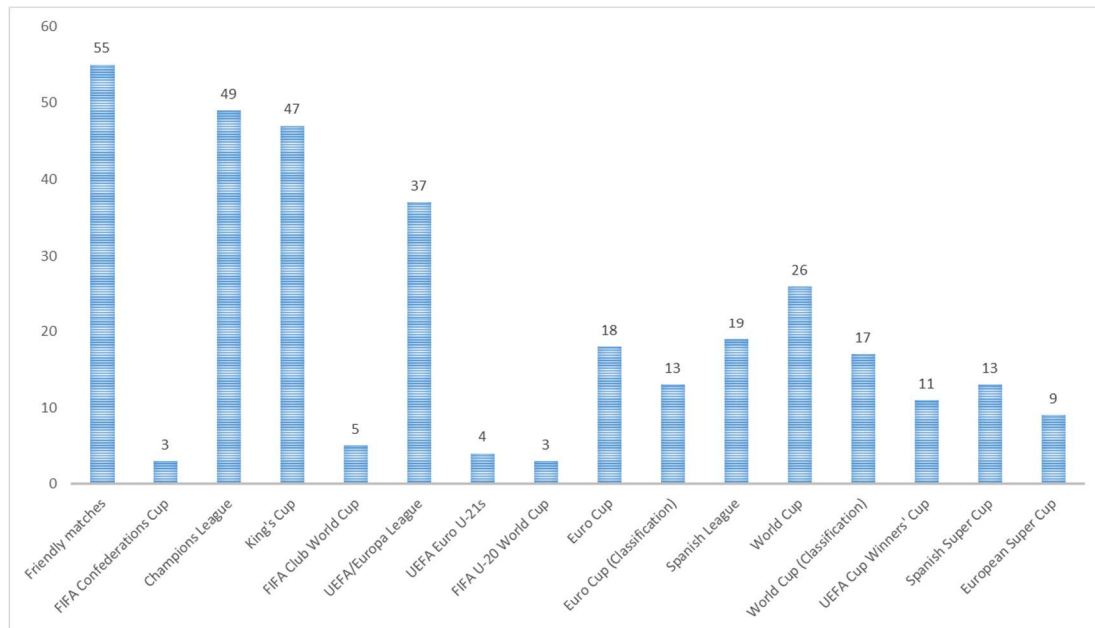
In spite of the emergence of more sporting disciplines, football continues to preponderate, which leads to the conclusion that televised football is also central to a wider sample (Football, 329; Formula 1, 135; Motorcycle Racing, 23; Basketball, 13; Tennis, 13; cycling, 13; Olympic Game, 1; and Horse Racing, 1).

The assessment of televised football's specific role among the 100 most watched programmes each year confirms its constant relevance throughout the entire period, averaging 20 broadcasts a year, although there were some slight upturns in the years when the World Cup was being staged (1994, 1998, 2002, 2006 and 2010).

It also corroborates the dynamic shown in the rankings of the 10 programmes with the highest audience, namely, that almost all the televised football matches featured a Spanish team. Of the 326 broadcasts, only 20 did not feature a Spanish team; however, even those broadcasts had some kind of connection to the Spanish context (such as being fixtures that would affect Spanish teams, draws for events that involve Spanish players, etc.).

Regarding the competitions that most frequently appears in the Top 100 programmes each year, the trends discussed in the Top 10 are repeated. European club competitions, such as the Champions League and the European League, predominate, although a significant rise in the King's Cup matches is observed and, most strikingly, in friendly games. This aspect is telling in that it bears no connection with the exclusive interest in football broadcasts of specific events, and confirms the audience's interest in the content (Figure 3).

Figure 3: Number of football programmes in the Top 100 audiences per year (1993-2010).



Source: Own elaboration based on data provided by Kantar Media.

Lastly, as regards to the channels that televised the most successful football matches, the trend of the Top 10 audiences is repeated. Contrary to the volume of sports programming, TVE1 reigns supreme with more than 60% of the football broadcasts, followed by Antena 3 (18%) and Telecinco (13%).

3.4. *The primacy of live broadcasting and the dominance of football*

A deeper analysis of the 100 most watched sports broadcasts each year also points to many conclusions about the characteristics of this content regarding audience success.

The first, which confirms one of the most paradigmatic aspects of televised sports content, is the exclusive preserve of sports transmissions (whether live or deferred) as compared with other types of sports programmes. The live event occupies practically all the positions in the ranking of the most viewed sports programmes, with 1711 broadcasts, in comparison to 89 given over to other modalities, mainly sports news broadcasts.

These last broadcasts, which generally occupy a low position (over 78) and last an average of 34 minutes with an average share of 9%, were mostly football-related. Noteworthy among them were the highlights of the Spanish league matches of the day, with programmes such as TVE1's *Solo Goles* [*Only Goals*] (1994-1998) and the Telecinco's sports roundup, *Deportes Telecinco* [*Sports Telecinco*], which reached its highpoint in 2001 alongside the rest of the channel's news content. Finally, some broadcasts were related to various draws for the Champions League (2004) or the World Cup (2006) and roundups of tournaments, including the Euro Nations Cup (2008).

Of the channels that aired programmes garnering high audience ratings, TVE1 was the leader with 55 programmes, followed by Telecinco with 22 and, in last place, Antena 3 (8), Cuatro (3) and TVE2 2 (1). Apart from Telecinco, football content monopolised all channels⁸

In relation to the leading content in the audience ratings, sports event broadcasts were programmes with an average duration of 94 minutes and an average share of 12.4%. As in the

⁸ The audience data shown henceforth does not include Canal Plus, as it had no programme or broadcasts in the ranking of the year's most viewed programmes.

case of other sports content, the broadcasts were dominated by football and its main competitions. Of the 1711 broadcasts, 1281 were of football matches, compared to 174 of Formula 1 racing, 129 of cycling competitions, and 70 of motorcycle racing.

This presence of football events is more prevalent still when focusing on the top positions in the audience ranking. All the most viewed sporting events of the period that occupied a No. 1 position in the ranking were football matches. Of the 180 broadcasts in the Top 10 for each year, 172 were of football, 5 were of Formula 1, and only 3 were cycling. Lastly, by extending the sample to the top 25 programmes in sports audience ratings each year, we found that out of 450 broadcasts, 415 covered football, 22 covered Formula 1, 11 were on cycling, and 2 on basketball.

The one common denominator of all these broadcasts is the inclusion of a prominent Spanish athlete or team, or the hosting of an event in Spain such as the World Athletics Championships in Seville in 1999. Of the 1711 broadcasts, 1535 featured an outstanding Spanish protagonist: Miguel Indurain in cycling, Alex Crivillé in motorcycle racing or the Spanish national basketball team in said sport. Most of the 176 programmes with no specific Spanish link corresponded to World Cup qualifiers or finals of international football tournaments, such as the Champions League. In short, almost 20% of sports broadcasts, regardless of discipline, featured a Spanish team.

The filtering of the data by broadcast channel confirms yet again TVE1's leadership over all other broadcasters. TVE1 led the period with 980 broadcasts, followed by Telecinco (245) and Antena 3 (243) in a hotly fought battle for second place. It is interesting to note the launch of La Sexta (102) and Cuatro (48), both of which endeavoured to televise top football competitions, including the World Cup, the Eurocup and the Spanish league.

The channels televising football events (1281) lasting an average of 97 minutes received an average share of 13.1%, which reflects a very similar trend to that of the "Top 100 audiences" in the general category: broadcasts of major events with a huge impact and, consequently, a large number of broadcasts of competitions attracting less audience interest.

As Table 2 shows, the leadership in number of broadcasts and audience share was held by the Champions League, which, in response to international television demands, transformed the competition system in 1992 by introducing a pre-season "league" among each country's best teams (thus abandoning the competition format restricting the number of participating champions from domestic competitions) (Dunmore, 2011, p. 241). The change in format of the Champions League had a clear impact on the airing and audience ratings of these matches. Major international events, such as the World Cup and Eurocup, as well as the Spanish league and the King's Cup, monopolised sports fans' television viewing.

Table 2: Football competition broadcasts in the Top 100 sports audiences (1993-2010).

Competition	Nº Top 100 broadcasts	Average duration (min.)	Average share
Champions League	365	101	13,7
Friendly matches	176	97	11,8
Spanish League	126	109	12,3
World Cup	120	91	15,2
King's Cup	92	87	15,3
UEFA/Europa League	88	100	12,6
Euro Cup	86	89	13,5
Euro Cup (Classification)	54	90	13,4
World Cup (Classification)	47	104	18
UEFA Cup Winners' Cup	38	108	13,1
Spanish Super Cup	29	105	11,2
European Super Cup	13	91	11,1
Others	47	85	9,3
	1281	97	13,1

Source: Own elaboration based on data provided by Kantar Media.

Finally, it is worth considering a phenomenon that had a direct impact on sports broadcasts in general and football broadcasts in particular. With the aim of obtaining better audience results, the channels fragmented the programmes (in this case, the sports broadcasts) to create content that would attract a greater number of viewers to a major event. Live football broadcasts, for example, were broken down thus: a standalone pre-match programme, featuring journalists presenting themselves on the field and breaking news; exceptional programmes resulting from extra time or penalties; and a standalone post-match programme with feedback from the protagonists, interviews, analysis, highlights and the celebration of titles.

The evolution of live transmissions, with the addition of new content, as well as their standalone nature in the programming schedule in relation to audience ratings, had a clear impact on the results of sports content. Of the 1711 most viewed broadcasts of the period under study, 91 were pre-game programmes, 57 were devoted to extra time, and four to penalties. More interestingly still, 25 of these programmes were featured among the 10 most viewed programmes in the period 1993-2010. This demonstrates the effectiveness of the new programme strategy and underscores the “mega-event” nature of football broadcasts aimed at large audiences.

4. Conclusions

In the period 1993-2010, marked by fully-fledged commercial television, sports content held its own in terms of audience and time on screen as compared with the period of the state television monopoly. Sports programmes dominated the launch and development strategies of some of the new television channels, such as Canal Plus, Cuatro or La Sexta. A similar situation is found during the state broadcasting monopoly, when sports programming had a role in the promotion and sales of the new broadcasters.

The huge contribution of sports content to the television marketing of the period came from football broadcasts, providing a good example of the “televised event” model, which became key for television channels, and which was further consolidated from 2011 up to the present, drawing mass audiences to live broadcasts of major events. The best example is found in the audience ratings for football events: of the 180 most watched programmes in this period, 105 were broadcasts of football matches followed far behind by fiction, with 36 programmes.

These “television events” changed previous programming strategies. Live broadcasts were broken down into separate programmes in order to boost audience ratings. This separated extra time or penalties from regular playing time, and new stand-alone programmes were encouraged around the sporting event: pre-match build-up and post-match reaction from the protagonists, interviews and highlights.

The success of this new formula is apparent from the fact that, out of the 180 most watched programmes of the period, 25 covered penalties, extra time and post-match reaction. In short, they drew a mass audience to an unpredictable and spectacular newsworthy event. In comparison with the period of the state television monopoly, football monopolised the sports schedule and saw its leadership greatly extended. Out of the 1711 most significant sports broadcasts of the period under study, almost 75% were football matches, accounting for practically all of the 25 most watched broadcasts each year.

Another aspect that was consolidated during this period, and which underscores the importance of so-called media events, was the presence of Spanish protagonists in the most viewed sports programmes in Spain. Almost 90% of the broadcasts featured Spanish stars or teams, most noteworthy among them being Miguel Indurain and Fernando Alonso, who were the only athletes able to breach the football monopoly. This seems to confirm that commercial television further consolidated the importance of “sports heroes.”

Finally, despite the arrival of private commercial broadcasters in the Spanish market, TVE1 continued its absolute leadership, both in the number of sports broadcasts with the largest audiences and in the diversity of its broadcasts. Worthy of note is the proportionally inverse relationship between the time devoted by each channel to sports programming and its audience ratings. Although the most successful broadcasters, such as TVE1, Telecinco or Antena 3, gave less airtime to sports, they obtained better audience ratings thanks to their focus on major events, such as the World Cup, the Champions League or the Spanish League. It is therefore understandable that most of the conflicts over broadcasting rights revolved around these channels and the aforementioned competitions.

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