Załącznik
Cultural Studies Appendix – English Issue 2019/2

VARIA

THEMATIC TELEVISION CHANNELS IN POLAND IN THE CONTEXT OF TECHNOLOGICAL CHANGES AND DOMINANCE OF NEW MEDIA[1]

Łukasz Bańburski
lukaszbanburski@gmail.com

What is a thematic channel? In what way does it differ from a thematic program? Barbara Turowska, Director of the Monitoring Department of the National Broadcasting Council, notes that the correct terms are 'television program' and 'program'. In fact, the Broadcasting Act of December 29th 1992 defines a 'program' as a 'structured set of broadcasts, commercial communications or other broadcasts disseminated in their entirety, in a way that enables simultaneous reception by the recipients in the arrangement established by the broadcaster', however, this nomenclature has not been adopted by the Polish community – there is a lack of cohesion in this field even among the employees of the above-mentioned institution[2]. The industry dictionaries are equally unhelpful with solving this issue – the new edition of *Słownik terminologii medialnej* [*The Dictionary of Media Terminology*] reads, on the one hand, that a channel is a 'standard frequency range used for broadcasting a single television program', but on the other hand, it also claims that 'a program is a synonym for a radio and television broadcast', as well as a 'separate radio and television program unit' and a 'component

[1] The article is an abridged and edited version of a bachelor's thesis written under the direction of Dr. Anna Wróblewska and defended at the Faculty of Humanities of the Cardinal Stefan Wyszyński University in 2017.

[2] An example of this is the *Strategia Regulacyjna na lata 2014-2016* [*Regulatory Strategy for 2014-2016*] document, where the notions of 'channel' and 'program' are used interchangeably. http://www.krrit.gov.pl/Data/Files/_public/Portals/0/konsultacje/strategia-regulacyjna-krajowej-rady-radiofonii-i-telewizji-na-lata-2014-2016.pdf (accessed: 3.11.2019).

of the programming' (Bartoszcze 2006: 136). It seems that the word 'program' has been used to describe sets of broadcasts from the same radio broadcasters (every listener of 'Trójka' knows the slogan 'Trójka – the Third Programme of the Polish Radio'), but in the context of television it means the content broadcast by a given channel. This creates a pattern, in which the programme is broadcast by the channel – for example „Wiadomości" are broadcast by TVP1. When we add that in many publications, in particular those concerning audience, we can find the word 'station' (Kurdupski 2015) used to denote the same concept, is not difficult to see that a proper differentiation can be problematic. For the purpose of this paper I will assume that the term for a separate frequency band is a 'channel', which is why the title of this paper features 'thematic channels', not 'thematic programs'. The word 'channel' was also used throughout the majority of the sources used, which is why it seems to be the most appropriate word and will be used in the following section, with the exception of quotations.

1. WAYS OF CATEGORIZING THEMATIC CHANNELS

According to the report published by „Telekabel" monthly (*Tematyczne vs uniwersalne* 2017: 7), in April 2017 there were over two hundred and forty Polish language television channels. Some of the divisions or attempts to systematize the market, which will be presented in this paper, were based on Nielsen's studies. Nielsen is a leading international company operating on the Polish market, providing services in the field of audience measurement. Nielsen slowly built its position by signing contracts with new channels, advertising houses and advertisers, and finally won a tender for cooperation with TVP in 2011 (*TVP wymienia TNS OBOP…* 2011). Currently, the company collects data for all the most important entities on the Polish market.

Below, you may find a division of thematic channels according to the most important criteria.

1.1. LICENSE TYPE

The first criterion for studying thematic channels is, in my opinion, their license. The Polish body responsible for issuing broadcasting licenses is the National Broadcasting Council (KRRiT); however, as the Director of the Regulatory Department of this institution, Krzysztof Zalewski, noted, in order to broadcast a signal that can be received in our country these days, there is no need to have a Polish license[3], obtaining it in another European country is sufficient. The open market, unfortunately, complicates the issue of control. Not only does the Broadcasting Council have no real influence on the content broadcast in these channels or even on the length of advertising blocks (Sadurski 2014), the institution is also unable to create a full list of channels available in Poland. This fact shows how complicated the system of regulation of thematic channels is at the current time.

These days[4], ninety-six satellite channels and twenty-three terrestrial channels – a total of one hundred and nineteen channels, have licenses to broadcast in Poland. The List of television licenses[5] maintained by the KRRiT lists two types of 'programme character' – universal (or, in other words, general) and specialized. In addition, specialized channels have additional characteristics, with individual subtypes listed below in italics. There is no ready-made and complete list of such types to choose from, which enables each new channel to avoid fitting into an existing mould – instead, each broadcaster, can propose a new category. Krzysztof Zalewski admits that it is up to the broadcaster to decide the type of specialization they want to pursue[6].

The above-mentioned list includes eighty-six specialized channels – eleven terrestrial programs and seventy-five digital programs. The most popular characteristic in the studied group is *music* channels. This category was selected by twelve stations, while five additional ones went with the related *music and entertainment* type. The second most frequently chosen characteristic is the *sports* channel (twelve channels). We should also add *entertainment, recreation and sports* channel, which gives a total of thirteen, or more than ten percent of the total pool. Eight applicants selected the *film* type, while four others selected a similar *documentary* type. Due to the significant representation with five channels each, the *entertainment* and *information and news* channels should also be noted here.

[3] Author's own interview with Krzysztof Zalewski conducted on the May 31st 2017.

[4] As of the May 31st 2017.

[5] http://www.krrit.gov.pl/dla-nadawcow-i-operatorow/koncesje/wykaz-koncesji-i-decyzji/ (accessed: 2.06.2019).

[6] Author's own interview with Krzysztof Zalewski.

Some types of programs target specific age or gender groups – six of them are intended for children, one for children, youth and their parents, and two for women. NEXT MAN 3D should also be added to this group, since its summary says that it is a *business programme for men*, which means that the target group is in this case complemented by a profile of interest of the intended audience, as well as Super Polsat – *intended for people with disabilities*.

We should note that target groups are very broad and after adding them together, they basically represent the whole society. It is worth thinking about why they are so broad. Looking at the list of characteristics, one can get the impression that these channels have not fully taken advantage of the opportunities offered by thematic television – after all, we could expect a better, more specific characteristics, for example a channel 'addressed to children aged 4-6'. The ignorance of the applicants is certainly not to blame here. Daniel Reszka (2016: 12), Vice-President of VIMN, a corporation operating a number of channels for children centered on the Nickelodeon brand, stated in a statement for the „Telekabel" monthly that the lack of such categorization in the application submitted to the National Broadcasting Council probably only proves that broadcasters do not want to narrow down their opportunities. Ultimately, after being added to the List in question, the broadcaster should broadcast what they have committed to, and invariably broadcast at least 70% of the content conforming to the chosen profile – in such a diverse market, nobody can be sure of the success of their plans.

1.2. THEMATIC SEGMENTS

Audience measurement studies are now the driving force behind the entire industry. Elżbieta Gorajewska (Marciniak 2016: 29), Managing Director of Nielsen Audience Measurement, compares them to a currency that allows TV stations to value their services. The list of thematic channel division systems cannot therefore lack the scheme used by this company.

Nielsen divides the broadcasting market into ten segments, which it assigns channels to base on their main theme – in the case of nine segments; it is a specific, precise theme, with the tenth – universal – category. In the annual study of market shares of these segments, an additional distinction is made between all audiences over four years of age (the so-called 4+ group) and cable TV audiences. The result is provided in the form of an SHR+ variable, which denotes the average audience share of all viewers over a given period of time;[7] in other words, the result means the percentage of viewers of a selected segment among all people who were in front of their TVs at a given time.

It should not be forgotten that Nielsen does not only study channels licensed by the National Broadcasting Council (KRRiT). As I have already pointed out, in mid-2017 the group of the latter stations numbered about one hundred and thirty, while Nielsen had already included more than thirty more in its study carried out a year earlier (Marciniak 2016: 29). The position of the channel in the company's ranking translates into financial results, therefore broadcasters, even those who did not apply for a Polish license, apply to participate in the study.

While in the case of the National Broadcasting Council everyone can propose their own profile, in the case of Nielsen's ranking it would not make any sense. To facilitate the clear presentation of the results, the numerous channels had to be divided into as few segments as possible with clear characteristics. There are ten segments, including: *TV series*, *information*, *children's*, *sports*, *film*, *travel and history*, *music*, *entertainment and lifestyle*, *non-thematic* (universal) channels, as well as *others*. Let us take a look at how their viewership in the 4+ group has changed over the last few years.

Table 1. Shares of thematic channel segments in the audience market in Poland (in percent)

Segment name	Year 2007	Year 2015	Year 2017
TV series	1.09	3.86	3.92
Information	8.05	8.41	8.76
For children	2.91	4.69	4.69
Sportive	1.23	2.74	1.94
Film	0.92	3.22	3.62
Travel and history	1.64	4.00	4.32
Music	0.95	2.25	2.02

[7] TVP Advertising Office website, www.brtvp.pl/16615065/slownik-tv (accessed: 18.09.2019).

Segment name	Year 2007	Year 2015	Year 2017
Entertainment and lifestyle	1.21	5.67	5.94
Non-thematic	80.15	61.41	60.51
Other	1.85	3.89	4.27

Source: Author's own compilation based on articles: Polska przed telewizorem, *„Telekabel" 2016, No. 5, p. 19;* Nasycony kanałami, *„Telekabel" 2017, No. 4, p. 25.*

The figures in the table show a huge leap between 2007, when analogue signals were still being broadcast, and 2015, when digital terrestrial television was already available. What is immediately noticeable at a glance is the enormous, nearly twenty-point drop in the audience of non-thematic (universal) channels. The issue of development of thematic channels in 2015-2017 is very interesting – let us note here that the only two thematic segments that recorded a decrease in audience in that period were *sports* and *music* channels, while *children's* channels remained at the same level. This should not come as a surprise, especially when it comes to music channels. In a survey conducted for the *Screen Lovers* blog, which included experts – heads of distribution and managers of TV stations, as many as a quarter of the respondents found that there were too many music channels (Kowalczyk 2017b). The remaining five segments, on the other hand, recorded an increase in viewership.

1.3. TV SIGNAL SOURCE

Although ordinary viewers usually do not think about how the source of the signal affects their habits related to television, it is still one of the most important factors that determines the contact with TV.

The broadest, and at the same time the most traditional division of TV signal sources includes satellite, cable and terrestrial television. To illustrate the percentages of the share of particular sources in Poland, Nielsen AC divides the market into several types of households – namely satellite, cable and terrestrial households. Of course, more and more often we have to deal with the situation in which the audiences use many signal sources. This relatively simple scheme will allow us to show how much television market research is now advanced and standardized (Marciniak 2016: 29).

In the era of digital terrestrial television, the signal of which reaches almost the entire territory of the country, anyone who decides to buy satellite television or popular cable TV set becomes the recipient of several sources of signal. Many people have received a TV package when purchasing broadband, and the trend of combining several services, including television, in one package is getting increasingly popular[8].

According to AC Nielsen, 34.8% of all households receiving TV signals in Poland in 2016 were terrestrial households. Their number has been growing steadily since 2012, but has still not reached the number of satellite households, which account for 35.6%. Satellite reception remains the most common in Poland, although its advantage has never been as small as these days. The open question is whether there will be a change on the top in the near future. Although a large part of experts predict an increase in the share of terrestrial households in their forecasts for 2017, there are also those who believe that the boom related to new multiplexes is already a history and that the market situation will soon stabilize (Kowalczyk 2017a). The survey shows the lowest percentage of cable households – cable TV providers have been constantly losing out to the competition since the launch of the digital terrestrial television network in Poland.

It is striking that, despite such large market developments over the last few years, including the revolutionary digital switchover, the research breakdowns by source type as well as the percentage proportions between specific types of households remain unchanged. Like in in 2012, each of the ways of receiving TV broadcasts holds a third of the market share.

Table 2. TV household types in Poland in 2012-2016

Household type	Market share in percent				
	2012	2013	2014	2015	2016
Satellite	37.9	36.7	35.3	36.1	35.6
Cable	32.6	33.0	31.0	30.1	29.6
Terrestrial	29.5	30.3	33.8	33.8	34.8

Source: Nasycony kanałami, *„Telekabel" 2017, No. 4, p. 24.*

[8] An example of this is the SmartDom offer, where users can combine services such as TV, telephone, broadband, electricity, insurance and monitoring to get additional discounts.

1.4. MEDIA GROUPS

Although the TV market gets more and more fragmented from year to year and the representatives of existing channels often have to endure the view of decreasing viewership, it does not mean that owning TV stations is no longer profitable. People have long realized that the losses of one programme can be compensated for by the profits of other ones. It works as follows – there is a main channel, usually universal, with a long tradition, with satellite programs set up around it. They are often specialized, thus facilitating increasing the audience thanks to easier targeting. This phenomenon occurs not only in satellite and cable networks, but also in the open band, in public multiplexes. As Krzysztof Zalewski admits:

> This was the policy of the National Broadcasting Council; they did not want to supplement the offer with universal channels, instead going for specialized ones. Due to costs, the programming is set up in such a way that one runs premieres and others for example show re-runs. Channels also share licenses for broadcasting films and programs, etc.[9]

These days, the production of television content has become very cheap, hence the widespread practice of creating new programs. As Grzegorz Miecugow describes:

> Making TV programs is becoming cheaper, especially if the channels are based on existing teams. TVs like TVN maintains the weather editorial office, so you only need to expand it a little and you can run a separate programme – TVN Meteo (today it is known as Meteo Active, because it's more in vogue these days)[10].

The vast majority of thematic channels licensed by the National Broadcasting Council (KRRiT) belong to eight entities, each of which offers at least three channels. These were Telewizja Polsat, ASTRO, ITI Neovision, Kino Polska, Michał Winnicki, Eska TV, Telewizja Polska, as well as TVN. Let us add that among these entities, only three meet the requirements of a universal media group, based on the model indicated above: a universal

[9] Author's own interview with Krzysztof Zalewski.

[10] Author's own interview with Grzegorz Miecugow, conducted on the September 4th 2015.

channel plus thematic channels. These are: Polsat, TVN and Telewizja Polska. In 2016, they controlled the market with a market share of 69.34% (*Zmiany w udziałach oglądalności…* 2017: 30), and in July 2017, their offer included sixteen of the twenty-five most popular thematic channels (Kurdupski 2017), nine of which were in the top ten of the ranking. Many things suggest that, despite the changes, these three entities will continue to dominate the market in the years to come, as they have done up to now.

1.5. FINANCING

After 1989 television in Poland was shifted onto the path towards the free market, which meant that every single broadcaster (partially even the public broadcaster[11]) needed to ensure their own further existence by generating income in a variety of ways.

Krzysztof Zalewski notes that the traditional television model is based on two main methods of financing: advertising funds or fees from operators or consumers[12]. In the first one, the TV station earns money by selling its airtime to advertisers, in the second one – by sharing its content. Until recently, this meant simply making one's signal available to one of the cable or satellite network operators, but these days a whole other spectrum of possibilities is available to broadcasters.

What has changed the current situation is, to a large extent, the connection between the world of television and the Internet. This applies primarily to the change in perception of the so-called VOD (Video on Demand) and other such facilities by the broadly understood television industry.

Derek Compare (2016: 337) wrote about the strategies of the TV stations in the 1980s, claiming, that 'television's primary goal is selling potential audiences to advertisers, not selling products to consumers'. In the age of VHS tapes, television was not interested in publishing its greatest hits so that viewers could watch them at a convenient time. The viewers were supposed to wait for the content they wanted to see, while watching advertising blocks as well, so that the stations could generate revenues.

[11] Article 31(1) of the Act of December 29th 1992 divides the revenues of a public broadcaster into four groups: subscription, trade in broadcasting rights and licenses, advertising and sponsored broadcasts, as well as other sources.

[12] Author's own interview with Krzysztof Zalewski.

However, as a result of the change in the process of creating and selling TV content, the old divisions between producers and production groups on the one hand, and distribution networks on the other, have disappeared[13]. Currently, they are often two separate departments of one large company, which takes care of comprehensive use of the production potential at each stage of sales process. In other words, if somebody wanted to watch the next (or previous) episode of a series produced by a given station or get acquainted with other content produced by said station, it would be better if they had a legal, comfortable source at their disposal, and thus the station would still earn money. Today, several of the largest TV stations in the U.S. are enormous conglomerates, which bring together film and TV format production companies, cable networks, music, book and magazine publishers, not to mention numerous different ways of distributing content on the Internet and in various on-line platforms. Similar trends can also be observed on the Polish market. Carlos Ortega (2016: 39), Executive Vice President of FOX International Channels, says that growth will be based on the integration of services driven by television brands. Let us add that all three of the largest Polish media groups mentioned above have their own VOD services linked with their digital platforms, thanks to which they can expand the number of ways they can use to reach their viewers, interrupting *on-line* content with advertisements or charging one-time fees for the possibility of watching them. Alicja Jaskiernia (2016: 72) aptly summed up the modern TV business, claiming that 'the stream of the greatest profits flows to the companies involved in providing the content of broadcasts, and not in their production'. It is therefore clear that there are currently more than just two main ways of financing television. New possibilities go hand in hand with every new way of receiving TV content.

2. VIEWERSHIP

The single channel viewership rate sparks the imagination of those responsible for creating television content, as it is easiest to deduce from it whether what they do is appreciated by the viewers.

[13] See: section 3.3 of this paper.

The fact that only three out of the fifteen most popular thematic channels in 2007 were ranked in 2016 proves how far the Polish thematic channels have come in the last few years. These were TVN24, Polsat2 and TVN Style.

The following table shows the fifteen most popular thematic channels in 2007 and 2016 respectively; those that reached a viewership of half a percent are marked with dark color, while asterisks are shown next to those available on digital terrestrial multiplexes.

Table 3. Ranking of 15 most frequently watched thematic channels in Poland in 2007 and 2016 with their market share (in percent)

No.	2007		2016	
1	TVN24	2.98	TVN24	3.81
2	Jetix	0.72	TVP INFO	3.26
3	Cartoon Network	0.63	TTV*	1.60
4	Polsat 2	0.61	Polsat2	1.52
5	MiniMini	0.61	TVP Seriale	1.48
6	VIVA Polska	0.53	Polsat News	1.11
7	Eurosport	0.50	TVP Rozrywka*	1.09
8	Polsat Sport	0.47	Stopklatka TV*	1.00
9	Discovery Channel	0.44	TVP ABC*	0.92
10	AXN	0.41	Polo TV*	0.83
11	TVN Style	0.36	FOCUS TV*	0.81
12	TVN Turbo	0.33	Nickelodeon	0.76
13	MTV Polska	0.26	ATM Rozrywka*	0.71
14	Animal Planet	0.23	TVN Style	0.70
15	National Geographic	0.23	TVP Historia*	0.60

Source: Author's own compilation based on Nielsen AC data provided in: Raport – kanały tematyczne, *„Telekabel" 2016, No. 5, p. 20; Raport –* kanały tematyczne, *„Telekabel" 2017, No. 4, p. 26.*

What conclusions can we draw from the analysis of the table? The first of them will undoubtedly be the dominance of TVN24, which has been able to keep the leading position for many years. In this respect, it is one of the few exceptions. We can certainly also appreciate the way in which the various thematic channels are performing on the audience market. Back in 2007, only the seven largest stations had market shares above 0.5%, in 2016 it was twenty stations (including all shown in the table). This proves that despite the progressing fragmentation of the market, good quality programming can reach the mass audience and gain recognition. The table also shows another important trend: a large number of channels available for everyone on terrestrial television. In 2016, up to eight of the top fifteen were given as a present for subscribers on free multiplexes. As I have already pointed out, more than one third of households still only have access to this form of broadcasting; the table therefore emphasizes that this group of consumers must not be underestimated under any circumstances.

This short list of channels is also an interesting cross-section of the audience's needs: the first two places are taken by channels belonging to the main players in the market – TVN and TVP, both are *information* channels, and these two are followed by another channel, whose KRRiT license describes its profile as *information, journalism and educational*[14], and in addition, a significant percentage of viewership was achieved by *film*, *children's* and *entertainment* channels. Is this what the audiences expect from contemporary television? Important news mixed with a lot of entertainment? It is certainly very possible.

3. DEVELOPMENT OF NEW TECHNOLOGIES FOR THE RECEPTION OF AUDIO-VISUAL CONTENT

Changes in television are inevitable if it does not want to become just a relic of the past. Let us try to answer the question whether television in its classic form, such as the one known to Poles in the 1960s, would be a competitive medium today? Not on any account. Grzegorz Miecugow described it aptly:

> There is no way that the times of old [Polish – Ł.B.] television will ever return, where people turned on their – rather rate – TV sets, gathered around the TV and watched a broadcast, which could not be understood by seventy-five percent of them, such as Kabaret Starszych Panów. To this day, public television boasts that this is the best show ever made. But if the average viewer had anything else to choose from in 1965, they would have chosen anything else, because that entertainment was simply at a level unattainable for those three quarters of the population[15].

14 National Broadcasting Council license no. 465/2011-T.

15 Author's own interview with Grzegorz Miecugow.

Nowadays, it is not enough to broadcast 'anything else', because there are a large number of stations broadcasting the most varied content in the unencrypted band only. Even television from several years ago, with landscape dominated by the 'Big Four' – TVP1, TVP2, TVN and Polsat, gaining more than half of the market share every month, and often reaching 75% (*TVN w górę…* 2007), looks archaic. This change cannot be undone. Broadcasters can no longer just serve 'any' content, they need to meet the tastes of specific audiences, have a specific offer, hence the growing popularity of thematic channels. The latter are attempts of broadcasters to win over and keep their viewers – who are more conscious, have specific requirements and want them to be satisfied. However, thematic channels are not the only way to attract valuable customers. Let us try to look at other forms, selected from among the most popular ones.

3.1. VCRS, DVD PLAYERS, HOME VIDEO SYSTEMS

Attempts to gain an audience for a variety of content started in the broadly understood West in the mid-1990s with the appearance of the first VCRs. What was this revolutionary technical leap often overlooked today[16], all about? Every VCR owner could watch what they wanted to watch at their leisure, at home. Before the introduction of VCRs, this was impossible. It also radically changed the audience's approach to television – at that time, viewers had to remember broadcast time – using a statement from that period, the reality was 'the viewer's total dependence on the programming timetable – if you're late, you don't watch' (Szulczewski 1972: 196).

Since then, over the next two or three decades, every new invention in the home video category has been just an upgrade, a face-lift of the same model. At first, at the pioneering stage of the development of this segment, the video cassettes were inconvenient to use, they contained only several dozens of minutes of programming and had to be rewound, and after a dozen or so playbacks the quality started getting significantly worse. Then there appeared the huge laserdisc, boasting the size of a vinyl LP, followed by technologically similar, but much smaller in size – CDs, DVDs and finally Blu-ray.

[16] 'Despite the ubiquity and unique qualities of home video technology, it has been sorely understudies in the academy' (Compare 2006: 336).

This way of watching content, despite being strongly linked to television, was for a long time mainly an 'extension of the film industry' (Compare 2006: 337) since it mostly used film facilities, not television production studios or broadcasting stations. This is one of the examples of how strongly television is connected with other ways of watching their content. Two worlds – cinema and television – became thus linked with each other. Initially, it was the world of cinema that saw a great threat in the simple access to content offered by television without the need to go to the screening. The results of the audience and attendance survey, however, spoke for themselves and led to a change in this belief: 'it has since become its [the film industry – Ł.B.] most crucial technology, fostering new markets for their products and providing the majority of their revenue since late 1980s' (ibid.).

Television content was not popular on the home video market until technology allowed for relatively cheap and good quality collections, such as whole seasons of TV series on DVD. From buying one's favorite TV series on DVD to be able to watch it at one's own convenience, there is only one step away buying access to the platform offering access to TV series' episodes.

The development of the DVD market meant that the audiences began to associate themselves even more closely with their favorite content, since they could actually 'own it', instead of just being able to watch it. This model, although theoretically distant from the 'traditional' way of functioning of television, began to bring significant profits already at the turn of the millennium and increased its market share year by year. In this situation, some publishers went with a middle ground between setting the content free beyond their control area and a universal programming, in which each type of programme has its own representation in the station. Said middle ground is thematic channels.

3.2. SMART TV, HYBRID TV, ON-DEMAND SERVICES

Although today the two most important media – television and the Internet – are often presented as antagonists (Lemańska 2017), the fact is that there is an exchange of ideas between them. Traditional content providers have long ago recognized the potential of new technologies linked to the global network to increase their spheres of influence. Sharing and making the content available on a new level was beneficial to them in two ways: first, they could reach a growing audience themselves – including age groups most valued by advertisers, and second, they limited the possibilities for new entities to pop up, thus limiting their potential competition.

A natural step in the process of television development[17] seems to be the creation of services and devices connected to TV sets, which, however, did not broadcast programs continuously, according to a programming timetable, but instead offered the possibility of viewing them without the possibility of recording them on a physical medium, using the streaming technology. It is a development of the idea of a brick and mortar rental store[18].

It is worth noting that VOD services are available to users in two main ways: first, as a website, which can be opened via a browser on a desktop computer or tablet with broadband access, second, as another function of TV sets (either directly or via a set-top box). The first of the above mentioned methods does not require a TV, but this does not mean that it makes it impossible to watch TV programming, which is more and more often available directly on-line (Kaźmierska 2016). The second method involves access to specific applications directly on the TV set, such as YouTube (researchers call it a 'closed system' [Zalewski et al. 2013: 5]), or to all the on--line content (in the case of the so-called open systems). This technical division is the key to understanding the difference between hybrid TV and *Smart TV*. According to the EBU (the European Broadcasting Union, which brings together more than half a hundred public broadcasters from all over the continent), the notion of hybrid TV is valid only if the user has access to the resources of the entire network. The name 'Smart TV' is reserved for devices with access to television applications specifically designed for the relevant model of a given manufacturer (ibid.: 6), where what the user ultimately sees is the responsibility of the manufacturer[19].

[17] The separation from the traditional television model was clearly seen in the famous slogan used by the American broadcaster: 'It's not TV, it's HBO'.

[18] Perhaps the most famous case of this type of company is Netflix, which started its on-line operations only after renting DVDs for ten years.

[19] In spite of the fact that 'Smart TV' became a customary name for products by various manufacturers, it is actually a product of Samsung. Other manufacturers have similar systems with different names; however, they have not been adopted by the general public to such extent.

Initially, VOD services offered content produced by others for TV stations, but quite quickly the direction in which the next changes were to follow was becoming apparent: When will the viewer's finally be able to view the content at any time? Who is going to wait for the content to be included in the programming? The opinion that the future of television will be limited to the creation of programs that will be shown by someone else became quite popular at the time. Based on interviews with employees of the Norwegian Broadcasting Corporation, Jostein Gripsrud (2004: 214) stated that television 'was to become primarily a producer of good programs, and its role as a distributor and composer of a schedule of certain mix od programs was expected to lose importance'. In retrospect, we can see that he was partly right – in fact, today's TV stations create more content than ever before, the emphasis is also on the quality of television[20], but the role of its distributor is still of great importance. Paradoxically, this is due to the falling number of people sitting in front of their TVs – media conglomerates are trying to keep the audience and don't let them go to the competition.

Returning to the issue of on-demand services, it quickly turned out that they do not have to be limited to the role of an intermediary and can create unique content on their own, which radically changed the situation of old-style broadcasters. One of the first signs of change was HBO's introduction of a new product to its offer – the HBO on Demand service, launched in the USA in 2001, which appeared in Poland seven years later, initially under the HBO Digital brand. The service offered access to content created for the HBO and Cinemax channels (which belonged to the HBO Group). It was not a VOD offer, but a VOD subscription addressed only to subscribers of the regular HBO channel, available via a TV set-top box. From the very beginning, the users could choose between HBO productions – feature films, documentaries, concerts, as well as TV series available in packages containing several episodes each. Every week, about a hundred programs were waiting for their audience (Nietrzpiel 2010). The new product was very popular. HBO management followed suit and introduced the audience to the HBO GO website in the holiday season of 2010 – it is worth mentioning

[20] The notion of quality TV is of interest to Polish researchers, see: Major 2012

that Poland was the second country in the world, after the USA, where the service was launched.

Let us also note that until the creation of the websites, which themselves created the content they shared, the model was as follows – the TV created a programme, which was then presented to its audience in a traditional or more modern form (via VHS, DVD or VOD platform). The year 2013 was a breakthrough in this respect, when Netflix, HBO GO's rival on the VOD platform market, started producing TV series with quality comparable to that of traditional television and even higher[21]. In Poland, the company entered the market officially in the first weeks of 2016, gaining great interest (Kozłowski 2016) on the spot (although some of its customers accused the website of having a very limited offer in Polish). While HBO created programs for its television channels, treating other ways of reaching the audience as secondary, Netflix has no such channels. The supply chain was significantly shorter – why pay for creating content when we can do it ourselves? The efforts to lower cost and optimize profits were previously used the other way around. In 2013, the KRRiT team noted that VOD services related to large advertising market players (mainly satellite platform operators, large cable networks and terrestrial TV broadcasters) dominate the Polish market (Zalewski et al. 2013: 12).

It is not possible to talk about television without mentioning platforms such as HBO GO or Netflix, although their impact on our market is still hardly significant – these global players have to compete with a whole range of more or less native websites, largely belonging to TV station owners. Krzysztof Zalewski considers larger investments in Polish production to be the key to increasing market share.[22] Poles are very fond of Polish content, including older and cult productions, which may lead the audience to use the services of domestic providers for a long time. Not all big players disregard local content – one of the youngest VOD websites in our country, ShowMax, seems to understand that such an offer can attract the Polish audience. From the very beginning, the website has been advertising with productions such as the satirical *Ucho prezesa* [*The Chairman's Ear*], as well

[21] *House of Cards*, a Netflix TV series, won three Emmy Awards in its first year, and was nominated in three more categories.

[22] Author's own interview with Krzysztof Zalewski.

as films such as *Pitbull* or *Planeta singli* [*The Singles' Planet*]. Although it belongs to the South African Naspers group, it also plans to offer production created by Poles (Kaźmierska 2017).

As it has already been mentioned, the services related to television channels have a very strong position on the market. Ipla.tv, which offers Polsat programs, Player.pl, which belongs to the TVN Group, as well as vod.tvp.pl, which belongs to the national broadcaster, are all websites with millions of users (Wojtas 2017). They bring huge profits and also make it easier to reach new types of audiences, often even people who were not previously interested in television. For example, ipla.tv offers access to eighty television channels, as well as thousands of broadcasts. For a long time now, it has not been a niche form of entertainment, which is increasingly often used by broadcasters.

CONCLUSIONS

Will the connection with the Internet be the future of television? If nothing unpredictable happens – definitely yes. The change of perception of television is taking place before our very eyes – it is difficult to expect that somebody who has had access to a laptop, tablet and a smartphone from an early age, and somebody who is accustomed to jumping between windows in search of interesting content, to sit politely in front of the TV and wait for a broadcast. At the turn of the millennium Wiesław Godzic (2001: 177) predicted: 'The 'new' digital way of watching television is not yet fully recognized and understood, and for a long time we will apply – mentally and behaviorally – the models that we know from our previous contacts with the silver screen'. It is very possible that the time mentioned by the Polish researcher has come to an end. While the elderly still devote a lot of time to watching television in the traditional, linear way, like in the times when a statistical viewer spent more than 80% of their time in front of their TV watching the 'Big Four', the young generations approach TV with a set of specific requirements.

What is the future of thematic channels in this complex landscape? What role will they play in the complex television market? It is difficult to give a clear answer to these questions. However, it is very possible that in the near future the number of channels – which is currently too inflated, will be radically reduced. Experts' opinions regarding their future vary. Some, like

Maciej Mrozowski, claim that they will survive both off-line and on-line, while others, like Adam Stefanik, director of Superstacja, foresee their rapid demise (Szeliga 2016).

Bibliography

Roman Bartoszcze (2006), *Słownik terminologii medialnej*, ed. W. Pisarek, Kraków: Universitas.

Derek Compare (2006), *Publishing Flow: DVD Box Sets and the Reconception of Television*, „Television and New Media", Vol. 7, No. 4.

Wiesław Godzic (2001), *Rozumieć telewizję*, Kraków: Rabit.

Elżbieta Gorajewska (2016), *Marzenia o jednym rankingu* [an interview with Andrzej Marciniak], „Telekabel", No. 5.

Jostein Gripsrud (2004), *Broadcasting Television: The Chances of Its Survival in Digital Era*, [in:] *Television after TV. Essays on Medium in Transition*, eds. J. Olsson, L. Spigel, Durham (N.C.): Duke University Press.

Alicja Jaskiernia (2016), *Od telewizji masowej do Netflixa – Telewizja w Stanach Zjednoczonych w epoce cyfrowej*, Warszawa: Oficyna Wydawnicza ASPRA-JR.

Anita Kaźmierska (2016), *Cyfrowy Polsat GO – dla kogo i w jakiej cenie?*, http://satkurier.pl/news/126473/cyfrowy-polsat-go-dla-kogo-i-w-jakiej-cenie.html.

Anita Kaźmierska (2017), *Jaki serwis VOD z filmami i serialami wybrać?*, http://satkurier.pl/news/158093/jaki-serwis-vod-z-filmami-i-serialami-wybrac.html.

Wojciech Kowalczyk (2017a), *Trudny rok TV tematycznych, wzrost UPC i Cyfrowego Polsatu: przyszłość płatnej TV w badaniu ScreenLovers*, part I, http://screenlovers.pl/trudny-rok-tv-tematycznych-wzrost-upc-i-cyfrowego-polsatu-przyszlosc-platnej-tv-w-badaniu-screenlovers-cz-i/.

Wojciech Kowalczyk (2017b), *Rynek stacji tematycznych jest przesycony, popyt na FTA oraz premium: badanie płatnej TV by ScreenLovers*, part II, http://screenlovers.pl/rynek-stacji-tematycznych-jest-przesycony-popyt-na-fta-oraz-premium-badanie-platnej-tv-by-creenlovers-cz-ii/.

Konrad Kozłowski (2016), *Netflix w Polsce – czy warto, jak zacząć, co obejrzeć*, http://antyweb.pl/netflix-w-polsce-czy-warto-jak-zaczac-co-obejrzec/.

Michał Kurdupski (2015), *Polsat liderem w sierpniu, TVP1 wyprzedziła TVN. Hitem „M jak miłość"*, www.wirtualnemedia.pl/artykul/polsat-liderem-w-sierpniu-tvp1-wyprzedzila-tvn-hitem-m-jak-milosc.

Michał Kurdupski (2017), *TVN24 z najlepszym wynikiem w historii, rosną Nick Jr i Super Polsat (top 25 tematycznych)*, www.wirtualnemedia.pl/artykul/ogladalnosc-kanalow-tematycznych-lipiec-2017.

Magdalena Lemańska (2017), *Pojedynek internetu z telewizją nabiera tempa*, „Rzeczpospolita" online, http://www.rp.pl/Media-i-internet/307169928-Pojedynek-internetu-z-telewizja-nabiera-tempa.html.

Małgorzata Major (2012), *Telewizja jakościowa*, „Dwutygodnik" , No. 83, www.dwutygodnik.com/artykul/3597-telewizja-jakosciowa.html.

Paulina Nietrzpiel (2010), *Jambox jako pierwszy z HBO Digital*, http://satkurier.pl/news/53868/jambox-jako-pierwszy-z-hbo-digital.html.

Mateusz Nowak (2017), *W polskim gospodarstwie domowym jest 6 urządzeń podłączonych do sieci*, https://www.spidersweb.pl/2017/04/liczba-urzadzen-podlaczonych-do-internetu.html.

Carlos Ortega (2016), *Bogatsza oferta, stagnacja opłat*, „Telekabel", No. 5.

Daniel Reszka (2016), *Raport specjalny – kanały dla dzieci*, „Telekabel", No. 6

Jakub Sadurski (2014), *Polskie kanały telewizyjne nadające na zagranicznej licencji*, http://mediamoje.pl/polskie-kanaly-telewizyjne-nadajace-na-zagranicznej-licencji/

Aneta Szeliga (2016), *Dziś obchodzimy Światowy Dzień Telewizji. „Telewizja nie zniknie"*, www.wirtualnemedia.pl/artykul/dzisiaj-obchodzimy-swiatowy-dzien-telewizji-telewizja-nie-zniknie.

Tematyczne vs. uniwersalne (2017), „Telekabel", No. 4

TVN w górę, najwięcej traci TVP2 (2007), www.wirtualnemedia.pl/artykul/tvn-w-gore-najwiecej-traci-tvp2#

TVP wymienia TNS OBOP na Nielsen Audience Measurement (2011), www.wirtualnemedia.pl/artykul/tvp-wymienia-tns-obop-na-nielsen-audience-measurement/.

TVP rzuca wyzwanie Netflixowi i uruchamia płatny serwis SVoD. „Wsparcie dla wpływów z abonamentu" (2017), www.wirtualnemedia.pl/artykul/tvp-uruchomi-platny-serwis-svod-wsparcie-dla-wplywow-z-abonamentu-rtv.

Tomasz Wojtas (2017), *VoD.pl, Player.pl i WP.tv w dół. Mocno w górę Netflix, ShowMax z 2,6 mln użytkowników (dane serwisów VoD)*, www.wirtualnemedia.pl/artykul/serwisy-vod-w-polsce-netflix-shwomax-vod-pl-player-pl-i-wp-tv-w-dol-mocno-w-gore-netflix-shwomax-z-2-6-mln-uzytkownikow-dane-serwisow-vod.

Krzysztof Zalewski, Stanisław Celmer, Jarosław Firlej, Ewa Murawska-Najmiec, Albert Woźniak (2013), *Telewizja Hybrydowa: szanse, zagrożenia i wyzwania regulacyjne*, Warszawa: Krajowa Rada Radiofonii i Telewizji, http://www.krrit.gov.pl/Data/Files/_public/Portals/0/publikacje/analizy/tv-hybrydowa_raport_2013-05-16_2_def-2.pdf.

Zmiany w udziałach oglądalności (SHR%) kanałów należących do wybranych nadawców/dystrybutorów. Porównanie w latach 2015-2016 (2017), „Telekabel", No. 4

Summary

The article considers a broad topic of thematic channels on the Polish market. Thematic channels, increasingly popular and obtaining more and more media coverage, fit well into the landscape of television, gaining a large audience and changing the way television is perceived by Poles. The author proposes various ways of categorizing thematic channels, because of their license types, thematic segments, television signal sources, media groups and financing methods. The author also provides information on station viewership. He also focuses on alternative ways of watching audio-visual content (videotapes, DVD players, home video systems, smart TVs, hybrid TVs, on-demand services), and defines how they have influenced the shape of contemporary television as well as the development of thematic channels.

Keywords: thematic television channels, TV, Polish television market, media groups, viewership data, viewership, terrestrial television, cable TV, satellite TV