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THE MEDIA MARKETING OF THE VOD PLATFORMS IN POLAND DURING THE COVID-19 PANDEMIC – AN EXPLORATORY STUDY

Abstract

The article attempts to map and systematise the changes and reactions triggered by the first wave of the COVID-19 epidemic in media marketing (MM) of VOD platforms operating in Poland. The aim of the authors is to capture general trends and regularities that appear in the industry practices, as well as to indicate, firstly, the most meaningful elements of MM (the product offer, distribution, price, and marketing communication), and secondly – to identify the VOD platforms that excelled in these changes. The paper, using the content analysis method, is the first to present a cross-sectional research perspective on the MM-VOD-COVID-19 line, aiming not only to initially estimate the actual media modifications caused by the pandemic, but also to classify them in order to lay the foundation for further research in case this type of situation recurs.

Keywords: VOD platforms, media marketing (MM), COVID-19, pandemic

1. Introduction

The coronavirus pandemic affects every area of human life: it has an influence not only on the health care system but also on politics, culture, education, economy, religion, and the media. The effects of the epidemic are not only the result of its extent, dramatic course, but also of the unprecedented scale of restrictions, managed by the authorities of various countries.

In Poland, the first preventive actions were taken as early as 9.03.2020, only five days after the first official case was announced; on 12.03, along with the introduction of the state of the epidemic, public gatherings of over 50 people were banned and institutions of culture, entertainment and sport were closed. The state of the epidemic (20.03) meant a lockdown of the country: restrictions on freedom of movement were tightened and all gatherings were prohibited. At the beginning of April, forests and beaches were closed, and strict sanitary requirements were imposed. The four-stage easing of restrictions began at the end of April, but only in its third phase (18–29.05) was work on film sets allowed to restart, and in its fourth phase (from 30.05) – it was permitted to open cinemas and organise gatherings of up to 150 people.

The lockdown has struck the work of the media: the requirements of the sanitary regime and restrictions on the number of gatherings effectively modified and hindered the functioning of the media. The direct effect of social distancing (with confinement in homes as an example) was establishing an indisputable role for the Internet in everyday life and therefore changing the media landscape. This resulted in far-reaching modifications in TV/radio programming and publishing market as well as in reshaping the media consumption habits. Reports published so far clearly indicate that in Poland the pandemic has contributed to an increase in the popularity of TV (news channels/programmes), news portals, social media, search engines, messaging services, and *video on demand* (VOD) platforms: the latter (according to PMR, 2020) by 32% or even (according to Resolution, 2020) by 51%. The average time spent on watching their content also increased (BG, 2020). Additionally, some of them strengthened their market position on an unprecedented scale: for example, Netflix recorded a 562% increase in popularity (Zawiślak, 2020).

An unexpected leap in the success of the VOD industry aroused political emotions. In March 2020, the European Commission requested Netflix to reduce the bitrate, thus relieving the bandwidth across Europe. The platform responded with a 25% bitrate drop for 30 days (Sweney, 2020). Meanwhile, in Poland, an audiovisual tax (commonly referred to as the “Netflix tax”) was imposed on VOD providers. It was implemented due to the massive viewership the platforms generated and as a result of the deepening pandemic-related crisis in national culture. The legislator decided that it would amount to 1.5% of advertising revenue or income, and the funds obtained from it would serve to support Polish cinematography (Erling, 2020).

These circumstances, resulting directly from the global pandemic, had a significant impact on the marketing activities of VOD providers themselves. They had to adapt to changes: both positive ones (e.g. popularity among viewers, growing competitiveness against traditional media) and negative ones (e.g. government restrictions limiting film production, new taxes). In other words, VOD platforms – in order to take advantage of the sudden opportunity for growth, but also to guarantee its stability and sustainability – had to adapt their programming, distribution, pricing, and promotional offerings to the current epidemic situation. However, despite the scale and complexity of modifications, it seems that the holistic view of the marketing activities of VOD platforms in the age of the pandemic remains understudied. The aim of this paper is therefore to explore the scope and specificity of these changes from the perspective of the whole media marketing of the VOD sector, rather than its individual components or specific providers.

The text is divided into three parts. In the theoretical one, the authors present the literature review on media marketing, VOD, VOD media marketing, and the interconnection between the pandemic and VOD (along with its media marketing). In the methodological part, the authors describe the assumptions of the research process. In the empirical part, the results are presented and discussed. The paper ends with conclusions with a reference to limitations of the study, implications to future research, and contribution to theoretical and practical aspects of media management.

2. Theoretical background

2.1. The idea of media marketing

In media marketing (hereinafter: MM), the media are at the same time the sender (producer), the message, the transmitter, and the recipient of marketing activities (Jupowicz-Ginalska, 2010, 2014). MM does not focus on non-media enterprises and institutions; instead, it places the functioning of media companies at the centre of research interest. In other words, it can be defined as the marketing of media companies, because it analyses the functioning of the media from the perspective of the marketing mix formula, which includes product, place, price, and promotion (see: McCarthy, 1960, 1981).

Despite being based on the 4P formula, MM itself is not old-fashioned or traditional. It cannot be, because it refers to the media which constantly undergo a process of mediamorphosis, defined as "the transformation of communication media, usually brought about by the complex interplay of perceived needs (…) and social and technological innovations" (Fidler, 1997, p. 15). It can be stated that MM constantly develops along with the media themselves: the 4P formula gives it the necessary systematising framework, while not reducing media observation to McCarthy's approach.

In terms of MM, a product is a commodity and/or a service offered by the media (i.e. TV/radio channels, press titles, websites, programming offers, specific TV/radio programmes, background media products deepening the product lines of individual media, e.g. social media profiles, applications, etc.). It is characterised by modifiability and flexibility, simultaneous objectivity and subjectivity of promotion, the abruptness of the course of the life cycle, and frequent occurrence of the aforementioned background media products. The issue of media products is related i.e. to their editorial policies/philosophies, content, packaging, and media brands (including people acting as brand ambassadors).

Distribution in MM takes into account all the processes and techniques of transferring media offer to their recipients, both traditionally and digitally.

Price can be understood as personal (paid by customers using the product offer, i.e. cover price, subscriptions, packages of TV channels, paywall) and institutional (advertising/sponsorship fees, paid by companies in exchange for buying airtime or advertising space). An additional price element is the pro-sale promotion.

The last component of MM is promotion/marketing communication pursuing a pro-image goal. It includes internal promotion (within the structures of a media entity), external promotion (outside its structure), and mixed promotion (a combination of both approaches). Each type of pro-image promotion has numerous techniques, both advertising and editorial (embedded in the journalistic materials).

MM is inextricably linked with the practice of the industry, it also applies to topics such as digitisation and multiplatformisation, transmedia, multiscreening, algorithmisation, new content consumption models, and innovation, manifested in the implementation of augmented/virtual reality (Jupowicz-Ginalska, 2018). Hence, it is apparent that the basis of MM is interdisciplinary, combining media studies with marketing, management, logistics, economic, legal, sociological, and psychological perspectives. It refers to all types of media companies (including VOD platforms), because all of them – while operating in a highly competitive market – must follow specific marketing strategies that ensure their development.

2.2. VOD platforms – definitions, classification and characteristics

There is no single compact definition that describes VOD platforms. The technical explanation recommended by the International Telecommunication Union (2009) defined it as "*a service in which the end-user can, on demand, select and view a video content and where the end-user can control the temporal order in which the video content is viewed*". The definition proposed by Włodzimierz Gogołek (2010, p. 142) emphasises the convenience of using the service because "videos that are stored in the server memory are made available to the recipients upon their request".

The on-demand services are widely diverse. VOD platforms that operate on the Polish market can be divided into at least three groups, according to the place of content storage, infrastructure through which the service reaches its users, and business model.

In terms of the place where the content is stored, the services are divided into push VOD and pull VOD. In *push VOD*, audiovisual files are transferred by content providers to the so-called client's set-top boxes. Since every storage place works as a hard drive, the number of video files is limited by the drive capacity. Using *push VOD* also requires having set-top boxes equipped with a *Personal Video Recorder* (PVR) function. The operator periodically makes changes to the offer. When creating a new one, the customer's order history is taken into account. In *pull VOD* service, the customers have all the audiovisual files available on the operator's server at their disposal. This type of service often requires payment for the use of a specific file (Stępka, 2009, p. 3; Oleszkowicz, 2015, p. 143; Suh et al., 2017).

When it comes to infrastructure, one can distinguish cable infrastructure, terrestrial broadcast/radio infrastructure, satellite platforms, ADSL connection (IPTV), and the Internet. The VOD platforms analysed in this paper reach their viewers via the Internet, thus they are characterised by low cost and wide reception range. Their biggest limitation is the image quality and disruptions in the continuity of transmission. To avoid it, content is offered at different speeds of data transfer (Stępka, 2009, pp. 4–5; Oleszkowicz, 2015, p. 143).

Regarding the business models, content can be *free on-demand* (FoD), where users do not pay any fees for the content watched, but in return they are requested to watch ads (*Ad-based Video-on-demand*, AVOD). The example here is TVP VOD (public TV). Another model, *rental* VOD, offers various forms of payment: the temporal renting of an audiovisual file (*pay per download*, e.g. Player or Canal+ VOD); watching programmes for a subscription fee which is the main source of income for the business (*subscription VOD – sVOD* – such as Netflix or HBO GO); rental of a specific programme package (e.g. episodes of a given TV series, like UPC); a fee similar to a pre-paid card, thanks to which the user can rent programmes (*packages*, e.g. Cyfrowy Polsat). The last model is *download to own VOD* (DTO, also known as *Electronic Sell Through*, EST), allowing the users to purchase programmes and store them on their hard drives (e.g. Amazon Prime Video) (Stępka, 2009, pp. 5–6; Oleszkowicz, 2015, p. 143).

Despite the differences, the VOD services have common features. They are an obvious example of mediamorphosis, a significant part of the digitalisation and convergence processes (see: Jenkins, 2006, 2007), and an emanation of multimedia services (Kopecka-Piech, 2011, pp. 7–13). Their appearance has significantly modified the 'traditional' media market, because as non-linear enterprises they offer their recipients convenient freedom in consuming content independently of the rules of the publishing cycle or TV schedules. It can be even said that they have activated their users, who are able to decide on the content they have chosen to consume (Jaska, 2019, p. 129). As a result, VOD platforms have begun to compete with the 'old media', accelerating the process of their modernisation (finally, the media considered to be 'traditional' have started establishing their VOD platforms to multiply the channels of reaching their recipients).

Another feature is the diversification of the content of VOD platforms. Among others, it consists of productions of traditional broadcasters, e.g. films and series, entertainment shows, reportages, and news programmes (as a catch-up TV service released in daily/weekly slots or as a pre-premiere, offered in archival and pre-release versions – both paid and for free) (Oleszkowicz, 2015). Apart from this, VOD service providers (especially the paid ones) rely to a large extent on the content accessed from third parties, using licensed content. Some service providers offer their original content (Marketing Charts, 2020). Moreover, a global approach to local content has been noticeable in recent years. As Sutherland (2020, p. 8) observed, platforms are starting to invest in local productions to attract a global and passionate audience.

VOD platforms also constantly update their offer, taking into account the specific preferences of their recipients. By using algorithmic mechanisms (Avezzu, 2017; Johnson, 2020), they suggest and prompt their users to make further choices in a personalised way. This ability to decide is not only limited to the type of content to watch but also allows the viewers to decide upon the way it can be consumed. An example of this is the phenomenon of binge-watching (Silverman, Ryalls, 2016).

2.3. VOD – the media marketing perspective

VODs can be considered as media products enriched with background media products (e.g. websites, social media profiles, applications), offering countless entertainment, journalism, and news programmes. They can function outside the structures of traditional media (e.g. Netflix, HBO GO, Amazon Prime Video, CDA Prime), but also within them, thus becoming a component of their product offer (e.g. Player.pl in TVN Discovery Network, Ipla.tv at Cyfrowy Polsat, TVP VOD at Telewizja Polska S.A.).

The VODs offer is one of the most popular topics studied. Productions available on the platforms are often analysed either in the visual context or as an interpretation of the content. Seadle (2019) for instance, reviews a Netflix documentary *The Great Hack* through the historical, political, and technical angle. Other researchers are focused on the cultural aspects of the VOD content. Bucciferro (2019) points out the contribution of VOD services when creating female-centred series. She claims that Netflix has revolutionised "*the traditional gatekeeping practices*" in media production by devoting a significant amount of its budget to minority creators. Cascajosa-Virino (2018) notices that VOD content allows the audience to actively participate in the narrative extension of a series, while Yalkin (2019) claims that TV series serve as the building blocks of VOD and streaming business models, reflecting on consumers' life events by disturbing, provoking, dividing, and consolidating audiences with their favourite productions. The social impact of the content is also examined. Krebs (2019) states that the Netflix series *13 Reasons Why* serves as educational contribution to suicide prevention that allows audiences to learn about suicide in a constructive manner, while Barker et al. (2019) claim that exposure to tobacco and alcohol imagery on Netflix and Amazon Prime Video is a risk factor for smoking and alcohol use among young people.

The distribution of VOD platform content requires the users to access the Internet, so in terms of technology, broadcasting is indirect (with the necessity to use the services of the network provider). Distribution of the offer is usually widespread, as suppliers want to acquire as many subscribers as possible. Selectivity does happen (e.g. country selection when launching a global platform) but is usually temporary. The offer distribution is different for individual platforms: some of its elements are distributed exclusively through their channels (e.g. their own original series and movies, such as the ones produced by HBO or Disney+) and some are broadcast on a license basis (these are often productions of public service broadcasters such as ABC, CW, or BBC). The distinguishing feature of VOD providers is that they release the whole season at once (although Amazon Prime Video works in a hybrid mode) and archive them simultaneously in media libraries.

In the literature, two main distribution-related threads can be observed: the technological one and the consumption one. The first one is exemplified by the model analysis provided by Xu et al. (2014) which helps to understand the minimum server bandwidth consumption for peer-assisted VOD systems. Fernandez-Manzano et al. (2016) analyse data management in audiovisual business using Netflix as a case study, while Barman and Martini (2019) provide a comprehensive overview of recent and currently undergoing works on the quality of experience modelling for HTTP adaptive streaming (HAS). The other thread focuses on the binge-watching phenomenon. For example, Panda and Pandey (2017) investigate the various triggers and consequences of binge-watching, while Samuel (2017) explores changes in contemporary television-viewing habits and experiences brought by on-demand platforms.

In the case of personal price, some providers offer products for free (e.g. TVP VOD), some – in the form of premium content – for a fee (Ipla.tv, Player.pl), while others (HBO GO or Netflix) operate on the basis of monthly subscriptions (there is also a combination of these solutions). In the abovementioned cases, bundling may take place, e.g. due to the content of media products (e.g. temporary free access to Netflix as a gift when buying a TV with the Internet from the Play provider). In the area of personal price, sales promotion is carried out, e.g. price discounts regarding the product offer or access to the platform (free trial, discount in subscription). VOD providers, on the other hand, present a different approach to institutional cost: some use price lists (advertisements appear on websites or before the emission of free content) or they abandon them (institutional cost is reduced to product placement in original productions, usually determined by separate negotiations).

The price of VOD platforms is mostly analysed from an economic perspective. For example, Niu et al. (2012) refer to the subscription issues, claiming that

VOD providers, such as Netflix or Hulu, make reservations for bandwidth guarantees from the cloud at negotiable prices to support continuous media streaming. Lotz (2019) examines shifts in the US television industry such as revenue model and ownership regulations to illustrate how adjustments in the underlying financing practices of series production and revenue sources structure the multiplatform environment. There are also papers devoted to economic and political regulations imposed on VOD providers by various governing bodies. For example, Dwyer et al. (2018), by comparing VOD media businesses and policies in Australia and South Korea, concludes that media markets are shaped by their own historical, cultural and economical, distinctive variations of industry and governance (p. 4568).

Pro-image promotion is based on both internal and external activities. In the first case, profiles on social media, websites, applications, or content of productions themselves are used, supporting one another by means of self-promotion or cross-promotion. In the second case, brand communication takes place through advertising campaigns, events, brand ambassadors, competitions for customers, media agreements (cooperation with other entities to support the platform's brands), or involvement in CSR, where the contribution of the VOD provider is emphasised. A wide range of studies investigates VOD promotion activities in terms of means of attracting customers. Martin-Quevedo et al. (2019) state that social media have become useful tools for audiovisual promotion and point out differences between the ways HBO and Netflix use their Instagram accounts for different markets. Sparviero (2019) focuses on PR activities conducted for the VOD brand (or its program offering). Park and Kwon (2019) analyse various types of strategies used by VOD to find its place in the firmly entrenched broadcasting industry, while Bhavsar (2018) points out shifts in consumer preference towards digital media and visible willingness to pay for premium content as a result of on-demand platforms investing more in digital advertising.

Due to the interdisciplinary character of media marketing, the literature combining its components with VOD topic is also interdisciplinary. However, it is noticeable that the 4P formula of the VOD providers is studied fragmentarily, with the focus on single 'Ps' only. Therefore, the existence of an academic gap can be confirmed (regarding the lack of a holistic MM perspective on the VOD industry).

2.4. The pandemic and the VOD sector: MM perspective included

Academic research on interconnections between VOD platforms and COVID-19 takes on a general, cross-sectional character. It focuses mostly on social, economic, or political contexts, mainly taking into consideration *product* and *place* elements of 4P formula.

In the social context, Dastidar (2021) describes changes in social behaviour and media consumption habits caused by the lockdown. The author notices that the VOD sector has boomed as a sustainable alternative to traditional entertainment and media due to its flexibility, quality content, and multiscreening availability. She also points out changes in the industry's economic activities which introduce innovative business strategies such as extended period offer or free subscription. Rodriguez et al. (2020) focus on activities in the field of marketing communication on the basis of the lockdown-triggered changes in the behaviour of Spanish society. The authors analyse the lockdown effect on the viewers during the premiere of the fourth season of *Money Heist* and come to the conclusion that transmedia storytelling has become a powerful communication strategy and plays an important role in the premieres of popular Netflix series. Bakkar (2020) observes an increased consumption of mobile applications (including Netflix) while Fan (2021) studies the popular Netflix TV show *Too Hot to Handle*, requiring all its participants to refrain from any sexual activity. She focuses on the role of Lana, a non-human sensor featured in the show as a reflection of a physical distancing warrant during the COVID-19 crisis. Madnani et al. (2020) prove the impact of the pandemic on reshaping consumer content preferences, Nhamo et al. (2020) describe the influence of the coronavirus on the leisure, gaming, and entertainment industries (including the issue of suspending production on film sets), while Dixit et al. (2020) or Ebner and Greenberg (2020) study the binge-watching phenomenon during these times.

From the economic perspective, Lozic (2021) presents a financial analysis of Netflix operations during the COVID-19 pandemic while Vlassis (2021) offers an analysis of the consequences of the pandemic for the operation of global online platforms, as well as for the political and economic aspects of the cultural sectors. Cunningham & Scarlata (2020) analyse political decisions affecting the cultural sector, referring to the challenge of unregulated SVOD services during 'temporary' suspension of Australian content regulations caused by the coronavirus.

Some of the academic papers refer to the media industry in general, focusing on trends and tendencies caused by the coronavirus outbreak. For example, Ibrus & Teinemaa (2020) look at the overall impact of the pandemic on the audiovisual market. Vlassis (2021) proposes treating the global COVID-19 pandemic as a major new industrial and cultural event and highlights current and key trends related to lockdown measures. Túñez-López et al. (2020) study COVID-19 and VOD through the lens of public service broadcasters, focusing on technical and professional constraints, changes in audience, production strategies, type of content broadcast, and journalists' routines. Feldmann et al. (2020) analyse higher traffic volumes of Internet connections within the VOD background.

Although the media-MM-pandemic literature is of *in statu nascendi* character, a second academic gap can already be diagnosed here: to the best authors knowledge, it can be stated that a holistic approach to MM of VOD platforms in the context of COVID-19 was not undertaken in any of the papers analysed.

3. Methodology

As stated, the aim of this paper is to explore the scope and specificity of the reactions of VOD sector in Poland during the first wave of the COVID-19 epidemic, studied from the holistic perspective of the media marketing 4P formula. It means that the authors did not intend to precisely and separately analyse the activities of each provider, but they attempted to indicate general trends and regularities which appeared in the industry practice.

The following research questions, resulting from the identified academic gaps, were asked: 1) what changes/responses to the pandemic can be observed in the MM 4P formula of VOD platforms? 2) which of the 4Ps of VOD platforms underwent the biggest modifications and what was their specificity? and additionally: which VOD platforms generally excelled in these changes/responses? No hypotheses were made because the research was exploratory.

The authors were inspired by the Mayring's (2014, pp. 39–115) approach to the content analysis method. Due to the editorial limitations of this paper only the most important steps of the research process are further characterised.

Based on the general procedural model of the method (p. 54), the authors firstly defined the material to be studied. Since the aim of the research was a cross-sectional analysis of marketing reactions of the VOD sector to the pandemic, it was necessary to aggregate a rich and equally cross-sectional set of examples of such reactions, simultaneously meeting the criterion of thematic homogeneity (the aforementioned marketing reactions) and diversity (references to many VOD platforms operating on the Polish market). As a basis for the construction of the corpus material, the authors selected journalistic articles published on the Wirtualne Media portal (hereinafter: WM). It is a thematic medium, which provides new industry information about media and marketing (including media marketing activity) on a daily basis. Therefore, it can be concluded that the thematic specificity undertaken by the portal fits into the research area of the text and is consistent with it (it should be emphasised that WM has the strongest market position among portals of this type). Obtaining research material from WM was therefore intended to structure the research process.

Afterwards, the authors identified the exact selection criteria for the articles published in WM to focus only on these ones which were strictly connected with the research goal and questions. These were thematic and time criteria. Regarding the first one, in order to build a research sample, keywords such as *pandemic*, *epidemic*, *COVID-19*, *VOD*, *video-on-demand*, and – as a complementation – names of specific platforms were entered in the WM's search engine. This provided a sample that related exclusively to the area studied.

Regarding the time criterium, the period between January and August 2020 was initially selected (from the beginning of the year till the beginning of the second phase of the pandemic in September). As it turned out, none of the publications between January and February 2020 addressed the studied subject, so the corpus material referred to the period between March and August 2020. As a result of the selection, 122 texts were obtained (they all focused on VOD threads during the first phase of the pandemic). Additionally, according to Mayring's approach, the formal characteristics of the material could be described as text.

In the area of the next research steps (direction on analysis and theoretical differentiation of the sub-components of the problem), the media marketing perspective was adopted. It was decided to study the selected corpus material through the angle of VOD's MM 4P formula. That means that each article was to be analysed in terms of changes in the VOD platform's product offer, distribution, price, and promotion. However, the authors were aware that the aforementioned categories could be too general. They decided to develop the subcategories within each category. Moreover, they wanted to avoid an accidental choice of the subcategories or relying solely on the literature because, as appeared, there were clear academic gaps in it. For this reason, they decided to read all of the 122 selected articles and, on that basis, to prepare the list of subcategories matching each P of the formula. Therefore, as a result of the inductive category formation, within the *product*, the following subcategories were introduced: new elements in the product offer, suspension of the production, changes in the production, decoding the offer, re-emissions, resumption or emission/production, other. The *place* category consisted of reduction of the data transmission signal, decoding the product offer, additional distribution channel, other. The *price* category comprised new price packages, decoding the product offer, and other were indicated. The *promotion* category was divided into the popularity of use, online events, CSR activities, additional communication techniques, and others.

This phase of the research process resulted in two revisions. First of all, it turned out that, in majority, one WM article refers to more than one VOD platform (thus to a more than one media marketing activity). Secondly, few of the articles were indirectly connected with MM (they could not be exactly identified with any of the 4Ps, but they offered a general view on the media company's marketing situation). In response, the authors implemented two solutions. Regarding the first issue, they took into account the frequency of references to VOD providers appearing in the articles. It means that the research sample covered the references rather than the articles (finally, the corpus material consisted of 266 references to the MM of VOD platforms). Regarding the second issue, the authors decided to introduce an additional category for the research, which was "other".

After the precise definition of the content analysis units the authors built the coding key which they embedded in an Excel sheet. Apart from the MM categories (and subcategories) the research tool consisted of the article's title, the date of the publication, the link to the publication, and the name of the VOD platform. When the research instrument was ready, the coding rules were clarified. They referred to the definitions of the categories and subcategories (for example it was agreed that some of the marketing activities could be associated with several categories simultaneously), the coders team (the authors) and the time of coding (trial coding, potential revisions and final coding were planned for September 2020).

After clarifying the procedures, the authors started working with the material. Trial coding proved the codification key to be understandable and convenient to use, so there was no need to revise it. The final version of the corpus material was finished on time. The cross-checking procedure was run in October 2020 – when any doubts occurred, the material was discussed and revised if necessary. As the last step, the results obtained (shown as a percentage) were interpreted and discussed in relation to the main research problem.

4. Results and discussion

Table 1 describes the speed and intensity of the VOD platforms' response to the pandemic. As it turned out, 44% of the references appeared in March, which is related to the introduction of the lockdown. As time passed, there were fewer reports on the reaction: this can be explained by the fading effect of surprise, the stabilisation of the implemented measures, and the gradual loosening of government restrictions.

Table 1. The market of VOD platforms – the intensity of response to the pandemic (percent references/month)

	Number of mentions	Percent of mentions
March	115	44%
April	63	24%
May	39	15%
June	21	8%
July	9	3%
August	16	6%
Together	263	100%

Source: Personal collection.

Later, the magnitude of the response of specific platforms was estimated (Table 2). Their disproportion becomes visible: in the adopted research period, the majority of references concerned Netflix (20%), the activity of this platform was also systematic. Player.pl (15%) and the platform market in general (10%) also stood out.

Table 2. Individual VOD platforms – the intensity of response to the pandemic (percent references/month)

	Netflix	HBO GO	Amazon Prime	Hulu	Disney+	VOD.pl	Ipla.tv	Player.pl	TVP VOD	Other	VOD in general
March	18%	8%	3%	0%	6%	5%	7%	14%	5%	23%	10%
April	24%	6%	5%	0%	3%	8%	6%	16%	2%	16%	14%
May	13%	5%	5%	0%	8%	5%	8%	18%	3%	28%	8%
June	19%	14%	5%	5%	0%	5%	5%	14%	0%	29%	5%
July	33%	0%	0%	0%	0%	0%	0%	0%	0%	33%	33%
August	31%	13%	13%	0%	6%	0%	6%	25%	0%	6%	0%
Together	20%	8%	5%	0%	5%	5%	6%	15%	3%	22%	10%

Source: Personal collection.

When analysing the media marketing perspective, it should be noted that most of the references in the analysed articles referred to the modification of the product offer. This thread dominated every month except July, when attention was shifted to the audiovisual tax imposed on VOD providers. The tax, commonly known as the "Netflix tax", amounts to 1.5% of income or advertising revenues, obtained and intended to support Polish cinematography (information on this subject is included in the "Other" section). It is worth adding that this tax was one of the elements of the Anti-Crisis Shield 3.0, designed to protect Polish economy from the effects of the pandemic.

Information on marketing communication of platforms appeared systematically, while the issue of distribution and price was referred to less frequently, mainly at the beginning of the lockdown (Table 3).

Table 3. VOD platform market – exposure of media marketing components (percent references/month)

	March	April	May	June	July	August	Together
Product offer	40%	41%	29%	38%	20%	43%	38%
Placement/distribution	16%	11%	5%	4%	0%	0%	11%
Priece	8%	4%	7%	19%	10%	5%	8%
Promotion/Marketing communication	35%	35%	36%	23%	20%	52%	35%
Other	1%	10%	24%	15%	50%	0%	9%

Source: Personal collection.

The analysis of the activity of individual VOD platforms shows that the distribution presented in Table 4 was associated with the activity of Netflix. The remaining platforms focused more on individual elements of media marketing such as marketing communication or product offer. The importance of these two components is also demonstrated by the data relating to the VOD market, where the share of references devoted to them was similarly distributed (Table 4).

Table 4. Individual VOD platforms – exposure to media marketing components (% of references on the platform)

	Product offer	Placement/ distribution	Price	Promotion/ marketing communication	Other
Netflix	43%	18%	1%	27%	10%
HBO GO	38%	8%	4%	46%	4%
Amazon Prime	0%	36%	7%	50%	7%
Hulu	0%	0%	0%	100%	0%
Disney+	19%	25%	6%	38%	13%
VOD.pl	53%	5%	0%	32%	11%
Ipla.tv	38%	5%	5%	43%	10%
Player.pl	42%	6%	16%	33%	3%
TVP VOD	42%	0%	0%	50%	8%
Other	40%	9%	9%	35%	6%
VOD in general	27%	0%	17%	27%	30%

Source: Personal collection.

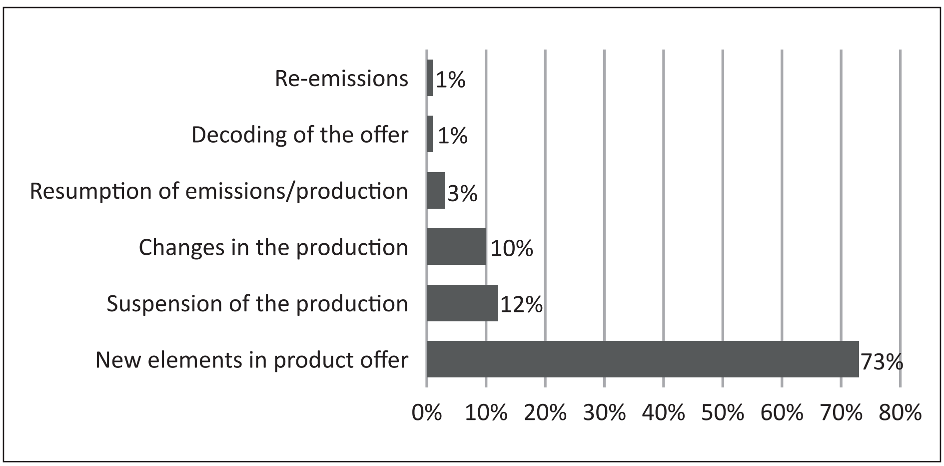
The further part of the text will present data relating to specific elements of media marketing carried out by VOD platforms.

Changes in the product offers are presented in Figure 1. The key topic covered in the articles was the introduction of a new programming offer (this happened every month, although the number of references decreased over time). In addition to new seasons of popular series (e.g. *Money Heist*, *Westworld*) and series premieres (e.g. *Into the Night* or the pandemic-inspired anthology *Social Distance* on Netflix), there was a noticeable trend of distributing cinema movies that had their premieres just before the pandemic. This group includes, among others, *365 Days* (Netflix, Player.pl), *Nobody Sleeps in the Woods Tonight* (Netflix), *Zenek* (TVP VOD, Netflix), or *Corpus Christi* (VOD.pl, Player.pl). According to Maciej Gozdowski from Player.pl, this type of solution during the pandemic is "*of particular importance*". In his opinion, thanks to the fact that the platforms provide cinematic content, "*viewers who did not manage to reach the cinema can watch the movie in the comfort of their homes*" (tw, 2020a).

The platforms also streamed and archived educational content addressed to children and teenagers who started remote education during the pandemic (*Szkoła z TVP* on TVP VOD, *Korki.TV* on Player.pl). Maciej Łopiński from TVP emphasised that such projects are “*logistic and technological*” challenges, but also “*the essence of the public broadcaster’s activity, making it possible to show that TVP [...] quickly responds to social expectations and meets challenges*” (tw, 2020b). Sport also found its place in the VOD product offer (*Poranek z Polsat Sport* was introduced to Ipla.tv) similarly to archival theatre performances (available on TVP VOD).

In the first months after the lockdown was announced, there were also references to the suspension of series/film production. In March, Netflix announced that all productions shot in the United States and Canada were suspended (*The Witcher*, *Stranger Things*, etc.); HBO GO decided to do the same (e.g. with *The Thaw*). These decisions were dictated by safety considerations and the need to adapt to the requirements of the sanitary regime. References of returns to film sets appeared in June (along with the loosening of the restrictions), but they appeared less frequently when compared to the first weeks of the pandemic. Making changes to the way individual programmes are produced is also an interesting subject. For example, the *Kuba Wojewódzki* talk show was transferred from TVN to Player.pl (under the new name *250 m² Kuby Wojewódzkiego*). Some productions were made remotely, such as journalistic (*Onet rano* on VOD.pl) and entertainment shows (e.g. *Domowy kabaret* on Ipla.tv, shot with smartphones in the homes of Polish comedians).

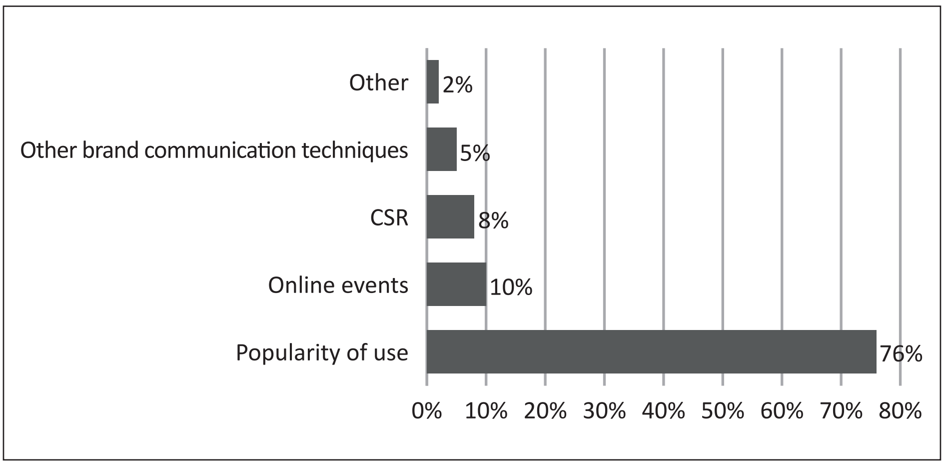
Figure 1. Media marketing perspective – product offer (% of total references in the study)



Source: Personal collection.

As mentioned, a frequently referred element of media marketing was the marketing communication of VOD platforms (Figure 2), and here, too, the number of references on this subject decreased monthly. The communication threads surpassed those devoted to the popularity of the platforms. Issues regarding the increasing number of their subscriptions, visits, and watch time, were raised. The impact of quarantine on the development of new habits of consuming VOD content was indicated (e.g. it was considered a novelty to turn on the platforms in the morning; Bochyńska, 2020). These successes were directly associated with the obligation to stay at home (tw, 2020b), but also with the closure of cinemas (tw, 2020c). It was even considered that Netflix and other VOD platforms are "*business beneficiaries of social isolation*" (tw, 2020c). This observation was justified in the financial aspect of the increase in the popularity of the platforms. The most popular providers recorded an increase in their subscription revenues in the first half of 2020, citing government restrictions as the reason (tw, 2020e).

Figure 2. Media marketing perspective – marketing communication (% of total references in the study)

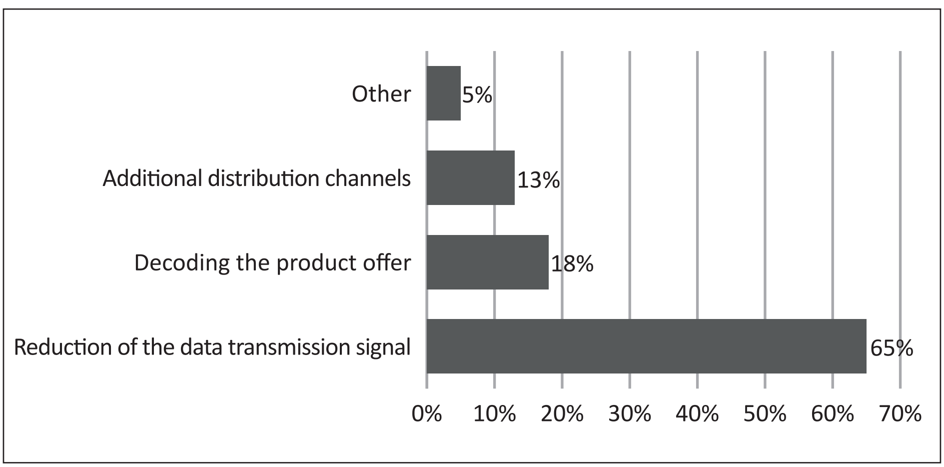


Source: Personal collection.

As part of marketing communication, the CSR of VOD platforms was also mentioned. It manifested itself in the promotion or co-organisation of social campaigns devoted to COVID-19 (e.g. the "#koncertdlabohaterów" online concert organised by the TVN Foundation and Player.pl, described as "*a thank you for the heroic work of doctors, nurses, paramedics, and other medical service employees*"; NB, 2020); providing financial support (e.g. transferring funds from the "Reklama na ratunek – razem w walce z koronawirusem" initiative by Ipla.tv; mk, 2020) or organising their own events. Among the latter, it is worth mentioning a fund supporting employees in the movie and production industry, launched by Netflix (bcz, 2020); co-financing of the film industry by Amazon Prime Video; the "Otwarte okno" campaign by Canal+, Play, and Netia VOD, encouragement to stay at home and use the decoded offer (jk, 2020b); remote introduction of the "First Movie Festival in the Time of Quarantine" by Player.pl; as well as previously mentioned educational programmes of TVP VOD and Player.pl or the social and advertising campaign "Thank you for #staying at home and watching legal VOD", in which Ipla.tv, Player.pl, and TVP VOD were involved. The analysed publications also referred to online events, which, in addition to the already described charity purposes, performed marketing functions, e.g., Player.pl broadcast the TVN Discovery Polska programming conference, as did Ipla.tv for Polsat.

In terms of the distribution of the VOD programming offer (Figure 3), the most attention was paid to the reduction of bitrate, e.g. by Netflix, Amazon Prime, or Apple TV (this act was a response to the increased demand for online services resulting from remote learning, working, and multiplied consumption time of VOD content). Decoding the content of the individual platforms was also referred to, e.g. via Ipla.tv, Player.pl, or Amazon Prime. Thanks to that, individual products (e.g. football matches on Player.pl), channels (Polsat News on Netia VOD, 40 channels on Play Now), or packages (e.g. as part of the Ipla Plus service on Ipla.tv) were made available. VOD providers also reached for additional distribution channels; for example, Netflix made 34 documentaries available on its YouTube channel, and the "#koncertdlabohaterów" charity concert appeared simultaneously on Player.pl and TVN24. Articles reporting changes in distribution appeared mainly in the initial period of the research, later their frequency decreased.

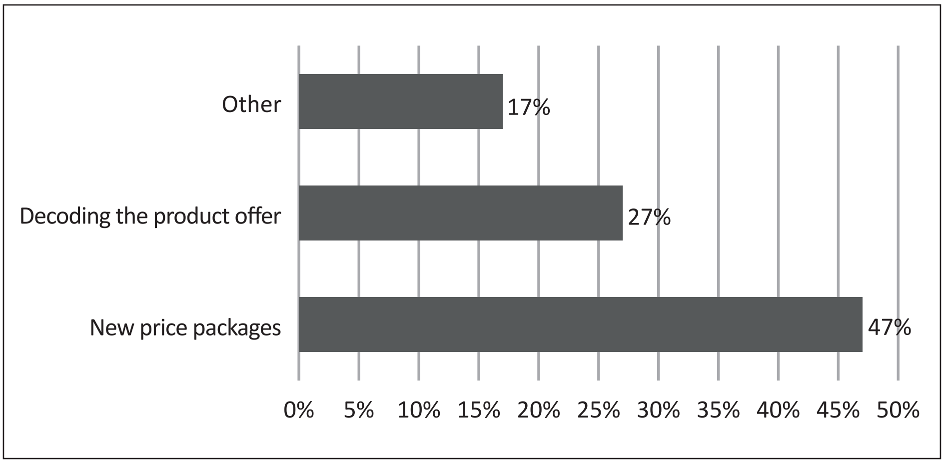
Figure 3. Media marketing perspective – distribution (% of total references in the study)



Source: Personal collection.

As for the price (Figure 4), it was most often mentioned in the context of promotions, e.g. discounts for new users (Player.pl), a rebate on access to packages (e.g. Player.pl), movie premieres (e.g. Canal+ VOD), or enabling the usage of the platform offered as part of an existing subscription (e.g. HBO GO). There was also the abovementioned topic of decoding the content – i.e. the periodic elimination of the price (open access). "Other" in Figure 4 contains various threads, such as a potential increase in subscription prices due to the "Netflix tax", pricing information policy, cooperation with production studios in the field of paid movie premieres, or consideration of deferring/remitting payments by suppliers due to deterioration of the financial situation of clients.

Figure 4. Media marketing perspective – price (% of total references in the study)



Source: Personal collection.

5. Conclusions

In this paper, the adopted research goal was achieved, i.e. the changes/reactions in the media marketing of VOD platforms that were caused by the first wave of the COVID-19 epidemic were mapped and systematised.

The research showed the specific 4P solutions that the video-on-demand industry introduced in the face of the pandemic (which also answers the first research question). As it turned out, the most frequent cases were the modification of the product offer, exposure to the popularity of suppliers, reduction of bitrate, and changes in package prices. A common factor for 4P was content decoding, which influenced the product, distribution, and personal MM price (interestingly, in the context of VOD, the institutional cost was not mentioned). The analysis shows that the majority of reactions/changes in the industry's marketing activity concerned the product and brand communication – the other two elements, although important for the marketing strategy, appeared less frequently (the answer to the second research question). Importantly, this conclusion does not prove the secondary importance of distribution or price and probably indicates that perhaps they aroused less interest in Wirtualne Media or the VOD providers themselves decided to provide the media with press releases which focused primarily on the product offer or brand communication. Among the aggregated research material, Netflix was in the lead in all the 4Ps, although Player.pl, VOD.pl, and HBO GO also appeared frequently (the third research question).

Overall, it can be said that the time of the pandemic forced VOD providers to change the way they operated, but it also led to the enhancement of their product offer, identification of new distribution channels, strengthening the market position (acquiring new customers, extending media consumption time, diversifying their portfolios), thus enabling them to implement important and loudly commented pro-social activities (image effect) and to expand the group of devoted consumers.

The coronavirus pandemic has opened up new opportunities for the VOD platform market in the context of customer contact. The providers undoubtedly made good use of this time, systematically informing about market successes and development plans tailored to the very specific needs of their consumers. People locked in their homes were looking for content that would allow them to temporarily forget about difficult reality and meet the needs of entertainment, education, culture, and contact with the outside world. Apart from charity activities and the distribution of educational content, VOD platforms played a significant role as media industry supporter. Therefore, it becomes noticeable that the popularity of VOD platforms during the pandemic strengthened their position so that they could compete with the traditional media (additionally, it is worth emphasising that where the "old" media and VOD operated within the media entity, there was frequent cooperation in the form of sharing the programme offer or mutual, cross-promotional support). According to experts, COVID-19 somehow sealed the success of VOD, thus accelerating the evolution of the media market and consumer behaviour (Niedźwiedzka, 2020; Szostak, 2020).

The research presented here has some limitations. One of them is the selection of the research sample, which does not represent all the reactions of the VOD industry in the country. It might also focus more on topics important to Wirtualne Media than to VOD providers. The analysis does not devote separate attention to each market player, including its international strategy (if applicable). On the other hand, as mentioned above, this paper presents a broader research perspective on the MM-VOD-COVID-19 line, which is indicative, aiming to pre-test the developed research process and thus improve it for future research, especially in the perspective of the influence of non-marketing (e.g. political, cultural) factors on the reaction of VOD platforms and the analysis of changes in the context of individual VOD platform strategies. It will certainly be necessary – not only to estimate the actual changes in the media market caused by the pandemic but also to classify and describe solutions and their effects in the event of subsequent situations of this kind. The second and third waves of the coronavirus prove that the threat still exists and that one should be prepared for it, also in the field of management and logistics of change. Organising and describing the activities carried out so far seems to be valuable knowledge, not only for the VOD industry but more broadly – for all media entities and their stakeholders.

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