
TRENDS IN MEDIA GLOBALIZATION AND OLIGARCHIZATION

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Abstract

This paper explores the trends of media globalization and media oligarchization in post-socialist countries with a special focus on Slovakia. The author builds her argumentation on several premises. Her assumption is that the globalization processes in the field of media have been, and continue to be, part of the strategy of media companies. The present paper points out a shift in media ownership in the central European region, including Slovakia. It is, the author maintains, a result of the 2007 economic crisis as well as the ‘classical media’ crisis, apparent from the drop in the numbers of readers, listeners and viewers and, subsequently, a decline in profits. In addition, the paper asserts that the media oligarchization process can be interpreted as a consequence of this crisis.

Keywords: media, globalization, conglomerates, production, marketing

1. Introduction

The globalization of media and their production becomes strong especially in the second half of the 20th century with media conglomerates and their subsidiaries emerging around the world. In the 1990s they also began establishing themselves in post-socialist countries in the so-called Eastern Block. The claiming of the media market in central European countries, including Slovakia, by media companies has become a natural part of the liberalization of market conditions and business activities. However, there has been a turn in this business sector in the second decade of the new millennium (2010-2020). One can observe the transformation of ownership structures with global players selling local media, most often subsidiaries, to local oligarchs. Based on research of these phenomena and related processes author can formulate the following premises:

- Globalization processes in the field of media have been, and continue to be, part of the strategy of media companies.
- The turn in media ownership in the central European region, including Slovakia, is a result of the 2007 economic crisis as well as the ‘classical

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media' crisis, apparent from the drop in the numbers of readers, listeners and viewers and, subsequently, a decline in profits.

- Media oligarchization is a consequence of this crisis.

The reasons for the emergence of the phenomenon of media oligarchization are the interests of local oligarchs, including spin doctoring, its impact on the formation of policies which are in accordance with their own economic activities, and the protection and promotion of their own interests.

2. Alternative developments to 'liquid globalization'

Despite the fact that globalization is not a new phenomenon in human history, it has never before spread with such a pace and intensity as was the case in the last century and the first two decades of the present century. In this respect, H. Hendersonová claims that this pace is driven by two powerful engines. The first is the development and spread of information technologies. The latter plays a key role in the spheres of globalized communication networks and media. The second engine is the decade-long processes of deregulation, privatization, and capital flow liberalization. Nation-state economies begin opening up, customs barriers are removed, and international trade expands [1]. There can be no doubt that these economic and financial strategies of supranational and multinational corporations, together with an intense development of information technologies, advance hand in hand with socio-political and cultural trends, having significantly influenced (and continue to do so) the psychological atmosphere of postmodern and late modern societies. It can be characterized by a shift from one form of capitalism to another, to the so-called 'liquid modernity'. Bauman's famous metaphor of 'liquid modernity' implies the typical attributes of contemporary western-type societies, such as mobility, consumerism, individualism, and globalization [2]. Reflecting on the crisis of society, M. Ford ascribes these attributes to a strong interconnection between the idea of materialistic matrix and mass society, further intensified by the fierce de-Christianization and secularization of Euro-Atlantic society [3].

Despite the described attributes of contemporary liquid modernity, it is evident that globalization is popularly linked especially to economic processes and the free movement of capital, the labour force, and a single currency. Nevertheless, reflection on this issue in social sciences and the humanities, as well as in practice in various branches of cultural industry, also point toward other globalization process areas. They include, for instance, the impacts of globalization on national cultures, cultural identity, or the formation of a unique media culture as a consequence of production and distribution strategies [4]. It can be hardly debated that legacy media (newspapers, magazines, radio, TV) as well as online media, represent an effective tool for facilitating a global-scaled change in thinking [5], as they are part of global communication that massively spreads the values of consumerist culture, the patterns of thought and behaviour, and ideological-political concepts, as well as propaganda [6]. However, the impacts of globally-spread culture are not unequivocal. R. Holton identifies

them with respect to the formation of three alternative directions. The first is the irreversible process of cultural homogenization. It is noted for standardization, with typical examples being such business corporations as McDonalds, Nike, and Starbucks. The standardization is a result of the efforts by powerful supranational corporations to create and control global consumer markets. The second direction of the development and consequences of global culture is opposition to its standardized forms. *A priori* stances are related to the strong tendency of individuals and groups to identify themselves with specific places and the attempt to maintain their national identity. The third direction represents the development of various intercultural fusions or hybrids, i.e., the linking of cultural elements from diverse sources; examples include 'world music' or a number of syncretic fashion styles [7]. These tendencies in the development of globalization processes in the field of culture can also be applied to its specific dimension, namely, media culture [8].

In addition to its socio-cultural influences, the globalization of media culture is expressed through various forms of concentrated ownership of media companies, as well as the means of media production and distribution on a global scale. Until today, the strategic interests of transnational media organizations oscillate between the striving for profit and compliance with technical and technological trends. Čábyová's research shows that the media market is controlled by certain groups of owners who dictate the content and regulate the information flow. Furthermore, the form of media is also adjusted to the market. Cheap, low-quality formats are especially preferred since they are popular with the viewers [9]. They are also motivated by an effort to provide the audience with as appealing production as possible that can simultaneously time guarantee financial profit. These efforts are, in turn, transformed into the enhancement of distribution and targeted production of attractive and demanded programmes around the world. And this is, according to D. Prokop, the sole reason why global players engross lucrative media branches and programs with a potential to gain them financial profit [10]. This claim is confirmed by the observations of P. Huntington. He argues that in terms of profit the US aviation industry is far behind American film, TV, and video production [11]. He ascribes this fact to the ability of this media segment to appeal to various audiences through its universal interest in love, sex, violence, mystery, heroism, and wealth. It means that the universal interests of the audience guarantee the commercial success of the film industry [12]. The media practice of major global players has shown that it is fully capable of meeting these universal interests of recipients around the world.

3. The media globalization process

It is a natural consequence of the efforts by media conglomerates, such as Time Warner, Walt Disney, News Corp, Viacom Murdoch, Bertelsmann, etc., mostly based in the United States, to control as much of the international media market as possible. Supranational media conglomerates therefore have a natural

tendency toward monopolization [10, p. 345]. D. McQuail argues that transnational concentration and multimedia concentration began in the second half of the 20th century. This process results in the fact that the media industry is increasingly controlled by a small group of owners who have a final say in gigantic supranational and multinational media conglomerates. Their business activity is varied and diversified in all forms of media practice. A degree of concentration can vary, ranging from perfect competition to the acquisition of an undaunted position on the market [13]. The process of media concentration and monopolization takes place in a specific way. It can involve product sales, production or recycling within the framework of the ownership of diverse kinds of mass media (e.g., press, radio, TV) or the ownership of media in a single branch (e.g. print media). Based on these premises, G. Burton and J. Jiráček describe the strategy of horizontal and vertical integration, respectively [14].

Horizontal integration is characterized by the formation of large organizations, conglomerates, as well as by ownership diversification. It means that a single owner acquires companies that could, under some circumstances, be, or actually are, his or her direct competition. Examples include two competing periodicals on the city or national level, fused within the common market. It can be an ambition of the owners to gain control over several TV channels, radio stations or periodicals published by different publishing houses or editorial offices. The basic advantages of the horizontal concentration of ownership include multiple valorisation of advertisement packages, individual programs, and human resources. Horizontal concentration means that owners control the production and distribution of several media companies in the same branches; for example, several TV channels. One of the advantages of the horizontal concentration of ownership is an opportunity for multiple uses of films or TV series as well as advertisement packages or dominant themes in news and journalistic programmes on the respective TV channels.

Vertical integration means that the structure of these companies within their hierarchical arrangement is subordinated to a single (most often) holding company. The latter is governed by an individual, a family, or a group of owners. A typical example of vertical concentration is the buying up of distribution companies and paper-mills by a newspaper publisher, or the control by a fibre optic cable producer over film studios and TV companies. An advantage of the vertical concentration of ownership is the valorisation of a chain as it ultimately makes production less expensive. One example is the transmitted programmes produced by individual TV companies in their own film and TV studios. For the owners of media conglomerates, it is important to valorise their chain vertically since it offers them numerous comparative advantages in comparison to smaller media. Their products are manufactured by their own film and TV production companies, or newspaper, magazine, and book publishing companies, and distributed through their own networks.

There is also the concentration of business activities based on the re-grouping of ownership relations in the field of informatics on all levels, i.e., in the field of production of new digital technologies as well as media production

and distribution. This trend became apparent as early as back in the 1980s. Back to that time go the beginnings of the ‘fairy-tale scenario’ of the building of the gigantic media empire by one of the doyennes of the international media markets. It is the Australian-born media tycoon Rupert Murdoch. He currently owns dozens of printed periodicals, TV channels, and radio stations. He has invested 1 billion USD in digital broadcasting, offering, together with two other companies, American audiences several dozens of TV channels. His activities have gone beyond the European and American continents. Together with the Japanese companies Sony and Softbank, he has created a satellite TV station project called Japan Sky Broadcasting. I. Ramonet argues that Rupert Murdoch is an example of the person whose utmost priority is to gain profit through unlimited multiplication of various integrations, fusions, and concentrations. The same can of course be said about such conglomerates as Time Warner, Disney ABC, Vivendi-Universal, Bertelsmann, etc. The story of Rupert Murdoch’s commercial success, however, best describes the world of media over the last three decades [15].

At the turn of the millennia the greatest capital potential in the field of media industry is held by telephone companies and internet providers who are also increasingly entering the field of classical media production. D. Prokop gives a few examples in this regard. In 2000, for instance, the internet provider AOL purchased the world’s biggest media conglomerate Time Warner for 156 billion USD. The conglomerate also includes the internet provider Compuserve and the browser producer Netscape. In 1999, AOL invested 1.5 billion USD in the satellite company Direct-TV. Having previously been owned by General Motors, it has outpaced wide-spectrum cable TV providers because it sped up the digital transmission of internet data. The AOL – Time Warner fusion enhanced the media portfolio of both TVs and the internet provider. The new conglomerate AOL Time Warner has transformed the internet, the worldwide web, into a mass medium. Right after the fusion, AOL Time Warner purchased the music company EMI to pursue the sales of media products via the internet [10, p. 345].

A few published data on the re-grouping of media conglomerate ownership suffice to show that it is hardly debatable that there is an enormous concentration of economic and symbolic power. The latter is concentrated in a modest number of private persons, divided unevenly among individual nation states as well as on the global level. J. Thomson published data adopted from a UNESCO report from the late 1980s. Based on a ranking according to the total turnover in media production it is evident that the 78 biggest media conglomerates resided in the most developed countries of the world, including 39 in the USA, 25 in Western Europe, 8 in Japan, 5 in Canada, and 1 in Australia [16]. The data confirm, inter alia, the assumption about the dominance of economically advanced countries in globalization processes. From this perspective it is significant that all media conglomerates have their domicile in North America, Europe, Australia or Japan. This is even though third-world countries open enormous media markets for commercial outlets of the products

and services of these conglomerates as part of the on-going globalization processes. These facts also show that the concentration of the economic and symbolic power of media conglomerates, unprecedented in human history thus far, is exclusively in private hands. Moreover, this power is divided unevenly from a territorial perspective.

4. The media oligarchization process

The discussion so far points to unequivocal conclusions. The offer of media products is subject to technology level, ownership forms, and the amount of capital. These are the factors that play a key role in the global networking strategy of media empires. However, this process is not without its problems since it is influenced by two crucial factors – production and marketing, respectively. They represent a certain sum of problems which the expanding media companies must constantly struggle with. B. Köpplová and J. Jiráček point at the production problem especially as media production evidently offers an increasingly bigger number of various kinds of media. This tendency ultimately results in the way of their production. This way generated the market satiety with media products, forcing their producers to repeat or recycle well-tested procedures or renew the offer of older production [17]. A second problem is the necessity of applying much more sophisticated media marketing strategies, including the distribution of media production, in comparison to the situation from a few decades ago [18]. This also means, *inter alia*, a need to engage much greater numbers of highly-specialized professionals in media marketing and the immense financial costs related to all marketing and distribution activities. On the one hand, one observes the reduction of production costs as well as the standardization and recycling of media production, created by globally-established mainstream media. On the other, these companies have increasingly higher costs to pursue their comprehensive marketing strategies.

These facts suggest that global strategists in supranational media companies must consistently consider the return on their investments. Another fact to consider is that the process of the globalization of media companies and their productions is unstoppable and further advancing. It is an open question, however, in which territories and to what extent and way of involvement these media companies are concerned in the process of globalization. For it becomes apparent after the 2007 global economic crisis and the drop in the numbers of readers, listeners, and viewers of, especially, classical media, that the time has come for global media companies to re-consider their investments [19]. This tendency can be observed in the Central European region, in countries of the former so-called Eastern Bloc. In the second decade of the new millennium there has been an interesting shift in media ownership in these countries. Influential supranational media institutions are beginning to leave national media markets. Subsequently, their shares are engrossed by local oligarchs, i.e., business people or powerful financial groups. In this context it is, however, necessary to emphasize that the phenomenon of media oligarchization, similarly to media

globalization, is nothing new, though it has become a hot topic for discussion in central Europe only recently. After all, the very term ‘oligarchy’, originating from Greek, refers to a form of government in which state power is concentrated among a small group of people [20]. In respect to media oligarchization this phenomenon can be understood and interpreted as a result of the concentration of media among a small group of owners who have gradually and deliberately built their media empires. It can also be viewed as a result of the engrossing of media by owners who have a dominant position in other business industries. Based on the following argumentation it is clear that oligarchs are interested in the purchase of media either because of:

- their need to include additional segments to their existing business activities to enhance the good reputation of their companies, products or services, i.e., for the purposes of advertisement and public relations;
- or, in order to influence the executive branch in its legislative decision-making or to make deliberate use of media as a tool of coercion and manipulation.

In the second half of the 2010s post-socialist countries in central Europe are showing a better economic growth. Nevertheless, experts agree that the 2007 financial crisis discouraged supranational media companies from further pursuit of their business in this region. This is one of the most relevant reasons for the changes in the ownership structures. Foreign owners are selling their shares to leave this territory, while new owners, members of domestic financial oligarchies, are emerging. This is due to a massive and unchecked privatization process as well as newly established and ideal conditions for the existence of early capitalism in Slovakia and other post-socialist countries in central Europe. However, the entrance of nouveau riche oligarchs to the media industry in Slovakia is not a recent issue. Besides supranational media corporations, there are cases from the 1990s and the 2000s of media companies which were overtaken by individuals or various companies. There is a full set of well-known cases when media were controlled by persons and financial groups. Examples include the boss of a Košice steel works A. Rezeš, with links to the People’s Party – The Movement for a Democratic Slovakia (ĽS-HZDS), who owned regional media in Košice and Bratislava (Národná obroda, Top rádio), J. Široký who owned the publishing company Perex, J. Majský (Rádio Twist), V. Poór (VTV), non-bank financial institutions BMG Invest and Horizont that funded the television channel TA3, Rádio Východ and the magazine Profit, and P. Rusko who was a co-owner of TV Markíza. Later, in the first and second decades of the 21st century, it was daily newspapers such as Národná obroda and Nový deň that were shaped under the influence of tutors from the field of politics, as well as other media controlled by business people and financial groups. These include media controlled or supported by individuals or groups, such as the Grafobal Group (television TA3), J&T (television JOJ), Penta (daily SME), etc. [<https://www.etrend.sk/trend-archiv/rok-2014/cislo-38/vlna-ktora-sa-zatial-neko-nci.html>] or co-owners of the company ESET (DenníkN) [<https://dennikn.sk/58733/dennika-n-vstupili-investori-sumou-12-miliona-eur/>].

It is important to emphasize that the loss of interest by global media companies in the Slovak media market, among other things, stems from purely economic reasons. They are related to simple calculations. The reconsideration by supranational media companies of the rentability of their business activities and the engrossing of domestic media by local oligarchs from other business industries has its pragmatic reasons. After the massive entrance of supranational media conglomerates on to the Slovak media market in the 1990s, the situation began to change in the 2010s. The drop in the number of readers, listeners, and viewers of classical media is ascribed to the offensive arrival and growth of internet media and much better access to internet networks in comparison to the situation at the beginning of the new millennium [21]. This trend is also evident in the increase of advertisement packages that gradually shifted from classical to internet media. The data from the branch association, IAB Slovakia, confirm it. According to the data, the expenses of ordering parties for online advertising reached more than 112 million EUR in 2016, which means a year-to-year growth of 24%. M. Žatkuliak of IAB says that it can be expected that more and more brands will transfer a major part of their budgets from classical media to internet media advertising [<https://medialne.etrend.sk/internet/vydavky-do-internetovej-reklamy-vlani-rastli-najprudsie-od-roku-2012.html>].

However, it is necessary to underline that it is especially the media business model that has been undergoing radical changes in Slovakia and the Czech Republic in the 2010s. It has resulted in oligarchs changing their motivation to engross media companies within individual nation states. This fact is emphasized by media analyst V. Štetka who points out a shift in media ownership in recent years. Oligarchs engross them to pursue their own primary interests in the economy or politics. It is clear, Štetka maintains, that their motivation is not to make money but to acquire a lobbying tool. It has now become a general trend that news media are increasingly often owned by influential business people whose aim is to influence the decision-making of politicians, or even the pursuit of their own political career. V. Štetka even says that each group is, in a way, connected with politics. He dismisses the idea of their philanthropic motivation for the purchasing of printed periodicals, referring to it as naive [<https://domov.sme.sk/c/20653847/odbornik-na-media-oligarchovia-v-mediach-nie-su-filantropi-ide-im-o-vplyv.html#ixzz5BGABF5WG>]. A similar opinion is also held by M. Kernová. She, too, argues that the situation with respect to media ownership and the interests in this field has significantly changed in Slovakia in recent years. In this respect she, for example, mentions the pulling of strings for the interests of the financial group Penta in the daily *Plus jeden deň*. She argues that this claim can be supported by reference to the articles that build up the good reputation of the pharmacies, insurance company or medical facilities owned by Penta. Similarly, J&T is untouchable in the TVJ JOJ news service, and some politicians are protégés of TA3 [<https://www.omeiach.com/blog/12092-blog-miroslavy-kernovej-dennik-penty-opat-neupozornil-na-konflikt-zaujmov>].

It is evident that media ownership provides the owners of the media with more effective protection as well as the ability to lean on those groups that could possibly pose a threat to their business or political interests. In this respect it is relevant to consider the published information on the intended sale of one of the most successful commercial TV stations on the Slovak media market, Markíza, owned by Central European Media Enterprises (CEME). It currently seems that the transaction is not going to take place. The journalist F. Múčka argues, however, that the possibility that the television could be for sale emerged due to pressure on the internet and after due consideration of developments on the media market. The Slovak financial group Penta or Czech billionaires P. Kellner and A. Babiš immediately expressed their interest in purchasing Markíza. F. Múčka believes that the era of business people on the Slovak media market will end for good should CEME release hold of Markíza. Only groups connected to politics or oligarchs will then be left [<https://www.postoj.sk/27642/penta-a-media-dve-sklamania-po-troch-rokoch>]. Such a scenario points towards additional consequences of the media oligarchization process. The political scientist R. Michelko brings it up when he reflects on the phenomenon of mutually conforming policies among media oligarchs [http://www.noveslovo.sk/c/Oligarchizacia_medii]. He asserts that media ownership very effectively protects the owners of media from attacks by other media oligarchs. Therefore, media owners must respect one another. To put it differently, they watch out for eventual causes that could damage all of them significantly. However, the refusal by audiences in a certain socio-cultural context to acknowledge and accept mainstream media operating in such a way seems to be a serious social problem. It is a consequence of the editorial work in favour of the owners [22].

5. Conclusions - from media globalization to media oligarchization

The globalization of media and media culture implies economic factors and various cultural influences. In addition, media globalization is expressed through specific forms of concentrated ownership of media companies as well as their production and distribution on a global scale. The origins of transnational concentration and multimedia concentration can be situated in the second half of the 20th century. Because of these forms of concentration, a small group of owners has begun entering and establishing themselves on international media markets. They have gained discretionary powers in huge supranational and multinational media conglomerates, now being able to shape the content and manage information flows. Media conglomerates have engrossed, and continue to engross, only such lucrative media branches and programs that have the potential to gain them financial profit. That is the reason why they, by and large, adjust media production according to the taste of mainstream audiences. Within this production one can observe an increasingly broad offer provided by an increasingly high number of various kinds of media. That is the reason why, on the one hand, production costs are reduced, and the standardization and recycling of mainstream media production take place. On the other, media

conglomerates have increasingly excessive costs to pursue their comprehensive, highly sophisticated marketing strategies.

There has been an intriguing shift in media ownership in the 2010s. Influential supranational media companies have begun leaving national media markets due to lower profits. Their shares are engrossed by local oligarchs, i.e. business people or powerful financial groups. This trend is apparent in central European post-socialist countries, including Slovakia. The reasons include, especially, the drop in the numbers of readers, listeners, and viewers, the shrinkage of advertisement packages, the increase in the costs of marketing strategies, and the overall instability of the media market due to the 2007 financial crisis. Despite this development, one can assert that globalization remains a part of the development strategies of supranational media conglomerates. However, the latter submit their investments to constant and very thorough scrutiny. If found to be uneconomic, they release hold of their shares, which are in turn engrossed by local oligarchs. Nevertheless, media oligarchization is nothing new. It is, however, evident that in the 2010s it is not only being intensified and expanded but also defended before the public as a completely legitimate process. Moreover, local oligarchs have priorities that differ from those of the owners of supranational media conglomerates. Media analysts agree that the interests of local oligarchs include, especially, spin doctoring and the protection and promotion of their own economic and political interests. They have effective tools to pursue this objective – they own the media through which they can exert pressure on institutions and persons as necessary, while also influencing and manipulating public opinion.

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