

FACTORS INFLUENCING COMPETITIVE ADVANTAGE OF SPORTS CLUBS IN TURKEY

TÜRK SPOR KULÜPLERİNİN REKABET AVANTAJINI ETKİLEYEN UNSURLAR

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ABSTRACT: The aim of this study is to investigate the competition structure of Turkish sport sector from the point of professional football clubs according to Porter's Five Forces Framework. Porter refers to the factors influencing competition in a sector as buyers, sellers, potential threats created by new entrants to the sector, substitute products and competition existing within the sector. Within the increasing economic value of sports, the share of the clubs is also increasing. As professional football clubs are the biggest part of Turkish sports economic with its external circumstances, they are chosen for this study. The main research question of the study is finding out the factors influencing competition in Turkish sport sector. Qualitative method was used for document analyzing and in-depth interviews. The results show that besides football federation, the competitive ability of the sports clubs mostly depends on the government's decisions in Turkey. Considering the increasing income of sports clubs such as sponsorship and donations, sports clubs have to look at the competition structure from a strategic perspective thus they can manage these increasing revenues and sources professionally. Sports clubs miss out on some competitive advantages if they do not make long-term agreements. These advantages have been assessed at the level of factors identified by Porter.

Key Words: Competitive advantage, Porter's five forces framework, Strategic management, Turkish sports clubs

ÖZ: Bu çalışmanın amacı Türk spor sektörü rekabet yapısının futbol kulüpleri açısından Porter'in Rekabetin Beş Gücü yaklaşımıyla incelenmesidir. Porter bir sektörde rekabeti etkileyen unsurları alıcılar, satıcılar, sektöre yeni girebilecek olanların yarattığı potansiyel tehditler, ikame ürünler ve sektör içi var olan rekabet olarak belirtmektedir. Sporun artan ekonomik değerinin içinde kulüplerin payı da artmaktadır. Profesyonel futbol kulüpleri de çevresel unsurlarıyla birlikte Türk spor sektöründe büyük bir pay oluşturduğundan çalışmanın konusu olarak seçilmiştir. Aynı zamanda alan yazında henüz Türk spor sektöründe rekabet yapısını bu bakış açısıyla inceleyen bir çalışma yer almamaktadır. Araştırmanın temel sorusu Türkiye'de spor sektöründe rekabeti etkileyen faktörlerin neler olduğudur. Doküman analizi ve derinlemesine görüşmelerle nitel veri analizi gerçekleştirilmiştir. Türkiye'de spor kulüplerinin rekabet edebilirliğinin futbol federasyonu dışında çoğunlukla devletin aldığı kararlara bağlı olduğu sonucuna ulaşılmıştır. Spor kulüplerinin sponsorluk ve bağışlar gibi artan gelirleri göz önünde bulundurulduğunda bu gelir ve kaynakları profesyonel bir şekilde yönetebilmek için rekabet yapısına stratejik bir

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çerçeveden bakmaları gerekmektedir. Spor kulüpleri uzun dönemli planlamalar yaparak rekabet avantajlarının sürdürülebilirliğini artırabilirler. Bu avantajlar Porter'in tanımladığı faktörler düzeyinde değerlendirilmiştir.

Anahtar Kelimeler: Porter Rekabetin Beş Gücü Modeli, Rekabet avantajı, Stratejik yönetim, Türk spor kulüpleri.

1. INTRODUCTION

Sport is a growing phenomenon with its social, cultural and economic aspects (Alkibay, 2005, 84). Also it must be evaluated on economic and social conditions considering the globalization (Devecioğlu, 2005: 2). In the economic world the most important signs of being successful are competitiveness and effectiveness. Especially in sport sector with its changing structure from voluntary to professionalism sport organizations have to redefine their strategic aims, tools and processes. Therefore, sport industry (A.T. Kearney, 2010) especially football should be analyzed not only as a sport in term of wins, losses and ties but also as a business in terms of its economic, social and environmental performance. Porter (1998) underlines two central questions for competitive strategy. The first question is; does the sector have long-term profitability, and the second question is; what is the average profitability of the sector. At this point Turkish sport sector -especially in the field of football- is an attractive sector with its own specificities.

There is not an accepted definition of competitiveness for nations. A competitive firm can be defined, but there are many criteria when the nations are being evaluated as competitive. Exchange rates, interest rates, government deficits, currencies, labor, natural resources, government policies and etc. can be a sign for nations competitiveness, but all of them are not valid for each nation. Every nation has variable advantage with one or more of these features. A mutual concept of competitiveness is defined as productivity by Porter. Productivity means products values by a unit of labor or capital and it increases the standard of living the citizens of a nation. For companies in a nation is the high level productivity important for the standard of living. So, for sustained economic success of nations is the productivity essential. Nations have to develop their capabilities to compete in many industry segments (Porter, 1990: 1-50).

In order to have competitive advantage with a new product in a new or youth target market, firms have to decide two important points. These points are the consumer segment -consisting buyers and potential buyers for a product- and the competition consisting firms offering the same or a substitute product. Also for sport sector both of this segments are critical in decision making process (Pitts, Fielding and Miller, 1994: 15-17). Strategic management which is focusing on competitiveness (Akgemci, 2008) requires an effective strategic decision making process. Starting from this point of view strategic management at sport sector

requires to consider consumers and competition factor. One of the main driver of this study is occurring from this approach.

Porter indicates sport and recreation is a growing linking sector with its subsectors from 1980's till today (Porter, 2011). This should be assessed by developing countries. In order to be productive, developing countries may be able to direct their potentials to developing areas such as sport to utilize the opportunities instead of competing with developed countries that are already competent in other sectors. Thus developing countries can provide competitive advantage. Also Turkey is a potential country with its young population, climate, emerging economy and social situation. Since, Porter's studies are mostly about developed countries (Öz, 2002, 510), Porter's five factors for competitiveness should be investigated on developing countries. Thus, the differences and similarities could be examined.

According to Porter (2008) however, managers define that competition occurs between direct competitors, the fact competition is happening beyond established industry rivals including customers (for sport industry available and potential spectators), suppliers, potential entrants and substitute products.

Also the extended rivalry is composed of five forces and this structure shapes the nature of competitive interaction within the industry. Although each industry should be analyzed within its own underlying structure, the drivers of profitability are the same. For industries the strongest competitive force or forces are not always obvious. The industries are not homogeneous and it is not possible to draw boundaries between sectors (Pitts et al., 1994: 15; Porter, 1985), especially at sport relating with many subsectors. Sport industry (Fen-Ching Tsai, 2009) includes sports manufacture industries (SMI) (sports goods and sport facility construction industry), participant sports services (PSS), and spectator sports services (SSS).

The business model of European club football is financially unsustainable. Figures show that revenues of sport clubs are increasing every year. However, success of more clubs does not increase in financial, managerial or institutional terms. Kassay and Géczi (2016) investigated whether there are any available management tools for clubs which they can use to improve their business competitiveness above and beyond the limitations of their maximum market size. The study indicates that club management and operations need a well-organized and business-like manner.

Starting from this point of view the researcher has recognized that Turkish sport sector is progressing especially at football but there is still no an investigation about sport clubs sector from Porter's five forces perspective as five core concepts. So, the research question is which elements are including at Porter's five forces

model in particular Turkey. Sport is still managing from governance in Turkey. Also institutional actors at sport in Turkey are Ministry of Youth and Sports, Autonomous Football Federation, sport federations, National Olympic Committee and municipalities. There is no special sports club law yet. There is “Frame Regulation” for amateur federations. There is no coordination and relationship between Ministry of Youth and Sport and Ministry of Finance.

2. LITERATURE REVIEW

Kassay and Géczi (2016) indicate the management and operation in a well-organized and business-like manner is a suitable tool of a football club. They have touched on the role of national football association in the process of market development, the role of the owners, how the sports sector will guarantee the efficient utilization of all the material resources. So, the study’s results are; the sports sector needs to have an operating system and club model for the utilization of resources in the most effective way. Ensuring sustainable operations of clubs mostly depends on club owners. Also to inspect the interaction between the club owners, coaches and players is a key task for creating a new club model.

Dobbs’ (2014) study’s findings, which provides a set of templates for applying Porter’s five forces framework and presents an example of a completed template for spectator sports industry, pointed to challenges in using five forces. These challenges are lack of depth, lack of structured analysis, lack of strategic insights and millennial generation preferences. Dobbs expresses that Porter’s five forces framework is a powerful tool in the hands of a skilled manager or analyst. The templates he provides will be improved in time with new application areas.

According to Mozūraitienė, Jasinskas and Simanavičienė (2011) one of the most important factor to provide the competitive advantage in the sport sector, considering the external factors, is customers’ activities, and then the implementation of development programs and the level of unemployment. Also the factor of “Diamond” model by M. Porter, i.e., the role of government, and economical factor analyzed by other authors is deemed to be the most significant.

Rowland (2017) has analyzed Nike Inc. as a leading player in the global shoes, equipment and apparel market bases on Porter’s five forces. The factors of the forces have been evaluated as weak, moderate or strong force and recommendations has been made in term of having competitive advantage.

2.1 Five Forces

However, the strong linkage of innovation and change and the need of change for competitive advantage, because of the difficulty of new applications at having established culture organizations, changes cannot be naturally implemented. Especially institutionalized activities have been adopted (Porter, 1990). Therefore,

the importance of these five powers and practices that they require are well known, it is not easy to apply the elements of these forces.

The first force is the threat of new entrants for existing competitors. A new entrant makes pressure on existing competitors in the way of gaining market share. Barriers to entry are supply-side economies scale, demand-side benefits of scale, customer switching costs, capital requirements, incumbency advantages independent of size, unequal access to distribution channels and restrictive government policy (Porter, 2008).

Second force, the power of suppliers, means that powerful suppliers have an advantage over the companies by charging higher prices, limiting quality of services, or shifting costs to industry participants. Companies are related with a wide range of suppliers for various inputs. Suppliers may specialize in the sector in which they offer goods or services. If they provide their goods/services in different sectors, they are not connected to a single sector for income. Changing suppliers can leave companies in difficult situations, such as changing prices, changing the quality of service (Porter, 2008).

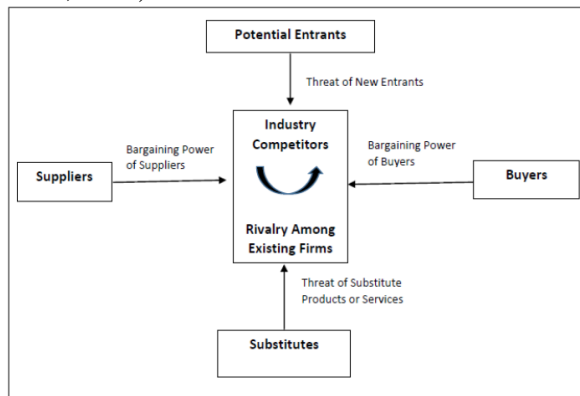


Figure 1: The five competitive forces that determine industry profitability

Sources: Porter, M. E., (1985) *Competitive Advantage, Creating and Sustaining Superior Performance*. New York: The Free Press and Porter, M. E., (2008) *The Five Competitive Forces that Shapes Strategy*. Harvard Business Review, 86 (1), 78-93.

Third one is powerful buyers, who can force companies the reduce prices, to demand better quality or more service. In many sectors buyers face few switching costs in changing vendors. Large volume buyers are particularly powerful in industries with high fixed costs (Porter, 2008). To identify the differences by segmentation of the market in terms of buyers -as industrial and commercial buyers- is useful for sport organizations. While the industrial buyers are taking decisions through purchasing process, size, ownership, financial strength, order

pattern; consumer goods buyers are considering demographics, life style or purchasing occasion (Pitts et al., 1994: 17).

Rivalry is one of the most discussed concepts in sport. From the fans perspective rivals are multiple, rivalry intensity is different between different rivals and for the fans of each sports clubs the perceptions of the rivalry are rarely equivalent (Tyler and Cobbs, 2017: 1). From these perspective sport club's managers have to consider firstly the various rivalry situation between the clubs which are competing on the same league or level.

Substitutes, another force, mean providing products and service with the same or similar function as an industry's product. There is always a substitute but it is not easy to estimate in which form it will be appeared (Porter, 2008). According to Tyler and Cobbs (2017: 11) to overcome of the complexity of differentiation of rivalry the specific features of rivalry in sports industry must be defined. Thus, the management and marketing activities will be more effective. Being successful and profitable at marketing activities provides more loyalty of fans.

In sports industry there are also many various opportunities as substitutes. All new recreational activities can be a substitute for existing sport clubs. All activities such a circus, hiking, picnic, if people prefer to go to them instead of going to sport clubs game, will be a threat as a substitute. For example; today, tennis is not called as tennis only. People especially marketing managers at sports clubs have to know the alternative activities of tennis even when the weather is cold or rainy, indoor tennis, cardio tennis, short tennis etc.

Fifthly the rivalry among existing competitors limits the profitability of the industry. Normally in many industries especially price competitions concern customers to price instead of the quality of the goods or services (Porter, 2008). But at sports industry the most important factor in choosing a sports club is the loyalty and enthusiasm to the club.

The internal factors of competitive ability of sport organizations and the opportunities for their improvement have not been analyzed in detail by the scientists yet. The constantly changing business environment, global changes in the market and globalization also lead to the necessity of continually analyzing the factors which increase the external competitive ability of sport organizations (Mozūraitienė, et al., 2011).

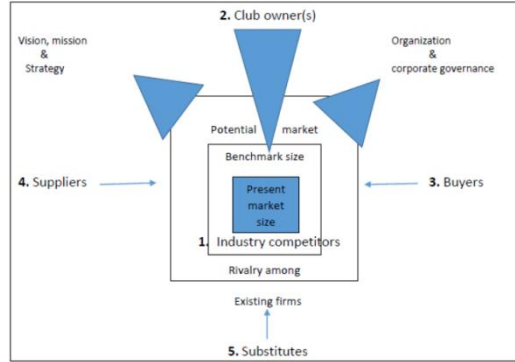


Figure 2: Factors of competition and their sensitive borders from an integrative approach

Source: Kassay and Géczi (2016), Competition and Cooperation in European Professional Club Football, *Physical Culture and Sport Studies and Research*, LXIX, 22-28.

Examining each market as a closed system, new entrants are represented by new owners of a club or existing owners, the club owners' assessment of sporting success interpretation of success and the links between sports results and revenue as primarily affecting the organizational structure and operations of a club. Club presidents are an important influence in determining the competition strategy and the vision of the club (Kassay and Géczi, 2016, Talimciler, 2008: 90). Also, in Turkey it can be clearly said, that club owners are determining rules, giving decisions, and they act as the sole actors who plans the future.

3. METHOD

The basic aim in qualitative data analysis is to explore the knowledge which is grounded in the social reality (Özdemir, 2010). Therefore, the method of the study is document analyzing by using secondary data and in-depth interviews as qualitative data analysis. The interviews have been made with five experts, who are academicians at universities on sports field and having experience at Super League football clubs as manager, director or trainer. Turkish Super League clubs which have the biggest share in the sports sector and some of which are traded on the stock exchange as a company, are evaluated from competitive perspective of Porter.

4. RESULTS

Since there is no competitive balance at the level of professional football leagues in Turkey, new clubs entering these leagues are not able to compete with a few clubs which have won the big prize of cake like the oligarchic structure. In addition, according to UEFA regulations, the necessity of having at least 30,000 spectator capacities owned football fields in order to play in Euroleague makes the clubs financially weak when competing against three big ones or large existing

ones. The sense of supporters of Turkey and the fact that the total number of supporters of the three major clubs constitutes almost the whole population is directly disadvantageous for newly entering clubs in this field. As an example of this situation Torku Konyaspor is a new entrant to the Super League, however the club has had many supporters from its own city, could not compete with “three bigs” in an environment of competitive balanced. At this point, when the threats of rivalries are high (Omsa, Ibrahim and Hisnol, 2017) and when the sport club aims to have competitive advantage (Alkibay, 2005, 92) differentiation strategy is recommended to apply. For example, Beşiktaş Spor Club’s strategy for increasing its supporter’s loyalty and creating a social and cultural cohesion is including game day rituals, branding the formation “Çarşı” primarily as a civil society etc. (McManus, 2013).

Sports clubs are involved with suppliers from many different sectors such as health, tourism, textile, education, information, construction, entertainment, media, service sector etc.. Also, if the supplier is sole (Morrison, 2016) for example the owner of the training ground or football ground could be have large impact to affect the football club.

Hall rental, stadium rental (from municipalities or ministries), football manager systems, travel-accommodation services, broadcasters, sports education schools, non-governmental organizations supporting sports, all local clubs in all age groups, city clubs and referee-observer’s Turkish Football Federation (TFF) is one of the suppliers in the sports sector. In addition, tribune amigos and fan groups that provide audience participation as cheering and supporting, from a different point of view, should also be considered in this section.

In today's marketing sense, conscientious consumers are pushing existing competitors by demanding lower prices or better quality on goods/services. If a customer buys a high volume, it can be strong at high fixed costs. If the products are standardized the buyers can have more bargaining power. According to Omsa et al. (2017) the pressure of the supporters as consumers also as buyers can direct the strategies of companies for gaining competitive advantage. Besides, (Alkibay, 2005, 103) the clubs has to focus to branding for gaining competitive advantage which aims directly the buyers who are mostly the supporters of the club.

The frequent change of club administrations, the failure of the presidents or administrations to fulfill the promises and the implementation of different situations are indications that institutionalization of clubs has not taken place yet. The reaction of fans and supporters associations to such non-institutional behaviors poses a threat by criticizing the club administration, reducing the income of the clubs in the form of not going to the game, pushing or stopping transfers, or negatively affecting club activities.

The lack of sufficient / strong sports policy in Turkey, the weak culture of sport, not to test of different sports branches and the lack of sufficient facilities and infrastructure activities implementation, lack of professional workforce and lack of sports education capacity in schools increase the possibility of creating threats the substitute industries for the sports sector. Especially, activities such as computer games, joining entertainment areas, which are preferred instead of doing sport by the suitable age groups for doing sports, the demand of sports clubs decreasing day by day. Or the magazines, which are printed publications that perform many activities through the web pages of the clubs, are threatened. Since football is a sector in itself, it is important that other branches mature.

The absence of competitive balance and the fact that competition is always within certain clubs causes other clubs to remain weak against the leading clubs. It is seen that the championship distribution in the top league in our country is only between 5 clubs at football. However, this number is about 15 in European countries. One of the reasons of this situation is the fact that big clubs can create political pressure and so that the state or public resources can be used in their favor. Similarly, it appears that major clubs are influential at arbitration board decisions, referee appointments and other decisions taken by institutional actors. For this reason, it is a priority issue that the TFF has independent management structure in the correction of this oligarchic structure in the professional football leagues in Turkey.

5. DISCUSSION AND CONCLUSION

It may be assumed that the competitive ability of the sports clubs in Turkey mostly depends on the government's decisions and the capabilities to take advantage of them (Mozūraitienė, et al., 2011) as the competition is on the interest of the government as a policy maker (Cetindamar and Kilitcioglu, 2013). Porter (1990) pointed out in his diamond model the state plays an important role among decision-making bodies. Öz (2002, 510) evaluates Porter's explanations about the role of government at five private industries as an indirect influencer because of the major influence of the government to the other four determinants. This situation can be observed for the Turkish sports sector especially on the federations outside the soccer federation. Since they are still loyal to government decisions because of not to being autonomous yet. In this case the major determinants of competitive advantage at sport clubs are; The Youth and Sports Ministry policies, the budgets for sports and at which level federations' sporting activities are supporting states the development of the sport in the country.

On the other hand, considering the increasing income of sports clubs such as sponsorship and donations, sports clubs have to look at the competition structure from a strategic perspective thus they can manage these increasing revenues and

sources professionally, for example implementing (Omsa et al., 2017, Alkibay, 2005, 103) differentiation strategy especially via branding. Also, the forces and factors which are influencing the competitive advantage and thereby the sportive and financial success of clubs should be well and detailed defined and considered.

Especially in recent years, branding has affected the sports industry and it was seen that the branding is both a basis and a result of differentiation (Alkibay, 2005, 84). Sports clubs miss out on some advantages if they do not make long-term agreements with uniform and licensed product suppliers. For example, getting discounts for the next season's productions, making payment easier, placing orders for other branches, getting support for different organizations in case of need, and most importantly, providing mutual brand awareness and strengthen brand image can be listed as some of these advantages.

Clubs can provide competitive advantage with these financial advantages. These advantages are among the factors which are defined from Porter as buyers. The industrial structure forms time specific influences on its participants (Dulčić, Gnjidić and Alfirević, 2012) and therefore sport clubs aims every year to be champion at the league. So, they have to be more deliberate in terms of gain the sustainable success without the championship and they have to consider the industrial structure.

According to Porter (1998) the followers of a leader are considering having goals and strategies, which can provide profitability to them. Also, five forces are influencing the industry, but especially for sports sector, because of having its own features, with priority sport clubs need to behavior as a good competitor. And the sport club's presidents are acting an important strategic role in favor of fans. On the purpose of analyzing the competitiveness effectively and yielding to better strategic insights, Dobbs' (2014) templates should be implemented in future studies.

Competitive scope is a highly effective role in competitive advantage through its influence on the value chain (Porter, 1985; Miyamoto, 2015). This result will contribute to the construct of sports economy in Turkey by determining the factors affecting this economy. According to Porter to gain competitive advantage at international level depends not only to the countries but also the organizations within the sector at national level. Certain features may be sufficient to provide a competitive advantage to be outstanding (Porter, 1990; Gürpınar and Sandıkçı, 2008). Through the value chain some specifications could be developed by the sport clubs and competitive advantage could be provided (Dağlı Ekmekçi, 2017). Therefore, future studies in this area can be associated with the value chain.

Generally Turkey has a potential power to have competitive advantage with respect to qualified work power, capital structure and substructure sources (Özer,

Latif, Sarıışık and Ergün, 2012) at sport as talented but still not discovered human resources. As Porter explains, as a developing country Turkey could concentrate on its own growing potential areas for the purpose of gaining competitive advantage.

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