Commentary

Is the Role of Public Service Media in Estonia Changing?

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ABSTRACT

The need to re-structure established media systems needs to be acknowledged. In a situation where new services will be provided by different actors of the digital economy, the role of public service media (PSM) requires attention. If, generally, PSM are under pressure in Europe, the situation in small national markets is even more complicated. PSM are under pressure and also need to find ways to reformulate their role in society and culture. Broad discussions and new agreements between politicians, citizens and the media industry are necessary to change this situation. We will approach the question of whether a specific gap still exists in the media market that can be filled by PSM? The article will seek these answers based on various survey data and collected statistics in Estonia.

INTRODUCTION

Historically, public service media have held a strong position in the European countries. PSM have played a leading role as a reliable source of information, provider of quality entertainment, and educator. An excellent summary of traditional public service values is provided by Lowe and Maijanen (2019). According them, the role of public service media includes the following: 1) developing and defending democracy; 2) providing independent, impartial, and trustworthy information; 3) providing relevant content for all; 4) ensuring that high journalistic standards are maintained; 5) serving as a domestic cultural institution; and 6) maintaining and developing the national identity (*ibid*.: 12). In the globalising world, and especially in digitally united Europe where the borders of the nation states have become more fluid, keeping cultural communities together is an additional function. If people move to live, work or study in other countries, digitalised media can help them maintain stronger connections to their home culture. On the other hand, in case of information overload and growing information disorder, PSM can help to safeguard democratic developments. The role of PSM in ensuring "that citizens have access to well-researched and trustworthy journalism is central to the functioning of democratic societies EBU (2019a: 1)".

The US presidential election in 2016 (Silvermann 2017) and Brexit attracted even more attention to the role of the media as a reflector and influencer of societal processes. Whereas traditional media channels used to play a clear role as the 'fourth power' in society, the increase in the popularity of social media and the amount of false information that is spread therein has called the importance of traditional media into question. Not only does the so-called mainstream media have to compete with social media news (Hermida *et al.* 2014), but also with increasingly popular alternative media channels. Users face new challenges in finding news in the oversaturated

media landscape, as well as navigating between the growing number of news sources (Swart *et al.* 2017). The role of public media in analysing facts and filtering content in the information overload of network society has become a central question of media policy (Donders, Raats 2015; Goodwin 2017).

The special strength of PSM has been, and still is, its contribution to areas of failure in the market, e.g. domestic children programmes, the representation of minorities etc. The parliaments and governments of many nation-states have seen the importance of guaranteeing the development of PSM and provided significant resources to ensure the functioning of PSM. This has been rewarded with high quality services being provided by PSM to the citizens. In some countries, especially the Nordics (including Estonia), PSM enjoy the attention and trust of its audiences (Weibull 2007), while in other countries, PSM have weaker positions (Terzis 2007). In the context of general ambiguity about the future role of PSM, it is probably rather surprising that the population of Switzerland overwhelmingly supported their public service media in a public referendum on the 4th of March 2018[1].

Born and Bosser (2001) defined the "three central principles [of PSM] with the second and third being largely derived from the first, that provide their ultimate justification: a) *Citizenship*: enhancing, developing and serving social, political and cultural citizenship, b) *Universality*, and c) *Quality* of services and of output" (Born, Bosser 2001: 671).

Serving civil society is the most important function of PSM and has included "three elements: genres (e.g. information, education, or culture), goals and functions (e.g. inclusion, participation, national identity), and characteristics of journalistic practice (e.g. innovative, balanced, impartial)" (Schweizer, Puppis 2018). Aalberg *et al.* (2010) argue that audiences are better

informed about news and current affairs in the countries where public television has a strong standing. PSM have created standards and influenced the television and radio programming decisions in the private media – at least in the provision of news. This finding is in line with the EBU (2019b: 9) report outcome: "Countries with high PSM TV and radio market shares and high PSM funding per capita tend to rank higher in the democracy index".

In various national and cultural contexts, the combination of elements results in PSM playing a specific role in the media systems. Several studies indicate that the function of public service systems differ significantly in various European countries. Nowak (2014) found that the main distinction lies in the orientation to the main target group, i.e. PSM can be accountable to the governments or to the audiences. For example, the systems in Italy, Spain and Poland are less politically independent, whereas in Germany and Sweden they are accountable to the public (Nowak 2014: 17). Dobek-Ostrowska (2015) argue that, in Central and Eastern Europe, four media models exist with the PSM in each model having a different (value proposition or) position.

The achieved goals that have been formulated by the legislation and regulation of PSM have not changed significantly during the last few decades, but the contextual factors that enable or disable the fulfilment of some goals have changed quite a lot. Based on the changes in the UK market, Doyle and Barr (2019) ask an existential question related to the national media: "Does "national" television content still have any relevance in the digital era?" (Doyle, Barr 2019: 940). Furthermore, we can assume that the acuteness of the question based on the amount of resources every country invests in PSM.

Thus, the central issue is what are the possible new roles that PSM can have in digital contexts (Lowe *et al.* 2018). Wauters and Raats (2018: 178) argue that for PSM to successfully exist, it should be defined as a part of a media ecosystem that combines

1   https://www.ebu.ch/news/2018/03/swiss-vote-in-favour-of-public-service-media

the media content value chain, broader creative industries, as well as the media-tech and internet technology industries. Ibrus and Rohn (2019) believe that, thanks to the specific position that PSM have in European markets, they can act as "coordinators and facilitators of inter-sector cooperation and various kinds of innovation activities" (Ibrus, Rohn 2019: 50). Expanding on their conclusions, it can be said that the market gap that needs to be fulfilled should not to be the provision of diversity, but the facilitation of cooperation between different content providers, which will also create diversity.

The analysis of the Estonian case should take into account that the Estonian market, as a liberal economic system, is very open to external influences, and the size of the language community presents specific challenges to the developmental possibilities of the media companies in Estonia (Jõesaar 2017). On the one hand, the competition for limited resources is acute – the Estonian media market totals approximately €100m (Baltic Media Health Check 2019). On the other hand, Ibrus and Rohn (2019) who have analysed the changes in Baltic media markets, state that the private media organisations have made important changes in their functioning logic. Namely, they have entered other business sectors (like education, health, tourism etc), and the industry is fostering cross-media solutions and cross-innovation (Ibrus, Rohn 2019: 48). Some sectors, like education, have previously been important for PSM, thus changes in private media strategies can also have an important impact on PSM.

In the article, we will analyse the role of PSM (in Estonian, the ERR – Eesti Rahvusringhääling) based on the data collected in Estonia. We will analyse the role of ERR in their specific functions in content provision and the audience feedback to their role performance. The aim of the study is to explore the possible new roles that ERR can play in society and for audiences. Thus, the research questions for the study are the following:

– What are the main changes in ERR programming compared to private media?
– How do audiences evaluate the provision by ERR? What specific strengths do the audiences attribute to ERR?

To provide the answers, we will use the public data provided by Statistics Estonia on the changes in the broadcast programming, as well as survey data collected by various studies (representative surveys among the Estonian population in 2014, 2017, and 2019, with approximately 1,000 respondents for each, organised in cooperation with TNS / Kantar Emor and Saar-Poll). We will analyse the situation of the Estonian public service media from three angles: resources, content provision, and audiences. The conclusions we draw could be relevant to PSM in other EU countries as well, since those systems face similar problems.

RESOURCES

The two most important transformations that have impacted the position of PSM in the media market are: 1) digitalisation and easier distribution of content; and 2) the globalisation of the markets. We have witnessed an explosion of media communications thanks to the internet and other communication technologies. Technology has been the enabler and disruptor of media development. There are more content providers, and more interest groups have their own channels in order to establish direct contact with their audiences. PSM have seen the need to move on to the new platforms, along with private online content providers and the audiences (Pickard 2011). The diversity of platforms in a single organisation – a cross-media organisational structure – creates challenges, as, on the one hand, more resources are needed for online developments while, on the other, the processes of convergence enable the better use of resources (Głowacki, Jackson 2013). Studies have found that, in a rapidly evolving digital media environment,

innovation is important for PSM, but their attitude towards innovation in products, processes or management are rather problematic – "the results show evidence of paradoxical tensions surrounding the maintenance of the status quo versus disruption" (Evans 2018: 18). "The fact that the fairly simple distribution strategy of the radio and broadcasting era has been gradually superseded by more complex and often unsynchronised (in terms of the balance of relative power) distribution strategies clearly requires some form of organisational change" (Donders 2019: 1023).

There is no factual data on what percentage of Estonian advertising revenues goes to global players – estimates vary from €13 - €25 million for 2018. This is roughly 20% of the total advertising market in Estonia. This means that less money is available for the domestic media sector. In order to compete with similar problems, some European Union members have introduced protective taxation (for example, in France). Along with the eroding advertising market revenues of the global platforms, commercial media also faces the threat of audience erosion; not only due to social media platforms but also public service media companies. Therefore, public service broadcasters across Europe are being increasingly challenged by claims of unfair competition (Sjøvaag, Stavelin, Moe 2016: 952). As a result of this pressure, regulators have forced PSM onto a 'diet' and public funding of PSM has not increased. In many EU countries it has actually decreased (EBU 2019b). This also makes it harder for PSM to reach their audiences. The third reason for commercial media's low revenues is the claim that advertising rates in traditional channels are quite low. The experts claim that TV ad rates are extremely low and the new players are taking even more out of the national markets (Kõuts-Klemm *et al.* 2019). The price pressure for commercial TV stations results from fierce market competition. This competition used to exist between the domestic print and broadcasting media, especially between newspapers and television. But for last decade, the role

of foreign internet companies has been rapidly increasing. Global platforms have the great advantage of using innovative methods of data collection and analysis, and IT-solutions that enable cost-effective personal advertising. This personal targeting reduces CPT (cost per thousand) and makes ad campaigns more effective for advertisers. This is good news for the economic growth of Estonian businesses. And the only losers in this 'game' are the private media companies.

At the same time, all domestic media outlets face the challenge coming from international social media platforms. The core of this challenge lies in the changes taking place in the audience's media consumption. Both local players – Estonia's private and public service media – are forced to adapt to the rules of the attention economy (as defined by Davenport, Beck 2001). The reality is that today, foreign players – mostly global platforms (owned by FAANG – Facebook, Amazon, Alphabet, Netflix, Google) garner a large part of audience attention. In order to keep their audience, domestic media needs excellent content and user-friendly services. The quality thereof depends on the resources available for research and development. And this is something which, in traditional business terms, should come from companies reinvesting their profits. However, not all Estonian private media companies are 'out of the red' (Donauskaitė *et al.* 2019). As described above, market conditions are getting tougher. Commercial media companies rely mainly on advertising (which hasn't increased) and subscription revenues (where the problem is convincing the decreasing number of print subscribers to use online services). The public service media depends solely on state funding. Here we can see that in Estonia, the percentage of the funding for PSM from the national budget compared to the budget growth has been nearly halved during the last few decades **(Figure 1)**.

The data in figure 1 is quite concerning – financing is stagnating, but the programming provided by ERR is broadening.
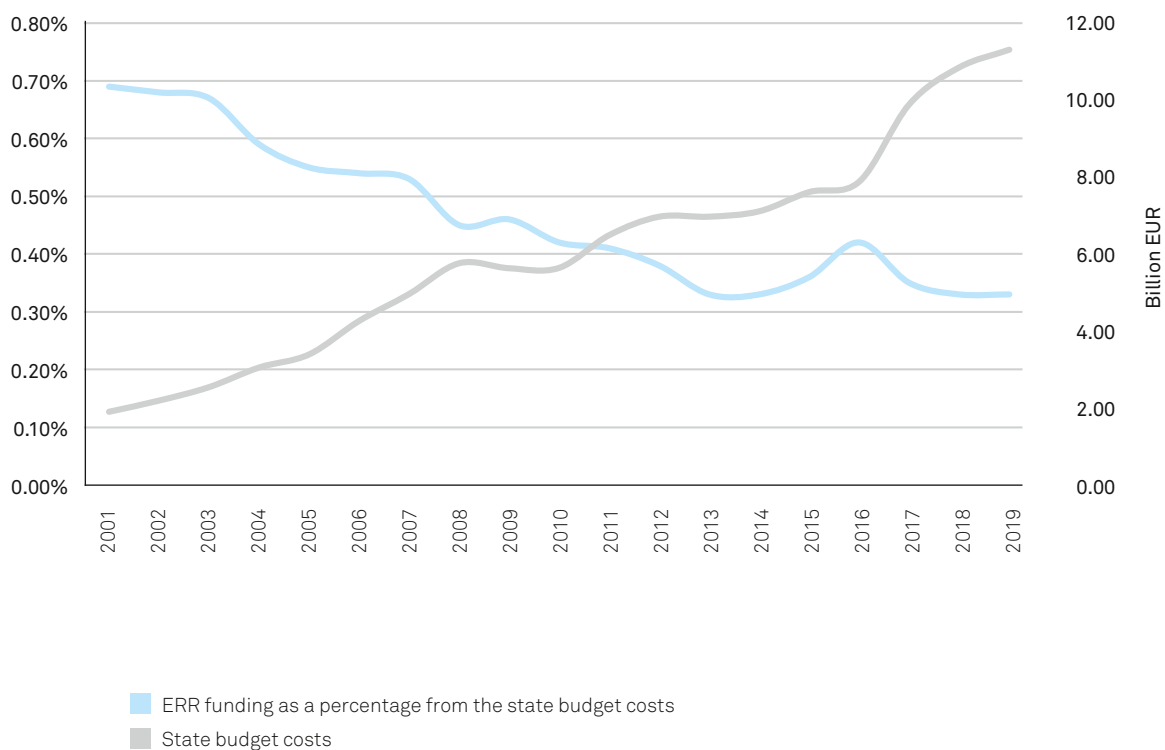
FIGURE 1. Ratio between ERR funding and the national budget costs (Authors' calculations based on the data from the Ministry of Finance and ERR).

ERR has five radio programmes (four in Estonian, one in Russian), three television programmes (two in Estonian, one in Russian, with full translation into Estonian) and one online platform with news (main content in Estonian, sub-pages in Russian and in English) and it provides original content for children's, science-related, cultural and sports programming. Legislation prohibits all these channels from participating in the advertising market. Thus, ERR is totally dependent on taxpayer money.

CONTENT PROVISION

Broadcasting has made extensive use of the new possibilities provided by digitisation to increase airtime for their programming. Based on statistics, during the last 20 years the total number of radio and television programmes in Estonia has increased from 33 radio programmes in 2000 to 38 in 2018, and from 5 domestic TV programmes to 21 in 2018 (Statistics Estonia, 2019). According to the MAVISE database (2019), more than 100 foreign TV channels are targeting Estonian audiences. For radio, domestic programming hours have increased from 267,000 to 271,000 hours annually, and for TV, from 32,000 to 150,000 hours annually (Statistics Estonia, 2019). Digitisation has been the main cause of the significant growth in the TV sector.

There is a clear difference between the television and radio offer. We can compare the differences between public service radio and private radio based on data from Statistics Estonia. Between 1997 and 2018, we see a decrease in educational and cultural programming (including significantly, the amount of "fiction") on public service radio, and a significant increase in news and current affairs discussions **(Figure 2)**. Currently, music comprises half the programming aired on the public radio stations. The programming on Klassikaraadio focuses on classical, world and jazz music. The programming on Raadio 2 promotes new Estonian pop music, but also includes several shows featuring musical styles that do not appeal to a very wide audience. However, the content of the private radio

programmes is comprised almost totally of popular mainstream and dance music (two-thirds of the programming), and there are either significantly fewer educational or cultural shows or there are none. (Statistics Estonia, 2019).

The traits of the TV programming provided by ERR are similar to the radio programming – there is a diversity of content and the various channels have their specific niches. Compared to others, ETV, which is the oldest channel, broadcasts more infotainment, news and current affairs; ETV2 dedicates a significant amount of programming hours to children, as well as cultural and scientific topics; the Russian-language ETV+ airs many hours of fiction, although infotainment and current affairs are also a significant component **(Figure 3)**.

The number of hours in the different programme categories fluctuate from year to year to some extent, and even the offering of news programming has been inconstant over the years. The news provision depends, to a great extent, on the number of stations on the air and the changes in their programming, but also on legal regulations. The rapid decline in TV news is related to regulatory changes – in 2018, the private TV channels were relieved of the requirement to broadcast news. These regulatory changes resulted in audiences being able to watch an average of 50 minutes of news per station in 2018, compared to 105 minutes in 2017. Public service radio has the highest provision of news – totalling almost 8% of all programming in 2018 **(Figure 4)**. The combined news programming on the three public service TV channels totals 5%. If we also include the amount of infotainment, 18% of the programming is comprised of news provision (calculations based on the data presented in fig. 3).

It is probably well-known that the programming content on public and private stations differs. And that's still true. Nevertheless, the question of how to attract an audience, and especially a younger audience, is extremely important for both PSM and private stations (Newman 2019: 9).
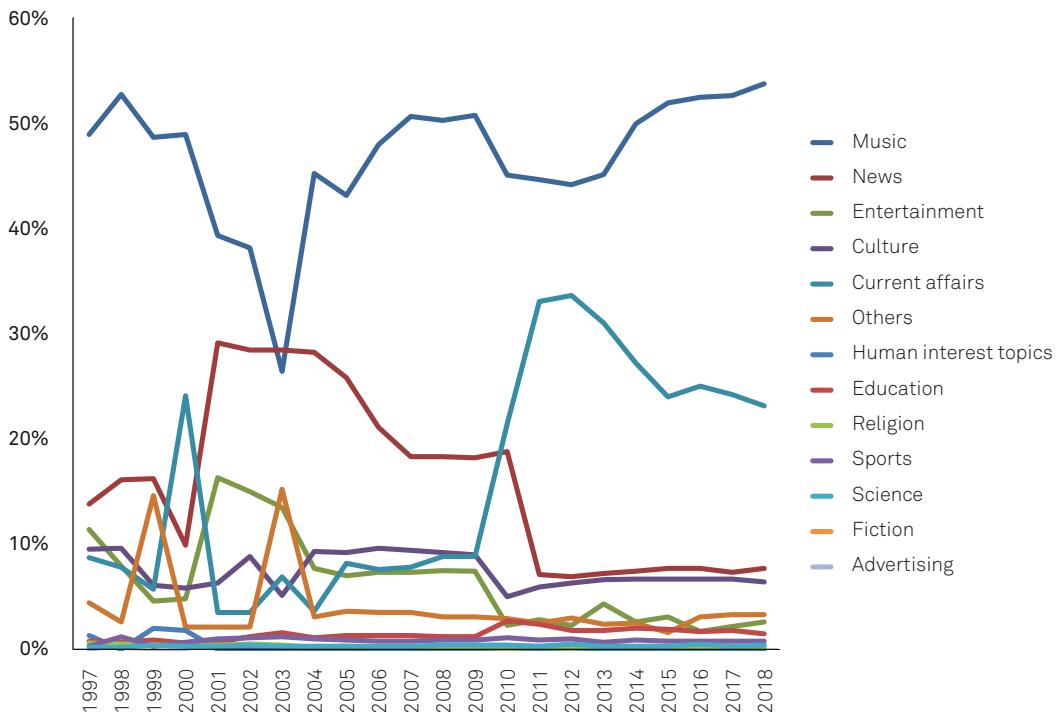
FIGURE 2. Changes in the content of public service radio programmes 1997–2018. (Statistics Estonia 2019; content classification categories EBU-TECH 2007).
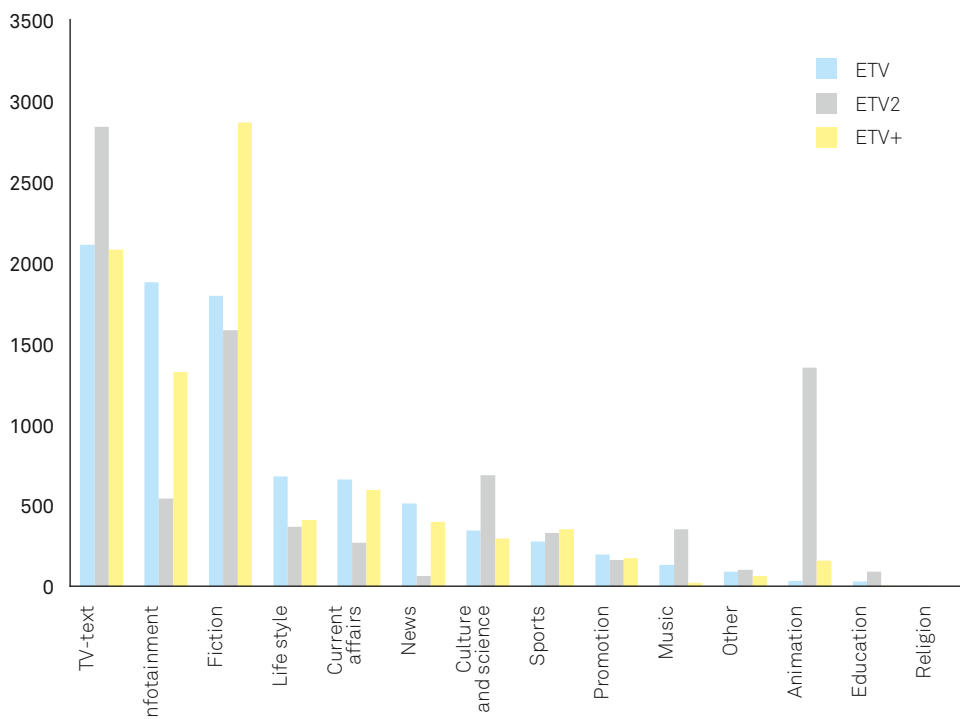

FIGURE 3. Programme hours in the different programme categories on Estonian Public Broadcasting's TV channels in 2018. (Data: ERR).
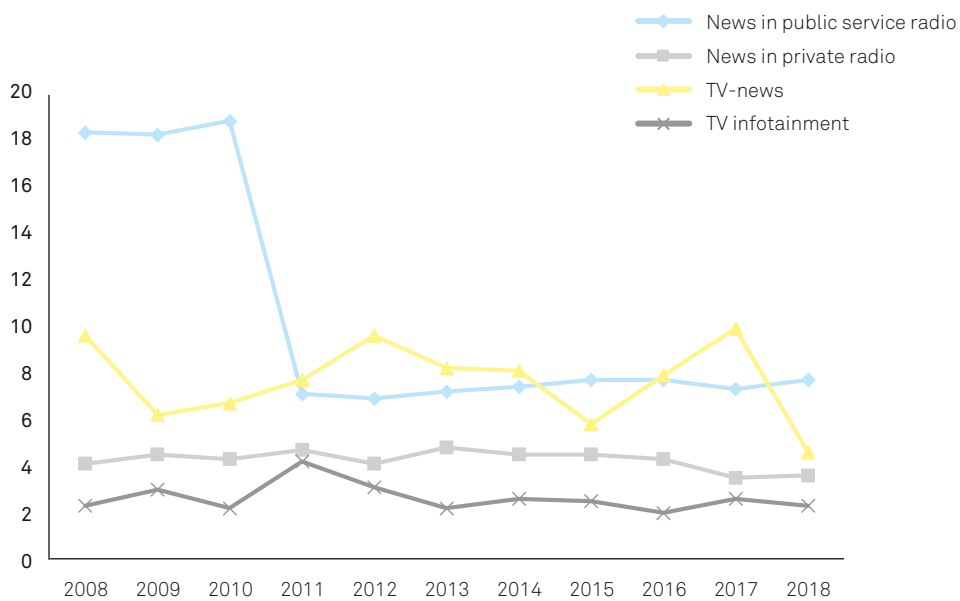
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FIGURE 4. News and infotainment in the programming (%),
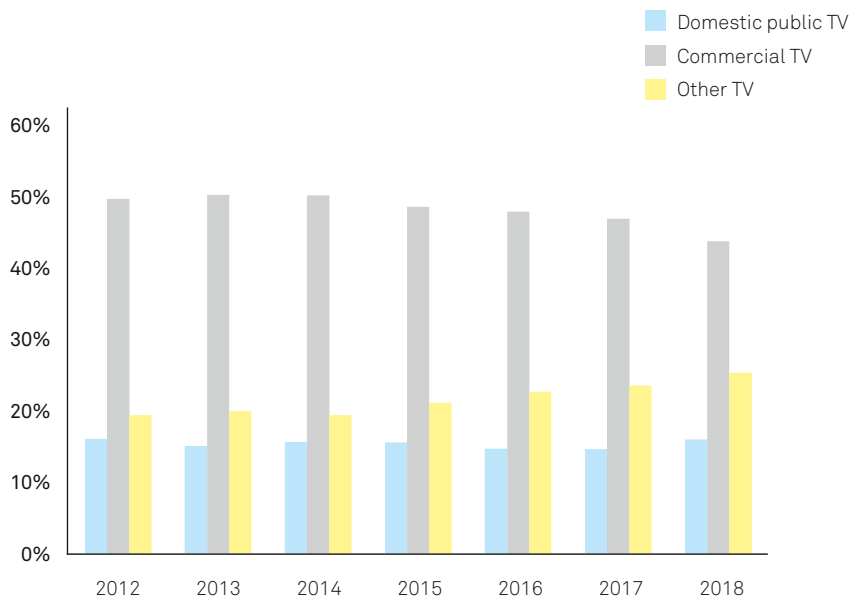**the public service TV data is not provided separately. (Data: Statistics Estonia, 2019).**

FIGURE 5. Daily share of viewing for the television channels in Estonia.
Source: EBU MIS Dataset.

AUDIENCES:
MEDIA USE AND TRUST

The audiences, i.e. those who pay for and take advantage of the PSM offering, find that the relationship between the value of PSM and the cost is equitable. The audience share of viewers and the viewing times of PSM compared to the private media is a good indication of how much value the audiences place on the former. Figure 5 shows that the daily shares for commercial TV programmes are decreasing, whereas the shares for public TV are remaining steady or increasing **(Figure 5)**. We see that other TV channels (like Fox, Discovery etc.) are competitors for private TV rather than for public TV.

When we analyse the position of the PSM from the viewpoint of audiences, we see that, at least in Estonia, the time dedicated to PSM TV programmes as a ratio of total TV viewing time (share) seems to be increasing. According to the aggregated data for different TV providers, the total viewing time for the channels operated by the public service ERR (ETV, ETV2 and ETV+) is increasing, and the privately-owned media groups (Kanal 2, 11, 12 and MyHits, i.e. channels owned by Postimees Grupp AS; and TV3, 6 and 3+, i.e. channels owned by the All Media Eesti AS) is declining. One reason for the decrease in TV3 and Kanal 2 viewing times could be that programming went from being free to being paid in 2017, thereby limiting their audience to their subscribers.

The audience shares of TV programmes from Russia have been slightly decreasing, the most viewed TV programmes from the Russian Federation (PBK, Ren TV, NTV Mir) have mostly retained their importance for their viewers (Figure 6).

As the result of information overload, audience studies show that people are developing different coping strategies for accessing balanced and accurate information (Mollen, Dhaenens 2018). Being informed about current affairs and following the news is a significant part of daily life. According to a survey by SaarPoll in 2014, 81% of Estonians and 77% of the Russian-speaking audience follow the news at least once a day. According to a survey carried out in 2019, 90% of the respondents said they follow the news at least once a day (Jõesaar 2019). The actual usage measured by the audience metrics indicates that 15% of the Estonian adult population visit the ERR news site daily, and 24% do so weekly (Kantar Emor: Interneti baasuuring 2018). The significant differences exist in platform preferences among various audience groups, but that's not all – differences in consumed content and the meaning of news also appear when comparing younger and older groups (see comparison by Brites and Kõuts-Klemm 2018). In a detailed analysis we can see important differences in the news platform preferences by age groups (see Figure 7). In the 2019 survey, the respondents over 50 report that they follow television news on a daily basis – the main platform is the news provided by PSM. However, most of the under-25 audience follows the news on their smartphones – a platform where PSM doesn't perform so well (Donauskaitė *et al.* 2019). The reasons for this difference could include the level of engagement and user experience provided by these platforms, as well as existing traditions and habits. Elderly people feel more comfortable with the traditional channels while younger audiences see themselves as 'digital natives' (as defined by Barlow in 1996).

The online ERR news platform reaches almost 10% of the youngest age group – both daily and weekly (Kantar Emor 2018). However, education has a greater impact than age when comparing the consumption of news offered by the public service media platforms. More than 60% of the actual ERR online news users have a higher education (Kantar Emor 2018). One reason could be that the news site doesn't carry advertising and the offering is perceived as "quality news". Studies in several Nordic countries indicate that news consumption represent new inequalities, for example, a division between news avoiders and news followers, or a division between those rich in culture and other forms of capital
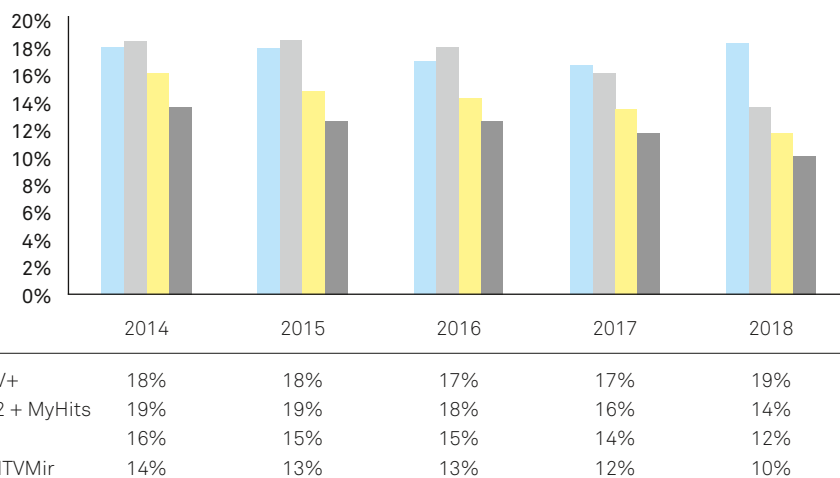
	2014	2015	2016	2017	2018
ETV + ETV2 + ETV+	18%	18%	17%	17%	19%
Kanal 2 + 11 + 12 + MyHits	19%	19%	18%	16%	14%
TV3 + 6+ 3+	16%	15%	15%	14%	12%
PBK + RenTV + NTVMir	14%	13%	13%	12%	10%

**FIGURE 6. Audience shares of the main linear TV providers in Estonia in 2014–2018.
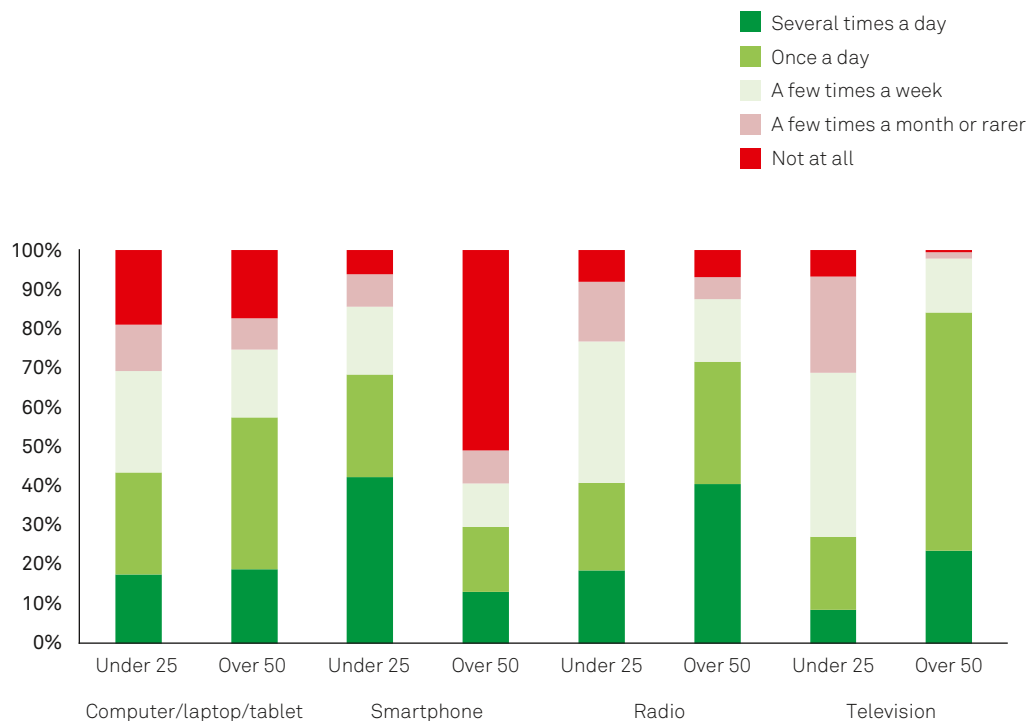(Data: TNS/Kantar Emor).**

**FIGURE 7. The intensity of two age groups when following the news on various platforms in 2019.
(Data: Kantar Emor 2019).**

compared to those with less forms of capital (see e.g. Ohlsson, Lindell, Arkhede 2017; about Estonia, an article by Vihalemm, Kõuts-Klemm 2017). People with a higher education in Nordic countries prefer "quality news" provided by mainstream media brands (Newman 2019), and this is true in Estonia as well (Vihalemm, Kõuts-Klemm 2017).

Generally, trust in news media is decreasing around the world (Newman *et al.* 2019). Traditional media are more trusted than online-media, and PSM are more trusted than private media (Eurobarometer, Newman 2019). Based on three educational levels – 1) primary or basic education, 2) secondary or vocational education and 3) higher education – the reliability of news sources is perceived more or less similarly in Estonia. The main difference is that respondents with higher education place more trust in the traditional public service channels. Audiences with primary and secondary education also place quite a high level of trust in public service media. However, commercial TV channels are also well-trusted, especially among those with a primary education. There is less trust in online platforms and social networks at all educational levels. The difference is that people with higher educations are slightly more critical than the others.

Similar patterns can be seen among the different age groups. Younger audiences have greater trust in online offerings, while older age groups have the greatest trust in television and radio. Commercial channels are still less trusted than the public service channels (Figure 8).

Among Estonians, the trust in public service media have been attributed to the perceived role of PSM – even those who do not follow the PSM channels tend to trust the channels. However, in the Russian-speaking community, a different relationship between the public role and trust exists –Russian-Estonians trust the channels they actually use (Kõuts *et al.* 2013: 95). Whereas the general pattern in the world is that "public broadcasters and their websites tend to have the highest trust

scores, at least in countries where their independence is not in doubt." (Newman 2019: 25).

The most trusted news programme is the evening news on ETV, the public service television channel, and the largest number of the respondents are willing to express confidence in the programme (see Figure 1.1. in Appendix). The news on both public service TV and radio receive high trust scores among audiences in Estonia, but the specific channel preferences differ among the Estonian- and Russian-speaking respondents. For the Estonian audience, the top five most trusted news programmes are: the evening news programme *Aktuaalne Kaamera* on ETV (94% tend to trust and rather trust), the evening news magazine *Seitsmesed* on the private TV channel TV3 (72%), the news on the public service radio station Vikerraadio (70%), the TV news magazine *Reporter* on the private Kanal 2 (57%), and the news programme on Kuku Raadio, a private talk radio station (48%). Among Russian-speaking audiences the most trusted news programmes are: *Aktuaalne Kaamera* in Russian on the public service TV programme ETV+ (63% tend to trust or would rather trust); *News from Estonia* by Pervõi Baltiiskii on Kanal PBK (53%), radio news on the Russian-language public radio station Raadio 4 (47%). *Aktuaalne Kaamera* in Estonian is trusted by the same amount of Russian-speaking respondents as the news programmes on the Russian TV channels (43% tend to trust or would rather trust, although there are a significant number of viewers, i.e. 15-20%, who do not trust the programmes in the latter category, i.e. the news programmes *Wremja* and *Vesti* and the RTR news).The general pattern indicates that the number of those who are not able to evaluate the trustworthiness of any single news programme is rather high – probably because they have not watched the programmes. Only a few news programmes are widely known among audiences – this can also be seen as resulting from audience fragmentation (Kõuts *et al.* 2013).
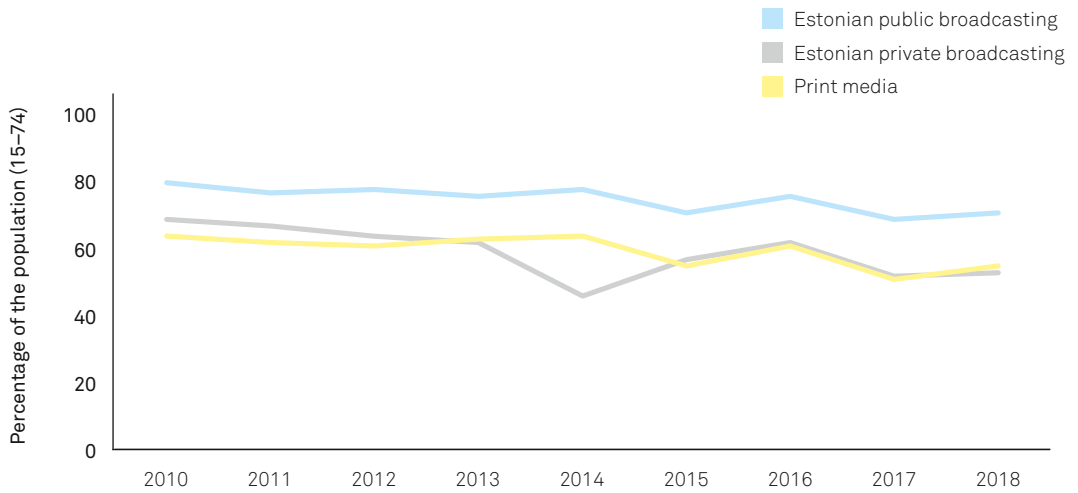
FIGURE 8. Trustworthiness of ERR, private broadcasting and print media among the Estonian population in 2010–2018 (totally trust and mostly trust, %). (Data: Turu-uuringute AS, TNS Emor 2014).
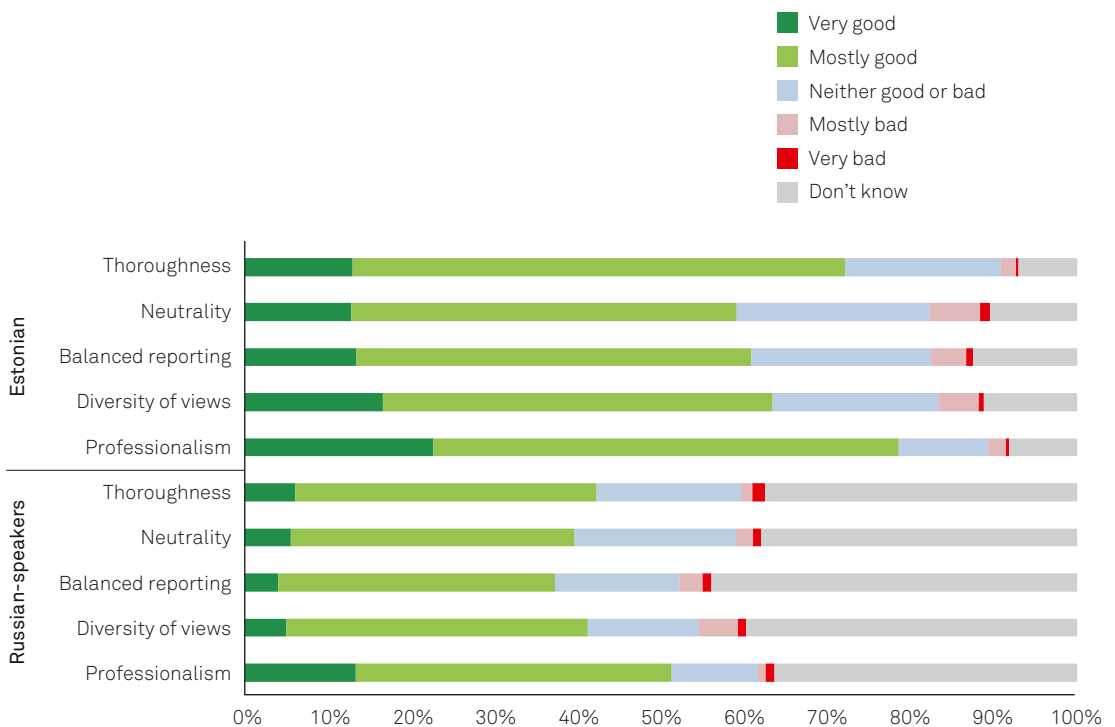

**FIGURE 9. Assessment of the role performance of ERR in 2019.
(Data: Kantar Emor 2019).**

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ROLE PERFORMANCE
OF PSM AS PERCEIVED
BY THE AUDIENCE

Nine objectives and eleven functions of the ERR were established by the Estonian Public Broadcasting Act. In addition, the more detailed expectations for programme services are defined in §6:

> The programme services shall be diverse and deal with the topics of social life in a balanced manner.

> The programme services and media services shall promote communication between the members of the society and social groups, the social cohesion of the society, and shall reflect different opinions and beliefs.

> The news programmes of Public Broadcasting shall be diverse, balanced, independent and appropriate.

> The programmes of Public Broadcasting shall be politically balanced.

Estonian Public Broadcasting Act

The citizens' assessment of the job performance prescribed in the Act is generally rather positive (Figure 9). Among the respondents who expressed their opinion during the survey in 2019, most considered all the areas to be very good or mostly good. There are significantly fewer respondents who evaluated the job performance rather negatively. Yet it is clear that fewer positive evaluations were given in the categories of 'diversity of opinions', 'balanced coverage' and 'neutrality'. The reason could be the increasing polarisation of opinions in society and the heated political climate, which may have impacted the respondents' valuations.

When making a more detailed analysis, we can conclude that the audiences are rather satisfied with the principles employed for content planning and programming in respect to culture and social diversity. However, they are less satisfied with the transparency of the institution's functioning. Even if the respondents tend to be satisfied, ERR is assessed as being politically independent by the smallest percentage of respondents and they are least satisfied with the information ERR provides about its organisational functioning (see **table 1** in Appendix). On the positive side, the audiences generally perceive ERR as being educational and informative.

The Russian-speaking audience is less able to evaluate the role performance of ERR, since they have more limited contacts with the different ERR channels – they mostly follow the public service radio station Raadio 4 in Russian, but they are less familiar with the Russian-language ETV+, or online ERR news in Russian (Kantar Emor 2018). However, more than half of the respondents do agree that ERR delivers important cultural content, is economically independent, represents gender balance, and supports democracy in Estonia (Kantar Emor 2019).

Generally, audiences in Estonia assess the need for ERR as being rather high. In three survey rounds, people were asked to assess how important they considered Estonian Public Broadcasting to be for Estonian society on a scale of 0 to 10. The research data from 2014, 2017 and 2019 indicate that Estonian residents consider public broadcasting to be a very important institution for Estonia (**Figure 10**).

Year	Estonians	Non-Estonians
2014	8.6	7.9
2017	8.4	8.3
2019	8.5	8.4

FIGURE 10. Importance of ERR for Estonian society. (Data: TNS Emor/ Kantar Emor, scale 1 – not important at all … 10 – very important).

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This data is in line with the evaluations related to the trustworthiness of the institutions as indicated above. The opinions of Estonians have remained relatively stable, while data from the last two studies shows that the assessments of Russian-speakers have become significantly more positive. According to the data from the 2019 study, 45% of Russian-speakers consider public broadcasting to be very important for Estonia. This positive trend among Russian-speakers can be explained by the impact of ETV+.

It is more complicated to draw any conclusions from the same questions posed about private media. If, in the case of ERR, we are talking about a specific institution and a relatively small number of channels, which are based on similar values, the term 'private media' includes many more players and the value scale they offer is more diverse and the quality of content more varied. Therefore, the replies are a generalisation that does not differentiate between different players, but rather provides a general image of private media. Data shows that the evaluations of private media are not as clearly differentiated based on language groups as they are for public broadcasting. This is understandable as the different groups watch different channels and the answers they provide reflect their evaluations of different media enterprises. Without knowing exactly which channels the respondents view as being 'private media', we can still see that 27% of Russian speakers provided a high evaluation (answers 9 and 10) as did 19% of Estonian-speakers. Almost half the Estonians (47%) assessed the personal importance of private media by giving it 7 or 8 points. The same response was given by 31% of the Russian-speaking respondents.

To summarise, digital technologies give audiences more power (Jensen 2014). Audiences can follow the programme or not and they have many alternatives in the digital world. Without a doubt, the assessments of the public media services correlate with the generally changed possibilities of media use. On the one hand, the audiences evalu-ate the content based on relevance to their personal lives (Schrøder 2019), but on the other hand, the opportunity to exercise personal choices is also becoming more important. Based on Web 2.0 technology, a new form of audience activity – *produsage* – has emerged (Burns 2008). Produsage as a new form of audience engagement is something that is difficult for traditional media companies to achieve. PSM has been slow to adopt their services to the new situation that requires interactivity (Lind 2012). Without an audience engagement position, the power of traditional mass media is undermined by mass self-communication (Castells 2019). In this context it is hard to overestimate the importance of PSM as a reliable and trustworthy information source. The changes in the programming and content of PSM should be several steps ahead of the needs of audiences.

CONCLUSIONS AND DISCUSSION

We have analysed the situation of the Estonian public service media from three angles: resources, content, and audiences. We have used the data collected by Statistics Estonia and the data from survey conducted in different years by media research agencies.

Regarding the resources ERR can use, we can see controversies related to financing and content provision – more programmes than ever being offered by the public service media, but financing is decreasing in comparison to the total national budget. PSM has to compete in a cross-media environment and also provide reliable online content that is trustworthy and significant for the audiences. Especially compared to private media, in which working processes have been accelerated (Himma-Kadakas 2018), PSM needs to pay more attention to careful fact-checking practices. This is expensive and time-consuming.

The rapid changes in the content provision by ERR have not occurred in recent decades. However, the programming is diverse and offers educational, cultural and informational programmes. We see

that slightly more news and current affairs shows are being provided by public service media than private media. The public service media ERR provides the greatest diversity of the programming, as analysed in the content categories by EBU. But the data does not specify the tasks assigned to PSM – the content categories are too general for this kind of analysis. Therefore, we have no data about the specific gap filled by ERR's online services compared to those provided by the private news platforms. The audience data allows us to assume that online news could be assessed as being "quality" news – the survey shows that the audience segments with higher education prefer news provision without ads and without "tabloid" stories – two-thirds of those who follow PSM online news have a higher education.

Younger audiences are moving away from the traditional platforms (TV and radio) where PSM has had, and still has, a strong position – and switching to online environments where the popularity of PSM is considerably lower than the private portals and social media platforms. Therefore, it can be said that older age groups are better served by PSM than younger ones. ERR's online content has one clear advantage for audiences – there is no advertising. Nevertheless, the online news provision could differ more from private news sites, as Sjøvaag and her colleagues (2016) have proposed based on the Norwegian analysis. The content of Norwegian public service online news "looks familiar to the general user; mainly because it follows the expected rhythm, layout and priorities of online news. This is interesting in light of the public service institutions' task to experiment and provide alternatives – to challenge established norms and conventions" (Sjøvaag *et al.* 2016: 966). Maybe, this could be one of the extras PSM provides for re-conceptualising the general role of PSM in today's complex environments. The younger generations could be more interested in the content and programming that enables produsage.

The paradox with PSM is that in order to serve the entire population bet-

ter it needs to improve its reach among the younger age groups and also attract more audiences with lower education levels. In order to achieve that, PSM programming should be more entertaining and less focused on the highly educated elite, and it should have a strong presence on all platforms. However, if PSM does this it will be accused of lowering its programme standards. PSM critics will argue that entertainment is not as valuable as news, investigative journalism or (niche) cultural programmes. The argument that they create 'unfair' competition for commercial companies through the use of entertainment – the domain in which the private sector is mainly active – will gain strength again. Also, the idea of improving PSM content services and user experiences on online platforms will also be criticised by the private sector.

The continued importance of ERR programmes for audiences is reflected by the fact that there has been no decrease in audience share and viewing time for ERR channels, while we are seeing a decrease in audience shares for private TV-channels. Trust in PSM is higher than trust in the private media in Estonia. The findings also correspond to the general trends in other countries (Newman 2019).

Although it has improved after the launch of the Russian-language channel ETV+, the reach of public service content among Russian-speaking community is still lower than among the Estonian community. PSM online news and other content in Russian are also looking forward to being discovered by Russian speakers.

If we go back to the concept of public service media fulfilling many different functions, as Lowe and Maijanen (2019) stated, then we see that ERR holds a strong position as a domestic cultural institution – the audiences assess the role of ERR in providing relevant cultural content as being the best. The trust in ERR is high, as it ought to be in order to fulfil their function for audiences. But audiences do see slight problems with independence and impartiality. This is probably the most important factor to be dealt with in the ERR's development

plans and policy documents as they formulate the solution when re-conceptualizing the role of the ERR. The laws of economy and ecosystems have proved several times that a position can be lost when an organisation hopes that nothing will change and there is no need to make changes in the content of programme or in the values held by the PSM-professionals. In a rapidly transforming environment, one's position needs to be strengthened as the media professionals themselves – even those from private media – agree (Kõuts-Klemm *et al*. 2019): the Estonian democracy needs a strong PSM while allowing domestic private media to survive as well.
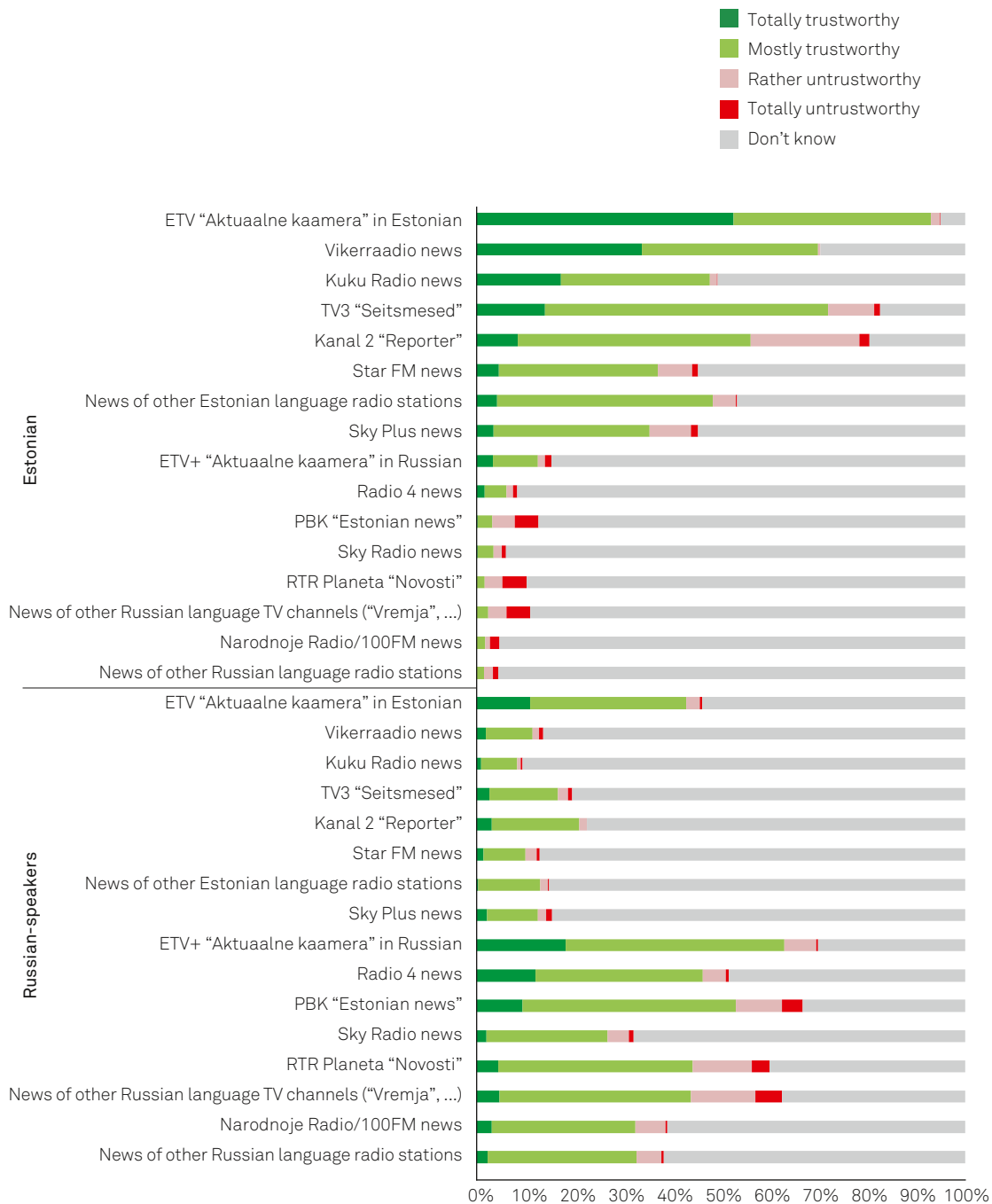
APPENDIX

FIGURE 1.1. Trust in the news programmes offered by the different providers in Estonia among Estonian and Russian-language respondents in 2019. (Data: Kantar Emor 2019).

	Estonian respondents		Russian-language respondents	
	Do agree (%)	Do not know (%)	Do agree (%)	Do not know (%)
Delivers the most important culture events to the audiences	88	9	60	37
Delivers the world's diversity to the audiences, opens new horizons	83	9	40	51
Offers something useful for every resident of Estonia	83	11	41	52
Offers a forum for representatives of different occupations in the programme	80	13	41	51
Is clearly different from the private media	75	15	55	34
Delivers the most important events to the audiences from every place in Estonia	74	12	41	53
Critically interprets the events and processes in society	73	15	47	38
Highlights all significant problems in society	70	13	42	44
Treats all parties honestly and equally in their shows/ programme	70	18	47	42
Supports democracy in Estonia	68	24	52	40
Takes into account the interests of audiences in their programme planning	67	26	51	43
Represents gender and age in correct proportions as they exist in the society	63	24	54	32
Takes into account the interests of ethnic minorities living in Estonia	58	31	47	39
Gives information about their functioning to the audiences	54	28	50	39
Is independent in programming in respect to economic interests	53	30	57	27
Is independent in programming in respect to politics	49	21	48	25

TABLE 1. Role performance by the ERR evaluated by the Estonian and Russian-language population in Estonia. (Data: Kantar Emor 2019).

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