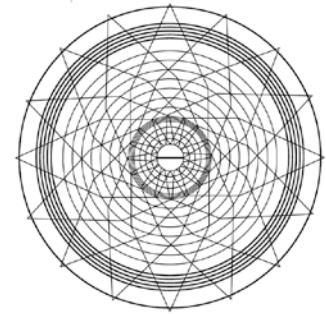


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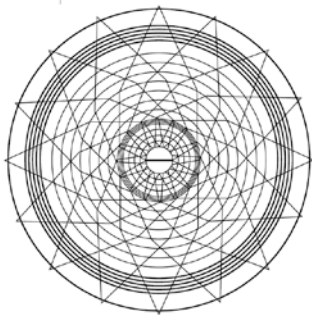
DAY AFTER: THE IMPACT OF THE LAUNCH OF THE RUSSIAN-LANGUAGE TELEVISION CHANNEL ETV+ ON ESTONIAN PUBLIC BROADCASTING'S VIEWING TRENDS

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Abstract:

At a time when many public broadcasters are closing down channels, the Estonian Public Broadcasting (ERR) launched a new channel on September 28, 2015. The aim of this study is to see how ERR's recently launched Russian-language television channel ETV+ changed the competitive environment. The Estonian Public Broadcasting Act (2007) established nine goals for Estonian Public Broadcasting. Two of these focus on increasing social cohesion in the society and assisting in the promotion of the democratic form of government and, as much as possible, meeting the information needs of all segments of the population, including minorities. This article uses two indicators for analysing the changes in the Estonian Public Broadcasting viewers between January 2006 and May 2017 – the weekly reach and share of general viewing time (data from TNS Emor TV-audience surveys). Using these indicators, it is possible to discern the trends that have taken place on a timeline, and predict the ability of Estonian Public Broadcasting to fulfil the goals required by law by extrapolating these trends into the future. The article focuses on the TV viewing trends of the Russian-speaking audience and assesses how effectively Estonian Public Broadcasting (TV channels) has fulfilled the goals and functions required by law related to meeting the information needs of the population, especially the Russian-speaking population.

Keywords: Television, Estonia, audience research, public broadcasting, viewing trends



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Language communities in Estonia

Before World War II, Estonia was a relatively homogenous nation-state. Estonians made up 88.1% of the population, and the larger minorities included Russians and Germans. Estonian was the national language used across the country's main spheres of activity (political leadership and management, education, science and culture). The war resulted in drastic changes. After being incorporated into the Soviet Union in the 1940s, Estonia lost nearly one-fifth of its population due to the war, mass repressions, and political exile. Due to the mass immigration from the other Soviet Republics, but especially from Russia, Estonia's population became multinational in only a few decades. The newcomers were mostly Russians, Ukrainians and Belarusians who spoke Russian. In the Soviet Union, the Russian language was the language of communication between and within different nations, which meant that, in practice, Russian was the official language. The majority of the Russians who moved to Estonia after WWII never learned the local language or became part of the Estonian community; rather, they formed their own Russian-speaking community, which, by the late 1980s, accounted for 35.2% of Estonia's population (Estonian Statistics 1997). The restoration of Estonia's independence in 1992 caused large-scale political and economic transformations. Most of the large All-Union industries lost their market and collapsed. The Soviet Army was withdrawn from Estonia in 1994. A large percentage of the Russian-speaking population lost their jobs and moved elsewhere. During the last two decades, there has been a significant decrease in Estonia's population and a change in the nationality ratio. In 1990, the total population was 1.57 million, 61.5% of which was constituted by Estonians. In 2015, Estonia's total population was 1.31 million, of which 69.1% were Estonians (Estonian Statistics 2016). Of the non-Estonians living in Estonia, half were born in Estonia and one-third in other former Soviet Republics. From the language perspective, at least 93% of the non-Estonians are Russian speakers, and in Estonia, these people are referred to as Russians. Today, Russian is the native language of 27.9% of Estonia's population (Estonian Statistics, 2016). Of the Russian-speaking people, 16% claim they do not understand any Estonian (Lauristin et al., 2011).

TV programming for Russian speakers

Until the early 1990s, the main TV channels broadcasting on Estonian territory included Estonian Television (ETV, broadcast mainly in Estonian) and three Russian-language TV channels retransmitted from Russia: Ostankino TV, Russia TV and Leningrad TV. The retransmission of the Russian television and radio channels was terminated between 1993 and 1994. The frequencies they had occupied were licensed to Estonian private broadcasters that had been recently established.

For the Russian-speaking audience, the changes taking place in the early 1990s were dramatic and the number of program hours broadcast terrestrially in Russian decreased substantially. No national TV channels targeting Russian speakers were established. The market demand for Russian-language programming was met by cable operators. They rapidly expanded their networks and started retransmitting the Russian channels available on satellite. Two sets of television channels – one in Estonian and other in Russian – divided the Estonian audience in two. Figure 1 shows the polarisation of the audiences by language preferences as of 2014.

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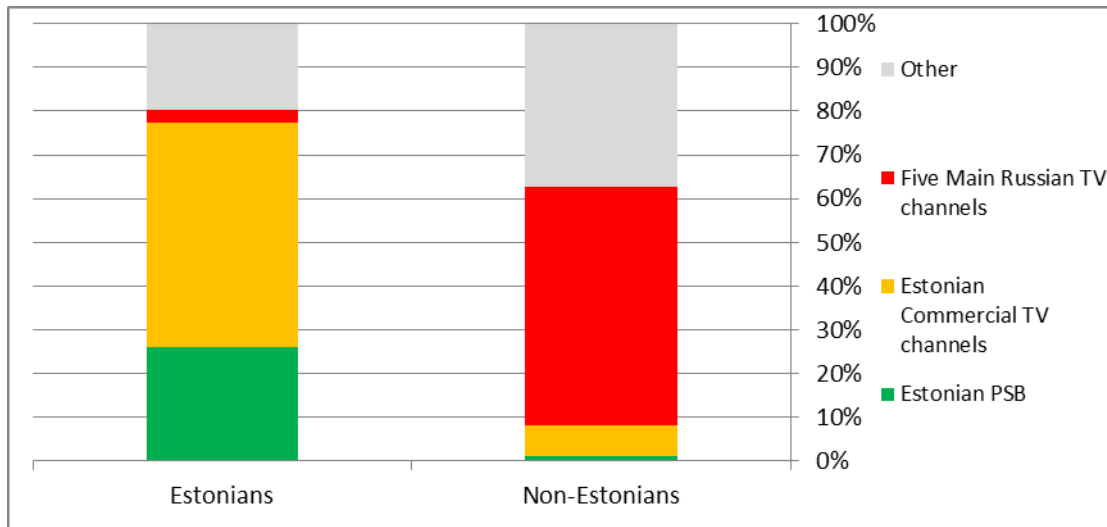
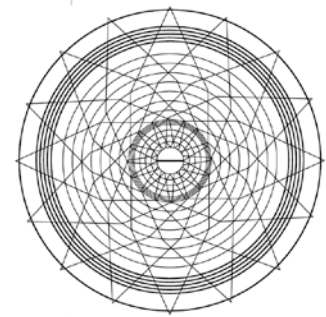


Figure 1. Share of viewing of the main TV channels in Estonia in 2014. Source: TNS Emor

TV has been considered one of the most important sources of information. This assumption was confirmed by the research conducted by Saar Poll (2014), which found out that for 72% of the Russian-speaking audience the most important sources of information are the Russian (state) television channels (PBK, RTR Planeta Baltic, NTV Mir and Ren TV Estonia). In 2014, the four main Russian channels mentioned above garnered more than 50% of the viewing time (share of viewing¹) of the Russian speakers². The programming of the Estonian private broadcasters (Kanal2 AS and TV3 AS) and Estonian Public Broadcasting were not popular among Russian speakers, but were watched mostly by Estonians (TNS Emor 2016). For Estonians, Estonian Television (PSB) is their main source of information, with 81% of the respondents considering it to be very important or rather important (Saar Poll 2014). Economical and political reasons are behind this process.

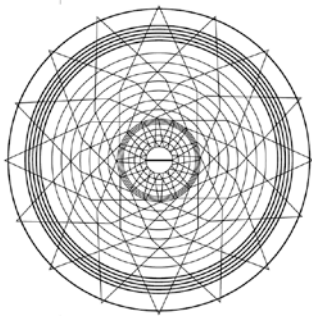
The challenges of a small market

A small market size also plays an important role in development (Puppis, 2009; Lowe et al., 2011). This has been an advantage in the building of Estonia's e-state (Charles, 2009), but a disadvantage when it comes to national journalism.

The market size determines the available resources. In smaller states there are fewer available resources (Doyle, 2002; Lowe & Nissen, 2011; Jõesaar, 2011). If the market is large enough to sustain profitable businesses and the resources are available, the general media tasks (variety, pluralism etc.) are fulfilled and the launch of niche media outlets will follow. On the other hand, restricted market entry and the global concentration of ownership encourage a common denominator provision for the mass market. A market-based media system is incapable of presenting a full range of political and economic interests in the public domain and finding expression in popular fiction (Curran, 1997, p. 140).

¹ Share of viewing. The percentage of the total viewing audience watching over a given period of time. This can apply to channels, programmes, time periods etc. BARB <http://www.barb.co.uk/about-us/glossary/>

² In total more than 100 Russian-language TV channels are available on Estonian cable networks. Source: MAVISE.



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Due to the market limitations, it is unprofitable to launch a wide range of media products in smaller markets. There will be less diversity of content in smaller and less wealthy states than in large and richer markets (Lowe et al., 2011). Estonia with its population of about 1.31 million people and a GDP of \$25.9 billion³ is a small country. The GDP per capita in Estonia is less than 30% below the EU-28 average⁴. Therefore, the ability of the Estonian media market to offer a wide variety of media products is strictly limited. And this is why only two major private broadcasters operate in Estonia with a total of five national Estonian-language free-to-air TV channels. But if the market is too small for the private sector to deliver a variety of media products in the national language, how can the interests of minority groups be served? Minority language groups in small countries represent a tiny unprofitable niche market. Estonia's Russian-speaking community is a specific niche market, especially from the public service broadcasting (PSB) perspective. It is logical to assume that, if the domestic services for Russian-language audiences are limited or do not exist at all, the audience will turn to offerings provided from abroad. In the case of the Russian-speakers in Estonia, the Russian language TV programming comes from Russia.

When talking about the economical background of multilingual markets, Hesmondhalgh (2013) alludes to the tastes of different ethnic groups. Can we talk about a common culture or should we be talking about geo-cultural markets as defined by Hesmondhalgh (2013, p. 279)? Even if there is a shared history, the main ethnic groups can interpret this history very differently. It is more relevant to talk about geo-linguistics and diasporic media. There are definitely some positive examples of the cross-border television progressive with cultural consequences (Hesmondhalgh, 2013, p. 285), but the separation of the Russian-speaking audience from the Estonian information field caused by foreign Russian channels has created many challenges for the society. Gitlin (1999, p. 173) argues that democracy requires a public or a set of publics, a public sphere or 'separate public sphericules.' This may be true, but according to the Habermasian theory related to the public sphere, these sphericules must have a space or higher sphere where to communicate; otherwise, isolated 'islands of different groups' will exist in the society. It has been argued that if ongoing negotiations among the members of different groups do not exist, the media can provide help. If this is true, how can the media policy support these processes?

A brief survey of Estonian media policy

The Broadcasting Act (RHS 1994) drawn up with help from experts from the Council of Europe and the European Broadcasting Union, reflected the expectations of the politicians and Estonian broadcasting experts in the 1990s. The European policy papers that strongly influenced the drafting of the Broadcasting Act were the European Convention on Transfrontier Television (EC 1989) and the Television Without Frontiers Directive. The primary objective of the Broadcasting Act, which was passed by the Estonian parliament in 1994, was

³The World Bank (2015) Data. Estonia <http://data.worldbank.org/country/estonia>. Retrieved on 28 August 2015.

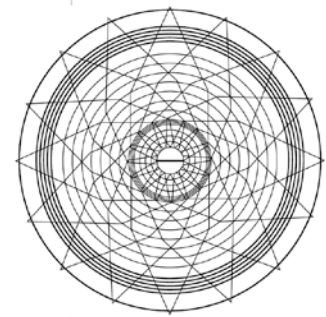
⁴Eurostat (2015). GDP per capita, consumption per capita and price level indices.

http://ec.europa.eu/eurostat/statistics-explained/index.php/GDP_per_capita,_consumption_per_capita_and_price_level_indices#Relative_volumes_of_GDP_per_capita. Retrieved on 28 August 2015.

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to establish a dual media system: i.e. the co-existence of PSB and a commercial sector. Licenses for private broadcasters were issued through public tenders. The economic conflict caused by the small size of the broadcasting market had not yet been perceived when the Broadcasting Act was prepared and passed. The passage of the new legislation was a big step forward in the formation of the broadcasting landscape in Estonia. The law was intended to create a new broadcasting order suitable for a young democratic state and secure freedom of speech and the development of a free market economy. In the mid-90s there were 41 private radio stations broadcasting in Estonian and only two in Russian; public broadcaster Estonian Radio had three channels in Estonian and one – Raadio 4 – in Russian. During the subsequent decades, Raadio 4 became the most popular radio channel among Russian-speakers. The domestic TV channels with nationwide coverage were all broadcast in Estonian. There were no serious attempts to launch a commercial Russian-language TV channel. The possible opening of a Russian-language public service TV channel was thwarted by the following assumptions held by those making media policy:

1. The domestic Russian-language media does not need national support because the Russian population will decrease as the result of emigration and those who remain will acquire sufficient language skills to satisfy their information needs from Estonian-language media.
2. Free market principles in media will provide a solution for informing and integrating language minorities without specific state-initiated regulations.

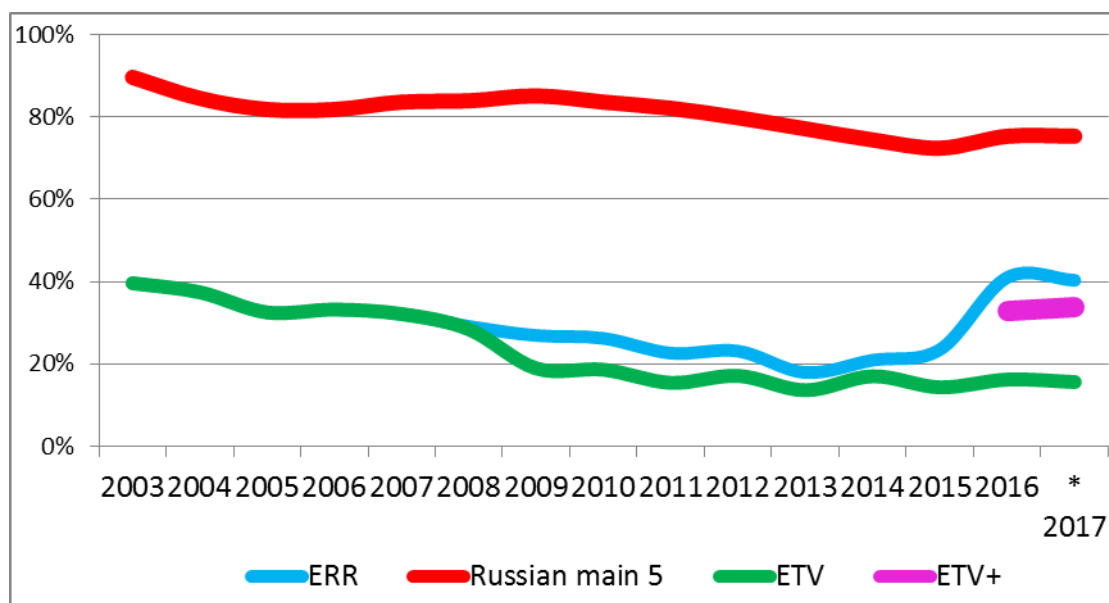
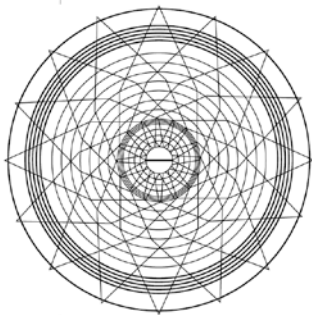


Figure 2. Weekly reach of all ERR channels (ETV, ETV2 and ETV+) and ETV+ among Russian-speaking audience January 2015 – May 2017. Source: TNS Emor

In reality, only some of these assumptions turned out to true. The Russian-speaking population is decreasing and their Estonian language skills are improving, but only 14% prefer Estonian



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media. Domestic Russian-language media is preferred by 21% of the non-Estonians (Vihalemm 2011).

The broad offering of Russian-language TV channels via satellite and cable networks and the decrease of Russian-language programming on ETV and ETV2 are the main explanation for the continuing decline in Russian-speaking viewers for ERR programming. During the last ten years, the weekly reach⁵ of ERR programming has dropped from 40% in 2006 to below 20% in 2015 (Figure 2). Even knowing all this, it was difficult for the ruling political parties to accept the fact that the media policy needed to be changed.

The discussion related to the launch of the PSB Russian-language channel has continued for more than two decades. It has been the subject of parliamentary debate and has been included in several PSB development plans (ERR 2016). Until 2014 all these debates at the governmental and parliamentary level ended without supportive action being taken. It could be said that the media policymakers were guided by the will of the people, as defined in the Constitution: to guarantee the preservation of the Estonian nation and language. Therefore, the idea of launching a Russian-language public service TV channel was met with criticism by the ruling political powers, which said that such a channel could undermine the Estonian language and open the way to Russian acquiring the status of a second official language. And this was not the only argument against the launch of a Russian-language public service TV channel. In the debate, the arguments against launching a Russian-language PSB channel included:

- To attract a Russian-language audience (super) high quality programming is needed;
- It is too expensive; sufficient additional financial resources are unavailable;
- Whatever the programming, it is unrealistic to expect it to the Russian audience, because of the great competition from abroad;
- There is a lack of professional journalists/hosts and other staff required for high-quality TV production;
- There is no need for such a channel – in the long run, everyone will understand Estonian and will therefore watch Estonian programs;
- It will decrease the motivation to learn Estonian;
- If state-financed propaganda is needed, these programs should be ordered from, and aired on the First Baltic Channel (PBK).

During the debates, the list of arguments in support of the channel was shorter, including:

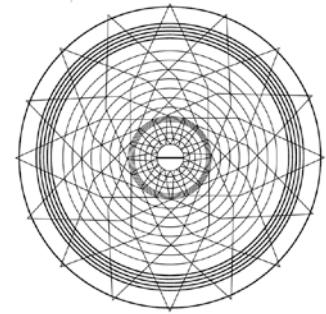
- The channel would support the enhancement, development and servicing of social, political and cultural citizenship;
- It would provide adequate and reliable information to everyone;
- It would alleviate tensions between the two ethnic groups;

⁵In this case, the weekly reach shows the net percentage of people who have seen a particular TV-channel during a week at least for one minute viewing time

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- It would serve to balance the influence of Moscow thereby lowering national security risks.

The fourth argument was added to the list for the first time after the events of the Bronze Night⁶ in 2007. The topic increased in importance during the crisis in Ukraine in 2014. As mentioned above, the findings of a Saar Poll (2014) survey indicate that two radically different information fields exist in Estonia: the Estonian-language information field promotes European values, while the Russian-language one promotes “Putin’s values”. In order to overcome that challenge, in late 2014, the Estonian Government decided to financially support the launch of a Russian-language PSB channel. Additional funding totalling € 2.53 million were added to the Estonian Public Broadcasting’s budget for 2015.⁷ In November 2014, Estonia’s parliament approved the additional funding for a Russian-language TV channel as a subsidiary of the public broadcaster. A historic decision had been made. The new channel was called ETV+. The ETV+’s programming team was faced with a challenging task: if it focused too much on politics it might not be interesting for the target audience; if it did not deal with critical political questions in a highly professional journalistic manner, it would not meet the PSB’s remit. Lurking in the background were the challenges posed by the ratings that could force it to air infotainment and entertainment programs.

The core vision for ETV+ can be described as follows:

- The uniqueness of the ETV+ is that it is local – talks about and with local people about the lives they live, the issues they care about;
- ETV+ provides a voice to all those who consider Estonia to be their home and wish to contribute to the development of the country;
- ETV+ is a multimedia channel that allows viewers to actively participate in its television and radio programs, website, video blogs, social media, apps and events (ETV+ 2016).

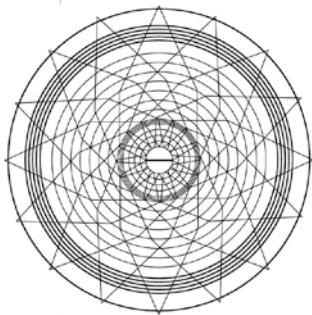
Along with its own productions (more than 20 hours per week), the network broadcasts many films and documentaries produced both in Estonia and abroad. More than 10 original programs are aired on ETV+. These include weekday morning and evening shows, discussion and entertainment shows, as well as news and analysis programs. Sports news and broadcasts include Russian-language commentaries. Most of the programs have Estonian-language subtitles, thereby making the content available to everyone living in Estonia.

ETV+, which is meant to appeal to a Russian-speaking audience, has been on the air since September 28, 2015. The analysis of the first months of operation shows that ETV+’s weekly reach among Russian speakers is steadily increasing and attained 40% in May 2017. Approximately 10% of Estonians also watch ETV+ each week. The share of viewing time is 0.4% and 1.5%, respectively. Thus, it can be said that ETV+ has been of interest to both communities, and a relatively large part of the Russian audience has found ETV+. In addition,

⁶On 27 April 2007 violence was sparked by the removal of the Bronze Soldier, a World War II memorial, from Tallinn’s city centre to a military cemetery.

⁷Ülevaade Vabariigi valitsuse tegevusprogrammi täitmisest 2014.a. [Overview of the Government’s action plan implementation in 2014]

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the weekly reach of ETV+ among Russian-speaking young people is higher than among their Estonian-speaking peers. When we compare the numbers of viewers during the period between September 28 and May 31, 2017 with the same period in 2015, we see that a positive change has occurred in the viewing of all the Estonian Public Broadcasting TV channels (Figure 2). It can be said that the downward trend of Estonian Public Broadcasting TV channels from January 1, 2006 to September 27, 2015 was reversed after ETV+ was launched and it probably also had a positive impact on the viewing of ETV and ETV2.

The weekly reach is considered to be an important criterion for calculating the potential of a TV channel to engage the audience. The second criterion is the share of viewing time. ERR's share of viewing time among the audience aged 4+ is above 18%, among Estonians the number is as high as 26%, but, before the launch of ETV+, it was around 0.5% among Russian speakers. ETV+ has been successful – in May 2017 it gained 1.7% of the share of viewing time and all the ERR TV channels reached 2.2%.

At the same time, the share of the five main Russian TV channels has declined from 56.3% in the 2014-2015 season to 51.3% in 2017 (Kantar Emor 2017).

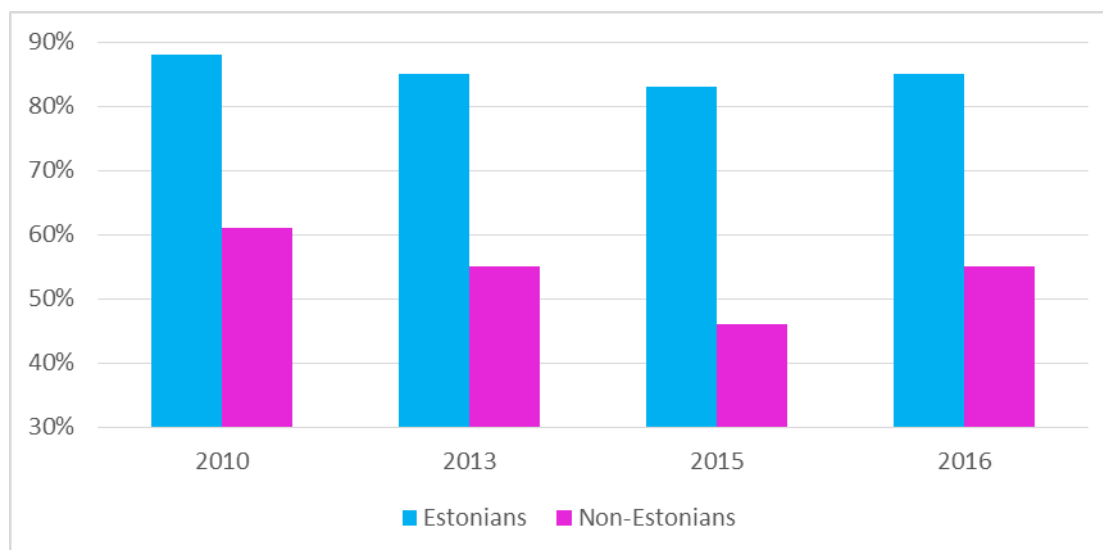


Figure 3. Audiences' trust in the Estonian Public Broadcasting. (Sources: Turu-uuringute AS 2010, 2013, 2015; Kantar Emor 2017)

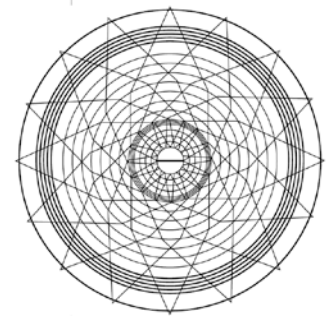
In addition to these criteria other indicators can also be used to assess the impact of ETV+ on the Russian-speaking audience.

The importance and influence of media can be measured through audience trust towards the media channels. Estonian Public Broadcasting has enjoyed a very high level of trust within the Estonian community throughout history. At the same time, the Russian-speaking community has been more 'suspicious'. The drop in the trust of ERR took place during 2013-2015 reaching the lowest point after the events in Crimea and Ukraine in 2014-2015 (Turu-uuringute AS 2010, 2013, 2015; 2017).

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Latest audience survey conducted by Turu-uuringute AS (2017) shows that trust⁸ towards the ERR has increased in 2016 (*Figure 3*). It will be reasonable to assume that the launch and quality of ETV+ plays a role in this.

A supportive argument for this assumption can be found from the other survey (Kantar Emor & ERR 2017) in the change of the Russian-speaking audience when they value the importance of the public-service broadcasting to the society (*Figure 4*).

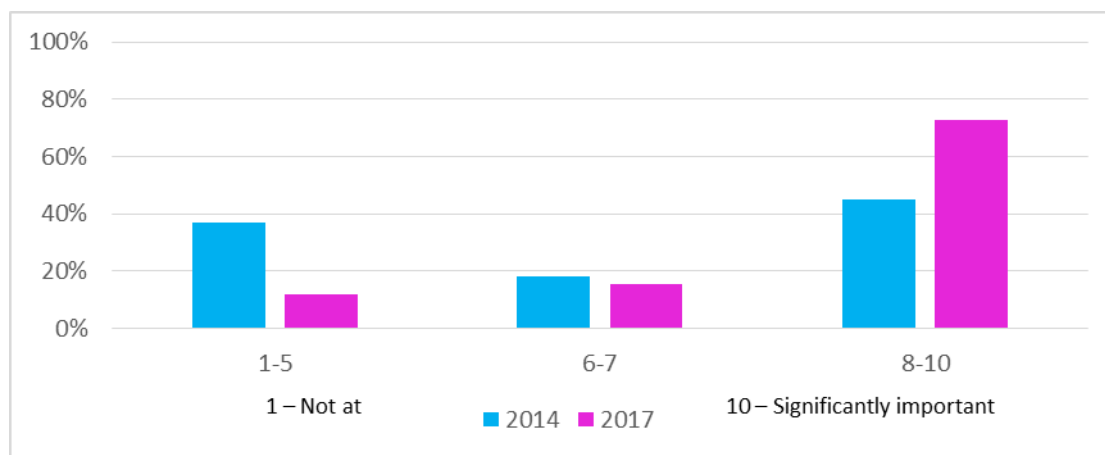


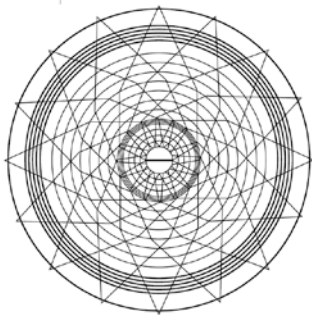
Figure 4. Valutaion of the Non-Estonian audience of the ERR's importance for the society (Scale 1-10). Source: Kantar Emor& ERR 2017

Response to the critics of ETV+ presented in the beginning of this article can be found from the focus group studies (ERR 2017).

- Localised content was considered of real interest to the audiences
- The local news content was the most commonly watched programming on ETV+
- Participants thought local content was a key selling point for ETV+ although the content could be quite 'raw' compared to other broadcasters
- Kofe+, Insight and Your Evening were received positively by the participants
- A diverse, positive and neutral content would be valued by audiences moving forward
- Participants considered presenter skills a key issue in their ETV+ viewing. Younger people seemed to like the relatively simple and direct, natural style of the presenters compared to presenters on channels such as PBK who appeared more stylised
- Technical and skills investments were suggested by participants as important for ETV+ to compete
- Website, social media and app usage was limited but some liked the design
- Audiences felt that the promotion of the diversity of interesting content on the site would be important to draw in a larger audience

As shown earlier, there are many positive marks, but still many challenges remain.

⁸ The trust towards institutions was measured on a five-point scale (1 - totally trust, 2 - rather trust, 3 - neutral, 4 - rather do not trust, 5 - do not trust at all, 6 - do not know). Respondents selecting answers 1 or 2 are considered to show trust towards the institution.



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- To secure sufficient funding
- To increase the weekly reach and viewing share
- To familiarise the audience with the variety of programs available
- To create better synergy through a tighter cooperation with Raadio 4
- To reach and engage online audiences
- To develop professional skills.

Conclusion

ETV+ has only been on air for a few months, but it has already acquired a noteworthy audience. Therefore, it can be said that after September 28, 2015, an important step was taken in order to more effectively fulfil the obligation of meeting the information needs of all segments of the population, which is required by the Estonian Public Broadcasting Act.

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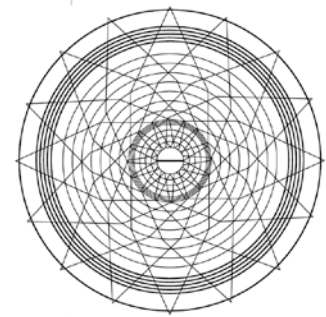
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