



ESTONIA

# MEDIA NEEDS SURVEY

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2020





Starting  
POINT

### *Introduction*

## THE AIM OF THE STUDY

This study is commissioned by The Latvian Journalist Association with aim to map the needs of Estonian independent media organisations in order to create a quality journalistic content for media developers and donors to understand the support needed for media development.

The introductory part of the study is based on the analyses of interviews conducted with media managers for the Estonian Media Policy Research 2019. Also, the main relevant findings from this report are referred.

The main part of this paper is focusing on figuring out of the opinions of professional journalist and editors regarding

- the skills of journalists
- media management skills
- technological development, including the ability of journalists to use new technologies
- data journalism
- availability of audience data
- challenges in the digital environment, social media journalism, digital storytelling, etc.
- previous training experience.

Based on interviews with members of the management boards of the largest media organisations in Estonia, the following points may be highlighted as the main challenges in the Estonian journalism:

- Estonian advertising market has not yet reached the 2008 pre-crisis level
- Revenues from paid subscriptions do not cover losses caused by a decline in the advertising market
- An increasing share of advertising money is moving out of Estonia to global platforms
- To increase their revenues, formerly media-focused companies are evolving into complex information and experience brokerage companies, providing new information and experiences through journalistic genres as well as through advertising portals, training courses, conferences, cultural events, etc. However, the expansion of activities raises questions about the independence of the press
- Fear of losing business partners (eg local government, various advertising partners) may result in smaller, generally local, media companies not fulfilling the task of critically monitoring the exercise of economic and political power
- Economically most vulnerable is the local press and community media. Businesses are concentrated in big cities and the advertising market in a county or municipality has shrunk to the point where it threatens the survival of quality local media

A close-up photograph of a hand holding a large, glowing blue question mark. The hand is positioned as if holding the stem of the question mark. The background is dark and out of focus.

Media  
managers  
THOUGHTS

# Existing training practices

All media houses have long-term experience in conducting internal and external trainings. There is a wide range of training courses available, ranging from specific practical skill courses to senior management coaching programs.

The decisions of the selection of training courses are mainly (80% cases) based on the goals set by the heads of units and the management of the companies, in accordance with the budget possibilities of the company.

We also asked if there are any incentives for employees to attend trainings. Only 10% from the respondents replied positively.

As a rule for the larger institutions, the organisation and commissioning of trainings is done by the Human Resources and/or Training Department. The respective budgets are agreed with the management during the annual budget process.

For smaller enterprises the decisions are made by management or heads of the unit.



# What has been done

Categories of trainings / courses carried out during last three years mentioned by survey respondents:

1. Management, coaching, job efficiency, teamwork, use of various online tools
2. Language trainings (including professional writing) in Estonian, Russian, English
3. Presentation skills, performance and speech training (diction, manner, dynamics, etc.), TV-program hosting
4. Personal trainings, memory training
5. Visual thinking, (journalistic) storytelling
6. Media legislation, personal data protection law, copyright law
7. (Mobile photography) and editing
8. Course for freelance journalists
9. Experiences from others (for example, a New York Times journalist went to talk about his work and his experiences).
10. First aid



7 - 27 January 2020

## ONLINE SURVEY

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The online survey had two main objectives.

Firstly, to find out what different skills journalists and editors consider most important in their daily work.

And secondly, what kind of training they would most need to do their job better.

## RESPONSE RATE

22%

The invitation to participate in the survey was sent to 224 addresses



# SAMPLING

From the major media players, representatives of the following<sup>1</sup> channels were selected

- ETV, ETV +, Vikerraadio (Estonian Public Broadcasting)
- Channel 2 (Postimees Group)
- TV 3 (All Media Estonia)
- Radio Kuku (Postimees Group)

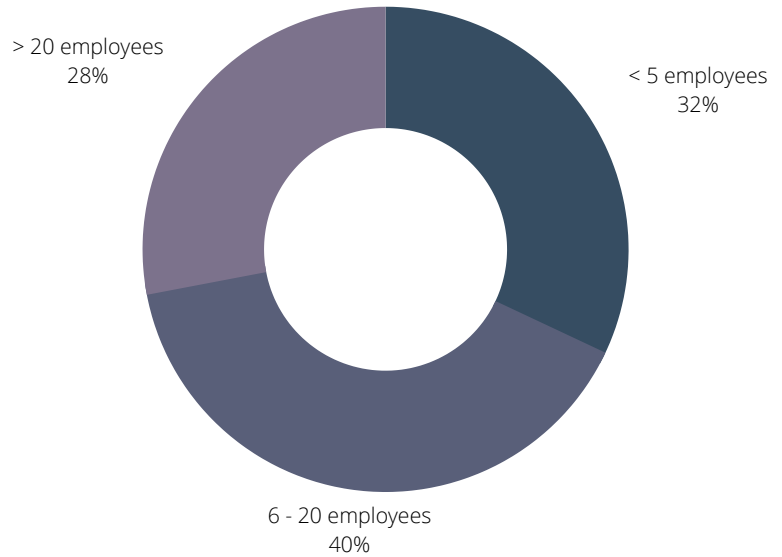
In addition to the two major media houses and the Estonian National Broadcasting, there are nearly one hundred smaller print and web publications, about twenty radio channels and about ten local TV channels in the Estonian media landscape. Given the focus of the study on the press, non-journalistic music radios and smaller TV channels were excluded.

Besides the paper and web publications of the Ekspress Group and the Postimees Group, there are over 100 smaller press content broadcasting media in Estonia to a greater or lesser extent. A large part of these are municipal newspapers and websites. Municipal publications were selected from those of larger centres. One-fifth of the smaller municipalities were randomly selected. The list of selected publications is given in Annex 1.



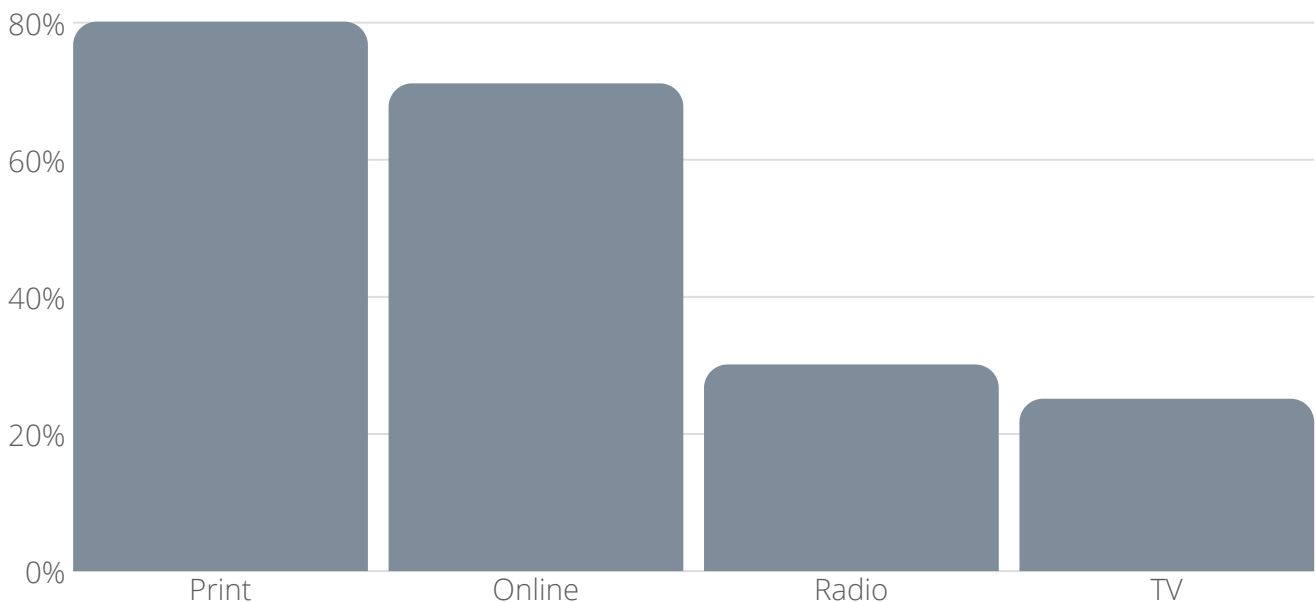
The aim of the survey was to look primarily at smaller independent media companies whose training capabilities and capabilities are not comparable to those of large media houses.

The target group was successfully reached in this respect. The variation of respondents by organisation size was well balanced.



From the response, the majority worked on several platforms. Most common was a combination of print and web, but also combinations of web and radio/television were common.

Q: With which platform(s) you are working?





# QUESTIONNAIRE

*Also see Annex 2*

Questions were compiled to meet the aim of the research in the best way.

Input gained from the consultations and feedback from employers on the development of the TU journalism curriculum was also taken into account.

**The first part** of the questionnaire focused on mapping, the skills needed to work as a journalist and an editor. Journalists and editors were asked to rate 30 different skills on a five-point scale, ranging from specific craft skills to general competencies.

**In the second** part questions about previous practices and future needs were asked.

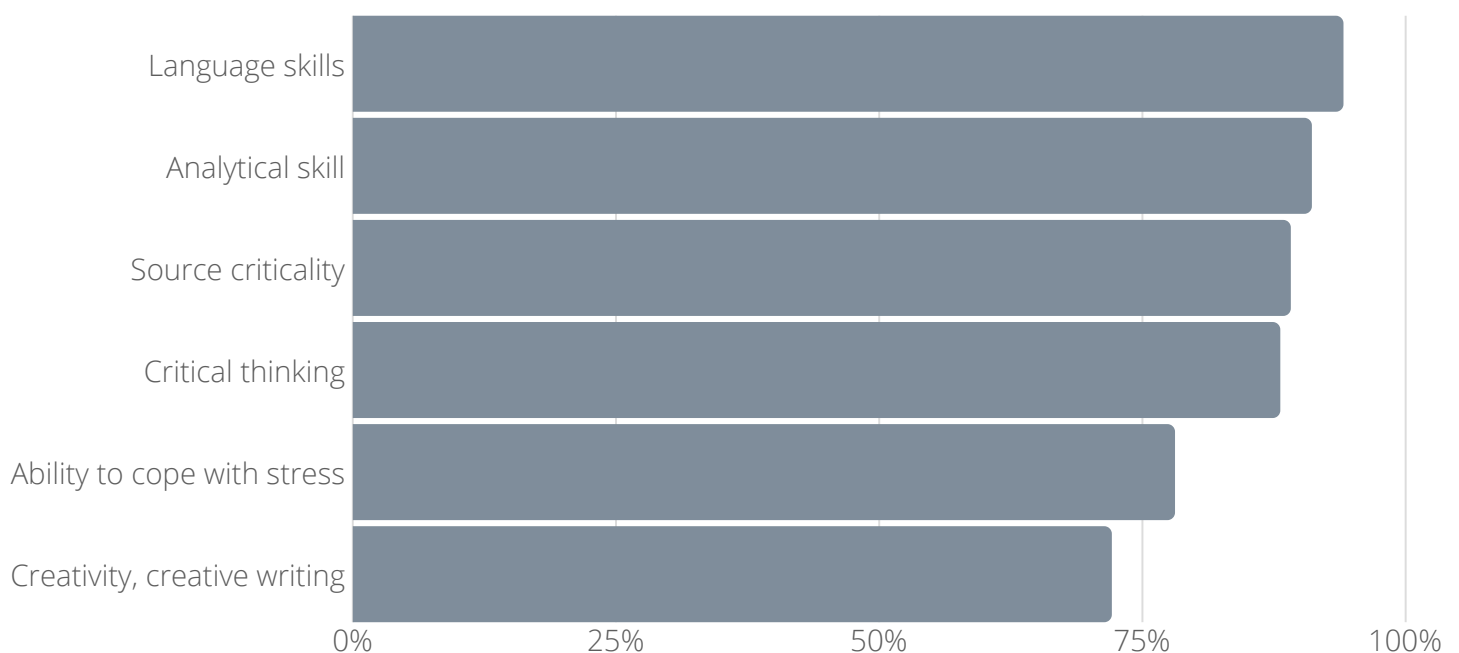
WHO  
WHEN  
WHERE  
How  
?  
WHAT  
WHY



## Valuation of skills and competences.

The answers can be divided into three groups according to the valuation given to the importance of the skill. **The first group** consisted of skills that were considered very important for journalists and editors by more than 70% of respondents. Conditionally this group could be called **core competences**.

## RESULTS



Despite the importance of development of these core competences, very few courses and trainings are actually conducted for the development of these areas.





## Valuation of skills and competences

**The second group**, and the largest group of responses consisted of skills more specifically related to the work of journalists and editors. About two-thirds of respondents considered these skills very important or important. In turn, this group can be conditionally divided into two. The first subgroup includes handicraft skills and the second subgroup consists general competences and knowledges in different fields.

**Valuable craft skills are**

- different ways of performing fact-checking (including identifying the original source of the photos/videos, verifying email and email addresses, etc.)ability to use social media platforms (Facebook, Instagram, etc.)
- storytelling on multiple platforms (TV, radio, web)
- data journalism, data mining, data processing
- analyse audience research data
- data visualisation, infographics
- recording video and sound in the quality required for reporter work

**Generic competences and knowledge** in different fields

- teamwork skills
- knowledge of the principles of functioning of society
- good knowledge of media and press regulations (including copyright, personal data protection, press ethics, etc.)
- knowledge of the basic principles of the functioning of the economy
- knowledge of the history of the media (including the journalism)

In these areas too, the provision of training is relatively scarce. Only teamwork trainings are offered widely. To acquire other skills and competencies, unique tailor made trainings must be created, either internally or externally.

Valuation of skills and competences

### **The third group.**

Into this group belong skills which were considered as very important or important by less than half of the respondents.

#### **Less valued by respondents**

- knowledge of different methods of audience research
- leadership skills
- understanding the nature of algorithms
- video editing skills (e.g. FinalCut)
- use of data processing software (such as Excel/numbers)
- design work (eg Illustrator)
- using software photo editing skills (eg Photoshop)
- graphic design,
- web programming (incl. creating and designing web pages)

However, it is in these areas that the training market has the highest supply (except for methods of audience research and knowledge of algorithms).

**A complete overview of responses is given in Annex 2**



Future needs

# EXPECTATIONS FOR THE FUTURE

**The last part** of the survey focused on the possible needs for future trainings

To determine this, the question with free text answer option was asked:  
*If you were offered free training, in what area could it be?*

Summarised findings are presented on the next page.

Regarding the question, if the training should be open for other participants or not and where and how long the training should be the most popular form was one full-day training for the company staff only carried out outside of the premises of the company.

Still in the comments respondents were quite flexible.

Less favourable were training at the end of the working week (Friday-Saturday).



Future needs

## LOOKING FOR

Skills	Management	Business models	Innovation	Sharing experiences	Personal development	Journalism	Social media	Creativity	Data
Video editing	Project management	Cross-media business models	Media innovation	Sharing with and learning from other media houses, practices (from Estonia and abroad)	Psychology	Developments in investigative journalism	Using social media	Creative writing	Data processing, data mining
IT and computer training (eg excel for senior staff)	Teamwork	Media strategies	New digital solutions	Making radio and television programs based on examples from other countries (such as cultural programs or morning shows etc.)	Social psychology, persuasion skills, sales skills (needed to talk to sources), etc.	Best practices for news creation Analytical thinking and background control methods	Internet / new media / multi-media	Storytelling using different tools (text, graph, long-lines, video)	Working with data
Web development and editing	Information management	Multi-platform media organization management	Service design		Avoiding burnout	How to find new perspectives on old themes			
Computer graphics	Practical television program management				Estonian language (grammar, writing) Analysis, writing / speaking style, various trainings related to voice and self-expression Self-determination Presentation skills Live debate skills	Making news stories - finding topics, developing, following up - on the example of other journalists / countries; making reportages abroad - what we notice, what to follow; strategies for interviewing, asking questions.			
Audio editing	Leadership				Motivation Teamwork	Web journalism			
Photo editing	Time management				Foreign languages	Journalism and media history			



# SUMMARY

In conclusion, strong need of trainings for journalists exists. Courses on several fields are very welcome.

The challenge is that a variety of wishes is wide. It is hard to specify courses which will be suitable for larger number of editorial teams.

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Which one to  
**SELECT**

## Daily and main weekly newspapers

Eesti Päevaleht  
Postimees  
Õhtuleht  
Maaleht  
Äripäev  
Eesti Ekspress  
Õpetajate Leht

*Targeted*

# MEDIA OUTLETS

## Newspapers and web pages of counties and municipalities

### Harju County

Harju Elu  
Harku Valla Teataja  
Jõelähtme vallaleht  
Kiili Leht  
Kose Teataja  
Rae Sõnumid  
Saku Sõnumid  
Saue Valdur  
Sõnumitooja  
Viimsi Teataja  
Haabersti Postipoiss  
Kesklinna Sõnumid  
Kristiine Leht  
Lasnamäe Leht  
Mustamäe Leht  
Nõmme Sõnumid  
Pealinn  
Pirita ajaleht  
Põhja-Tallinna Sõnumid  
Tallinna Postimees  
Keila Leht  
Linnaleht Tallinn, Tartu, Pärnu  
Loksa Elu  
Maardu Panoraam

### Hiiu county

Hiiu Leht  
Hiiumaa Teataja  
Ida-Viru county  
Alutaguse Valla leht  
Toila Valla Leht  
Lüganuse vallaleht  
Peipsirannik  
Põhjarannik  
Vestnik  
Viru Prospekt  
Jõgeva county  
Vooremaa

### Järva county

Türi Rahvaleht  
Järva Teataja  
Paide Linnaleht

### Lääne county

Lääne-Nigula valla infoleht  
Vormsi valla leht  
Lääne Elu  
Läänlane

### Lääne-Viru county

Haljala Valla Sõnumid  
Kodukant  
Koduvalla Sõnumid  
Rakvere Valla Sõnumid  
Sõnumed  
Viru-Nigula Valla Teataja  
Väike-Maarja valla infoleht  
Kuulutaja  
Virumaa Teataja

### Põlva county

Kanepi Teataja  
Põlva Teataja

### Pärnu county

Kihnu Leht  
Kodused Häälled  
Lihula Teataja  
Liiviranna  
Lääneranna valla ajaleht  
Paikuse Postipaun  
Saarde Sõnumid  
Tori Valla Teataja  
Pärnu Postimees

### Rapla county

Kohila valla ajaleht  
Märjamaa Nädalaleht  
Rapla Teataja  
Valla Vaatleja  
Raplamaa Ühistöö  
Raplamaa Sõnumid

### Saare county

Muhulane  
Saaremaa Teataja  
Meie Maa  
Saarte Hääl.

### Tartu county

Elva valla infoleht  
Kastre valla infoleht  
Kodu Uudised  
Koduvald  
Nõo Valla Leht  
Peipsiääre Teataja  
Tartu Valla Kuukiri  
Tartu Ekspress  
Tartu Postimees

### Valga county

Lõuna-Eesti Postimees  
Otepää Teataja  
Tõrva Valla Teataja

### Viljandi county

Leole  
Mulgi Sõna  
Viljandi Valla Teataja  
Sakala  
Viljandi Linnaleht

### Võru county

Antsla Valla leht  
Mägede Hääl  
LõunaLeht  
Setomaa ajaleht  
Uma Leht  
Võru Linna Leht  
Võru Valla Teataja  
Võrumaa Teataja

