






ESTONIA

MEDIA NEEDS SURVEY

ANDRES JÕESAAR
2020

Iceland  Liechtenstein  Norway 
Norway grants Norway grants



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



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

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 following¹ 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.

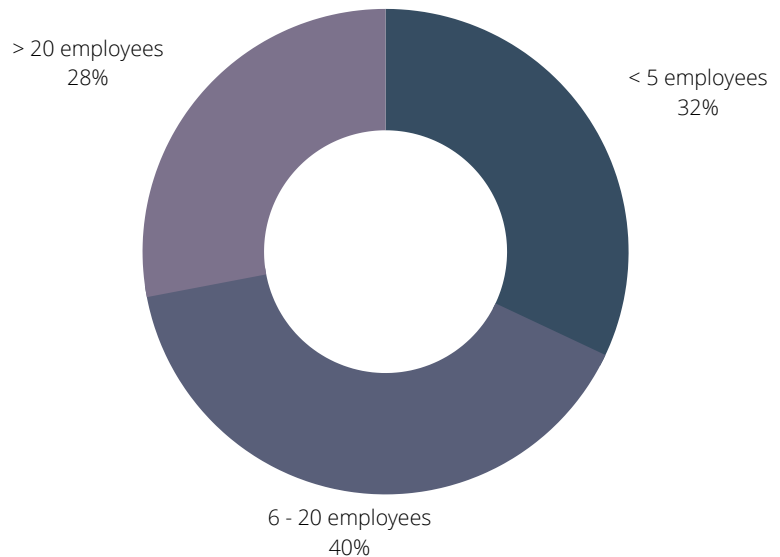
Besides the paper and web publications of the Ekspress Group and the Postimees Group, there are over 100 smaller press content broadcasting media in Estonia to a greater or lesser extent. A large part of these are municipal newspapers and websites. Municipal publications were selected from those of larger 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.

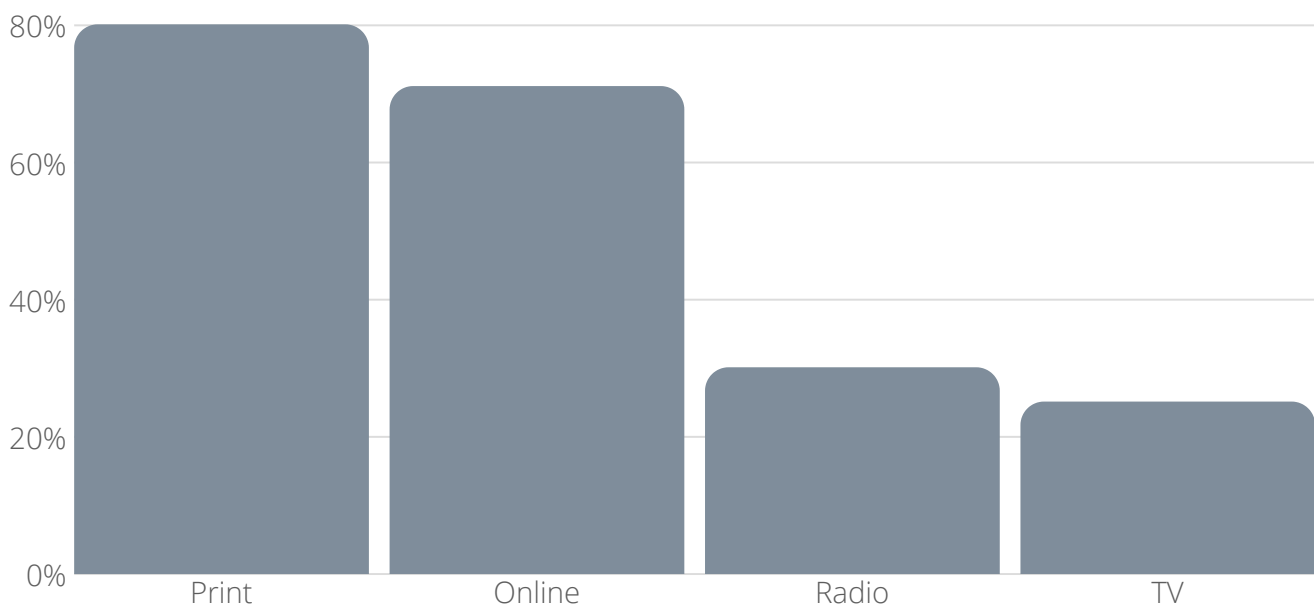
The target group was successfully reached in this respect.

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.

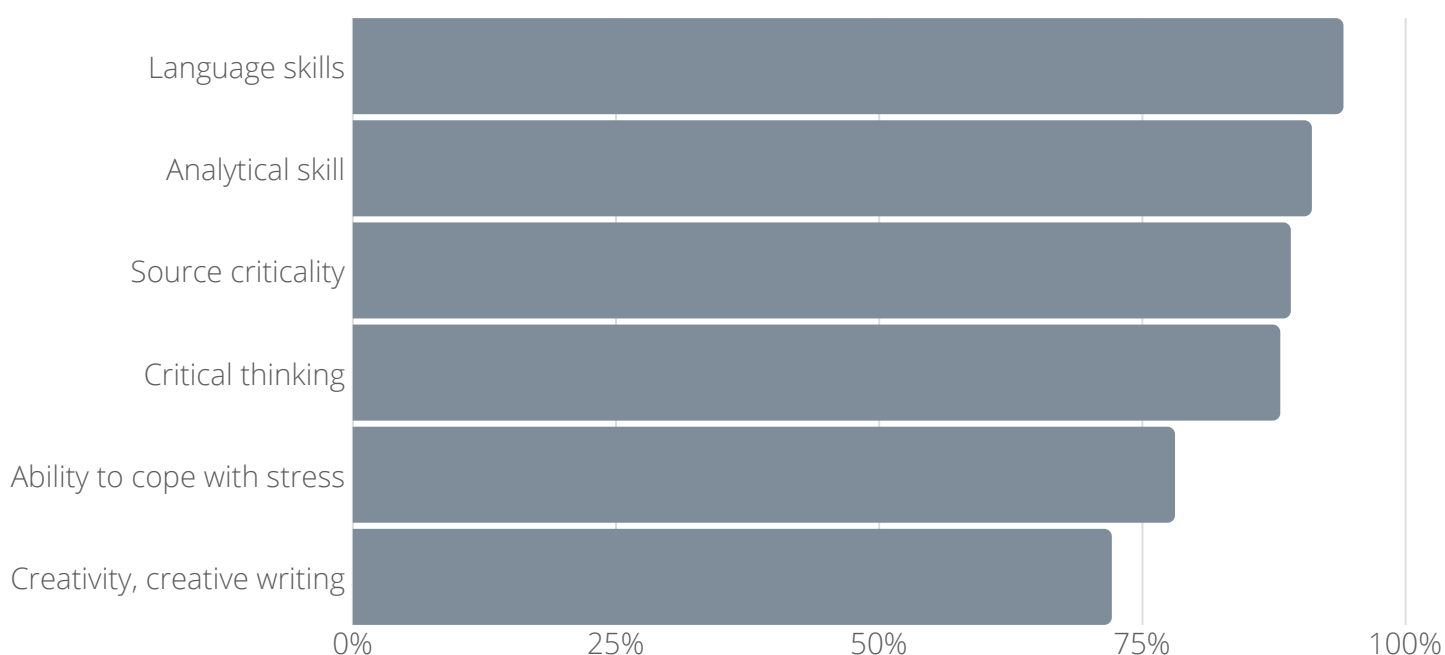
WHO
WHEN
WHERE
How
?
WHAT
WHY



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.



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

