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TRENDS IN ESTONIAN MEDIA LANDSCAPE IN 2000–2012

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ABSTRACT: Estonian media landscape changed radically together with Estonian society as a whole during the years of political breakthrough in 1987-1991, the years of constituting a new political, economic and social order in 1991-1995, and the economic stabilisation in 1995-2000 (see Hoyer, Lauk & Vihalemm, 1993; Lauristin & Vihalemm, 2002). However, changes in media system and media use continued also over the first decade of the new century due to the continuing societal transformation and rapid development of information and communication technologies.

KEYWORDS: media system, transformations, media use, social factors, Baltic countries, Estonia

SECOND DECADE OF TRANSFORMATIONS

After their restoration of independence in 1990-1991, Estonia, Latvia and Lithuania had to build up from the scratch their economies, political systems and legislation. Despite strong similarities in their development, analysts have also pointed at significant differences in their economic policies (e.g. privatisation models), constitutional reforms, political culture and the pace and scope of institution-building. These differences have affected developments in their media systems as well. For a comparative picture of Estonian, Latvian and Lithuanian development, a special issue of the *Estonian Human Development Report* was compiled in collaboration of social scientists of the three countries. The following characterization of the development of Estonia, Latvia and Lithuania in the first decade of the new millennium was borrowed from the above-mentioned volume (*Estonian Human Development Report 2010/2011*, 2011).

A new period in the development of Estonia, Latvia and Lithuania began with the accession of the three countries to the European Union on 1 May 2004. This period of general increase in well-being followed by the economic downturn can be seen, on the one hand, as the end of the period of transition. On the other hand, it can be characterized as a time when the countries are standing on a new crossroads and have to make new fundamental choices. The beginning of the period saw strong economic growth in all of the Baltic States: the countries experienced a GDP growth of 10% and more from the spring of 2005 to the autumn of 2007. This part of the period can be identified as a time of increasing well-being and peaceful accumulation of social wealth when no fundamental changes were planned and the countries enjoyed the fruits of their success. This period was also marked by an increase in public satisfaction among groups whose situation had heretofore been less favourable, including the Russian-speaking minority. The deep economic recession that followed the time of fast growth has put the sustainability of all three Baltic States to the test. Estonia as well Lithuania and Latvia suffered the most onerous recession, but by now have managed to put the worst of the situation behind them and have hopefully managed to find new paths of positive development (Lauristin, 2011: 11).

The first to be hit by the crisis, Estonia was also the first to recover. The self-confidence of this country was boosted by the country's joining of the European Monetary Union on 1 January 2011. While older members of the European Union, Greece and Ireland were almost ruined by the crisis, and almost all of the members offended against the self-imposed criteria of financial discipline, Estonia managed to keep fiscal balance and meet the Euro convergence criteria. While for Lithuania and Latvia, such achievements still remain an uncertain future, they followed Estonia in recovering from the crisis by 2011, jointly earning the reputation of the "bouncy Baltic trio" (Lauristin, Norkus, Vihalemm, 2011: 136).

Although the development of all three Baltic States has been generally successful after the restoration of their independence and the countries are recovering from the strong economic depression of 2008–2009, there remains quite a lot of dissatisfaction with the changes of the past 20 years. The level of dissatisfaction varies strongly from country to country (see *Table 1*).

Table 1. General evaluation of changes: Are you personally happy with the changes in the country since the restoration of independence? (Lauristin, Vihalemm, 2011).

	Estonia	Latvia	Lithuania
Rather happy	50	23	25
Rather unhappy	21	63	40
Difficult to say	29	13	35

Only in Estonia did the respondents who were happy with the changes (50%) outnumber those who were unhappy (23%). In Latvia, the proportion of people who found the changes unpleasant was much higher, with just 23% of the population approving of the changes and 63% disapproving of them. Negative opinions were also to the fore in Lithuania, although not as overwhelmingly: 25% of the population saw the changes as positive and 40% as negative (Lauristin, Vihalemm, 2011: 19).

SPECIFIC FEATURES OF ESTONIAN MEDIA LANDSCAPE

In Estonia, the level of trust in media, as well in political institutions is higher than in Latvia and Lithuania.

The level of trust in the legal system in Estonia is comparable to that of in France, Ireland, Netherlands, Portugal or Great Britain (the numbers in Scandinavian countries are substantially higher), while the numbers for Lithuania are similar to those for Ukraine, Serbia, Bulgaria and Croatia (Pettai, Auers, Ramonaite, 2011: 157). The general level of institutional trust is important for the effective functioning of the political system, since the absence of political trust can foster corruption and impede the development of civil society (Rothstein, 2000).

While this headway in Estonia among the Baltic countries can be explained by a better institutional performance both in the economic and political sphere (e.g. higher GDP and lower level of corruption), low levels of trust in public institutions in Latvia and especially in Lithuania could hardly be accounted for by these same variables. Quite the contrary, during the period of 2001 to 2008 when the GDP in these countries was growing the fastest, trust in parliament gradually decreased and, unsurprisingly, reached an extraordinary low level during the economic crisis of 2009-2010. In Estonia, trust in political institutions has, despite the economic crisis, even increased during the last years. Therefore, a growing gap between Estonia on the one hand and Lithuanian and Latvia on the other is apparent in this respect as well (Pettai, Auers, Ramonaite, 2011: 157).

Comparing trust in politicians, parliament or president, we can distinguish, with a few exceptions, the more trusting Northern Europe from the less trusting South, the more trusting "old" EU countries from the less trusting "newcomers" (*Eurobarometer*, 2006; 2011). After the collapse of the Soviet Union, post-communist countries have shown clearly lower trust levels compared to stabile democratic countries (Sztompka, 1995; Mishler and Rose, 2001; Lovell, 2001; Delhey & Newton, 2002). It is still the case. If for example in Finland 58% of citizens trusted parliament and 56% trusted government in year 2011, in Estonia the respective percentages were 40 and 49, in Latvia 14 and 19, in Lithuania 11 and 18 (*Eurobarometer*, 2011).

Trust in the media and trust in state institutions are correlated in Europe, but directions of those correlations differ in clearly distinguishable country groups (*Figure 1*).

[1] Since the role of specific media types are different in different countries, Figure 1 gives the percentages of the most trusted media type (TV or radio), and, based on the same considerations, the most trusted state institution (government or parliament). Positions on Figure are compared to the highest EU-27 average in both dimensions (in 2011, of the mass media types the radio is more trusted than TV – respectively 57% and 53% tend to trust them; of the state institutions, national parliaments are more trusted than governments – respectively 27% and 23% of the Europeans tend to trust them).

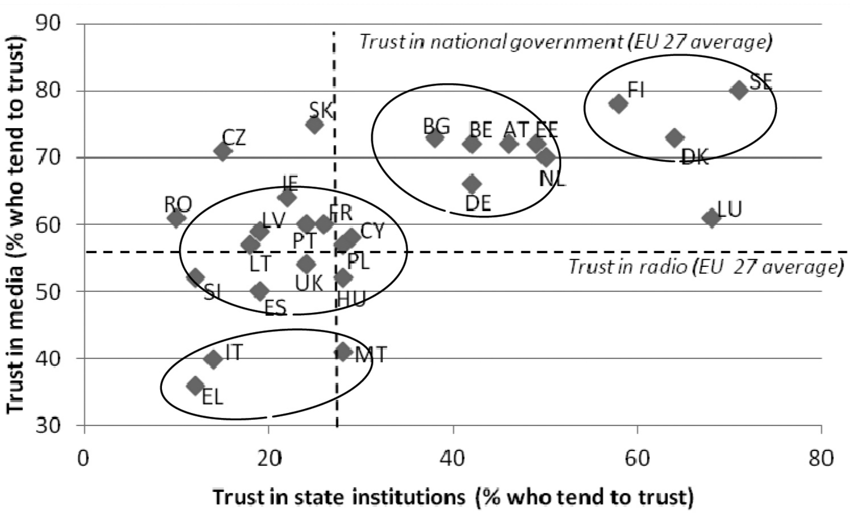


Figure 1.
Trust in media and in state institutions in European countries in 2011 (Eurobarometer, 2011[1]).

As we can see, the Baltic countries belong to the different country groups of institutional trust. Estonia, together with Austria, Netherlands, Germany and Bulgaria, belongs to the second group where political trust is lower than in the Nordic countries (first group), but media trust is comparably high. Latvia and Lithuania belong to the third group that is characterized by moderate trust levels compared to the EU average.

Characterising media systems in the Baltic countries in terms of dimensions identified by Daniel Hallin and Paolo Mancini (2004), Henrik Örnebring comes to the conclusion that Estonia has most similarities with the liberal system (Örnebring, 2011a: 30), Latvia with the polarised pluralist media system (Örnebring, 2012: 30), and Lithuanian system "has a hybrid character with most similarities to the polarised pluralist system" (Örnebring, 2011b: 26).

Table 2. The three media systems and the Baltic countries (Örnebring, 2011a, 2011b, 2012).

	Polarised pluralist	**Democratic corporatist**	**Liberal**	**Estonia**	**Latvia**	**Lithuania**
Development of the press	Low	High	High	High	Low	Low
Political parallelism	High	High	Low	Low	High	Medium
Professionalism	Low	High	High	Low	Low	Low
State intervention	High	High	Low	Low	High	High

As we can see from *Table 2*, of the four generalised media system characteristics only one is similar for all three Baltic countries – journalistic professionalism can be assessed as low. Closeness of the Estonian media system to the liberal model has been mentioned also by domestic analysts (see for instance Kadastik, 2010).

A large part of the Estonian media market is controlled by foreign, mainly Nordic capital – first of all by Norwegian Schibsted, Swedish Modern Times Group and Bonnier. Unlike many other East and Central European countries, foreign (Nordic) ownership in Estonian media has remained relatively stable also in 2007-2010, while in Latvia and Lithuania the new national owners started to "use their media outlets for gaining political and economic influence" after the withdrawals of foreign capital (Lauk, 2012). At the media conference at

Tallinn University in May 2012, Vaclav Stetka from the Oxford University stated that the Estonian media differs significantly from the media in other East and Central European countries (including Latvia and Lithuania) because of the absence of oligarchs who are more and more controlling the media (Kadastik, 2012; Raudsaar, 2012).

We can assume that these tendencies are behind the different global rankings of press freedom in the Baltic countries. According to Freedom House indices, in 2012 Estonia holds the 22nd rank (16th in 2008), when Latvia dropped from the 40th position in 2008 to the 54th in 2012 and Lithuania from the 25th to 40th.

STATISTICAL PICTURE OF GENERAL TRENDS IN THE ESTONIAN MEDIA SYSTEM

The Estonian media system can be characterised mainly by the amount and structure of different media channels. Not all needed data are publicly available for a systematic and complete survey of ownership and economy in the field of media. There is no special yearbook of media statistics[2]; the yearbook of cultural statistics publishes only some general data about printed matter, broadcasting, film and cinema (see *Kultuur/Culture 1997-2007,* 2009).

PRINT MEDIA

Print media channels may often lack clear definitions of a newspaper or magazine, different institutions are using different criteria. As a result, the number of Estonian newspapers and magazines in different databases and sourcebooks differs considerably[3]. The Estonian National Library is using relatively vague and not clearly formulated criteria for newspapers; according to their database, 109 titles of newspapers were published in Estonia in 2000 (see *Table 3*). The Estonian Newspaper Association has used a more rigid definition of a newspaper which requires at least 50 issues to be published a year (a similar criterion, 52 issues per year is used in all Nordic countries) and according to their database, 70 titles of newspapers were published in Estonia in 2000 (see *Table 3*).

Since 2005, the Estonian Newspaper Association has listed only their member organisations' publications as newspapers, and as all data about Estonian newspapers in the World Press Trends originate from this Association, the number of newspaper titles has seemingly diminished by one third in 2005 compared to the previous year – 61 in 2004 and 41 in 2005 (*World Press Trends 2009*, 2010: 387). In fact, the amount of newspapers has remained the same.

[2] In 1995-2001, the Baltic media yearbook titled Baltic Media Book 1995…2001 was published by the leading Estonian marketing research and consulting company Emor Ltd (currently TNS Emor) with its Latvian and Lithuanian partners.

[3] There is a large amount of newspaper-like and magazine-like publications: small papers distributed in municipalities or organisations (usually published once or twice a month or irregularly); newsletters and official publications which do not correspond to newspaper's or magazine's criteria by their content (lack of diversity in themes, genres and authors); supplements without their own identity and separate distribution; advertisement papers and customer papers, which correspond to newspaper's or magazine's criteria only by their exterior, etc. Even in small Estonia there are hundreds of such publications, their number is many times larger than the number of newspapers and magazines.

At the Institute of Journalism and Communication at the University of Tartu, we have been using our own criteria for a newspaper and a magazine (Vihalemm, 2003; Vihalemm & Kõuts, 2004); according to our data, 57 titles of newspapers and 180 titles of magazines were published in Estonia in April 2004 (Vihalemm & Kõuts, 2004: 61-76). In December 2008, the number was slightly larger – 66 newspapers (Malmi, 2010).

But as we do not have exact numbers of titles for all years 2000-2011, we shall use only the data of the National Library for the print media analysis.

Table 3. Print media in Estonia 2000-2011 (Kultuur/Culture 1997-2007, 2009; Statistics Estonia, http://pub.stat.ee; Estonian National Library, http://www.nlib.ee).

	2000	2002	2004	2006	2007	2008	2009	2010	2011
Newspapers: number of titles*	109	127	133	143	148	155	151	131	132
*Newspapers: number of titles***	*70*	*70*	*61*	*42*	*46*	*43*	*42*	*41*	*40*
Dailies	16	13	13	16	16	17	15	13	13
Dailies in Estonian	12	10	9	11	11	11	11	10	11
Periodicals: total number of titles*	956	1143	1171	1158	1183	1254	1166	1153	1159
Magazines: titles*	251	292	310	312	317	332	328	330	324
Magazines in Estonian*	208	240	245	251	256	267	272	271	272
Books: titles*	3466	3458	3994	4040	4310	4685	4551	3760	3716
Average circulation of one book*	1702	1562	1452	1807	2065	1558	1516	1462	1193

*Data of the Estonian National Library

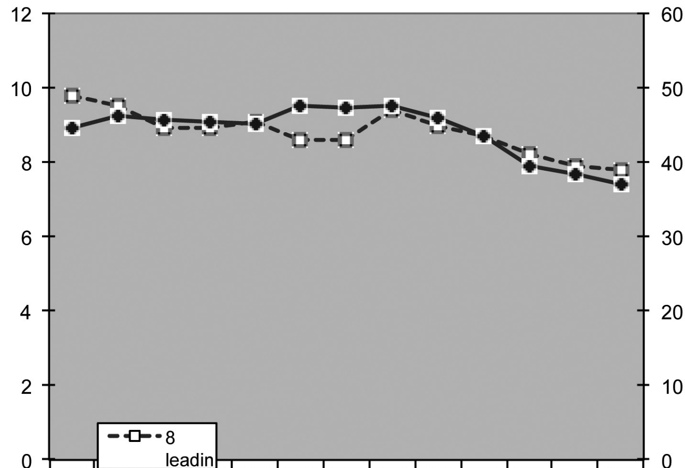
**Data of the Estonian Newspaper Association

Table 3 demonstrates that in the years of economic growth 2000-2008, the number of titles of newspapers as well magazines and books were growing. The peak of publishing was in the beginning of 2008. After the outburst of the economic crisis in autumn 2008, the number of titles, especially concerning books but considerably also newspapers, started to decline.

The same trend can be seen in *Figure 2* about average circulation of leading national and regional newspapers.

Figure 2

Average circulation of Estonian leading newspapers, 2000-2012.



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
8 leading regional newspapers	9.8	9.5	8.9	8.9	9.1	8.6	8.6	9.4	9	8.7	8.2	7.9	7.8
Leading national newspapers*	44.5	46.2	45.6	45.5	45.2	47.7	47.2	47.7	46.1	43.5	39.4	38.5	37

* 4 dailies (*Postimees*, *Eesti Päevaleht*, *Õhtuleht*, *Äripäev*) and 2 weeklies (*Eesti Ekspress*, *Maaleht*).

** In thousands.

Average fall in 2007-2012 was 22% for leading national papers and 17% for leading regional papers. Circulation of the business paper *Äripäev* fell most drastically by 51% (23.9 thousands in January 2008 and 11.7 in January 2012). Current circulation of leading Estonian newspapers can be seen in *Table 4*.

The Estonian press market is dominated by the two concerns: Express Group and Eesti Meedia (Schibsted), though the share of Eesti Meedia (Schibsted) is presumably larger.

We can see in *Table 4* that at present, only one Russian daily – the Russian version of *Postimees* – exists in Estonia. Two Russian-language dailies that had been published since Soviet time bankrupted three years ago, in 2009 – *Estonia* (former *Sovetskaya Estonia*), which became *Vesti dnja* in 2004, and *Molodjozh Estonii*. The Estonian largest and oldest daily *Postimees* started its new Russian-language version in 2005.

The weekly *Komsomolskaya Pravda Baltia*, published in Tallinn, is a version for the Nordic and Baltic countries of *Komsomolskaya Pravda*, one of the largest dailies in contemporary Russia.

Table 4. Leading national newspapers in Estonia, April 2012 (Estonian Newspaper Association, http://www.eall.ee).

Title	Circulation (in thousands)	Owner
Dailies		
Postimees	57,7	Eesti Meedia (Schibsted)
Õhtuleht (popular tabloid)	53,6	50% Eesti Meedia, 50% Ekspress Grupp
Eesti Päevaleht	27,8	Ekspress Grupp
Äripäev (business paper)	12,6	Bonnier Group
Postimees in Russian	9,9	Eesti Meedia (Schibsted)
Weeklies		
Maaleht (rural paper)	43,9	Ekspress Grupp
Eesti Ekspress	30,4	Ekspress Grupp
MK Estonia	12,0	Baltic Media Alliance
Denj za dnjom	11,7	Eesti Meedia (Schibsted)
Komsomolskaya Pravda Baltia	10,9	SKP Media
Sirp (cultural weekly)	4,8	Foundation Kultuurileht (state-owned)

Although the circulation of the cultural weekly *Sirp* is a moderate five thousand, it is a very important element of the Estonian press system, being the main forum for cultural professionals and competent audience. Its circulation was very large in Soviet time and in the period of political mass movements (91,000 in 1989), and decreased drastically after the restoration of independence, when media and all cultural sphere lost their integrating functions (see Lauristin & Vihalemm, 2002: 30-32). Circulation of *Sirp* was the lowest (3,100) in 1997 and has since then gradually increased, reaching 4,900 in 2007-2011 and 4,600 in

2011. Due to the state support of cultural press, its circulation has not declined during economic recession. *Sirp* is published by the state-owned foundation Kultuurileht which is publishing 2 newspapers (beside *Sirp*, also a teachers' weekly) and 9 cultural magazines. The foundation covers their basic costs; for the authors' honoraria, many cultural publications get support from another foundation – Eesti Kultuurkapital (Estonian Cultural Endowment).

BROADCASTING

The number and structure of radio broadcasters has been relatively stable all over the decade, including 30-35 programmes. There is one public broadcaster, the Estonian National Broadcasting (Eesti Rahvusringhääling - ERR) which in 2007 integrated the previous Estonian Radio and Estonian Television, although the name Estonian TV (ETV) is still in use. ERR has five radio programmes and two TV programmes, ETV 2 started in August 2008.

We can see in *Table 5* that despite the economic crises, the number of programmes in Estonian TV broadcasting has considerably grown during the last four years.

Table 5. Broadcasting in Estonia 2000-2011 (Kultuur/Culture 1997-2007, 2009; Statistics Estonia, http://pub.stat.ee).

	2000	2002	2004	2006	2007	2008	2009	2010	2011
Radio									
Broadcasters (programmes)	33	30	31	32	32	34	34	35	34
Public	5	5	5	5	5	5	5	5	5
Private	28	25	26	27	27	29	29	30	29
By coverage: national	4	4	4	4	4	4	4	4	4
Regional	17	15	15	16	16	16	17	16	16
Local	12	10	11	11	11	13	12	14	13
Share of broadcasts in the Estonian language (%)	67	73	69	75	74	72	72	69	70

Television									
Broadcasters	5	4	4	5	7	15	15	13	14
Public	1	1	1	1	1	2	2	2	2
Private	4	3	3	4	5	13	13	11	12
Share of broadcasts in the Estonian language (%, own production)	99	98	99	99	99	91	90	90	96

In 2001-2005, three national TV programmes were functioning in Estonia – public ETV; Schibsted-owned Kanal 2; TV3 (owned by the Swedish Modern Times Group) and a modest local TV programme Alo TV in Tartu. The share of digital TV started gradually to grow in 2004; since 1 July 2010, the whole TV broadcasting is digital in Estonia. This technological change opened up the sphere of TV and gave opportunities for newcomers. First of them were music channels, MTV Estonia in 2006 and Seitse (Seven) in 2007. The sports channel Kalev Sport also started in 2007. In 2008, several new channels started, among them the 'smaller sisters' of ETV, Kanal 2 and TV3. Due to economic difficulties, MTV Estonia and Kalev Sport were discontinued in 2009.

A controversial issue for the Estonian TV broadcasting is the penetration of some TV channels of the Russian Federation, which are designed for Estonian Russians. Beside usual content, their programmes contain some elements produced specially for Estonian audience, such as a special Estonian news programme or advertisements of goods and services available in Estonia. The most influential of them is Pervõi Baltiiski Kanal (PBK), which started in 2003. It is a version of Russia's Pervõi Kanal (First Channel), its programme includes, besides local advertisements, an everyday newscast for Estonian Russians and some other broadcasts. Similar programmes function also for Latvia and Lithuania.

Comparing the structures of the public and private TV programmes, we can see a remarkable difference in the shares of fiction and non-fiction (see *Figure 3*). After advertising was removed from the public TV in 2002, the public ETV is focussed on non-fiction, including its own-production news, debates, etc. Due to a limited market, the commercial channels are focussed on mainstream entertainment, broadcasting mainly fiction (acquired films and serials) (Jõesaar, 2011: 22-23).

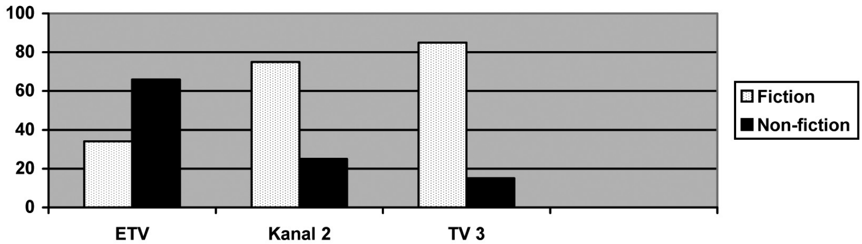


Figure 3.
Programme structure of major Estonian TV channels 2010 (Jõesaar, 2011).

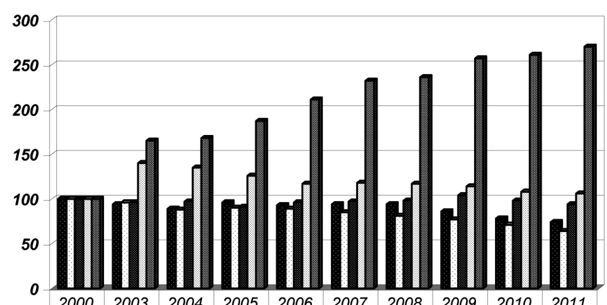
	ETV	Kanal 2	TV 3
Fiction	34%	75%	85%
Non-fiction	66%	25%	15%

LONG-TERM TRENDS IN MEDIA USE

VOLUME OF MEDIA USE

Figure 4 characterises the level of media use in recent years in comparison with 2000. We can see a slow decline in press reading in years 2000-2008 and a fast fall since 2009. It could be partially influenced by the economic recession, but the main reason is obviously the growing importance of the Internet as a dominant information medium for young generation. Average radio-listening time decreased gradually, approximately reaching the level of the year 2000 in 2011, while the average TV-viewing time did not demonstrate any similar decline.

We can guess that changes in TV viewing and radio listening figures in 2003, compared to the previous three years, mainly reflect changes in the monitoring methodology, not in the actual media use (see also Šein, 2005: 307).



	2000	2003	2004	2005	2006	2007	2008	2009	2010	2011
Share of regular newspaper readers	100	94	89	96	93	94	94	86	78	74
Share of regular magazine readers	100	96	88	90	89	85	81	77	71	64
Average TV vie-wing time per day	100	96	97	91	96	97	98	104	98	94
Average radio listening time per day	100	140	135	126	117	118	117	114	108	106
Share of Internet users	100	165	168	187	211	232	236	257	261	270

Figure 4.
General trends in media use in Estonia, 2000-2011 (TNS Emor, http://www.emor.ee).

When analysing the reading of published press in Estonia (*Table 13* in the Appendix), a distinction is usually made between two levels of reading – regular and irregular. Answers to the question: “Have you read any of the last six issues of this publication?” were used as empirical indicators for measuring reading regularity. Reading from at least four of the last six issues had been interpreted as regular reading, one to three issues as irregular reading.

In *Table 13*, press reading is characterised by two kinds of aggregated indicators, which are complementary to each other – the share of people who generally and regularly read newspapers, magazines, and other periodicals (according to the above-mentioned criteria, used by the TNS Emor) and the average number of generally and regularly read newspapers and magazines by one person. These indicators highlight slightly different trends in press reading. On the basis of *Table 13* we can conclude that the share of regular newspaper readers among Estonian adult population was quite stable in 2000-2002, slightly decreasing in 2003-2004, and then stabilising until 2008.

About 5-10% did not read any newspapers at all in 2000-2008, but a much larger number of people, 25-30%, did not read newspapers regularly. As we can see from below, there is a difference in regular newspaper reading between the Estonians and non-Estonians; between the young generation, on the one hand, and middle-aged and elderly people on the other.

Compared to newspapers, recent trends in reading magazines and other periodicals are relatively similar, with the exception that the number of periodicals read by an average Estonian resident decreased in 2000-2008 clearly more than the number of newspapers. Since the year 2001, the interest in magazine reading, initially boosted by a new variety of titles, formats, and topics, started to decrease.

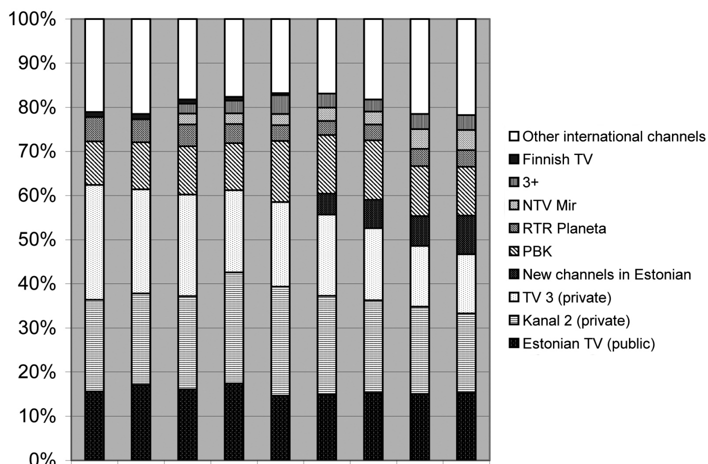
All indicators show a rapid downtrend in print media reading since 2009. Thereby in 2010-2011, the pace of decline has even been slightly larger than in 2008-2009 and 2009-2010.

In the autumn of 2011, 21% of the population did not read any newspapers at all, and the respective percentage for magazines was 38.

TRENDS IN TV CHANNELS PREFERENCES

Domination of the public ETV in TV-watching habits continued several years after the launching of the first private channels in 1993. The situation changed in the turn of the century when TV3 acquired the leading position and soon

ETV was left for the third. The share of ETV was 42% in 1995/1996 and 26% in 2004/2005. TV3 held its leading position for five years, but in 2006, Kanal 2 got the largest share of viewing time and holds it also currently, in spring 2012. Since 2010, the public broadcaster ETV has held the second position among the national channels, overtaking TV3. It is important to mention that Finnish TV, which was very influential in Soviet time, lost their importance after the restoration of independence, which opened access to the bulk of international channels. In the beginning of the new century, its viewing share diminished to one percent, so that in 2008, TNS Emor stopped to publish it separately. TV-watching preferences of non-Estonians are quite different than those of the Estonians. They are dominantly watching Russian channels, first of all Pervõi Baltiiski Kanal (PBK). In autumn 2011, 48 % of Russian minority members watched more or less regularly also ETV (including broadcasts in Russian), but its share in their daily viewing was only 5%. (See *Figure 5* and *Table 14* in Annex).



	2003	2004	2005	2006	2007	2008	2009	2010	2011
Other international channels	*20,5*	*21,1*	*17,8*	*17,2*	*16,5*	*16,5*	*17,4*	*20,7*	*21*
Finnish TV	*1,1*	*1,2*	*0,9*	*0,8*	*0,4*	*0,0*	*0,0*	*0,0*	*0*
3+	*0,0*	*0,0*	*2,2*	*2,8*	*4,2*	*3,1*	*2,6*	*3,3*	*3*
NTV Mir	*0,0*	*0,0*	*2,4*	*2,4*	*2,5*	*3,0*	*2,8*	*4,3*	*4*
RTR Planeta	*5,4*	*5,1*	*4,8*	*4,2*	*3,5*	*3,1*	*3,4*	*3,8*	*4*
PBK	*9,6*	*10,5*	*10,7*	*10,4*	*13,6*	*13,0*	*12,9*	*10,9*	*11*
New channels in Estonian	*0,0*	*0,0*	*0,0*	*0,0*	*0,0*	*4,6*	*6,1*	*6,5*	*8*
TV 3 (private)	*25,4*	*23,2*	*22,5*	*18,2*	*18,9*	*18,1*	*15,6*	*13,3*	*13*
Kanal 2 (private)	*20,2*	*20,3*	*20,6*	*24,5*	*24,2*	*21,8*	*20,0*	*19,0*	*17*
Estonian TV (public)	*15,2*	*16,8*	*15,7*	*17,0*	*14,4*	*14,6*	*14,6*	*14,5*	*15*

Figure 5.

Changes in the Estonian TV-field. Average share of different TV channels in the daily viewing time in 2003-2011 (TNS Emor, http://www.emor.ee).

* Population in age groups from 4 to older, in October of the respective year, %.

The main factor differentiating the amount and content of TV-viewing by Estonian population is related to the ethnic background. Comparing TV-viewing activities among the ethnic Estonians and the Russian-speaking minority, we can see in *Table 14* in the Annex, that Russian-speaking inhabitants are mainly watching the programmes produced abroad – on the first place, channels from the Russian Federation, but also other international TV channels. They use more actively than Estonians also international programmes about nature and popular science, as well as news channels (*Euronews, CNN, BBC*). One explanation for it seems to be the fact that many international programmes, including for example *Euronews* have Russian translation.

TRENDS IN RADIO CHANNELS PREFERENCES

Radio has traditionally been very influential in Estonia, but nowadays it is fighting for maintaining its role in the Estonian mediascape. The 35 radio programmes in Estonia can be classified into the following five internationally used format groups (Luts, 2011):

1) news and talk programmes (share of musical part of the programme is less than 30%): Vikerraadio (public) and Kuku Raadio (both in Estonian language);
2) full service programmes (ratio between the verbal and musical parts of the programme is approximately 35:65): Raadio 2 in Estonian and the fully Russian-language Raadio 4 (both public);
3) formatted music programmes (classical music, Hot AC, CHR/TOP 40): 17 programmes, 2 public and 15 regional;
4) local radio stations with mixed format (9 programmes);
5) Christian radio stations (5 programmes).

The main factor contributing to the change in the preferences of radio listening is age. *Table 15* in the Annex demonstrates that there are quite strong age-related differences in radio listening, based on the format of the programme.

Young people are quite seldom listening news and talk programmes, preferring current hits channels. The latter are not popular among elder generation, preferring the public news and talk programme Vikerraadio. Another news and talk programme, the private Kuku Raadio is much less popular among

Estonians over 65. There is also difference in coverage – public channels cover 100% of Estonian territory, larger private channels up to 80%, and Kuku Raadio only 65% (Luts, 2011: 68).

The same trends characterise also the Russian-speaking radio audience, though the trends are weaker when compared to Estonian audience (*Table 16* in the Annex). Formats of radio programmes in Russian seem to be also less clearly expressed.

It is important to notice that 13% of Estonian Russians are regularly following radio programmes in Estonian. Concerning TV programmes in Estonian, this share is 22%, newspapers in Estonian – 8%. According to the index of contacts of local Russians with media in Estonian, 22% of them are relatively active in following media in Estonian, and 29% do not follow it at all.

This is connected with the knowledge of Estonian. According to the Integration Monitoring 2011, 28% of the Russian-language minority can freely understand media content in Estonian, 23% understands it generally, 28% partly and 21% not at all (*Estonian Integration Monitoring*, 2011: 30).

TRENDS IN READING OF LEADING NEWSPAPERS

Results of representative sociological surveys “Mina. Maailm. Meedia” (“Me. My World. The Media”, shortly MEEMA), carried out every third year by the Institute of Journalism and Communication at the University of Tartu (with number of respondents about 1500), allow us to observe trends in newspaper reading, distinguishing regular and irregular reading, paper and online editions.

According to the data of our surveys, while regular reading of the leading newspapers is in decrease, their irregular reading is increasing (*Table 17* in the Annex).

Concerning two of the six leading national newspapers, the most popular daily *Postimees* and the countryside weekly *Maaleht*, our survey data demonstrate however, the growth of regular reading, too. The success of *Maaleht* in raising its circulation we can interpret as the evidence of increased interest towards this paper, characterised by solid conservative style and critical approach to our turbulent world. Authors of this paper express ironic attitude toward official discourse of national success and are not appraising growing consumerism. The survey results which show that regular reading of the leading daily *Postimees* is also growing, are a bit more controversial, because the factual circulation of printed *Postimees* is in serious decline – it was 68,000 copies in January 2008, but 58,200 in January 2012. Thus we can interpret the survey data showing increase in regular reading of *Postimees* as the expression of the popularity of this paper which has managed, despite the decrease in the readership of its printed version to maintain regular contacts with its audience through its on-line edition: *Postimees.ee* has the second largest audience among Estonian news portals after delfi.ee, having around 875,000 unique visitors per week in April 2012[4].

[4] For more information: http://tnsmetrix.emor.ee.

TRENDS IN THE INTERNET-USE

Internet arrived in Estonia relatively early, in June 1992. Since 1995, Internet access and usage have increased rapidly (see Herron, 1999), currently placing Estonia among the top 12 countries in the European Union with respect to Internet penetration and online availability of public services[5].

[5] See Eurostat data of 2011 at http://epp.eurostat.cec.eu.int.

Table 6. Internet use in different social groups, 2005-2012, I quarter of the year (Statistics Estonia, http://pub.stat.ee).

	2005	2006	2007	2008	2009	2010	2011	2012
All population in age 16-74	59,2	61,2	63,6	66,2	71,2	74,1	76,5	78,4
Gender: men	62,1	61,8	63,7	66,5	70,9	73,5	75,7	79,2
Women	56,6	60,7	63,5	65,9	71,5	74,7	77,2	77,7
Age: 16-24	89,0	93,6	93,0	94,7	97,9	98,0	98,1	98,1
25-34	73,5	83,4	86,3	89,4	95,1	95,5	96,4	97,0
35-44	70,0	72,0	77,8	80,0	85,9	90,0	91,4	93,2
45-54	57,3	55,8	56,9	60,3	66,6	71,1	76,5	78,0
55-64	32,6	29,4	32,4	36,6	46,2	47,1	52,8	59,0
65-74	10,4	11,0	13,8	15,6	13,7	23,8	25,0	27,4
Education: primary	52,2	50,0	52,1	55,7	57,9	64,0	64,0	61,6
Secondary	54,4	56,9	59,8	62,8	69,0	71,7	73,8	76,4
Tertiary	73,0	78,6	79,4	80,9	84,4	84,6	88,4	91,0
Employment: employed	68,9	71,3	73,0	75,7	83,5	85,3	87,3	89,2
Unemployed	47,4	44,3	59,3	71,1	71,0	76,5	83,1	79.4
Students	99,1	98,1	98,5	99,4	98,9	99,5	99,7	99,6
Pensioners, nonworking	19,6	19,1	23,2	27,0	31,9	37,8	37,6	42,5

Table 6 shows that over last three-four years the new Internet users came mainly from middle-aged and elderly age groups, people under 45 have already reached the 90% level of usage. More active Internet use among men compared to women characterised earlier stages of Internet development, which ended in Estonia by 2010.

As can be seen from *Table 7*, only 12% of Estonians have never used Internet, and three quarters of them are doing it on daily basis.

Table 7.

Internet-related habits in media use, Autumn 2011 (MEEMA, 2011).

	All respon-dents	**Language groups**		**Age groups**						
		Estonian	**Russian**	**15-19**	**20-29**	**30-44**	**45-54**	**55-64**	**65-74**	**75-79**
Have used Internet										
today, yesterday	73,7	75,7	69,6	98	92	86	71	57	27	14
last week	6,7	7,1	5,9	2	5	8	10	7	6	6
last month	1,7	1,9	1,2	0	0	1	3	3	2	1
some months ago, earlier	2,6	2,9	1,8	0	1	1	4	5	6	1
never	15,3	12,4	21,5	0	1	3	14	28	60	78
Has stopped in recent years due to Internet										
printed newspaper reading	19,2	20,0	17,5	27	27	23	19	9	6	1
listening newscast from radio	14,1	13,8	14,7	23	24	15	11	6	5	0
listening music from radio	11,9	12,4	10,8	22	24	10	9	5	4	4
watching films and broadcasts from TV set	8,3	7,1	10,8	18	16	8	4	3	3	1
nothing like that	69,2	68,2	71,2	53	55	65	72	85	87	92
Uses social media	51,1	50,2	52,8	92	83	62	35	21	8	0

Growing Internet penetration has had a strong impact on media use habits. Almost one third of all respondents, nearly half of young age groups have in recent years changed their traditional media use habits, first of all stopped reading printed newspapers. Approximately one half of the Estonian population, and over 80% of youth is using social media.

The most popular social media environment is Facebook, used by 83% of social media users (42% of all respondents). 78% of all respondents in age group 15-19, 58% in age group 20-29 are using Facebook every day. YouTube is also quite largely used – 77% of social media users (39% of all respondents) are using it.

What are people doing on the Internet (*Table 18* in the Annex and *Table 8*)?

According to the results of our nationwide sociological survey *MEEMA* (2011), Internet use for practical purposes is the most widespread (everyday practical information and Internet banking), which is common also among the older age groups. Very popular is also the use of Internet for communication with friends, relatives and acquaintances, for entertainment and for work. In *Table 7* we can observe also the quite divergent importance of these functions for people of different age. These differences have been generalized with the help of factor analysis and were used to create a typology of Internet users (see e.g. Runnel, Pruulmann-Vengerfeldt & Reinsalu, 2009).

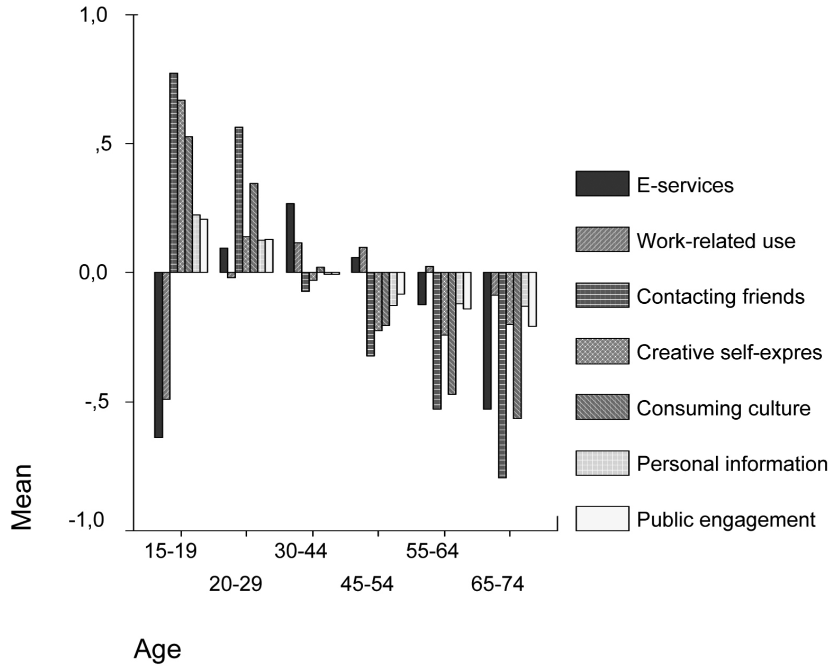
Factor analysis of the 2011 survey based on the Internet usage categories presented in *Table 7* allows us to bring out the following factors of the Internet usage (*Table 8*).

Table 8. Results of factor analysis of the Internet usage purposes (MEEMA, 2011).

		Factor loading
Factor 1: E-services and everyday practical information	Use of the Internet banking	.733
	Search of practical information (weather, timetables, contact data, etc)	.677
	Use of e-services (tax office, official forms, etc)	.667
	Search for information about jobs, dwellings, travel, etc	.578
	Buying online and gathering information related to it	.549
	Search for information in the websites of municipalities	.535
	Looking for advice about family relations, children, health, etc	.523
	Following online newspapers and portals	.402
Factor 2: Consumption of culture, media and entertainment	Downloading films and music	.706
	Downloading and reading books, journals, articles	.703
	Cultural consumption (visiting virtual exhibitions, watching quality films etc.)	.686
	Use of online databases (libraries, datasets, etc.)	.455
	Search for interesting and exiting information	.659
	Search for entertainment (games, music, films)	.611
	Following radio and TV broadcasts via internet	.547
	Search for studies and learning-related information	.459
Factor 3: Work-related communication	Communication with colleagues, partners, customers, etc	.759
	Using of Intranet, mailing-lists and other organizational means of virtual communication	.754
	Communication with officials through Internet	.707
	Search for information from the websites of state institutions, ministries, etc	.540
	Search for work-related information	.519
Factor 4: Creative self-Expression	Uploading videos (YouTube etc.)	.733
	Sharing music, films, programmes (Bittorrent etc.)	.674
	Developing own website or blog	.526
	Expressing my views in Forums	.526
	Expressing my views in commentaries	.496
	Participation in virtual games and environments (Second life, Warcraft etc.)	.491
Factor 5: Personal information	Search for information about relatives and acquaintances on the Internet	.827
	Following the information about myself on the Internet	.779
	Following the information about other people on the Internet	.740
Factor 6: Communication with friends	Communication with friends and acquaintances	.701
	Observation of friends' and acquaintances' life using social media (Facebook etc.)	.688
	Sharing my experiences in social media	.598
	Uploading of pictures and photos to the Internet	.549
Factor 7: Public participation	Participation in virtual polls	.678
	Participation in forums and blogs, writing commentaries	.604
	Participation in virtual civic activities and campaigns	.496

The importance of these factors is different in the Internet usage profiles of different age groups (see *Figure 6*). If for the youngest group, practical services and work-related communication via the Internet have a very low importance, while these practical functions are prevailing for the users of the age of 30-44 years. At the same time, for the two youngest groups the social and cultural importance of the Internet, including contacts with friends, cultural and media consumption, creative self-expression, getting and giving personal information and public participation is increasingly high. The age groups of 55 years and older are passive in all aspects, only the work-related information is preserving some importance.

Figure 6. Different Internet-usage profiles of the age groups (MEEMA, 2011).



IMPORTANCE AND CREDIBILITY OF NEWS SOURCES

For Estonians (but not for the age group of 15-29 years), the most important news sources are Estonian TV channels, followed by communication with friends and relatives, radio, and the Internet. The latter is clearly at the first place for the young generation. TV, particularly PBK, is very important also for the Russian-speaking group but communication with friends and relatives (presumably more trusted than the media) is the most important source for them. News in Estonian have a relatively marginal importance (*Table 19* in the Annex).

Television has the leading position also in the ranking of media channels from the viewpoint of their credibility (*Table 9*).

Table 9. Credibility of different media channels for Estonians in 2011 (MEEMA, 2011).

	Tend to trust	Tend not to trust	Do not know	Share of respondents assessing this channel	Trust among those who assessed this channel
Estonian Television	91	5	4	96	95
Postimees	82	8	10	90	91
TV 3 (private)	76	17	6	94	81
Maaleht (rural paper)	74	4	22	78	95
Kanal 2 (private)	70	24	5	95	74
Eesti Päevaleht	70	12	18	82	86
Vikerraadio (public)	66	7	27	73	90
Eesti Ekspress	63	15	22	78	81
Äripäev (business paper)	52	10	35	65	79
BBC, CNN	51	7	41	59	88
Kuku Raadio (private)	50	9	41	59	84
Õhtuleht (popular paper)	32	57	11	89	35
PBK	11	23	65	35	32
Tallinn City Television	11	37	51	49	23

* ranking based on the share of respondents tending to trust.

The most trusted TV channels differ by ethnic groups – Estonian TV for the Estonians and PBK for Russian-speakers. Newspapers, the *Postimees* and *Maaleht*, hold the second rank in credibility for the Estonians. If we look at the column where the share of credibility is computed only for those respondents who assessed the particular media channel, we can see that the comparable credibility ratio of the *Postimees* is the same as it is for the Estonian public TV, and on the same level are the countryside weekly *Maaleht* and the public radio broadcaster *Vikerraadio*. Almost on the same level are also international news channels CNN, BBC, and the national quality daily *Eesti Päevaleht*. *Kuku Raadio* is most trusted among private broadcasting channels (*Table 9*).

The balance of trust and distrust is negative (the share of people tending to distrust is larger than the share of those tending to trust) regarding the following three channels – the yellow *Õhtuleht* (balance 35:65), PBK (32:68) and Tallinn City TV (23:77).

The credibility level of media channels for non-Estonians is considerably lower than for the Estonians. The minimal level of distrust is 20% while for the Estonians it's 4-5% (compare *Tables 9* and *10*). For the Russian-speaking audience, the most trusted media channels are Russian TV channels, such as PBK as well some others, which are trusted by 75-77% of the respondents who assessed this channel (for the Estonians the respective indicator is 95%). Radio is more trusted than newspapers. The most trusted channels in Estonian are news portals, the only channels in Estonian where balance of trust and distrust is positive (see *Table 10*).

Table 10. Credibility of different media channels for the Russian-speaking population in 2011 (MEEMA, 2011).

	Tend to trust	Tend not to trust	Do not know	Share of respondents assessing this channel	Share of respondents tend to trust among those who assessed this channel
PBK	69	23	8	92	75
Other Russian TV channels (PTP, HTB, etc)	67	20	13	87	77
Other radio channels in Estonia in Russian beside Radio 4	50	24	26	74	67
Radio 4 (public)	49	27	24	76	65
Local newspaper	44	29	27	73	61
BBC, CNN, Euronews	40	27	34	66	59
MK Estonia	40	31	28	72	56
Estonian news portals in Russian	38	24	38	62	61
Denj za dnjom	33	36	31	69	48
Postimees in Russian	32	35	33	67	48
News portals in Estonian	27	23	50	50	54
Estonian Television	25	28	47	53	48
Postimees	22	32	47	53	42
TV 3 (private, in Estonian)	19	24	57	43	44
Tallinn City Television	18	22	60	40	45
Komsomolskaya Pravda Baltia	17	26	57	43	39

* ranking based on the share of respondents tending to trust.

The number of media channels with the negative balance of trust and distrust is larger for the Russian-speaking inhabitants than for the Estonians. It is interesting to note that the *Komsomolskaya Pravda Baltia* is a relatively less trusted media channel for the Estonian Russians.

How critical is the Estonian population about the performance of Estonian media?

Table 20 in the Annex brings data of *MEEMA* (2011) on critical attitudes of different social groups to Estonian media.

Our questionnaire included five questions about different aspects of media criticism. Analyzing responses we can conclude that in general, the level of criticism is relatively moderate. The index of criticism has a higher average among the people with a higher educational level. The most critical attitudes characterize middle-aged people with university education. The most uncritical (or indifferent?) are the youngest and the oldest age groups, people lacking secondary education and non-Estonians in general (see *Figure 7*). The share of negative reactions was the highest concerning feelings about how protected or unprotected are Estonian people against media mistakes and mishandlings. More than a half, 54% of all respondents agreed with the statement that people are unprotected in such cases. Much less, 10% found that Estonian people have good opportunities to protect themselves against media mistakes and mishandlings.

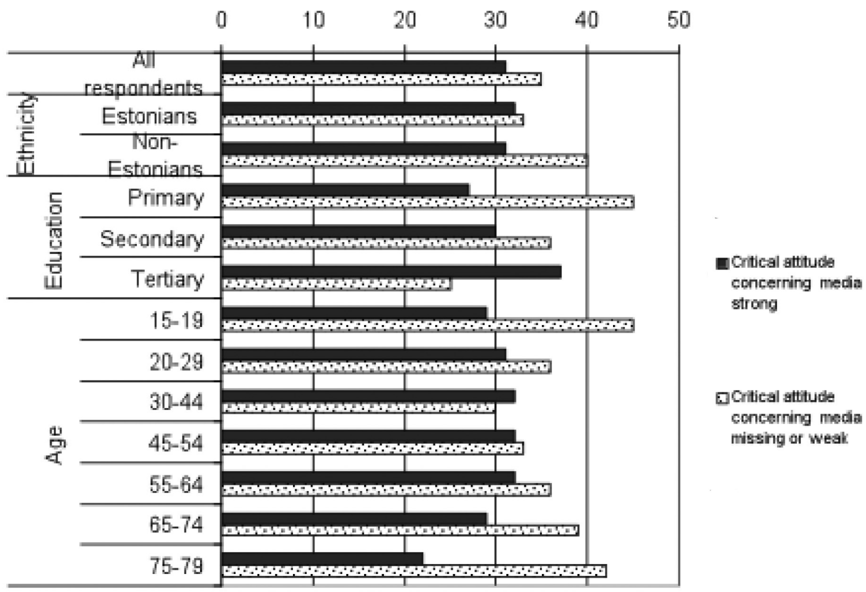


Figure 7.
Critical vs uncritical attitudes concerning media (MEEMA, 2011).

* % of holding critical or uncritical attitudes among different groups.

Reactions to the crucial question about the watchdog function of Estonian media were more balanced. 31% of all respondents agreed with the statement that Estonian media is in general well fulfilling its watchdog function, and 29% disagreed with it, finding that it is weak and can be manipulated.

SOCIAL FACTORS OF MEDIA USE

The long tradition of media and communication research in Estonia (see Vihalemm, 2001) has given us an opportunity to trace throughout the last decades the changes in social factors, which are affecting media use.

According to surveys carried out by the Department of Journalism at the University of Tartu and by the sociological research group of Estonian Radio and Estonian TV in the 1970s and 1980s, during the Soviet era, **education** and **ethnicity** were the main differentiating factors of media use (see Lauristin et al., 1987; Vihalemm, 2004). These surveys revealed that in the life of local Russians, press reading and radio listening played a significantly smaller role, compared to the majority of population. The Russian-speaking population did not use Estonian language media. At the same time, Russian-language media channels were less available in Estonia. The Estonians had a long tradition of newspaper reading. Estonian newspapers and magazines had played an important role in national integration since the mid-19th century, and had also preserved this function under Soviet rule (see Hoyer, Lauk & Vihalemm, 1993). Education had the most notable influence on press reading (more highly educated people read more), and a smaller effect on radio listening and TV viewing (people with higher education were less active listeners and viewers).

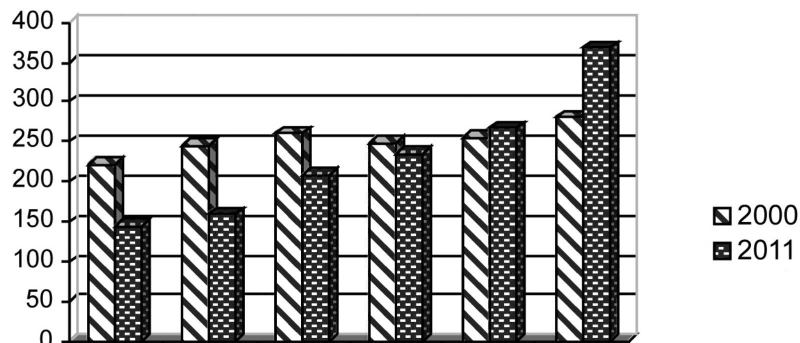
Are these tendencies persisting in the new conditions? Based on the data presented in Tables above, we can conclude that ethnicity remains one of the main factors affecting media use. It influences more the consumption of traditional media than the Internet. Education continues to affect very strongly the regularity of press reading and the scope of reading; the role of education has even increased over the last two decades.

However, **age** has clearly become the crucial factor in general media use during last decade. Large disparities between the age groups appear not only in the Internet usage but also in newspaper and magazine reading, radio listening, and TV viewing. The youngest group (aged 15-24) is characterized by more frequent and diverse use of the Internet than the second age group (aged 25-34); for the youngsters, the Internet has become the main source for entertainment, reading newspapers and magazines, listening to music and following TV and radio programs, studying and communicating with friends (Vengerfeldt & Runnel, 2004; Runnel, Pruulmann-Vengerfeldt & Reinsalu, 2009). This trend indicates the beginning of a fundamental shift in media use in Estonia: among the two youngest age groups we can speak about an Internet-centred media environment and about media convergence.

INCREASING GENERATIONAL DIVIDE IN MEDIA USE

Huge differences can be observed in the volume and character of Internet use by the two youngest and the oldest age groups. When for middle aged and older people Internet is a complementary medium to the traditional channels of information, than for the young generation it is the main, if not the only medium, used for all purposes of communication.

Comparing the data about the traditional media consumption in 2000 and 2011, we can observe that the difference in average TV viewing time per day in youngest and oldest age groups had increased from one hour to almost three hours, the difference in average radio listening time per day from two hours to more than three and a half. In the youngest age group the average TV viewing time has decreased for almost one hour, when as in the two oldest age groups it has increased for about three quarters of hour. These changes have happened step-by-step, year-by-year during the period 2000-2011. In 2011 the volume of TV viewing is in Estonia proportional to age (see *Figure 8*).



	15-19	20-29	30-39	40-49	50-59	60-74
2000	222	246	260	249	256	281
2011	145	160	209	235	267	368

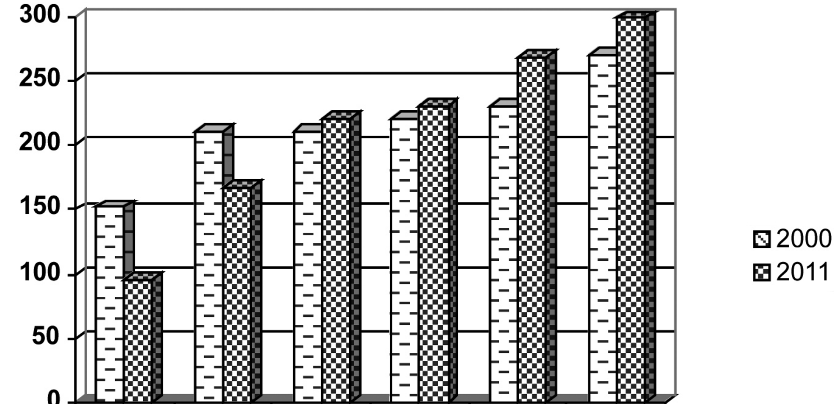
Figure 8

Average TV viewing time per day in age groups, 2000 and 2011 (TNS Emor, http://www.emor.ee).

* In minutes.

In 2011, the volume of radio listening was much more proportional to age than it was in year 2000 (*Figure 9*). The decrease in average radio listening time in the two youngest age groups is smaller compared to the decrease in TV viewing time. The larger decrease in TV viewing time compared to radio listening time can be explained by the larger convergence of TV and Internet use by the young generation, while radio listening is less influenced by the growth of multifunctional use of the Internet.

Figure 9.
Average radio listening time per day in age groups, 2000 and 2011 (TNS Emor, http://www.emor.ee).

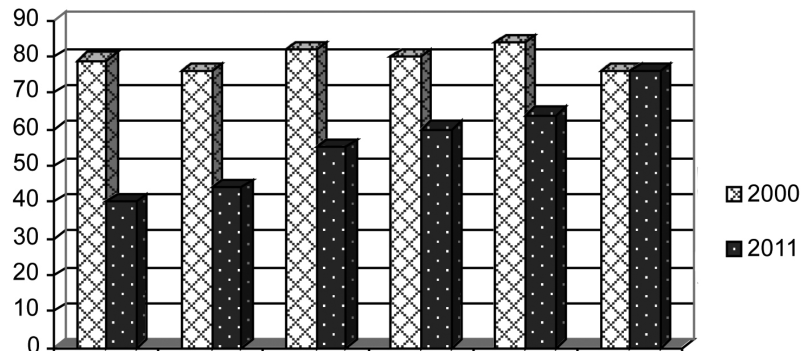


	15-19	20-29	30-39	40-49	50-59	60-74
2000	152	211	210	221	230	270
2011	96	167	221	230	268	299

* In minutes.

Young people are much more oriented towards entertainment programmes, and less interested in news and discussions. This is reflected in the ageing of the public service broadcasting users. People over the age of 50 dominate the audience of public service radio and TV programmes. According to the data of TNS Emor, in summer 2011 among the audience of the public service radio programme Vikerraadio (which is the most popular in Estonia as we can see in *Table 8*), the share of people in the age group 50-74 was 76% whereas the proportion of people in the age group 12-29 was only 6%. In November 2011, among the audience of the public service Eesti TV the proportion of people over 55 was 56% and of people in the age group 4-24 it was 6%.

Regarding reading of the press, then in 2011 the age differences were significantly larger and proportionally age-related, compared to 2000 (*Figure 10*). The gap is deepening due to the decrease in reading among the younger age groups, whereas the reading of newspapers by the oldest audience groups remained on the same level.



	15-19	20-29	30-39	40-49	50-59	60-74
2000	79	76	82	80	84	76
2011	40	44	55	60	64	76

Figure 10.
Share of regular readers of any newspaper in age groups, 2000 and 2011, % (TNS Emor, http://www.emor.ee).

The decrease in regular newspaper reading in the two youngest age groups can also be explained by the more multifunctional Internet use. This does not mean only changes in the character of media channel, but also changes in the regularity of contacts. Reading online editions of dailies is probably more irregular compared to paper editions.

Reading of newspapers' online editions has in general demonstrated considerable growth in Estonia during last five-six years. In autumn 2011, the number of regular readers reached 45% of the population in age 15-79, and among Estonians, even more than a half of the population, 52% (*Table 11*).

Table 11. Reading of newspapers' online editions, % (MEEMA, 2011).

	All respon-dents	Nationality		Age groups						
		Esto-nians	Non-Est	15-19	20-29	30-44	45-54	55-64	65-74	75-79
Are you reading printed newspapers or online editions?										
Mainly printed	37	34	41	15	16	27	42	53	74	88
Both, printed and online editions	37	42	28	40	45	43	40	31	14	7
Mainly online editions	18	19	14	32	28	23	11	8	4	0
Do not read newspapers regularly	9	5	17	14	11	8	7	8	8	6
How often are you reading newspapers on the Internet?										
Several times per day	7	8	4	7	10	10	6	2	1	0
Usually once a day	14	17	7	14	18	17	10	13	8	3
Quite regularly but not every day	24	27	17	28	31	27	27	18	8	3
Quite seldom	29	27	34	41	30	32	30	28	13	7
Not at all	27	21	38	9	10	14	28	38	69	88

As we can see in the *Table 11*, young people under 30 much more prefer reading newspapers on the Internet than printed papers, in the age group 30-44 the shares of readers who prefer online and who prefer printed papers are approximately equal. Among people over 45 there are more of those who prefer to read printed versions (though in age groups 45-54 and 55-64 quite a large number of people are reading also online versions).

INTERESTS IN DIFFERENT TOPICS IN MEDIA CONTENT

As we can see from *Table 21* in the Annex, there are remarkable differences between the levels of interest in media content of the main social-demographic groups. First, we can observe the line of ethnic divide in the media preferences. The Estonian Russians are strongly oriented to the media content provided by Russian TV-channels and they are less interested in Estonian political, social and cultural issues, confirming their lower integration into Estonian political, social and cultural life.

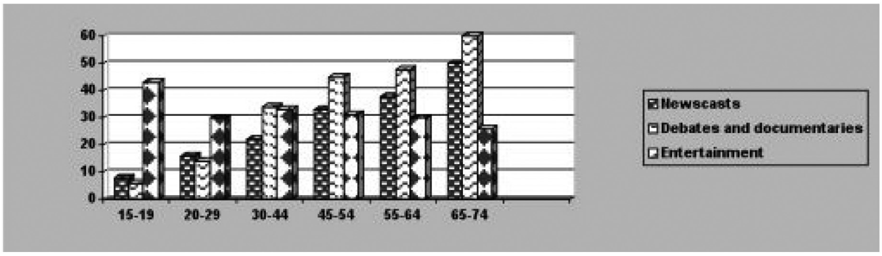
Remarkable differences can also be observed between the interests of men and women. There is a divide between 'feminine' and 'masculine' issues; health, family, education, culture, social activities belong to the first group, economy and business, cars and computers, sports, science and research belong to the second group. Gender stereotypes are strong in Estonian society and culture. Barbi Pilvre has concluded in her dissertation that "a hybrid form of national state-centred patriarchy and corporate masculinity has been accepted as the dominant ideology in Estonian society" (Pilvre, 2011: 95). Gender stereotypes have had a strong impact on men's and women's media representation and journalism culture in Estonia (see Pilvre, 2011) and thus the media have strengthened the gender-related divide in society. The latter has only during last 5-7 years slowly become more recognised and more reflected in the media and public debate.

However, despite the ethnic and gender differences, education is playing an important role in broadening the scope of interests. People with higher education are more involved and more interested in current debates, social affairs, economics, and legal, historical and cultural matters, while less educated groups are passive and most oriented towards information about their immediate environment.

Evidently, the growing differences among the age groups are most significant. Data in *Table 21* confirm the above conclusions about the relatively weak abilities of the young generation to find their way among social processes and current affairs. As a result, the age structure of the news audience of all channels is shifting towards the older groups. According to our survey data from September-October 2011 (*MEEMA*, 2011), the share of respondents who were exposed to the news content delivered by different media channels, including the Internet, at least once per day, was 27% among the youngest group, 53% among the middle aged audience and 57% among the elderly people. This trend reflects a lower level of interest in traditional forms of politics and a lower level of participation in public affairs among the young generation. The participation of young generation in e-forums, the rise of political blogging, Facebook, YouTube and other emerging new forms of communication are the new and challenging areas of our research.

Results of *MEEMA* (2011) also demonstrate a clear divide in the TV viewing preferences of different age groups. We compiled three indices, aggregating data on the interest to follow different TV broadcasts – orientation to newscasts, debates on current affairs and entertainment (*Figure 11*).

Figure 11. Trends in TV viewing interests in age groups 2011(MEEMA, 2011).



	15-19	20-29	30-44	45-54	55-64	65-74
TV newscasts	8	16	22	33	38	50
Debates and documentaries	6	14	34	45	48	67
Entertainment	43	30	33	31	30	26

* % of respondents in the age group, who's level of interests is higher than average for all respondents.

As we can see, the youngest age group is oriented to entertainment and has little interest in news and debates. Orientation to TV news and debates is proportional to age.

CLUSTERS OF MEDIA USAGE

Different patterns of the media usage can most clearly be revealed using cluster analysis. In the present analysis we present the results of the cluster analysis of media usage patterns of the Estonian-speaking respondents from our recent *MEEMA* (2011) survey. As the input indicators for the K-Cluster analysis we used aggregated indices measuring the intensity and diversity of TV-watching, radio-listening, reading printed press and books, the diversity of cultural consumption habits, intensity and diversity in using the Internet and social media. Results of the cluster analysis allowed us to specify five distinct patterns (or types) of the media usage and relate these media usage types to the social context of audiences, to their interests, values and civic participation. This analysis helped us to reveal certain general patterns behind the confusing diversity and multiplicity of the old and new channels available for the contemporary audiences.

At first, let us look at the media preferences of the five media usage clusters (*Figure 12*, *Table 22* in the Annex).

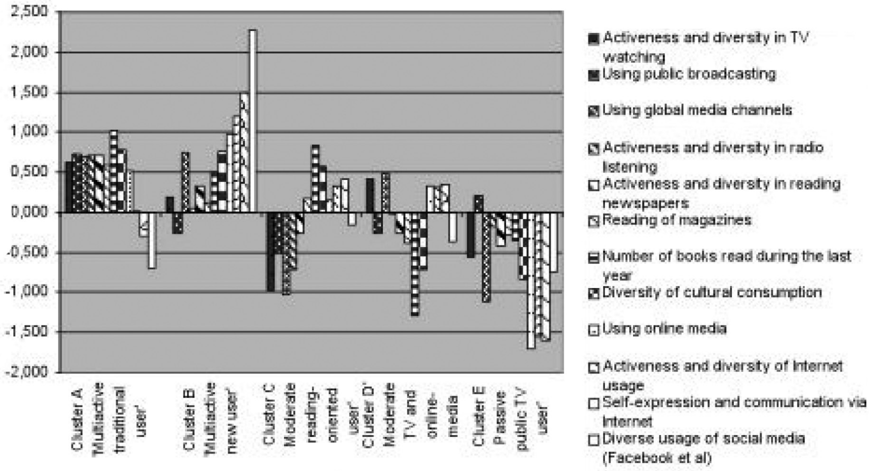


Figure 12.
Media usage cluster profiles (differences in the means of the media usage.

* Differences in the means of the media usage indeces for clusters from the means for all respondents on the 5-point scale.

We can briefly describe media usage clusters as follows:

(1) **Cluster A - 'Multi-active traditional user' (19.3% of Estonians aged 15-79).** This cluster is formed by respondents having a broad range of interests and very high regular contacts with all kinds of media, with the exception of social media. They prefer quality press and serious debate to the gossips and scandals, and public media to the commercialised one. Their interests lie more in the spheres of politics, society, environment, history and culture than entertainment, business and technology. This cluster is most widely representing educated middle-class people aged 45-64.

(2) **Cluster B - 'Multi-active new user' (18.4%).** This cluster is comparable with the previous one by diverse interests, active cultural and civic participation and active usage of various channels, but its special feature is the highest and multi-functional engagement with all kinds of digital media, including social media. Importance of traditional mass media, mainly the public broadcasting and magazines, is much lower. 90% of this cluster is formed by people younger than 45; 59% of them are under 30. 45% of the interviewed young people of age 15-19 belong to this cluster. Traditional forms of politics are not interesting for this cluster, but they are most actively involved in alternative civic actions and informal organizations, acting often in the virtual environment.

(3) **Cluster C - 'Moderate reading-oriented user' (14.1%).** Women comprise 78% in this cluster, albeit its share among all female respondents was only 20%. The cluster represents the traditional model of female gender role, far from politics and technology, mostly dealing with home, children, private relations, fine arts and other more spiritual matters. The cluster is characterized by a very low interest in any kind of news media and the highest interest in reading fiction. As the cluster is relatively young (67% are the age under 44), the usage of the new media (but not so much social media) is also high, mostly for communication and self-expression.

(4) **Cluster D - 'Moderate TV and online-media user' (25.7%)** presents a contrasting profile to the previous 'female' pattern of media usage. Having no interest in reading and in cultural activities, this 'male' type of audience is focussed on media entertainment, sports, cars and other technical matters and business interests. They prefer international entertainment and sport oriented TV- channels and online media. Male blue-collar industrial or service workers form the majority in this cluster in the age 20-44.

(5) **Cluster E - 'Passive public TV user' (22.5 %)** is a cluster dominated by retired people, mostly watching only the national public TV. Members of this cluster are nevertheless quite actively interested in public affairs, in history and the environment.

We can see, that two multi-active media usage clusters, the 'traditional' A and the 'new' B are both characterized by active reading habits, high diversity of cultural consumption and very active use of the global media. The principal difference between those two most active patterns of media usage lies in the different usage of traditional and new media. Cluster A is taking a maximum from the opportunities offered by the diversity of printed world and classical broadcasting, using quite actively the Internet and online media as a tool for work, e-services and information, but not for self-expression and informal communication. Cluster B is an opposite case, fully using all opportunities offered by new multimedia environment. The most distinctive feature of cluster B, opposing all other clusters, lies in the active and diverse usage of Facebook and other social media, and in a very high orientation toward digital forms of self-expression. Two moderate media usage clusters C and D are, on the one hand, rather active online-media users, but on the other hand, their relations with the traditional media are quite different. Cluster C is evidently not much interested in traditional broadcasting programmes and news affairs, preferring to read books and magazines and actively visiting theatre, concerts, exhibitions and other cultural events and using also virtual opportunities for cultural consumption and self-expression. At the same time cluster D is quite distanced from the cultural realm and is not actively reading books and printed press, but prefers commercial and global TV-channels and is a more active user of online-media than cluster C. The most passive media usage of the cluster D is characterized by the prevalence of the national public TV in its media-space, leaving all other channels below the average.

Looking at the social background of these media usage clusters (*Table 23* in the Annex), we can discover quite predicable social factors, already described above: the vital role of age is behind the difference of the two active clusters A and B. Older age combined with the lower social status is also the main factor affecting media behaviour of the more passive cluster D. Differences in the media preferences between clusters C and D could be most obviously explained by effects of gender-biased media use, cluster C with its higher cultural sensitivity representing the traditional female repertoire, while cluster D having more male centred characteristics.

The content of these differences will became more visible, when we compare thematic interests of those clusters (see *Figure 13*, based on the factor analysis of the thematic interests concerning news media).

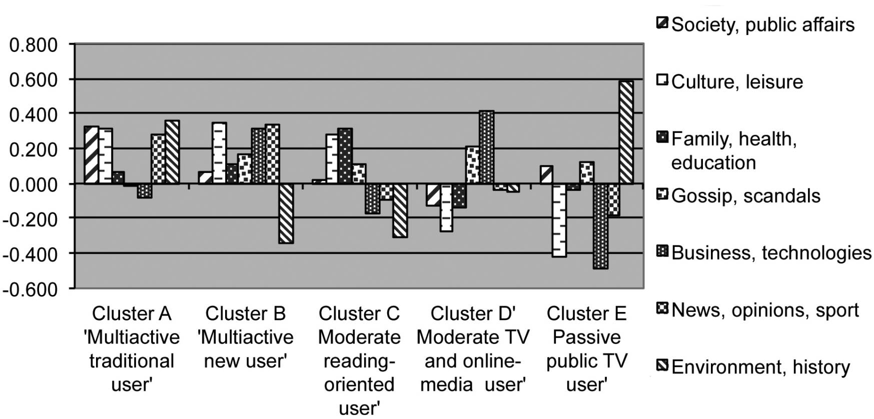


Figure 13.
Thematic interests in the media usage clusters.

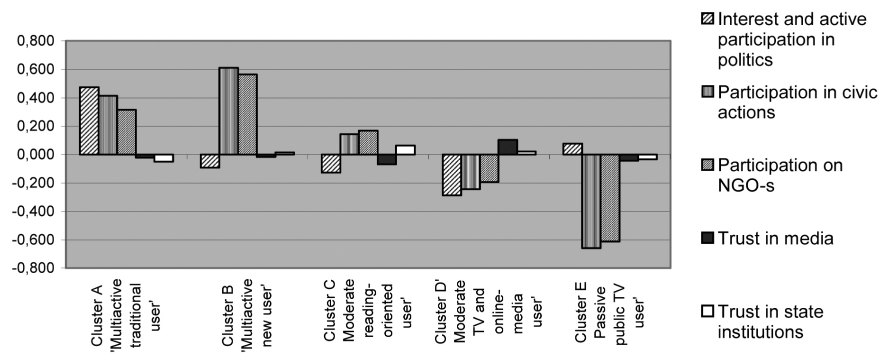
* Factor scores of thematic choices for clusters.

Comparing thematic preferences in different clusters, we can observe that 'serious' media content (news, public affairs, culture) is fully represented only in the preferences of the two most active clusters. Public affairs are also a relevant topic for the most aged passive cluster E. Gender bias in the composition of clusters C and D is becoming more obvious when looking at the difference of their thematic interests: culture and social affairs are important for C, business and technology for D.

How, then, is the media usage differentiation related to the quality of democracy? Are the media able to generate active participation and social trust?

Looking at the presented media usage typology from this perspective, we have to conclude that, first, there seems to be very little reason to relate trust in media or trust in state institutions to the media usage habits (see *Figure 14*).

Figure 14.
Trust and participation in different media usage clusters.



* Differences of cluster' means from the mean for all respondents.

The most active media users (cluster A) are demonstrating even a slightly lower level of trust in both the media and other public institutions. This cluster is also more critical concerning the performance of Estonian media. The picture is ambiguous with respect to the link between media activities and interest in political matters, where only the traditional multi-active audience is showing higher involvement. On the other hand, there is a clear positive relation between the engagement in civic society and more active media usage.

AUDIENCES' FRAGMENTATION AND INTEGRATION OF ESTONIAN SOCIETY

The integrative capacity of media is challenged through two processes: growing fragmentation of media use by audiences, and changing communication capacities of different media, caused mainly by the development of new technological platforms for media content.

If audiences have more possibilities to choose between different media outlets, everybody can compile a personal 'media menu' and there are no unified media any more, used by almost all. Media use patterns in Estonia show that we have at least three differentiating socio-demographical factors in media usage: language (Estonian- vs. Russian-language inhabitants), age (youngest and oldest inhabitants) and education (low vs. high level). Especially non-favourable for integration are the combinations of 'disadvantegous' factors – Russian-language old people with only primary educational background are most likely excluded from the Estonian media-space and society. Since they are more oriented to media channels from Russia they, rather, know what is happening in Russia and, due to the information gap, they have fewer possibilities to participate in society.

Patterns of audience fragmentation show that there are no clear social divides between more or less active, traditional or new media users, but it is possible to distinguish groups of active users of traditional and 'new' media from the groups of only 'new' media orientation and the groups of only traditional media orientation, and even the groups where media use is rather low. Problematic is orientation only to a single medium. We know that active and diverse media use is related with higher participation in social life and with higher institutional trust as well, and vice versa – less active and rather one-dimensional media use is reflected in low participation and institutional trust (Kõuts et al., 2013).

If we analyse potentialities of social media to have a shared or common communication space among the Estonian- and Russian-language groups, we can see that the Russian-language respondents who use social media are to some extent open to mutual communication in the Estonian language (*Table 12*). The Estonians are more oriented towards the English-language communication and only 7 % say that they communicate in Russian as well.

	Estonian-language respondents, % (n=511)	Russian-language respondents, % (n=260)
Estonian language	98	30
Russian language	7	98
English	49	28
Other languages	7	-

Table 12.
Languages used by respondents in social networking sites (MEEMA, 2011).

The Estonian language has a symbolic value denoting integration into society. Not being able to communicate in the official language of the state means less possibilities to present one's interests in society. There is really a significant difference in the using of e-possibilities for participating. For example, if 69 % of the Estonian-language respondents and only 30 % of the Russian-speakers use the Internet for communicating with state authorities – this is a significant difference (*MEEMA*, 2011). It seems that barriers still exist on the Internet and communication technology alone does not diminish existing divides between groups.

CONCLUDING REMARKS

Generational differences in media use have a fundamental social and cultural meaning. The Internet as a main news medium is raising the speed of news mediation but, at the same time, control over information reliability is decreasing, following of news is becoming more occasional and superficial. As a result, the picture of social events and processes is becoming more fragmented, orientation abilities in social life are diminishing. According to our research data, many young people are not interested in politics and are probably not able to make sense of events taking place in society, neither on national nor international level. One important factor of the low level of interests in politics of the young generation seems to be their irregular contacts with news media, especially newspapers. Among the young generation, Internet use is mostly connected with entertainment and interpersonal communication. Entertainment dominates also in programmes of commercial radio and TV, which young people are following much more frequently than the older generations.

We can predict that Internet use in Estonia will in the next five years continually grow, approaching the current level of technologically most advanced countries, involving 85-95% of the population. As the Internet already is the main medium of information, interpersonal communication and entertainment today, the further enlargement of its use concerns mainly the middle-aged and elderly generations. But we do not expect that in the media-space of these older generations, the Internet could achieve such kind of a dominating position, which still belongs to the traditional media. Newspaper reading, radio listening and TV viewing as separate activities will, probably, even in the future maintain their important role in the lifestyle of people who are over 35 today. This lifestyle will not change substantially under the influence of economic difficulties or digital technology development although, for example, magazine reading would probably decrease further under harder economical conditions.

We can foresee that the switch to new media as the main provider of public information does not mean the disappearance of 'quality journalism', as the 'elite' audience interested in the coverage of public affairs is not disappearing despite the generation change. At the same time, the integrative thematic identity-related interests (history, the environment), which were prioritised by the audience in the first post-communist decade, are losing their meaning for the new young digital media users in clusters B, C and D. When news, public affairs, culture, the environment and history have traditionally been regarded as topical areas of universal interest, having a strong integrating potential for the national mass media, it is more difficult to discover such integrating topics for the different media usage types of today. Interest in gossip and scandals seem to be the most widespread common element for different media usage clusters. But these are themes that are not integrating but, rather, alienating and fragmenting media audiences.

As the clusters B and C are demonstrating, the role of traditional media will probably not fade completely away. Even if the printed word will more and more adapt to the digital format, traditional printed newspapers, magazines and books can preserve some special functions in the future; they could become a special brand or elements of a certain 'elite' lifestyle for the young generation. Looking at more educated young people, it is evident that hand in hand with intellectual maturity and rising professional competence grows also a need for deeper understanding and for more analytical communication, still offered by quality press and books to a much larger extent, compared to surfing the Internet. On the one hand, this would keep alive the traditional textual formats of the printed word, even if they were transferred into the format of e-books and e-journals. On the other hand, we could expect changes in the digitalized culture, moving toward the synthesis with the institutionally embedded forms of traditional culture and creating a new environment for intellectually and aesthetically demanding cultural participation (Lauristin, 2012, Laak, 2012). As a result of this synthesis between old and new media, there can be expected the 'intellectualization' of the online-media; the new multimedia could offer significantly more sophisticated and diverse content, compared to the online-media we encounter today. We can only hope that in 10-20 years, this new digitalized and culturally rich environment will also enhance the interest and capacity of the young generation in active political and social participation, even if the role of traditional media were, for them, significantly smaller compared to the media-space of today's middle-aged and elderly generations.

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ANNEX

Table 13. Aggregated indicators of media use in Estonia, 2000-2011, IV quarter of the respective year (TNS Emor, http://www.emor.ee).

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Newspapers' reading												
General reading (share of regular or irregular readers of any newspaper, %*)	95	94	95	92	91	93	92	92	90	87	83	79
Regular reading (share of regular readers of any newspaper, %**)	79	76	78	75	71	76	73	74	74	68	62	58
Average number of newspapers regularly read	2.11	2.08	1.98	1.97	1.83	1.81	1.82	1.90	1.81	1.67	1.40	1.31
Reading of magazines and other periodicals												
General reading (share of regular or irregular readers of any magazine, %***)	86	86	85	85	81	79	79	77	74	71	67	62
Regular reading (share of regular readers of any magazine, %****)	72	73	71	70	64	65	65	62	59	56	52	46
Average number of magazines regularly read	2.55	2.59	2.35	2.30	1.92	1.98	2.33	2.12	2.10	1.75	1.53	1.23
Use of electronic media												
Radio: average listening time per day (min)*****	209	209	209	292	281	264	245	247	244	238	226	221
Television: viewing time per day (min) *****	254	268	290	244	246	232	245	247	249	263	248	240
Internet: have used during last six months (%)	28	33	44	47	47	53	59	66	67	73	74	76

* Have read at least one of the last six issues of any newspaper.
** Have read at least four of the last six issues of any newspaper.
*** Have read at least one of the last six issues of any magazine or other periodical.
**** Have read at least four of the last six issues of any magazine or other periodical.
***** Change in data collection methodology since January 2003 – TV meters introduced instead of viewers' diaries, more precise determination of radio listening.

Estonians			Russian-language respondents		
	Share of regular viewers	**Incl every day**		**Share of regular viewers**	**Incl every day**
Kanal 2	86	55	Pervõi Balt Kanal	82	61
TV 3	85	52	RTR, NTV, TVCi	75	47
Estonian TV	84	56	RTVi	45	23
ETV 2 (public)	57	22	Intern. pop science channels	39	16
Other channels in Estonian	45	16	TV 3+	37	16
Channels of films and serials	29	10	Nature channels	35	14
Intern. pop science channels	27	7	Old Russian movies	26	11
Nature channels	26	5	Intern. news channels	24	11
Sport channels	22	6	Russian history channels	24	10
Music channels	17	4	Sport channels	22	7
Int news channels	10	3	Music channels	22	6
Pervõi Balt Kanal	10	3	Est TV, Est TV 2	19	7
Other Russian channels	10	3	Channels of films and serials	19	6

Table 14.
Regularity of watching different TV channels, Autumn 2011 (MEEMA, 2011).

	All respon-dents	**Age groups**						
		15-19	**20-29**	**30-44**	**45-54**	**55-64**	**65-74**	**75-79**
Music stations (current hits): regularly	42	67	66	52	35	22	8	6
Not at all	34	12	16	23	28	52	71	88
Vikerraadio (public, news and talk): regularly	38	7	12	27	48	53	59	82
Not at all	36	74	61	37	22	22	12	6
Raadio Elmar (traditional popular music):								
Regularly	33	13	13	34	49	43	41	41
Not at all	34	56	51	29	18	27	31	37
Raadio 2 (public, full service): regularly	16	9	20	20	15	17	12	4
Not at all	47	52	43	42	37	49	59	69
Raadio Kuku (news and talk): regularly	16	6	11	14	22	19	21	12
Not at all	55	78	71	49	38	46	54	67
Local radio stations: regularly	9	3	4	10	13	9	12	8
Not at all	78	86	82	76	73	72	79	86

Table 15.
Listening of different radio channels among Estonians, Autumn 2011, % (MEEMA, 2011).

Table 16.
Listening of different radio channels among Russian-language respondents, Autumn 2011, % (MEEMA, 2011).

	All respon-dents	Age groups						
		15-19	20-29	30-44	45-54	55-64	65-74	75-79
Russkoye Radio (popular music): regularly	43	23	31	50	50	42	42	17
Not at all	27	42	36	20	20	23	42	54
Radio 4 (public, full service): regularly	38	19	17	23	45	49	23	4
Not at all	32	58	53	41	22	12	25	29
Radio 100 FM (dance music): regularly	35	19	32	47	41	31	20	8
Not at all	35	50	36	19	29	38	63	79
Radio Sky (current hits): regularly	28	38	37	42	28	11	5	0
Not at all	42	42	26	23	40	58	82	83
Local radio stations. regularly	9	0	4	7	8	13	22	8
Not at all	78	96	80	80	75	75	70	79
Any radio programme in Estonian: regularly	13	4	11	17	17	13	5	0
Not at all	68	69	74	60	61	65	87	96

Table 17.
Reading of leading Estonian newspapers in 2002-2011 (MEEMA, 2011).

	Regular reading				Irregular reading			
	2002	2005	2008	2011	2002	2005	2008	2011
Postimees (national daily)	40	34	40	46	37	46	43	43
Eesti Päevaleht (national daily)	31	22	24	22	36	48	48	55
Õhtuleht (national, popular daily)	42	34	35	33	39	47	48	49
Äripäev (business daily)	13	11	12	10	30	38	39	45
Eesti Ekspress (weekly)	21	17	19	16	36	46	46	50
Maaleht (weekly)	19	14	20	22	36	43	42	47

* % of Estonians in age 15-74.

Table 18.
Most common Internet-related activities in Autumn 2011 (MEEMA, 2011).

	All respon-dents	Age groups					
		15-19	20-29	30-44	45-54	55-64	65-74
Search of practical information (weather, timetables, contact data, etc)	95,5	91	99	97	96	93	87
Use of the Internet banking	92,5	85	97	95	93	88	82
Use of e-services (tax office, official forms, etc)	85,6	62	91	92	89	82	68
Communication with friends and acquaintances	85,5	96	96	89	81	70	55
Search for information about jobs, dwellings, travel, etc	82,3	69	89	91	82	74	55
Search for entertainment (games, music, films)	82,0	97	95	88	73	60	51
Search for information related to work	81,0	59	90	91	85	80	40
Use of online databases (libraries, datasets, etc)	79,3	79	83	88	78	68	51
Search for information from websites of municipalities	79,0	61	80	86	82	74	74

Search for information from websites of state institutions, ministries, etc	78,6	64	80	86	79	83	70
Following the online newspapers and portals	77,2	79	84	83	74	66	53
Search for interesting and exiting information	77,1	86	85	83	72	61	52
Buying and gathering information related to it	75,3	71	82	83	75	63	47
Search for information and advice about family relations, children, health, etc	73,3	65	81	83	69	63	41
Following radio and TV broadcasts on the Internet	71,8	81	85	80	65	48	36
Search for information about relatives and acquaintances on the Internet	65,7	82	82	67	58	48	41
Search for information related to studies, learning	65,1	97	81	68	54	39	27
Observation of friends' and acquaintances' life using social media	65,1	93	87	70	46	38	29
Downloading of films and music	63,2	94	86	70	49	24	18
Uploading of pictures and photos	62,4	91	84	62	46	38	36
Following the information about myself on the Internet	60,5	81	75	63	52	42	29
Visiting virtual exhibitions, reading fiction books, watching worthwhile films, etc	58,8	64	68	65	50	44	37
Communication with colleagues, partners, customers, etc	57,1	37	65	64	60	51	31
Communication with officials over the Internet	57,1	31	64	65	56	53	51
Participation in forums and blogs, writing commentaries	52,9	76	66	58	42	31	20

* % of Internet users who are doing it, in ranking order.

Table 19.

How important are for you the following channels as news and knowledge sources? Share of answers 'very important' (Estonian Integration Monitoring, 2011).

Estonians					Russian-language respondents				
	All res-pond.	Age groups				All res-pond.	Age groups		
		15-29	30-54	55-74			15-29	30-54	55-74
1. Estonian TV channels	63	57	61	76	1. Communi-cation with friends and relatives	47	55	42	48
2. Communi-cation with friends and relatives	52	61	50	43	2. Estonian news from PBK	37	29	35	45
3. Radio channels in Estonian	51	43	47	67	3. Estonian TV news in Russian	33	34	29	38
4. Internet	50	82	47	13	4. Other Russian TV channels beside PBK	29	30	25	34

5. Newspapers in Estonian	48	48	42	59	5. Communication at workplace, in school	29	34	35	15
6. Communication at workplace, in school	40	57	41	18	6. Estonian newspapers in Russian	25	28	21	29
7. Social media	15	32	10	1	7. Estonian news portals in Russian	24	33	28	10
8. Global news channels	8	12	8	4	8. Other Estonian radio channels in Russian beside Radio 4	23	21	23	25
9. Russian TV channels	4	2	6	5	9. Radio 4	20	11	15	36
10. Newspapers in English, German, etc	3	11	2	1	10. Russian news portals	17	28	17	8
11. Radio channels in Russian	2	1	4	2	11. Social media	17	35	16	5
12. Newspapers in Russian	1	1	2	0	12. Global news channels (CNN, Euronews, etc)	14	15	12	15
12. Newspapers in Russian	1	1	2	0	13. TV channels in Estonian	13	18	10	7
					14. Russian newspapers	9	11	7	11
					15. News portals in Estonian	8	12	9	3
					16. Newspapers in Estonian	7	12	7	5
					17. Newspapers in English, German, etc	3	6	2	1

Table 20. Criticism of Estonian media in different social groups, % (MEEMA, 2011).

	All respondents	Language		Education			Age						
		Estonian	Russian	Primary	Secondary	Tertiary	15-19	20-29	30-44	45-54	55-64	65-74	75-79
Criticism of Estonian media (index) strong + very strong	31	32	31	27	30	37	29	31	32	32	32	29	22
Criticism missing + weak	35	33	40	45	36	25	45	36	30	33	36	39	42

Does Estonian media have many features that make you angry? Quite a lot, very many	26	26	26	22	24	32	16	28	26	27	27	28	22
Very few, not at all	31	26	42	37	33	24	47	34	27	29	31	37	32
The quality of Estonian journalism is declining, its credibility is decreasing	42	43	41	34	43	48	40	47	44	52	41	35	27
The quality of Estonian journalism is improving, its credibility is increasing	16	19	10	16	16	16	9	17	15	18	18	15	12
Estonian media is in general well fulfilling its watchdog function	31	34	25	27	32	33	30	34	30	33	33	25	23
Estonian media is weak and can be manipulated	29	29	29	25	29	32	23	26	29	30	30	32	30
People in Estonia are unprotected against media mishandlings	54	55	53	42	55	61	46	53	59	56	54	49	44
Estonian people have good opportunities to protect themselves against media mishandlings	10	12	7	9	10	11	14	12	9	14	8	5	6
Estonian media is lacking of substantial discussions and analyses	39	37	45	26	40	49	33	39	42	42	38	36	29
In Estonian media is quite a lot of substantial debate and analyses	26	34	9	49	34	25	43	32	35	31	36	34	38

Table 21. What topics are interesting for you in the media? (MEEMA, 2011).

	All respondents	Language		Gender		Education			Age						
		Estonian	Russian	Men	Women	Prima.	Second.	Tert.	15-19	20-29	30-44	45-54	55-64	65-74	75-79
News from Estonia	86	89	79	83	88	78	87	88	71	83	88	88	89	88	93
News from own county, town, parish	77	83	65	75	79	71	78	78	59	71	79	82	83	79	84
Foreign news	60	63	53	64	56	49	60	69	61	67	57	61	60	55	55
TV broadcasts, movies	55	58	48	50	60	59	55	51	61	55	51	55	54	62	53
Health, health care	54	55	53	39	67	45	56	57	29	44	50	64	63	68	84
Humour	51	54	46	51	51	52	53	48	59	52	53	54	47	47	56
Opinions on current affairs, debates	48	53	39	45	52	30	50	59	23	43	51	56	57	49	58
School, education, learning	46	50	38	31	59	38	45	55	66	53	54	39	38	27	32
Social affairs	45	45	47	35	54	28	47	56	25	38	44	53	53	54	71
Crime, police, courts	45	49	37	47	43	47	48	37	44	48	39	50	48	46	41
Home, family, children	43	44	39	24	59	32	44	48	15	40	54	50	43	28	34
Laws, regulations, legal information	40	39	43	38	42	31	40	48	22	36	41	47	49	36	41
Sport	36	38	32	52	22	33	37	38	50	34	38	31	36	35	38
Nature, environment	36	38	32	32	39	28	36	42	25	26	33	41	46	48	45
Corruption and scandals	34	36	29	35	33	25	36	36	20	31	32	39	42	37	32
Celebrities, relationships	33	37	25	24	41	32	34	33	43	33	31	34	31	33	33
Vacancies	32	32	32	29	36	27	36	28	18	42	36	40	31	9	4
Youth culture	32	36	24	24	39	38	31	31	67	46	34	24	20	12	15
Social activities	32	37	21	22	41	34	31	32	49	37	32	33	26	22	18

Music, musical events	30	34	23	27	33	31	29	32	56	43	27	27	20	17	15
History, memoirs	29	32	21	32	26	21	28	35	23	19	26	33	34	41	53
Art, literature, theatre	29	30	25	18	38	12	26	45	23	27	29	29	32	30	30
Rural life	28	39	6	26	30	25	30	27	13	16	28	33	39	42	44
Cars	28	29	26	45	13	30	31	22	42	34	30	29	22	12	12
Selling and buying	28	29	25	28	28	27	31	22	23	34	32	31	24	12	12
Economy, business, entrepreneurship	28	30	22	34	22	14	27	39	19	30	32	31	27	18	18
	All respondents	**Nationality**		**Gender**		**Education**			**Age**						
		Estonian	**Non-Est**	**Men**	**Women**	**Prim.**	**Second.**	**Tert.**	**15-19**	**20-29**	**30-44**	**45-54**	**55-64**	**65-74**	**75-79**
Science and research	27	28	26	33	22	15	27	39	20	28	28	32	27	24	32
Computers, Internet	27	28	25	38	18	30	27	27	47	43	28	23	14	10	3
Travel and tourism	26	25	27	20	31	17	23	38	28	28	30	24	23	17	8
Statistics, research data	23	25	20	23	24	16	21	33	23	27	21	26	25	18	18
President, parliament	20	24	12	20	20	16	20	24	15	20	17	18	24	30	36
Building, real estate	19	20	15	22	15	12	19	21	9	25	22	20	17	6	10
Government, ministries, departments	18	21	11	19	17	8	16	29	9	17	17	19	22	21	27
Politicians, parties	15	16	13	18	13	11	14	21	9	13	13	14	21	24	25
Architecture and design	15	15	15	12	18	10	14	20	21	15	17	13	16	8	10
Civic activities, social participation	15	16	12	13	16	11	14	19	19	14	13	17	18	10	16
Museums	12	12	14	9	15	4	12	19	3	7	12	14	19	16	12

* % of the group, mentioned interest.

Table 22. Media usage profiles of clusters (MEEMA, 2011).

	Cluster A 'Multiactive traditional user'	Cluster B 'Multiactive new user'	Cluster C 'Moderate reading-oriented user'	Cluster D 'Moderate TV and online-media user'	Cluster E 'Passive public TV user'	Mean of index for all respondents	Standard deviation
Share of cluster among the Estonian respondents (age 15-79)	19,3%	18,4%	14,1%	25,7%	22,5%		
Activeness and diversity in TV watching	**0,627**	0,188	**-0,974**	**0,415**	**-0,553**	3,157	1,070
Using public broadcasting	**0,736**	-0,257	**-0,506**	-0,264	**0,200**	2,955	1,192
Using global media channels	**0,699**	**0,753**	**-1,030**	**0,478**	-1,111	3,117	1,254
Activeness and diversity in radio listening	**0,717**	0,058	**-0,712**	-0,028	-0,184	2,959	1,162
Activeness and diversity in reading newspapers	**0,715**	0,332	-0,267	-0,255	**-0,421**	3,231	1,058
Reading of magazines	**0,593**	0,123	0,173	**-0,387**	-0,273	3,027	0,936
Number of books read during the last year	**1,030**	**0,509**	**0,839**	**-1,287**	-0,349	3,006	1,415
Diversity of cultural consumption	**0,783**	**0,760**	**0,577**	**-0,710**	**-0,838**	3,025	1,149
Using online media	**0,515**	**0,965**	0,157	0,327	**-1,699**	2,938	1,336
Activeness and diversity of Internet usage	0,011	**1,203**	0,325	0,316	**-1,554**	1,772	1,213
Self-expression and communication via Internet	-0,291	**1,486**	**0,410**	0,339	**-1,606**	2,972	1,319
Diverse usage of social media (Facebook et al)	**-0,692**	**2,283**	-0,162	-0,364	**-0,751**	3,102	1,315

* Differences between means of media usage indices for clusters and means for all respondents on the 5-point scale.

Table 23.
Social composition of the media usage clusters, % of cluster (MEEMA, 2011).

		Cluster A Multiactive traditional user	Cluster B Multiactive new user	Cluster C Moderate reading-oriented user	Cluster D Moderate TV and online-media user	Cluster E Passive public TV user	Mean for all respondents
Gender	Male	46	41	22	60	51	46
	Female	54	59	78	40	49	54
Age	15-19	4	21	11	8	1	9
	20-29	6	38	24	32	7	21
	30-44	27	31	33	32	11	26
	45-54	21	7	13	14	17	15
	55-64	24	3	12	10	19	14
	65-74	15	0	5	4	30	11
	75-79	3		1	1	15	4
Education	Primary	7	26	19	25	34	23
	Secondary	58	42	47	56	54	52
	Tertiary	36	32	34	20	13	25
Netto income per month per family member	<160 euro	11	17	24	24	18	19
	161-250 euro	13	14	17	19	21	17
	251-400 euro	30	21	24	24	44	29
	401-600 euro	27	30	18	18	14	21
	> 600 euro	19	16	15	14	4	13
Professional background	Non-skilled worker	6	6	11	13	9	9
	Skilled worker	17	7	5	24	14	15
	Service staff	13	20	12	15	6	13
	Middle level professional	22	21	26	10	4	15
	High level professional, manager	14	14	9	12	2	10
	Not working	28	33	37	25	65	38