Liking social media as an extension of online public service media strategy
How European public service media strategically utilize commercial social media platforms

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ABSTRACT

While public service broadcasters started out as monopolistic organizations in their respective countries, they have currently evolved into public service media in highly commercialized and diverse media markets. Not only commercial broadcasters, but also online video on demand services and other web media companies have started to compete with them. Social media platforms can also be thrown into this equation, although these third-party platforms also offer many opportunities for public service media to engage and interact with their audiences. Nonetheless, the commercial nature of these platforms conflicts with the public values most European public service broadcasters have to adhere to. Hence, the following research question is posed: *"How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?"* Through 10 interviews with 11 employees from various public broadcasting organizations across Europe, many interesting insights into the social media usage of public service media were found. A thematic analysis was performed on the data, which in the first place brought to light the complicated organizational structure that makes online and in particular social media activity still quite hard to do in comparison to the core Radio and TV activities. Nonetheless, online activities are growing steadily: public service media are currently mainly focusing on building centralized video on demand platforms where all broadcast content can be consumed. Web-only content and other classic web characteristics such as personalization features are also gradually becoming more accepted at public broadcasters. Furthermore, public service media are also slowly expanding their activities on third-party social media platforms, most notably Facebook, Twitter and Instagram. Strategies used on these platforms include second screen functionalities, pure promotion of their own content and online platforms, and the creation of native stand-alone content for various social platforms. The ability to successfully do that though with the desired high-quality is limited, due to current regulations but most notably due to a lack of available resources for such online activities. Most respondents acknowledged the third-party commercial status of the social media platforms they used, but did not see this as an issue that should hold them back in using such platforms. Consequently they valued connecting with the fragmented audiences on these platforms as more important than trying to completely protect their public service mission, by arguing that the presence of various audiences is precisely the reason why they should also be present on social media platforms. Nevertheless, social media activity by public service media is still very much in development as the organizations are still adapting to its emergence and the situation might be completely different a few years from now. Subsequently it will be interesting to see how social media utilization by public service media develops in the future.

KEYWORDS: *Public service media, public service broadcasting, social media, multi-platform, online strategy*

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Preface

I sincerely want to thank everyone that helped to make this master's thesis project possible. First of all I want to thank all 11 interviewees from public service media across Europe who were so kind to give me the time to interview them about the social media activity of their organizations. Next, I would also like to thank everyone else who replied to my multiple emails throughout my search for more participants, it was really very much appreciated. Furthermore I wish to thank Sjoerd Pennekamp from the Dutch public broadcaster NPO, with whom this research project was partly in cooperation. I would also like to thank my thesis supervisor Drs. Matthijs Leendertse for his thorough feedback and support throughout the varying stages of writing this thesis. Finally I need to thank my family, friends and girlfriend, since this thesis would not have been possible without their support. As this thesis will likely be the final work of my academic career, I hope that you will enjoy reading this paper!

1. Introduction

In recent decades public service broadcasting (PSB) has come to deal with increased competition, both on traditional broadcasting channels but also on new online platforms due to technological developments and other types of media innovation. Most public broadcasting systems around the globe originated mainly from government intervention with the broadcasting system to deliver broadcast content of a certain quality to the broader population. As Hallin and Mancini (2004) note, these broadcasting systems differed per country because of political and cultural differences, but all still had the financial support from the government and an imposed public mission in common. Only in the past few decades has commercial broadcasting also emerged to compete with public broadcasters, which has caused a shift from a single monopolist public broadcaster to a competitive market (Nissen, 2006). In recent years the competition has increased even more as newer online competitors such as Netflix or Amazon Prime were introduced, companies who also create unique television content, but this time for an online audience only. Thus, although competition was not a major problem for broadcasters in the early days of broadcasting, it is becoming an increasingly bigger issue these days. As a consequence having a clear strategy, which was not much of an issue without real competitors, has become very important for public broadcasters in this changed media landscape with abundant competition.

Subsequently, the future of public broadcasting in a competitive market has been a heavily debated topic that has already been researched from multiple angles. Among many other studies, Nissen (2006) has for instance done research into what the role of public service broadcasting can be in the new information society, while Enli (2008) has tried to redefine public service broadcasting into a multi-platform, participatory process instead of the one-way communication it was originally deemed to be. Debrett (2009) has argued that broadcasters are slowly turning into media content companies, and Doyle (2010) adds to these findings by suggesting all broadcasters should turn into multi-platform, '360-degree' companies to remain sustainable in the digital age. Such views are mainly focusing on an on-going process of convergence, in which public broadcasters and commercial parties are growing closer together using the same media technologies. Meier (2013) on the other hand, argues there can also be a type of divergence in which public broadcasters, while using the same converged technologies, will remain in a separated part of the market focusing on delivering quality informational content, while commercial companies will create popular entertainment programming to engage their audiences. In that sense the question emerges if public

broadcasters should try to attract larger audiences by joining in creating entertainment content, or if they should try to engage their audiences by continuing to focus on programming that relates to their core public service mission and values. Furthermore the arrival of online platforms has also brought another debate back to life again, namely to what extent public broadcasters with their publicly funded activities may compete with commercial parties.

Such a discussion can mainly be linked to another technological development that happened in the past decade, namely the emergence of social media platforms. A large part of the traditional television audience is now also present on these different social media platforms, as Moe, Poell and Van Dijck (2016) note. Similarly, Van den Dam (2010) argues that the arrival of social media is redefining broadcasting, since social media promote the use of new technologies, non-linear viewing habits as well as new types of consumer engagement. Ellingsen (2014) has summarized these developments into the emergence of an on demand culture, in which consumers or audiences decide what content to watch, when they watch it, and on which platforms they watch their content. Such a shift in the media landscape also has immense consequences for public broadcasters, who have traditionally been in control by creating programming schedules on different channels with different types of content. Since they are losing part of that controlling function as the audience has a wide variety of options, they need to seek new ways to reach and engage audiences, for which social media platforms are a major opportunity. To solve this problem, the creation of new social media platforms controlled by public broadcasters themselves has for instance been discussed (Andrejevic, 2013), as well as broadcasters who have started fully cooperating with several existing social media companies and with exploring the functionalities they offer (Corcoran, 2015).

Inevitably, public service broadcasters will need to use these social media platforms in some way, as a large part of the audience they need to reach through their public service mission is present on those third-party platforms as well. As Van Dijck and Poell (2015) mention though, doing that as a publicly funded party is harder than it looks. Several problems arise, since these social media platforms originally started as platforms connecting people with people, but they have grown more corporate with businesses also exploring this space which consumers are collectively occupying (Van Dijck & Poell, 2015). Social media platforms have thus grown into commercial platforms, which directly opposes one of the core public values of public broadcasters, which is independence. For the Dutch public broadcaster NPO for instance, their first of eight core value reads 'Independent: all content will be created independently from political and commercial influences' (NPO, 2015, p. 17). As such, can

public broadcasters actually use commercial social media platforms to promote their own broadcast content? Because next to the publicly created content from broadcasters, social media platforms such as Facebook and Twitter can place corporate advertisements on their platforms as well. Furthermore there is the fact that through exclusive social media content public broadcasters could actually attract consumers to the commercial social media platforms instead of their own platforms and thus largely unintentionally promote a commercial company. This subsequently leads to the main research question of this master thesis project, which reads as follows:

How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?

This question is both socially and academically relevant for several reasons. First of all, media and broadcast consumption still constitutes a major part of time spent for people, with for instance 8 hours and 40 minutes spent on average on media for Dutch people in 2014 (Media:tijd, 2014). Subsequently it remains necessary to research this topic, especially considering the new technological and market developments for broadcasters, as it will be interesting to see how broadcasters adapt to this as media consumption is changing. Moreover, market shares in European countries for most public broadcasters are still at over 30% (European Audiovisual Observatory, 2013), showing that they still hold a very important position in terms of traditional media consumption. That is also why the research question specifically mentions European public service media (PSM) instead of just focusing on a single country, because the comparative perspective will allow for broader conclusions to be drawn as well as the generation of international comparative knowledge. How these European organizations subsequently try to maintain their position in the online realm as well by use of various social media channels is very interesting to investigate. Social media platforms have amassed large user bases over the past few years, Facebook being the biggest with over 1.5 billion users (Constine, 2016), ensuring that these platforms have also become an increasingly dominant domain for media consumption, once more confirming the social relevance of this study.

While there has been much research done on the case of public service broadcasting, including their specific activities on online platforms, employing social media strategically is still a relatively new practice that broadcasters are experimenting with (Van Dijck & Poell, 2015) thus also making a case for this study from an academic perspective. The wider online

remit of public service media has been investigated extensively in more general terms, for instance by Hargreaves Heap (2005), Enli (2008) and Moe (2008b). At the same time, more specific strategies for more audience-focused and participatory online content have among others been addressed by Leurdijk and Leendertse (2009) and Jackson (2009). Still, these two elements of the public service mission and audiences on social media have not been researched in a wider overall study on specific online strategic stances public media companies have. That is, this debate is mostly discussed in theoretical terms as for instance done by Van Dijck and Poell (2015), but no specific examples of differing strategies across public broadcasters in practice are really found in the current academic debate. It is consequently very interesting to compare how some practical elements of social media such as second screen functionalities (Pond, 2016; Wilson, 2016) and personalization strategies (Schwarz, 2016) are viewed as part of the wider strategy public broadcasters have for using these platforms. Therefore, a study into this topic is currently mostly exploratory in trying to make sense of how public broadcasters experience their usage of third-party platforms as a public company in more practical strategic terms as well. Hopefully this study can shed some light on new possibilities for public service broadcasting in the online multi-platform market to prove their relevance in an increasingly competitive media system.

This research is structured in such a way that an extensive theoretical discussion is presented in the next section first. The larger context of the shift from public service broadcasting to organizations operating in a commercial multi-platform media market is introduced in this theoretical framework from a strategic point of view. Subsequently, several issues relating to social media are introduced, including research on specific promising features as well as some barriers for using those platforms for public service media. In the next section the method of the actual study is described: in-depth expert interviews with employees from public broadcasting organizations across Europe, which have been analyzed using a thematic approach. The results of that data collection process are reported in the results section, going into detail about the varying public service missions, the online activities of the interviewed organizations, and eventually their specific social media strategies and their views on using these third-party platforms. Finally, the conclusion discusses the implications of these results for public service media and media organizations alike when it comes to using social media platforms in a strategic way to disseminate content to online audiences. Moreover, some limitations of this study and suggestions for future research into this topic will be provided as well.

2. Theoretical framework

The research question of this master thesis, '*How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?*' consists of many different components that need to be clarified in-depth to execute this research. First of all, the unique history of (European) public service broadcasting needs to be analyzed theoretically, to understand how the current public service broadcasters are operating, since they are usually limited by regulations and policies stemming from historic situations and their public service mission. Related to this general history of public service broadcasting, is the emergence of a competitive media market after the broadcast frequencies were opened up for commercial parties. As a consequence, today's media audiences have the option to choose alternative programming with the arrival of commercial broadcasters in national media systems, which has several effects on the overall strategy of public service media. As an even newer development, new online multi-platform services have also been introduced in the past decade as consumers are also shifting to these flexible services that offer on demand content. One specific successful group of online services, social media services, which have also attracted huge audiences, is introduced in another separate section. These platforms act both as a place where people can discuss broadcast content and broadcasters can engage with audiences but also as a place that competes with traditional broadcast content. Finally, the development of these social media platforms can be introduced within the context of the public mission of public service broadcasters. Only then does the complexity of social media utilization for public broadcasters become clear, since they have to deal with different circumstances than commercial broadcasters and multi-platform companies, as well as increasingly fragmented audiences on these private platforms. All these main points will be developed extensively in the following sections, providing a clearer overview of why the research in this master thesis is a relevant issue for these parties that needs to be addressed, as well as providing a clear outline of main issues that are addressed in the actual empirical data collection process of this study.

2.1. A brief history of public service broadcasting

To understand how public broadcasters are adapting to new developments in media technology such as social media services, the core mission of traditional public service broadcasting needs to be defined first. In a brief history of broadcasting, governments have

traditionally been the ones who allocated access to the broadcasting realm when broadcasting technology first emerged, and they have tried to control which kind of values and beliefs were transmitted through broadcasting by creating and supporting public broadcasting institutions (Brown, 1996). These public service broadcasters had to carry out a public task, although it has often remained unclear what such a public mission should actually entail, as for instance Scannell already addressed in 1989, while similar questions on the actual role of public service broadcasting have for instance also been posed by Picard (2002) and Enli (2008). That debate is analyzed even more closely in later sections of this theoretical framework, as the digitalization of media has reinforced the relevance of such discussions. As Bardoel and d'Haenens (2008) write, public broadcasters are now "at the heart of public attention" (p. 337) in times of digitalization and commercialization. First though, the history of public service broadcasting can be defined in terms of their relative independence in terms of government interference with content (Hanretty, 2009), while at the same time they continue to be dependent on financial government support (Berg & Lund, 2012).

While governments have originally controlled public broadcasting by requiring broadcasters to make sure they adhered to a certain level of diversity if they wanted to make use of a certain broadcast frequency (Trappel, 2008), they have always been largely independent of government intervention with actual content production. This independence took shape in the early days of PSB when the mission of public broadcasters was "universal dissemination of content services as a public good" (Leurdijk & Leendertse, 2009, p. 155). This included a diverse mix of programming available for national audiences, as Scannell (1989) writes, and such a basic idea for public service media persists today. The independence of broadcasters from political interference then is still heavily regulated and in some cases it has even increased because of recent legal changes (Hanretty, 2009), meaning that most broadcasters have a great amount of liberty when it comes to making choices about their audiovisual output. Some intervention does occur though in the current market, for instance through partnerships that have been imposed on broadcasters by policy-makers, especially with cultural or educational entities (Raats, 2012). By inducing such partnerships governments try to ensure that a certain amount of socially responsible qualitative programming is being made, as well as the inclusion of diverse ethnic groups and cultural viewpoints in the media system.

Next to this relative independence in terms of content, public broadcasters have also been characterized by their dependence on the government for their funding. On this front though, it seems that governments have actually become more reluctant to support their

public service broadcasters (Bardoel & d'Haenens, 2008). As Norbäck (2009) writes, a main justification of public funding has always been that this puts additional pressure on public broadcasters to actually create valuable content for audiences, who indirectly fund this content. Now in the digital age, with a competitive market, this pressure is even higher, since it is argued that this funding requires public service programs to be made that the commercial market does not create on its own (Robinson, Raven & Low, 2005). To be able to make such programs as well as maintain a high diversity of content, public broadcasters are no longer just simply publicly funded. Rather, they now have several additional revenue streams such as advertising added to their total income as Moe (2007) notes. Next to a direct license fee or a fee that is included in regular taxes, other income streams used by public service media include thematic subscription-channels, advertising income, strategic partnerships with commercial parties, product placement, royalties and program sales (Moe, 2007; Berg & Lund, 2012). Such income streams are necessary to continue the production of diverse content, and some people have even called for a complete shift to a voluntary subscription PSM model only in which consumers can decide themselves if they want to have public service content (Elstein, 2005) or a complete replacement of the public service broadcaster with other types of government intervention to ensure the commercial market creates the required types of diverse, informational content (Hargreaves Heap, 2005). Such a rigorous shift has not happened yet, but the implementation of minor commercial revenue streams has also in fact complicated things for PSM who are now often also relying on co-production with commercial media companies (Norbäck, 2009), something that can actually also affect the independence in terms of content which public service broadcasters used to have. Still, as Enli (2008) notes public broadcasters do have the capacity to address the entire nation with a wide variety of programming, while commercial parties currently still employ more targeted programming to satisfy advertisers.

That mainly has to do with the public values public service media are required to adhere to as well as required to include in their actual programming. As Nissen (2006) writes, there is usually a legal framework or policy in place that determines that public broadcasters need to represent all parts of the population equally and to provide content not present in the general media market. As a main value the traditional independence from the government in terms of content as was discussed above is usually mentioned, as well as the direct funding by the public and a universality of the public broadcaster in structural terms, meaning that the organization should cater to all parts of society (Brown, 1996). Other values focusing more on the specific content public service media produce include a concern for the national identity,

catering for minorities, a large diversity of content, quality of programming, and creative freedom (Brown, 1996, p. 4). Nissen (2006) distinguishes between three main obligations for public service media that are similar to Brown's values: serving the individual citizen, sustaining a national identity and cultural diversity, and enhancing social and cultural cohesion. To achieve these obligations, several participatory elements can be introduced as well to connect the public with PSM content, making public service media into what Jackson (2009) calls sociable media. Examples of such participatory initiatives, especially social media, as part of the public mission will be discussed later on in this theoretical framework, but first the market position of public service media is discussed more extensively in the next section.

2.2. Public service media in a competitive media market

The core of a business model as Osterwalder and Pigneur (2010) argue, is the value proposition. Even for non-profit institutions like public service media it can be argued that this value proposition stands at the basis of their existence. Simply put in the current market public service media create different types of value for national audiences, who by watching PSM content prove the value of PSM to the government that is funding the public broadcaster, which in the ideal situation once again leads to the creation of more value by the PSM organization for the public with newly amassed public funds. Nonetheless, as Steemers (2003) notes there has been a "steady demise of public service broadcasting" (p. 123) in times of increasing personalization and commercialization.

That commercialization is a development that needs to be addressed first, since it has affected the traditional monopolistic position of public service broadcasters. While at first the radio spectrum in many European countries was only open to the public broadcaster, governments opened up that space for other advertising-supported radio and television networks in the eighties and early nineties (Brown, 1996). At the same time, new technologies such as cable and satellite television were also developed (Brown, 1996), while digital technologies followed a few years later making the media environment increasingly global through border-crossing technologies (Raboy, 2003). As Syvertsen (2003) writes, this presented many new challenges to public broadcasters, who did not only have to compete with new private broadcasters in their own countries, but also had to adapt to new technologies changing the whole market infrastructure as well as international commercial parties who were now also able to enter foreign markets. This complicated the core of

business models for public broadcasters across Europe, since their value proposition, or "the reason why customers turn to one company over another" (Osterwalder & Pigneur, 2010, p. 22) was no longer unique. So although the decision to open up the media market this was initially a part of a process of deregulation of the media markets, it can be said that in the long term this decision caused a lot more work for national governments to regulate and control their public broadcasters, simply because the commercial parties proved to be very strong competitors that were working against the public parties.

As Syvertsen (2003) mentions, commercial broadcasters had the ability to grow increasingly large through international mergers and acquisitions, something national public service broadcasters of course could not do. Porter (1991) explains that national public broadcasters were in no way protected against international commercial parties, since no regulatory framework existed as European Union regulation opened up the media landscape for commercial parties who could air advertisements for a maximum of 15% of program time. As a consequence, no national public broadcaster has since then been completely "isolated from the pressures of the marketplace" (Steemers, 2003, p. 123), with the economic power of major global media corporations far exceeding the government support for PSM on the national level. Questions were subsequently also raised from the commercial broadcasters' point of view about unfair competition, since public broadcasters did not have to work as hard to maintain their position since they could simply rely on government funding. Such questions about the tension between public and private have continued to linger until today, but already in the early days of commercial television the commercial offering was described as inherently different "with its cost-efficient, mass-entertainment programs" (Thomass, 1994, p. 26), helping to legitimize the continued support for public service broadcasting. Nissen (2006) adds that informative, educational or cultural genres are often also imposed on public service broadcasters, since the mass audience target groups of commercial media reduce the diversity in the media system. As some research also suggested (Brown, 1996), the broadcast market would fail altogether without a public service broadcaster, providing additional security for their relatively protected position in the market.

Around three decades later, commercial broadcasters have established themselves next to the public broadcasters in almost every national European market. Audience shares for public broadcasters were at a level between 20 and 50% in 2000 (Hallin & Mancini, 2004), meaning that by then the rest of the market was already controlled by commercial parties. In 2012, the audience shares in several Western European countries for PSM were at a similar level: 36.2% in the Netherlands, 42.9% in Germany, 42% in Belgium, 32% in France and

37.3% in the United Kingdom (European Audiovisual Observatory, 2013). Thus, although the public broadcasters still hold a share of around at least one-third of the market, the commercial broadcasters combined have claimed the majority of the broadcast market. This has everything to do with the newly found freedom of the audiences, who are no longer limited to just the public service content, but now can also choose to watch content made by any of the commercial broadcasters. As such the level of industry competition has only increased going by Porter's (2008) framework for analysis of competitive strategy, which views the increased bargaining power of audiences as well as new commercial entrants to the market as two main factors in determining the overall level of industry competition.

Such a competitive market has also required public service media to think of new commercial income streams to be able to compete with these commercial parties. Steemers (2003) has outlined several strategies of commercialization that could work for public broadcasters, as different types can be implemented in different contexts. These range from the least commercial alternatives with a small popularization of the content and more cost-effective management practices to subscription-based access for additional services, advertising income, co-production measures or even a complete disbandment of public broadcasting leading to a fully commercial market. These strategies all work in various ways, but they do require an adaptation of the original public service remit. Furthermore, as Bardoel and d'Haenens (2008) write, various European nations have decided on different directions for their policy regarding the national public broadcasters, in which the market-oriented approach is the most prominent. Moreover, as Picard (2011) writes, the recent economic crisis has also led to cutbacks for public service media and a reduction in services, also causing public service media to rely more on external sources of funding or partnerships with commercial media companies.

Mjøs (2011) discusses such partnerships of public broadcasters with cross-national media companies like Discovery to secure the continued production of content for the local markets. Although this level of commercialization can sometimes conflict with the public partnership agenda with national non-media cultural and educational organizations as discussed by Raats (2012), it is still necessary for public broadcasters to be able to produce relevant content for their audiences. This has subsequently led to the entrance of commercial revenue streams and interests in the public service media realm, most dominantly with advertising blocks between programming or through co-productions. As of yet though, no public broadcasters have been completely disbanded or replaced by a completely commercialized media market with some regulations to protect the public's interests as for

instance Hargreaves Heap (2005) suggested could be an option. Nevertheless, the introduction of commercial interests into the public broadcasting system is something that is changing the market from the inside, while it could also affect the original independence of public service media in terms of content.

Not all scholars unanimously agree on such a convergence between the public and commercial broadcast systems though. A view opposing this idea for instance comes from Meier (2013), who has looked at the German public broadcasting system and found that the content on the public channels is completely different from the commercial offerings. He believes the broadcast market could evolve into a dual system with public and commercial media clearly distinguishable. On the one side Meier (2013) projects the production of quality content for various audience segments with a predominantly informative angle in the public media system, since entertainment content is already sufficiently produced by commercial parties. On the other side then these commercial broadcasters can continue to offer popular entertainment programming, attracting the major advertisers as well as the mass audiences. As the industry keeps developing it is hard to definitively conclude this debate, but it might well be true that some national media systems will evolve into a dual market like Meier (2013) predicts, while in other markets the public and commercial broadcasters will converge in terms of content using such commercialization strategies as mentioned by Steemers (2003) in their search for audiences. How public service media fare in each country, should subsequently also be analyzed on a case-by-case national basis, as Van der Wurff argues (2007). But to perform such an analysis, the larger strategic context for public service media is introduced in the next section first. This will help with defining the complex position public service media have in a commercializing competitive media market in which incumbents operate on multiple platforms.

2.3. Public service media strategy: between politics and the public

As discussed above, the commercial media market has changed the industry immensely, with trends ranging from complete convergence to divergence, different levels of commercialization, complex partnerships programs, and changing market shares. This can be analyzed using the business model canvas from Osterwalder and Pigneur (2010) of which the value proposition was already discussed above, but an even more revealing approach is to look at the macro-oriented overall strategy that was also briefly mentioned. This is what Porter (1997) calls 'the structural analysis of industries' (p. 13) in which the position of public

broadcasters in relation to other market incumbents as well as possible new entrants or substitute services plays a major role.

Most importantly though when it comes to positioning for public service broadcasters is its unique position between adhering to the political regulations on the one hand, and trying to cater to the public's needs and desires in the market on the other hand. As was discussed in the brief history of public service broadcasting above, public broadcasters are traditionally dependent on governments for funding. Moreover, governments are also interfering more with the content public broadcasters create, since that content needs to promote a certain national or cultural identity as Nissen (2006) writes, as well as having informative or educational value in their programming. On the other hand, the public can now also choose to watch entertainment programming from commercial parties, which can cause a shift in broadcaster strategy to produce a slightly different collection of content than the government requires. Still, the public broadcasters need to adhere to these content regulations to make sure their financial government support is continued as well as that their relative independence is not breached any further by unsatisfied governments that seek to make their mark on a country's media system. In that sense, public service broadcasters are caught between two conflicting stakeholder groups, which makes strategic positioning more complicated for them.

Porter (1997) distinguishes between three often used strategies, namely a cost leadership strategy, a differentiation strategy and a focus strategy. Public broadcasters cannot currently really use a cost leadership strategy, since that is mostly focused on reducing costs and being as effective and profitable as possible (Porter, 1997), making the provision of quality products which is very important for PSM a secondary consideration. Such a strategy then is also more likely one which commercial broadcasters employ, but something which can also increasingly become a public media strategy if a process of heavy convergence and decreased public funding continues. A type of strategy that is already inherently part of public broadcasters because of their imposed public service mission is differentiation. Nonetheless, although the differentiation towards quality informative content can result in added value for the public, it may also cause market shares to drop since such a strategy caters less well to the general mass audience (Porter, 1997). Such a strategy might then be placed under Meier's (2013) divergence theories, although it might be ineffective to continue to reach all national audiences. This is also a main issue with a focus strategy of specifically targeting clearly defined separate market segments, which is the final generic strategy Porter (1997) discusses. Again, this is not an ideal situation for public service broadcasters, since they do need to represent the complete national identity instead of just singling out some specific customer

segments, although they do of course need to provide content for different minorities as well as Brown (1996) mentioned.

As becomes apparent from the examples mentioned above, the extent to which public service media can successfully execute the desired strategy is also complicated by their organizational structure. As Zand (2009) explains strategic renewal, a situation that seems relevant for public service media needing to adapt to new platforms, also requires changes in the organizational structure to make the strategy work. That is, a possible gap between the intended strategy of public broadcasters and the regulations affecting the structure of the organization might develop if these two elements are not aligned in the right way. As Jennings and Seaman (1994) have found, organizations with a higher level of alignment between structure and strategy tend to have better performances. As such, public service media organizations as well as political regulators need to make sure that the public service content offering on different distribution channels does not become out of touch with audience needs or technological developments. To continue to do that they will need to adapt their strategy accordingly and on a periodical basis (Zand, 2009), to manage new developments in the market as smoothly as possible.

It also has to be noted that the overall strategies public service media can employ are limited not only by national regulations, but also increasingly by European Union directives that determine the opportunities for media in European countries. To begin with it can be argued that the EU Council's decision to open up the market with the Broadcasting Directive in 1989 (Porter, 1991) has lowered the entrance barriers and opened up the market for a higher level of competition. As a consequence the level of competition in the market increased tremendously over the years, which has caused public broadcasters to draw out a strategy in the first place. More recently, European broadcast media have been regulated under the 2007 Audiovisual Media Services Directive. This directive regulates among others equal access for viewers, time limits of TV advertising and the protection of minors, as well as encouraging self-regulation and installing quotas for national and European content on broadcast networks (European Commission, n.d.). This means that broadcasters for instance cannot use too much non-European syndicated content and that they can only rely on a fixed level of commercial revenue streams. Considering such European regulations on top of the more specific national regulations, strategic positioning for public service media (as well as for commercial broadcasters) is quite limited as the space in which they can operate or make strategic decisions is not all encompassing.

In the meantime though, many technological developments have made this European legal framework slightly outdated, since this directive does differentiate between linear television and non-linear video on demand content (Metzdorf, 2014), but that distinction has become increasingly blurred. Furthermore, it does not include newer types of digital platforms such as social media services, which are now also occupied by public service media. Such developments are actually part of an upcoming new Audiovisual Media Services Directive, but this has at the time of writing not yet been implemented 9 years after the original directive. The slow tempo in which these regulations are made then complicates the strategic options for public service media, while the public is much more flexible and continues to evolve into different fragmented audiences on different platforms. These varied audience target groups have subsequently become more powerful in recent years, as is discussed in the next section that discusses the fragmented audiences on multiple platforms.

2.4. New media technologies: fragmented audiences on multiple platforms

As explained above, commercial developments have caused public service broadcasters to actively involve themselves with drawing out a strategy for their public service radio and television channels in terms of commercial income to complement their government funding. The multitude of commercial broadcast channels is not the only development that has affected strategies for public service media though, as technological developments have also played a major role in the changing media landscape. Public service broadcasting, present on radio and television, should now be considered as public service media as Lowe and Bardoel (2007) argue. Media forms and technology have converged, as public broadcasters are no longer just active on the traditional broadcast transmission platforms but also on the Internet with converged digital forms of radio and television as well as forms of digital storytelling. Moe (2008a) described some of the early steps the NRK in Norway, ZDF in Germany and BBC in the United Kingdom have taken in trying to use online technologies to expand their public service mission to the online realm. Although these initial activities were marginal, the importance of the online realm for public service media has continued to grow with a new multi-platform media market emerging according to Doyle (2010), which also requires new strategies from the broadcaster's point of view.

Such strategies are also necessary, because in the online realm public service media are not only competing with commercial broadcasters, but also with online-only companies. The framework of Porter (2008) was already used to address the complex position between

the political regulations and the public's desires as a consequence of the entrance of commercial broadcasters in the market, but it can also be applied to online services that may evolve into substitute services replacing the value of public service media. Ellingsen (2014) expands on several successful companies in the online landscape, naming Netflix as one of these companies that starts acting like a TV network on an online platform by offering different types of web-only content on demand. Netflix, which started out as a DVD-rental company and is now most famous for the production of the House of Cards web-based television series, is available to users globally on mobile phones, tablet computers, PC, and most other digital devices including smart televisions (Ellingsen, 2014). Netflix also uses licensed content from other broadcasters and media companies, through which it helps those broadcasters by spreading their content, but on the other hand it can also take away traditional broadcast audiences who can now also watch traditional broadcast content on Netflix. Furthermore as discussed above, although the early forms of video on demand services were included in the EU Audiovisual Media Services Directive, the current platform Netflix offers has involved into much more than just a video on demand platform for which the current regulations are no longer really suitable. Ihlebæk, Syvertsen and Ytreberg (2014) are talking about a post-network era, where public service media no longer are programming on just one or two networks or channels but on multiple networks and platforms. Doing this though is complicated in the larger framework of audiovisual regulations, which continues to see public service broadcasters as predominantly broadcasters instead of media companies operating on various platforms, a typology that does apply to the online-only competitors like Netflix.

Subsequently, public service media need to adapt to this "on demand culture" (Ellingsen, 2014, p. 109) by trying to strategically promote their own content via various digital channels as well. Thus, public service media need to create their own online platforms, on which they offer their traditional broadcast content as well as content specifically made for these online platforms. In terms of PSM's own web content strategies Doyle (2010) distinguishes between the re-use of linear content on digital platforms, new digital content complementary to linear broadcasts and thirdly web-only content with no link to any linear content. But all of these multi-platform strategies require investments in new technologies and expert staff, as well as a clear rethinking of how linear content could work in an online environment, complicating the implementation of this for public service media (Doyle, 2010). Another possible strategy, as proposed by Evens (2014), is actually through cooperating with their closest online competitors in producing new content to be able to compete with them by profiting from their global scale and its own national position. Such co-opetition procedures

are not always allowed by market authorities though, as public service broadcasters might be limited in executing them because of their independent public mission. Nevertheless, these online services have started to compete with the traditional public service media by creating a lot of new content that is available on demand for a small monthly subscription fee, a kind of digital cable-subscription to name it in traditional terms.

This shift towards multi-platform media organizations, as Lowe and Bardoel (2007) mention, does not only affect the organizations themselves, but also the audiences who have changed from passive consumers of linear content to active consumers of a wide variety of on demand audiovisual content. This content is "personalizable, shareable and interactive in nature" (Debrett, 2009, p. 823), and has created a new type of relationship between public service media and the increasingly fragmented audiences. As Bardoel and d'Haenens (2008) write, public service media run the risk of losing touch with younger audiences, migrants, and the less educated groups in society, who can either shift to entertaining content by commercial broadcasters or make their own selection of programming via online, global channels. This relates back to the ideal business model from Osterwalder and Pigneur's (2010) that connects with multiple elements in this theoretical framework, as they define the customer's side of things with three different elements: the actual customer segments, the channels through which those can be reached, and the relationships customers build up with the broadcasting organization which makes them coming back to that broadcaster's content. These three have all undergone heavy changes with the arrival of new digital technologies.

First of all the customer segments, which have become increasingly fragmented due to new personalization algorithms used on digital platforms as well as the on demand culture, allowing them to choose their own preferred content. From a research commissioned by the European Commission it appears that linear television-viewing time is stable across the general European public, but there is a strong decrease among younger audiences (Fontaine & Grece, 2015). From this same report it appears that audience tracking is increasingly done over a period of 7 days instead of just on the day of broadcast, also acknowledging online and delayed viewing, which makes up around 10% of all time spent watching video on either TV or online (Fontaine & Grece, 2015). Next to the audience fragmentation across platforms though, several demographic features also matter when it comes to audiences of different media. As Van der Wurff (2007) writes, media markets in general serve active citizens with a higher education and income much better than people who are more detached from society with lower education and income. On the other hand lower educated groups in society do watch more television, albeit mostly commercial programming (Van der Wurff, 2007). This

can possibly be conflicting with the mission of public service media, which should serve the entire public in the best way possible. For this reason, Hasebrink (2009) argues that audience research should no longer be purely data-scientific, but should also look at how their use of public service and commercial media is embedded in their daily consumption patterns, to for instance show the level of attention consumers have to the public service value of the content. Only then the fragmented audience in today's multi-platform media landscape can be properly assessed, and public service media can continue to serve all audiences on different platforms.

This fragmentation also links up with Osterwalder and Pigneur's (2010) channels element of a business model, which is "how a company communicates with and reaches its customer segments to deliver its value proposition" (p. 26). In the case of public service media these channels include the traditional radio and television, as well as the various newer digital channels such as the public broadcaster's website and social media channels. Such newer channels have been adopted using a strategy called 'follow the audience', which simply means trying to go to those platforms where the audiences also are (Leurdijk & Leendertse, 2009). Leurdijk (2007) argues though that there have been several issues with public service media adopting these new channels, the most prominent claims being that public service media have been too slow in adapting to new online opportunities. There has also been criticism from commercial broadcasters on public service media operating in the online environment. Bardoel and d'Haenens (2008) write that the "commercial sector has tried, and continues to try, to limit public broadcasting to the provision of a free program offering via open, analogue networks" (p. 342), but EU and national regulations currently continue to allow PSM to operate on online channels as well. These developments link up with the reconsideration of public service broadcasters to public media content companies (Debrett, 2009), but this could even go one step further into a 'public service anything' as Donders, Pauwels and Loisen (2012) argue, once again raising questions about what services and platforms can all be included under the public service media moniker. While that debate remains largely unresolved, broadcasters are currently in a phase of innovation and adaptation to figure out fitting programming strategies for each of these different channels and their networks to reach as many different customer segments as possible (Doyle, 2013). Strategy-wise then this means that there currently are opportunities to experiment with online media, but it is not heavily regulated what exactly is allowed for PSM companies and regulations can possibly be introduced in the future which would again limit the online activities from public service broadcasters.

Nonetheless through such current online strategies public service media can reach the

various customer segments and control the audience flow (Doyle, 2013), attempting to create customer relationships. While this used to be easy in the early linear media landscape where customers would already be linked to the monopolistic offerings of the public broadcaster, this has become much harder in an environment where the consumers are increasingly taking control by for instance choosing to watch Netflix amidst many other options instead of programming on the public service networks. Subsequently, it has become very important to create these relationships with an audience to bind them to the content offerings through audience engagement (Moe et al., 2016). This audience engagement or participation can also be used to legitimize the existence of the public broadcasters: if audiences are interacting with public content, there is more reason for policy makers to continue support for PSM. Not all strategies to improve audience participation are successful though according to Bakker (2011), who describes several online initiatives for participatory journalism that failed, while other similar platforms did flourish. Similarly, Sørensen (2014) discusses the use of thematic video on demand portals to manage audiences and establish relationships with them through curation practices. Another strategy is the use of interactive television, in which users can for instance send text messages to the broadcast program (Leurdijk & Leendertse, 2009). The most prominent type of platform for audience participation and engagement though, is currently the social media platform, of which the various types and services will be discussed extensively in the next section.

2.5. Connecting with audiences on social media services

As Jackson (2009) writes, Internet-content and services increase the opportunities for the public to participate in public service media. Early forms of such participatory platforms included simple message boards or live chats where broadcast audiences could discuss media content, but that has now expanded to social media as well. Moe (2013) mentions that public service broadcasters have subsequently also started using social media services (or social networking sites) in order to gain new audiences as well as to engage more with existing audiences. Social media can be defined as "group of Internet-based applications that build on the ideological and technological foundations of the Web 2.0 and that allow the creation and exchange of user-generated content" (Kaplan & Haenlein 2011, as cited in Van Dijck & Poell, 2013, p. 5). These social media sites started as networks where friends could interact with each other, but later on also enabled businesses to open up profiles, meaning that social media also became suitable for business-to-consumer communication and consumer-to-business

communication. This interactivity or two-way-traffic social media platforms facilitate has been challenging for public service media, who as discussed have traditionally only employed linear programming strategies. Social media offer many opportunities though, of which some are discussed here using some key characteristics of social networks.

First of all, the majority of Internet users are also present on social media platforms, as the largest platform Facebook for instance attracted 1.59 billion monthly active users in the fourth quarter of 2015 (Constine, 2016), while Twitter had 305 million in the same quarter (Geuss, 2015) and the Facebook-owned Instagram reached 400 million users in September 2015 (Hook, 2015). A large amount of these users are also younger audiences, with adolescents leading the way when it comes to using social media platforms on a daily basis (Cingel, Lauricella, Wartella & Conway, 2013). As Van Dijck and Poell (2013) write, social media at first had a democratic function where all users had equal opportunity to participate in debates. Uses and gratifications for people to use these platforms are varied though and include social interaction, information seeking and sharing, entertainment, the communicatory utility and relaxation among others (Whiting & Williams, 2013). Gradually some social network users have grown more popular and more prominent with higher amounts of Facebook likes or Twitter followers, thus claiming a powerful position in shaping public opinion via social network algorithms simply because of the reach of their messages. This is also what could attract public service media to these social media platforms, since not only can they reach large groups of younger audiences, they can also try to claim a prominent position in the social media market as well next to their general offerings on traditional media platforms, enabling them to continue to spread their content to all multi-platform audiences.

Next to these major mass audiences using social media, these platforms also offer features to reach target groups on a smaller scale through processes of personalization. Schwarz (2016) mentions that there have been ongoing discussions on if such personalization features should even be part of public service broadcasting which is traditionally intended at mass audiences. Nonetheless he has found that public service media in the Nordic countries for example are actively employing such new functionalities. Sørensen (2014) already addressed the possibility for curation through multi-platform strategies, but as Helberger (2015) writes such practices can also take place on the micro level with individual consumers. She argues that through digital algorithms, on social media but also on other digital platforms, users can be profiled and targeted. Such technologies use the infrastructure of the Internet to collect data on previous visits, clicks and consumed content, which can subsequently be linked to similar newer content also available on the same social media service or any other

platform. On top of that, as Van Dijck and Poell (2013) note, on social networks data is not only collected on the preferences of individuals themselves, but also on the interests of their friends, subsequently creating smaller intertwined communities with shared interests to which content can be distributed. Moreover, since social media allow for users to share content they enjoy, only one person in a smaller community needs to post something for several friends to be able to see it as well. In such an occasion the content is also coming from a trusted friend as well, instead of being distributed top-down from a broadcaster to a mass audience, possibly lending more credibility that the content is something that is interesting for the consumer. Finally, Helberger (2015) argues that these trends of personalization can also help with increasing the diversity of content that is distributed to consumers, as the algorithms can be tweaked in such a way that a diverse range of content is distributed to different customer segments.

As a third incentive for public service broadcasters to use social media platforms, it seems that the companies behind these platforms also see the opportunity to cooperate with broadcasters to tie users to their platforms. These platforms have been developing several services that connect well with the needs of broadcasters, focusing on video distribution. YouTube has traditionally been the dominant video platform online, but Facebook is now a close second with between 18 and 29% of videos watched online being on Facebook (Fontaine & Grece, 2015). The time spent per video is still significantly lower on Facebook though, where it is easier to skip to another piece of content that could also be non-video. Facebook is also experimenting with other features to complement live TV and to become a sort of television platform itself (Winslow, 2015), while several broadcasters are also distributing unique content via Snapchat's Discover feature such as CNN and Comedy Central (Schenker, 2015). Twitter has also been a way for television viewers to share their thoughts on TV shows for a while now, since the real-time timeline of Twitter links up well with the real-time programming on television (Lam, 2014). That can for instance be used by users to commentate live on political debates, but also after the linear broadcast of a show has already finished (Pond, 2016), thus giving also additional value to the public service debate and democratizing function of online media. In that sense, social media are also often used as a so-called 'second screen' complementary to the primary broadcast screen as Wilson (2016) writes. Thus, it appears that broadcasters do not only need to use social media to find new audiences, but social media platforms also want broadcasters to partner with them since it will lead to higher usage rates of their platforms as users can discuss programming and content from public and commercial broadcasters there with their friends.

Linking these three elements of the reach of social media, the trends of personalization and the social media platforms catering to broadcasters back to Osterwalder and Pigneur's (2010) elements of customer segments, channels and customer relationships, some things can already be concluded. Although audiences get more fragmented on online platforms, the total reach of all social media users combined still makes for a very large audience that can be reached by public broadcasters. Furthermore, as public broadcasters need to maintain a high level of diversity in terms of content as well as reach niche audiences, it seems that the personalization features of social media also enable them to do that. The notion of spreadable media (Jenkins, Ford & Green, 2013) can also be linked to this, as they argue that online social media have opened up the potential for audiences to share content as well. In that sense, public broadcasters do not need to share all their content online themselves, as users now also have to possibility to share content they like, thus creating multiple starting points for new diverse distribution chains as well. Finally, social media themselves have also started to facilitate more traditional media companies on their own platforms, hoping to profit partly from their large user bases as well. This can all be connected to the thoughts on a public service anything by Donders et al. (2012), since the public domain is stretched to include many more platforms than just the traditional television and radio channels as well as the public broadcaster's own website. Andrejevic (2013) expands on this by saying that search engines with their algorithms and social media platforms can possibly also be seen as public goods. To what extent that really is possible remains to be seen though, since these social media platforms are of course for-profit companies as opposed to public service media, as is discussed in the next section.

2.6. Public broadcasters versus private platforms

A common theme that has come back throughout the pages above has been about what exactly the public service mission should entail in light of market changes and increasing digitization. Such a debate is now once more taking place but this time with regards to the specific endeavors of public service media on external commercial social media platforms (Van Dijck & Poell, 2015). As Moe (2013) writes, social media have forced us to rethink public service media with a more commercial state of mind. Steemers (2003) already presented several more commercial strategies and income streams public service broadcasters could use, and it could be argued that earlier commercial activities of public service media, allowing advertising for instance, were simply for practical reasons and the generation of the

necessary extra revenue, making it a more passive embracement of the commercial market. As Bennett and Kerr (2011) write, partnerships between commercial parties and public service media in the United Kingdom have actually been quite successful and play an increasingly bigger role for a "360° public service sector" (p. 219). By actively using social media platforms though it could be argued that this is not really a partnership between the commercial social media platform and the public service broadcaster, but it is a situation in which the public organization actively occupies commercial space on the Internet. Here, public service media take an active role in promoting the use of such a commercial platform, a kind of activity by public service media that has not really been seen before at such a large scale. As such, in some countries regulation is also in place that limits the opportunities for publicly funded activity in such a corporate environment to ensure a level playing field (Van Dijck & Poell, 2015), which can affect the strategic choices made by public service media to a great extent. If social media platforms can only be used in a limited way, it would be a challenge to come-up with a complete online strategy targeting all audiences, albeit through differentiation or focus or any other type of strategy. Currently such regulations are not completely developed, allowing public service media to remain active on social networking sites for now to varying extent.

On these social media platforms broadcasters will need to target as many people as possible to make their activities there worthwhile for their public service mission which includes reaching all national audiences. Looking at how most people on social media can be reached though presents a new problem, since entertainment is one of the main gratifications of users that attracts audiences on social media (Karnik, Oakley, Venkatanathan, Spiliotopoulos & Nisi, 2013). Entertainment content is something that also attracts large audiences on commercial television, and something that is increasingly criticized from a public service point of view. Meier's (2013) view for instance projected an informative public service media, while in the Netherlands the state secretary in charge of the public broadcaster also has plans to ban entertainment programming from the public media system (Dekker, 2015). This would bring the core mission of public broadcasters back to providing informative quality content, but the strategic question is if such content will attract similar large audiences on social media platforms.

A second point complicating the use of commercial social media platforms is the loss of control public service media have when it comes to managing their audiences on these external platforms. Are Facebook users watching a video on their timeline from public service media still the broadcaster's audience, or are they simply a user of Facebook watching a video

because it appeared in their personalized timeline? Similar developments in the news industry raise questions about this as well: Facebook's Instant Articles function, embedding news articles directly on the Facebook website, could eventually mean that less people will continue to visit the actual news medium's website (Marshall, 2015). Similarly, as Van Es (2016) has found, allowing audiences to actively participate with and influence a television show via social TV also endangers the control producers have over the content and quality of their shows. Furthermore, as Schwarz (2016) notes in an article on data-driven personalization, commercial social media platforms will likely never give all their data to public service or commercial broadcasters. Some user data may be available for these public service media, but they do not have access to the back-end data that the platform owners do, and can consequently never target their users in such a way as the social media platforms can with all kinds of posts by other businesses active on these platforms as well. Hence, by utilizing the features of social media to become active where a large part of the public is also active, public service media are also relinquishing control of their audiences, which is the opposite of the goal of utilizing social media to connect more with PSM audiences.

On the other hand, several studies have also shown that the use of social media can have a positive effect on audience engagement with TV channels. Lim, Hwang, Kim and Biocca (2015) for instance found that the communal dimension of engagement had a direct effect on the channel loyalty of broadcast consumers. Another study by Wilson (2016) presented the use of social media and second screen applications as delivering an enhanced viewing experience for some genres and audience segments. This enhanced viewing experience does not only take place during the linear broadcast as Pond (2016) argues, but social media also enable viewers to comment on programming after and before the actual live broadcast. As Van Dijck and Poell (2015) add, social media thus actually enable citizens to participate in the public debate, since most of the social media pages are publicly accessible. Moreover, since community building is the ultimate goal of social media engagement (Lim et al., 2015) it seems a clever idea to actually participate in those online spaces where communities have already been formed, namely on social networking sites.

It has to be noted though that audience engagement via social networks is not suitable for all types of content or users, as Guo and Chan-Olmsted (2015) have found. The quality of the content and the user's affinity with that content play major roles as well as the innovativeness of the user to utilize digital features, but such characteristics may of course differ for various types of programming and users. Consequently, public service media can also take up the role of what Burri (2015) calls a "public service navigator" (p. 1341). In such

a model they can simply lend exposure to their own diverse public service content, without putting a lot of their own content directly on social media platforms which could also lead to profits for these third-party platforms. Social media would then merely be used as a platform for the promotion of suitable public service content within these communities, leaving the idea of active audience engagement for all the different types of content via these platforms behind. This would make social media no longer a main element in the overall strategy of broadcasters, since they neither try to differentiate themselves using those platforms, nor do they use it in any other significant way. In such a situation public broadcasters may need to choose what their real priorities are, since treating social media as a side activity might result in an unstructured strategy which can make the use of these platforms very ineffective.

Finally, since the main competitors of public service media still are commercial broadcasters, the differences in how social media can be used between these two entities also needs to be addressed. The suitability of social media platforms for entertainment content should only benefit commercial broadcasters since that is their main programming category, and their perceived credibility of quality is already lower compared to public media (Vila & Kuster, 2014). The second danger of losing control over the audience on social media is something that also applies to commercial broadcasters though, as they also do not own the commercial social media platforms and possibly are in even more direct competition with these platforms in the fight for audiences and advertisers. Nonetheless, commercial broadcasters are in a better position to directly use the predictive function of social media about what audiences like (Schwarz, 2016), while public media are tied to their public mission of offering informative, diverse content and subsequently cannot anticipate too much on the audience's desires. Moreover, commercial media are also more flexible when it comes to producing and distributing international social media content, while the geographical borders limit national public service media on these global platforms. Audience engagement then, is inherently different for commercial and public service broadcasters (Moe et al., 2016), since in the end they have totally different goals in mind when creating their content.

How public broadcasters subsequently try to deal with these differences as well as the other elements of their unique market position in terms of their social media activity is the main focus point of the research presented here. This is an extremely complicated issue, since the younger audiences who are most active on social media hardly have a sense of the traditional distinction between public and private (Van Dijck & Poell, 2015). Public broadcasters might also find it hard to use social media because social media platforms are much more flexible in adapting to market changes and adding new features (Enli, 2008),

while public broadcast policy and strategy evolves more slowly as it is shaped by "the particularities of national legal, regulatory, and policy environments" (Flew, 2006, p. 282). The possibilities of public service media are increasingly regulated, as European media policy was designed in such a way that Internet services could only be complementary to the traditional public service media activities (Moe, 2008b). Online activities being supplemental to regular broadcasts is currently the case in some countries, but in other contexts the options for PSM are more extensive (Just, Latzer & Saurwein, 2012). Claims from commercial media that the presence of public service media in the online realm was unfair competition have mostly been disregarded though, since the European Commission found the provision of quality PSM content via all available channels an important issue (Trappel, 2008). But if public service media are not able to use social media successfully within the constraints of their public mission, the connection with social media audiences could be lost, either to commercial broadcasters or to completely new online-only services.

2.7. A brief summary of online public service media strategy

To summarize the complex issues mentioned above, it could all be brought back to the general online strategy of public service media. As Porter (1996) writes, a company's strategy often changes due to structural changes in the industry, of which the emergence of different social media platforms are certainly one. As written above, public service media can use those platforms and other web 2.0 features to target mass audiences or they can use such online platforms to differentiate themselves from competitors and focus on specific niches and deliver more value to them (Porter, 1997). They can treat social media platforms as stand-alone channels where specified content needs to be distributed, or they can simply use them as an extension of their own platforms by simply viewing them as spaces for promotion as Doyle's (2010) distribution strategies explain. They can also actively engage with different parts of the audience or they can just use these platforms as distribution channels. Furthermore they can do this through strategies similar to commercial parties or by continuing to emphasize their public service nature. Important to note though is that the chosen strategy can only be really successful if the structure of the company allows it to work (Zand, 2009), thus referring back to the government and regulatory structure that will always be a part of public service media. This structure that is imposed upon the public service media organizations across Europe could conflict with what the more flexible online media audiences want, placing public service media in a tricky situation. As was also clarified in this

theoretical framework, these audiences have started to create their own media consumption patterns by use of social media platforms, instead of just consuming what is distributed to them via linear channels by traditional media companies. Exactly how public service media adapt their strategy then is complicated, because they do not only need to fit their strategy to the newer dynamic platforms, since the older traditional media have still remained very important as well. How exactly European public service media are dealing with these issues, is the main research focus of this master thesis.

3. Method

As discussed above, the topic of public service media has been researched extensively in the academic debate. How these public media deal with newer digital developments like social media in practical terms though is still relatively new and has not been researched that much as of yet, which subsequently makes this thesis exploratory in nature. Furthermore, since this thesis project intends to make sense of how public broadcasters themselves experience their use of social media, a qualitative approach is necessary to gain valuable insights on the current use of social media platforms for public broadcasters that can help to shape future social media policy. Hence, the following research question was posed in the introduction:

> *How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?*

This question takes most of the things that were discussed in the theoretical framework into account on a contextual level, but in the end focuses mostly on the distinction between traditional public service broadcasters and newer dynamic and commercial social media platforms, and how that fits into the wider online strategy of public service media. To research this, it seems that a methodology using qualitative expert interviews is suitable for several reasons. Expert interviews fall under the category of qualitative interviews and are defined as "a semi-standardized interview with a person ascribed the status of an expert" (Littig & Pöchhacker, 2014, p. 1088). As Lindlof and Taylor (2010) write on the value of qualitative interviews, first of all they can be seen as a source of information on what happens in particular settings that cannot be retrieved through other means of observation. This seems especially applicable for this study, since for instance through a case study approach it would remain largely unclear how public broadcasters experience their use of commercial platforms as a public institution themselves, as case studies usually take an outsider perspective where the researcher has little control over the research topic (Yin, 2014). Other qualitative methods like focus groups or a content analysis are also not feasible for this research, either due to geographical constraints of bringing experts together or due to social media posts not giving direct insights into how social media are used from the public broadcaster's point of view. Second of all, qualitative interviews help with "understanding the social actor's experience and perspective through stories, accounts and explanations" (Lindlof & Taylor, 2010, p. 173), something which needs to be achieved to be able to answer the main research question.

Finally, the use of expert interviews is a method that also been used in several of the articles cited above in the theoretical framework (e.g. Doyle, 2010; Raats, 2012), showing the value of this method for research into the topic of public service broadcasters.

Something in the research question that has not really been addressed yet is the appearance of the word 'European'. It is necessary to research this topic from a comparative perspective with multiple national public service broadcasters under investigation to be able to determine strategies that work and do not work in different contexts. Previously for instance Moe (2008b) and Bardoel and d'Haenens (2008) have also taken such a European focus for their studies, and European public broadcasting systems have also been the most developed and subsequently the most written about in general, with Hallin and Mancini's (2004) influential study for instance also focusing on mostly European countries. Furthermore, since interviews with employees from different European broadcasters are held, it is helpful to have some additional context on the respective media systems, which seems the most feasible if the study is limited to countries within Europe on which most research has been done and for which the overarching context of the Audiovisual Media Services Directive also applies to all European Union member states. On top of that, this research was performed partly in cooperation with Senior Advisor Media Policy Sjoerd Pennekamp of the Dutch NPO, who also has several contacts with several public broadcasters across Europe that could be interviewed. Following from this, something that was also addressed indirectly in the theoretical framework, it also has to be noted that this research focuses on the overarching broadcasters or broadcast channels and how they act on social media. That is, the social media activities from individual broadcast programs or shows are not considered here, but only how the public service broadcaster themselves try to promote their own overarching organization or networks as a whole.

3.1. The research sample

To get a clearer overview of how different broadcasters deal with the issues at hand, 10 qualitative interviews of around one hour were performed with digital strategy and/or social media departments of several public broadcasters across Europe. These interviewees have been selected using statistics on the Internet adoption rate in these countries, using the most recent global data from the World Bank (2014), since in countries with higher adoption rates it seems logical that public broadcasters here should be more experienced with Internet usage and more inclined to use digital services and social media. A list of over 20 European

Broadcasting Union (n.d.) public broadcasters operating on a national level in European Union member states with the highest Internet adoption rates was compiled, with relevant contacts or employees contacted via a personalized email with a request for participation in this research project. Contact details of the relevant contacts were obtained partly in cooperation with the Dutch NPO, partly through cooperation with the EBU Eurovision Social Media Trends Group and finally through extensive searches via the broadcasters' websites as well as professional LinkedIn pages. In the end 11 experts at various contacted broadcasters were able and willing to participate within the given research period before the deadline of this research project in June 2016. At least 11 other people from various other European broadcasters replied to the research requests as well, but they were either too busy to participate, not interested in the research project or not in the right department to be able to discuss the topic with the researcher. The personal details of the final participants can be found in Table 3.1, including their employing organization, the European country this organization operates in and the job title of each interviewee. The exact names of the specific participants in the study have been made anonymous. Several of these experts were either fully in charge of the wider social media strategy at their public broadcasting organization or were directly contributing to the main social media activity of these organizations. As such it was assumed that these respondents were able to reliably and validly elaborate on the social media strategies their organizations use, thus being a good representative sample of the wider population of employees concerned with social media at European public broadcasting organizations.

Table 3.1. Alphabetical list of participating countries, their public broadcasters and the role of the interviewees

Country	Public service media organization	Role
Estonia	ERR	Two participants: Head of Marketing & Communications and one of the Social Media Managers
Finland	Yle	Head of Market Intelligence & Social Media
Germany	ARD	ARD Online Coordination & Social Media Manager

Germany	ZDF	Head of Digital Strategy
Ireland	RTÉ	Head of Communications & Brand Development
Netherlands	NPO	Senior Advisor Media Policy
Spain	RTVE	Transmedia Coordinator
Sweden	Sveriges Radio	Development Editor of Social Media
Switzerland	SRF	Online Project Manager in the Multimedia Department
United Kingdom	BBC	BBC Digital Strategy employee

The ten interviews with the responsible persons from these organizations were conducted between the 11th of May and the 8th of June 2016. Due to geographical constraints most interviews were conducted digitally via either telephone or the Skype audio/video-calling software program, except for the Dutch respondent who was interviewed face-to-face at the NPO headquarters in Hilversum. The interviews with the German respondent from ZDF, the Irish respondent and the Swedish respondent were conducted via a telephone conversation on speaker to be able to record the interview. The two Estonian respondents, the German respondent from ARD and the Swiss respondent were interviewed using an audio call via Skype. The Finnish, Spanish and British respondents were interviewed via a Skype video call. The expert interviews lasted between a minimum of 56 and a maximum of 74 minutes. Of all interviews two recordings were made, one with Quicktime Media Player on a MacBook Pro and one with the Voice Memos app on iPhone as a back-up recording. Apart from some very brief Internet connection issues and audio issues with the Swedish respondent's computer which resulted in the interview being conducted via telephone, all interviews went smoothly. The two audio recordings per interview were used to transcribe the interviews ad verbatim which was done using the online transcription tool *Transcribe* (https://transcribe.wreally.com/). The two recordings per interview were used to ensure the quality of each transcript by being able to listen to unclear audio fragments in the back-up recording as well. The full interview transcripts as well as the audio recordings can be made available by the author upon request.

3.2. Operationalization and topic list
In the theoretical framework several interesting topics came forward regarding public service

broadcasters and their use of commercial social media platforms. To assess how public broadcasters across Europe experience these topics and issues, these topics have been operationalized in the form of topics and interview questions that have been used during the semi-structured qualitative interviews. In total around 25 main interview questions are asked, keeping in mind the total of 20 to 30 main questions Hermanowicz (2002) advises for qualitative interviews. This number naturally does not include several probes or sub-questions to extract more detailed information and experiences from the interviewees. Some of these sub-questions are also found on the topic list, but this of course does not include possible questions that arise during an interview itself. Every topic consists of at least three questions, making sure that the underlying concepts as discussed in the theoretical framework are addressed in the correct way in the interview, thus ensuring the validity of this research. Since the interviewees come from different countries, some exploratory research into the country's media system and the public broadcaster's offerings will of course also be done. This may result in additional questions about interesting regulations or online projects specifically for each interview, and are hence not part of the standardized topic list. This standardized topic list with the relevant interview questions can be found in Appendix A, while the main topic categories are explained here:

Personal details and function description of the interviewee

First of all, several questions are asked to get a better overview of the exact position the interviewees occupy in their public service media organization. This is mainly done to be able to contextualize their answers on the other questions, since it provides insights into the power and independence they have within their organization, as well as their professional experience with (social) media.

The public service media organization

The second topic concerns the actual public service broadcaster the interviewee works for. Questions in this topic investigate the core public mission of the organization using elements from Nissen (2006) and Brown (1996) as well as its independence from the government in terms of funding and content. For instance different types of commercial revenue streams the broadcasters can use as outlined by Steemers (2003) are also discussed as well as the main content genres the broadcaster provides. The different networks and channels of the public broadcaster are also investigated, since this can possibly affect the type of strategy that is being used online and on social media platforms.

Strategic decisions in a competitive digital media market

Next, using the wider theoretical ideas of convergence and divergence and Porter's (1997)

strategic framework the main strategy of the broadcaster is researched. Especially how their own public service media organization is acting in this competitive environment is researched, as they might try to differentiate themselves further from commercial parties or they might employ certain focus strategies only targeting specific audiences. Within this changed media landscape it is interesting to see how these public service media try to compete or possibly also cooperate with commercial broadcasters, for instance using a co-opetition strategy (Evens, 2014). Comparisons between the commercial parties in the country in question and the public service media organization are logically also made.

Key activities within the competitive digital media market

Once the wider strategic choices of the broadcaster have been discussed, some key online activities by broadcasters are discussed, for instance by looking at success stories from the broadcaster themselves or by focusing on best practices of other organizations. Using among others Doyle's (2010) framework on multi-platform strategies, it is investigated what specific platforms these organizations have possibly developed and what their main activities on these platforms are? Examples of successful and or failed projects are also discussed, as well as how national or European regulations enable or limit public service media in taking online opportunities.

Social media platforms

As a specific category of online services that can be a key activity, social networking sites will be discussed. Here it is researched on which platforms the organization of the interviewee is active and what the strategic reasoning is to use precisely those platforms. On a more micro level, specific social media strategies they might have for individual platforms are also discussed. Do they use different pages or accounts to cater to niches, or do they try to reach mass audiences? The differences in functionalities as well as audience groups will also be discussed, following from Osterwalder and Pigneur's (2010) channels and customer segments. Moreover, the complicated issue of scheduling content for such a non-linear platform (Doyle, 2013) is also discussed as well as the possible loss of control over the audiences, which can complicate the strategic utilization of such promising social media platforms.

The public service mission on commercial social media platforms

This topic tries to explore how the public service media organization views these commercial social media platforms using the theoretical foundations of Van Dijck & Poell (2015). Is there regulation in place that prevents public service media from doing certain things on social media or prevents them from cooperating actively with these platforms to use new social

media features? How social media activity from commercial parties is perceived in comparison to their own activity is also researched here, as well as if there are certain strategies public service media use to operate on these private platforms with a public mission in mind.

<u>Concluding questions and remarks</u>

Finally, to conclude the interview the interviewee is asked for any final remarks or topics on social media that have not yet been discussed in the interview. Other remarks the interviewee may have or suggestions for public service media strategies in the online world are also welcomed here, as the interviewee has a final chance to speak freely about the research topic and the things he or she finds interesting.

3.3. Data analysis

The transcripts of these qualitative expert interviews have been analyzed using a thematic analysis. Gavin (2008) mentions that such an analysis process can be used for several types of qualitative data, such as interview data, case studies, and for observations. Guest, MacQueen and Namey (2012) note especially the comparative features of applied thematic analysis, which seems especially relevant for this study when interviews and cases from different European media systems are going to be compared. The data has been logically coded, a process Boeije (2010) describes as "a means to break up the data into smaller parts" (p. 93) and "a tool with which to create order" (p. 94). That is, during the coding process, each individual theme or topic that was found in the theoretical framework and operationalized in the section above has been analyzed in a structured way by collecting quotes on similar topics and looking for similarities and differences. Excluding the personal information of the interviewee, this has lead to three main topics in the results section: the public service media organization itself with its mission and organizational structure, the key online activities in a commercialized media market, and all social media activities including used strategies and the debate on the public presence on the third-party platforms.

For each of these themes, the individual codes of different types of answers per question and sub-question have been compared to produce interesting insights into the different experiences public broadcasters may have with the growing importance of online services and social media. This coding process also allowed for a discussion of separate categories that emerged per theme, after which a thematic comparative analysis was performed for all the researched themes together. Such a process happens through

"qualitatively comparing the content of narratives and highlighting similarities and differences between two or more data sets" (Guest et al., p. 162). This has lead to several interesting sub-themes and insights into how public broadcasters across Europe experience their use of commercial social media platforms. An overview of the main themes and their sub-themes can be found in Table 3.2. The full results with accompanying quotes and explanations per theme and sub-theme are presented in the next section.

Table 3.2. Overview of main themes and sub-themes

Main theme	Sub-themes
The public service media organization	- Public service mission
	- Organizational structure
Online activities	- The public service broadcaster's own platforms
	- Competition with commercial parties
	- International exchange of knowledge
Social media	- General social media strategy
	- Other success stories and issues on social media
	- The different social media platforms
	- The public mission versus commercial interests

4. Results

The data from the interviews with employees from public broadcasters across Europe have been analyzed thematically following the topic list that was described in the Method section above. This resulted in three main topics that were found, building firstly on the broad theoretical foundations of public service media organizations that were outlined in the theoretical framework of this study. Subsequently the wider online activities of the different public service media organizations are discussed secondly to provide sufficient context for their specific social media activities as well. The social media activities in particular are finally analyzed in terms of the general strategy, the different available platforms and their respective features and the debate on to what extent public broadcasters can actually use these commercial third-party platforms.

4.1. The public service media organization

4.1.1. The public service mission

As expected, all interviewees for this study acknowledged the public origins and public service mission of their organization. The traditional triptych of inform, educate and entertain was mentioned by most interviewees as still being relevant today, although be it to a different extent. Especially entertainment was mentioned as an outlier since in the Netherlands for instance, recent regulation has caused entertainment to be minimized for the Dutch public broadcaster, while the Estonian respondent also emphasized entertainment as being the least important. Next to that, preserving and promoting the national language and cultural programming also played a major role in the mission of several interviewees, with for instance a specialized historical drama about a famous Spanish queen or programming about minorities in Switzerland:

> "I think we always, we will never be very cool, and we don't have to I think, it's not our mission, but I think people should still take us serious, they should still get what they expect from us, and this could be serious information, the sports, some level of entertainment content of course, because we're doing lots for cultural events as well, for niche audiences and so on."
> – *Swiss, SRF*

Such cases subsequently confirm the traditional public values outlined by Brown (1996) and Scannell's (1989) traditional views of public service broadcasting, which according to this respondent will never be very cool but is still necessary for society to function. Overall, most

interviewees had very similar views on the public service mission of their organization, although the level of regulation of this mission and the organization overall also differed across nations.

The political influence on their organizations was described by some respondents as non-existent, with the content production clearly separated from politics according to the Swedish interviewee and no restrictions in place in Finland. In other cases though, politics did have an effect with new regulations and government plans coming out in fixed periods of for instance 5 or 10 years. At the same time some respondents also mentioned having to deal with possible upcoming changes, such as a referendum on the PSM's funding in Switzerland, a new Royal Charter coming up in the United Kingdom and a recently passed new media law in the Netherlands. Furthermore, the European Audiovisual Media Services Directive which is currently up for renewal was also acknowledged by some respondents, mentioning that they would have to deal with any changes forthcoming from that legislation as well, but currently did not really feel limited by it.

Regarding the funding of these organizations, all organizations were either financed through a separate license fee, a special tax for the broadcasters, or directly from the overall state budget. Changes in funding systems are ongoing though, as Berg and Lund's (2012) views on a license fee system active in the Nordic countries have already become outdated with Finland's Yle switching to a tax-funded system in 2013. The issue discussed the most in terms of funding was the lack of resources available to try and develop the organization's online offerings on different platforms, including their own platform. Especially in some of the smaller nations in terms of population the available budget proved to be a bigger issue than any regulation in terms of the public service mission:

> "So we kind of have a free hand to do what we want, they're not really saying that we cannot do anything... but we don't have the resources to put a real effort to maximize the potential." – *Estonian, ERR*

> " Yes we can do more but when I look at ARD and ZDF, because they have a bigger audience, more money, more people working on it, so if I think in products, or quality wise I'm really envious..." – *Swiss, SRF*

> "So between 2008 and 2012 RTÉ reduced its operating costs by over a 130 million, and over 500 staff left the organization as part of a restructure... in the current time the commercial income is showing a modest recovery and it is coming back up, but public funding remains in

decline in real terms... there hasn't been increase for over seven years, and rates of evasion in Ireland are among the highest in Europe, so it is a financially challenging situation for RTÉ for sure..." – *Irish, RTÉ*

As Moe (2007) already concluded, some commercial revenue streams were allowed for most public broadcasters in this study as well as is for instance confirmed by the Irish comments above, but these income streams were mostly marginal. This most commonly included the sales of content rights to internationally operating video on demand-parties like Netflix, limited advertising time on the broadcast channels only and direct sales of content to consumers via for instance DVDs or affiliated merchandise, which are some of Steemers (2003) mentioned strategies for commercialization. In Spain though the commercial revenue streams were actually cut off in 2009, making the public broadcaster RTVE completely publicly funded again, although the overall budget has been slightly decreasing since then. In The Netherlands the funding has also decreased, while the Dutch NPO was told to look for more external funding to finance their activities, thus confirming Picard's (2011) view on financial cutbacks for public service media as well.

4.1.2. The organizational structure

This core public service mission that sets these organizations apart from their competitors in terms of content and funding was often found as affecting the online and social media strategy of their organizations as well. Already in the organizational structure it quickly became apparent that online and social media activity is not yet a fully developed core activity for most of the public broadcasters. The Swiss respondent put it as follows: "...the main product or content or whatever we produce is for TV and Radio, because of this regulation as well, we are broadcasters so this is our core." Subsequently, online and social media did not always have their own departments, as they were originally launched under the main television or radio branches or in the communications department. Consequently not every respondent felt that social media had the right position in the organizational structure, for instance in Estonia: "We both work for the marketing department, although I do believe that social media is not only about marketing..." Sometimes though the social media activity actually was not a part of communications on purpose as the Swiss respondent explained, or the coordinating social media role was only added later as the Finnish respondent mentions:

> "So I am half strategy and half media department, fifty-fifty, and in the media department I am the Social Media Manager since February, this is a new role that has been started because there was this need to coordinate what activities we are doing in social media..." – *Finnish, Yle*

Alternatively, several interviewees also mentioned the promising start that was given to their online media or innovation departments, but that they were later disbanded and brought back to belong under the main TV and radio departments. In The Netherlands for instance an Innovation and New Media department was launched in the early 2000s, but later disbanded due to cuts in the funding. In Spain, something similar happened:

> "The interactive department, originally when it was created in 2008 it was like, it was on the same level as TV and Radio... (...) It was a very important project, and then for 5 years, no, three years, we were like disbanded... (...) the structure changed, and then we were dependent on TV... (...) and then that was three years, until December 2014, and then again we were independent, working directly for the head of the whole company, and we've been like that for over a year, for something like sixteen months... and now again, this week actually, we are again dependent on TV..." – *Spanish, RTVE*

On the opposite end of the spectrum, in Sweden the social media activities were clearly separated from the other online activities and newsrooms:

> "I don't work with the website or the on demand application at all, I am a social media strategist, and I'm part of a small team with 4 people..." – *Swedish, SR*

Nonetheless, it was more often than not the case that the interviewees were not solely responsible for social media, but also for the digital strategy or even the overall communication and marketing strategy of the public broadcaster including traditional distribution channels. In Ireland for example the main accounts of the organization were moderated by the communications department, while the specific accounts for different services such as the video on demand platform and specific radio stations were controlled by different editorial departments belonging to a different main division altogether. At the same time, it seems that in the United Kingdom and Germany social media has always been a part of the wider digital strategy departments, thus again being directly connected with the online activities of these public broadcasting organizations as well. As such it seems that these companies for now only really value their social media as part of their wider online

communications strategy, instead of considering it as a stand-alone important distribution channel. Connecting this to Zand's (2009) notion that a strategy can only work if the structure of the company allows it to work, it seems that most public broadcasters have not yet fully adapted their corporate structure to the opportunities multi-platform distribution offers. At least, it has become clear that there is not yet one universal way in which public service media structure their organization towards the use of online and social media platforms as well.

4.2. Online activities

4.2.1. The public service broadcasters' own platforms

These overall online activities also differed across the different European organizations that were interviewed for this study. Most prominently, the own public broadcaster's website was the most visited platform as a landing page that offers a diverse array of different content on the website. In some cases though, the specific website of the main TV broadcast channel was more popular than the main platform of the overarching broadcasting organization, as was for instance the case with ETV.ee being larger than ERR.ee at ERR in Estonia. Nonetheless, most organizations tried to keep all their online activities centrally connected to one platform, even if multiple web pages existed:

> "But that's a direction we are taking, it's that we... catch-up television you can do there [on specific stand-alone program websites], that always works with the NPO Player. And that NPO Player functions in the same way everywhere, so the recommendations you get, that is the trajectory we are on now, those are the same everywhere." – *Dutch, NPO*

This NPO Player the Dutch respondent speaks of is the central piece of software for their online video on demand catch-up television service. This was something that most broadcasters also had: the BBC iPlayer in the United Kingdom, ARD Mediathek and ZDF Mediathek in Germany, Yle Areena in Finland, RTVE a la carta in Spain, Play SRF in Switzerland and RTÉ Player in Ireland. In some cases though the on demand service was not a stand-alone platform with its own brand on the website, but was just included in the general website layout, which was the case at Sveriges Radio and ERR in Estonia. Notably though, it also became clear that for all interviewed public broadcasters, their website has started to become much more than just complementary to their traditional broadcast offerings, and these platforms are no longer only catch-up services, but they are also becoming the home of web-only content. Lowe and Bardoel's (2007) theory of public service broadcasters becoming

public service media is subsequently more than confirmed, as they are using newer strategies for the multi-platform market they operate in as Doyle (2010) predicted. One of the German respondents explains one of their upcoming offerings, which will have no link to TV or radio broadcasts at all:

> "We try to do something that is either an extension, but a very free and very far extension of the television idea, or to do something that is outright not made for television at all. That is video for these new platforms, and if you take a look at the new offering that will start in October, jointly with ARD and ZDF, for people in the age group 14 to 29 (...) It will be online-only... there won't be any television channel and there won't be any radio channel. And so, this is the first really big step, where we'll produce content that does not have any connection to any TV program or radio program at all because there won't be any channel. (...) What we hope is that this type of producing content for these new distribution vectors, uhm, will somehow feed back into our traditional program making, and will also in the end... will lead us to a content offering that is much more diverse today." – *German, ZDF*

This thus leads to a situation Ihlebæk et al. (2014) mentioned, in which public broadcasters now need to schedule their content on multiple platforms and are no longer limited to simply linear scheduling. To adapt to such an on demand culture (Ellingsen, 2014), quite a few public broadcasters are also starting to use some of the most prominent features of the Internet, namely the ability to personalize content for individual consumers. In the Netherlands and Germany a personal identification account for website users will be launched in the autumn of this year, while such an offering is already active right now in Ireland and Finland:

> "So we have underway our Yle ID, Yle Tunnus that's in Finnish, that we are trying to get by the end of next year a million Yle ID users, using Yle services such as NewsWatch app and Yle Areena, and we have just launched a Sports site with this Yle ID. So, getting enough people that are logged in and Yle ID users, we then hope to use that data in modeling recommendations for un-logged in users, so a wider user base. So, that's helping us to be more data-driven, so more like Netflix in the user experience I suppose." – *Finnish, Yle*

Next to these strategies of personalization, many public broadcasters also mentioned the creation of web-only content. Examples include a web-only award show format running simultaneously to the traditional award show broadcasted on a TV channel in Spain to the BBC3 channel in the UK which has been turned into an online only channel. Nonetheless,

some of this content was later also again re-used for TV and just as with the German example presented above still functioned towards the main TV and radio activities as well:

> "Now we could produce these web series, and some of them they were on the web, and later we broadcasted them on TV, and some of them were really just web-only, we left it completely on the web, and yeah this was cool, since 2013 we can do that." – *Swiss, SRF*

> "There is a small movement towards making more web-only content… so content that hasn't been on radio or TV, but in general, yes, our online activities serve our radio, TV and on demand content." – *Dutch, NPO*

4.2.2. Competition with commercial parties

Compared to the traditional broadcast market with only commercial broadcasters, the competition in the online environment is even more intense with video on demand services as well (Ellingsen, 2014). Not only commercial broadcasters can be seen as competition here, but also newspapers, online-only media companies such as Vice Media and Buzzfeed and video on demand services like Netflix can be said to be competing with public service media. Nonetheless, all interviewees argued that their online activities were a rightful intervention and even a necessity to ensure public values are still being transmitted to consumers. Here again the public service mission played a big role, setting public service media apart from any commercial offerings:

> "We need to be able to provide something that isn't just a replica of what the commercial market is providing, so I think we're trying to make sure that all of our online services, whether it's our news service, whether it's our children's services, whether it's iPlayer, which is our online TV service, are distinctive. (...) There's just me speaking personally here, but the very same things that make public service broadcasting a necessary intervention in the broadcast world apply to online as well, so I think the things that we produce online are different to the things that a purely commercial provider would and that has benefits to UK citizens and UK consumers." – *British, BBC*

It actually appears to be that most of the public broadcasters actually were the first in their national market to start these services, which subsequently informed consumers about video on demand functionalities, as was the case in Finland. The Dutch respondent expands on this idea by saying that their activity actually made it harder for commercial broadcasters to also

successfully start their own VOD services, since consumers were accustomed to the free availability on the public broadcaster's website. Both quotes from the interviews with the Finnish and Dutch respondents can be read here:

> "Everybody thinks well of Yle Areena and it has paved the way making media consumers and online users accept this VOD idea, and other commercial TV stations they have their own VOD services, Areena is the biggest and has the most content and most viewers, but these commercial television stations' web media, they are also quite successful too..." – *Finnish, Yle*

> "But because we, as I can say, as the first mover set the tone and actually taught people that they could view all our programs online (...) of course it's harder for, let's say RTL, to say 'no I only want to show this for free for 7 days' or 'I want to ask a small sum of money for this episode', that model is frustrated because we taught the audience something." – *Dutch, NPO*

Other comparisons with commercial parties also occur, especially when it comes to the regulatory debate if public parties are allowed to do everything they want or if that might harm the commercial market incumbents too much. Most interviewees mentioned that discussions were ongoing with regulatory bodies or commercial companies in the market about the presence of these public parties as their competition, but that they also continued to be able to mostly do what they want in the online realm as well.

> "… of course we had, we've had intense debates with newspapers about our news coverage on the Internet and those debates with private broadcasters about what we shall do and what we shouldn't do and this is not without conflict, but in the end, this being Germany, we are a quite consensus oriented country in the end, and we somehow found something that most of the people can live with." – *German, ZDF*

> "There is a controversy, and many of the Swedish newspapers are... uhm, are having difficulties to uhm, to [make money with advertising online]. So a lot of all the Swedish newspapers managers are not so fond of Sveriges Radio doing that much content, for example text and pictures on the website as competition..." – *Swedish, SR*

International VOD platforms like Netflix are also increasingly active on the European market, with for instance it having "a phenomenal rise" in Finland according to Yle's interviewee, but simultaneously "doing really poorly" in Estonia according to the respondents at ERR.

Subsequently, this also contributes to a continued fragmentation of the audiences as Fontaine and Grece (2014) also found, with some respondents saying that they especially see younger audiences using services like Netflix. Nonetheless, most public service media organizations admitted that they were licensing some of their content to commercial video on demand services like Netflix as well, thus engaging in a process of co-opetition. As Evens (2014) explains, this is actually a process of simultaneously competing with companies, but at the same time also partly cooperating with them. In a way, this was something parties already did for traditional distribution channels as well through licensing their content to pay-TV channels for instance:

> "So these kind of licensing deals here we are accustomed to in the old world already, but we do that with the new players as well, so Netflix has some... has acquired some licenses of our programming, Amazon did so, Maxdome has it and... yeah, it's like, like most of these newer relationships with the digital players, it's a form of somehow well co-opetition, it's some sort of cooperation and it's also competition... you cannot just make it a clean black and white thing anymore." – *German, ZDF*

So although most of the interviewees accepted the arrival of Netflix and have also started to distribute some of their content via that third-party platform, not everyone saw only the advantages. The Finnish respondent mentioned the fact that the arrival of Netflix raises the prices to acquire the rights to international content for their own VOD services, while the Dutch respondent also was not very fond of this added competition:

> "…and if you start bringing your content to Netflix, then you kind of undermine the position you can have with NPO.nl, so that cannot really happen." – *Dutch, NPO*

4.2.3. International exchange of knowledge

In that sense, it seems that these public broadcasting organizations are thus also watching the international competition to see what they do, which allows them to improve their own content and distribution services. This was a theme that was not explicitly discussed as a part of the theoretical framework for this study, but throughout the interviews it turned out that many broadcasters looked at their neighbors to learn about new strategies and technologies. "No need to reinvent the bicycle right?" one Estonian respondent mentioned when discussing how they looked at Yle in Finland and the BBC in the United Kingdom among other examples. The Swiss respondent mentioned their own VOD service Play SRF, which looked

quite a lot like the BBC's iPlayer, as well as looking at similar-sized countries such as Denmark and Sweden to get a better comparative perspective. Not only public service broadcasters served as inspiration though, as for instance the Finnish respondent mentioned looking at American media companies without the traditional media legacy like Buzzfeed for their social media strategies. The interviewee from the BBC confirms that they are for instance also looking at such companies for specific strategies to target younger audiences:

> "We look at what other PSBs are doing, and more generally just what other media organizations do... people would look at what, take inspiration from how Vice as an example, Vice Media as an example are serving those younger audiences which are becoming harder for us as an organization to reach, that... those sorts of things will feed in to how we look to change some of our products and services..." – *British, BBC*

Next to being inspired by what other companies are doing, several broadcasters also mentioned the European Broadcasting Union as a platform for exchange. One of the Estonian interviewees as well as the Irish interviewee for example mentioned yearly summits where all the public broadcasters and other members of the EBU come together to exchange knowledge specifically on social media. Furthermore, some of the interviewees were also part of a specialized EBU social media expert group, which also lead to an improved exchange of information and successful social media strategies for public broadcasters. Moreover, as the Finnish respondent explained, the EBU is also actively used as a platform to cooperatively address potential partners like Facebook, which can subsequently make it easier to use such platforms as public service media:

> "We want to have a good relationship with them [Facebook] and we want to make sure that the public service broadcaster's needs are being considered... and as [EBU Contact] may have said, he's gathering forces from the smaller EBU members, to sort of like jointly address Facebook..." – *Finnish, Yle*

4.3. Public broadcasters on social media

4.3.1. General social media strategy

As previously mentioned above the public broadcasters are already collectively trying to improve their position in respect to the social media platforms, but they of course also have their own strategies for these platforms. These differed greatly across the different public

broadcasting organizations that were interviewed, and the results will be discussed in this section.

To begin with, it was found that regulation of social media activity both from government institutions and from the public broadcasting organizations themselves differed greatly. Respondents from Estonia, Finland, Germany, Ireland, Spain, Sweden, and Switzerland said that there were no limitations on using social media whatsoever, allowing for open-minded use of social media and plenty of experimentation. At the same time the respondent from the BBC mentioned that they need to argue why they want to use a particular new platform first before they may spend public money for using that platform, while the NPO in the Netherlands can only be on social media for the promotion of their content. Nonetheless, all these interviewed organizations were active on many different social media platforms, leading to an overview of ideas and strategies for social media.

First of all, the traditional second screen usage was used in all countries to enhance the viewing experience of viewers. In Estonia for example, viewers could ask questions directly to contestants in the national song contest via Twitter, as well as tweets being shown during the broadcast as well, while social media were also used in Sweden to create more user interaction with broadcast content as Leurdijk and Leendertse (2009) already discussed as a possibility. In that sense Wilson's (2016) enhanced viewing experience during broadcasts applied to many interviewees, while some countries took this even further. In Spain viewers were enabled to give suggestions for plot changes for an ongoing drama series, giving additional power to the common people via social media platforms in the days surrounding the broadcasts as well:

> "Eventually there has to be a script writer or whatever, but I like the idea of really like let's try to have the people interact and they can make some change in the, you know in the plot... it's like for me it's a great, experimental, it's the way the web allows you to work..." – *Spanish, RTVE*

At the same time though, this Spanish interviewee also emphasized the negative side of giving the people too much power via social media as a second screen, explaining a case when viewers could vote on the best player in a football match and sarcastically chose the goalkeeper who made several big mistakes in the match, thus partly abusing their power and leading to a decrease in control over their content for producers (Van Es, 2016).

A second way of employing social media is to use it to promote content available on other platforms from the public service media organization. All of the interviewed broadcasters used strategies of promotion to various extent, especially for instance in those organizations where social media was also part of the marketing department, as is for instance the case in Estonia. As was already emphasized above the Dutch NPO may only use social media for promotion, although they currently find it difficult to define exactly what promotion can entail:

> "We are there [social media] for promotion, and what I'm currently in the middle of is answering the question: "What is actually promotion?" We currently employ a Guideline Platform Selection in which we give a definition of promotion (…) and the most important thing we say right now is that [promotional] content should not be longer than 5 minutes. (…) But currently maybe a program makes a very cool trailer for *Penoza* of 10 minutes, and then that would not be promotion because it's too long, so we are looking for a new way to define that at the moment…" – *Dutch, NPO*

With this current social media approach though the Dutch NPO is the only real clear example of what Burri (2015) described as a "public service navigator" in which they simply lend exposure to their content that is available on other platforms. Other interviewees though did not really value using social media purely as a promotion tool for broadcast content. The Swiss, Irish and German respondents explained their reasons for disliking this quite clearly, actually preferring to do more on social media platforms than just promoting their content:

> "We want to tease just if we can show something, if there's a teaser that should be a link back to our page, just somewhere where they can see more of our content, we don't want to tease them just to watch this show, because we think this shift is not going to happen." – *Swiss, SRF*

> "If the central accounts just become kind of redistribution systems for content that has already been distributed on other social channels, I think people will gradually lose interest in the end, and will lose loyalty to the accounts, and we don't want that to happen. We are very serious about treating @RTÉ in Facebook and Twitter in particular as channels that operate and offer really good compelling content that people can't get elsewhere..." – *Irish, RTÉ*

> "We really experiment with everything that is possible... uhm, I think that uhm, the promotion, pure promotion of content is not working very well, so we're driving a bit away from that. For

certain genres the second screen can work, but it's quite limited, so I think the most important focus is really to produce content that is specifically made and tailored for the use on Facebook, but that is still related to television content that we have elsewhere, so there is some sort of interaction..." – *German, ZDF*

As this quote from the ZDF-employee makes clear, a third and final main strategy to use for social media is the creation of native content, although this is not an accepted strategy yet at every organization. In Sweden for instance the public television organization is only allowed to do promotion, while the public radio organization can mix native content with promotional content. In Estonia the social media department wants to create more native content, but a lack of manpower and resources currently does not enable them to do that as much as they would like. In Germany, the native content that is created is still always linked in terms of branding to a linear broadcast, for instance by posting native short video fragments with unique content on Facebook during weekdays for a show that airs on TV only on Fridays. In Spain, RTVE takes even more risks by for instance creating exclusive fan communities on WhatsApp and delivering unique native content to those viewers only, which subsequently resulted in many more users wanting to be a part of that small WhatsApp group. Most respondents were subsequently very enthusiastic about their native social media content, in some cases even to such an extent that it became more interesting than other types of content:

"So Yle Kioski is specifically is deep into this distributing content idea, Kioski doesn't actually produce anything on Yle.fi, it publishes natively on social media to the extent that you have to learn and take the brand where the young users are... and now we are kind of in a funny situation where we're looking at our own website that is not as interesting as, as our offering on social media pages." – *Finnish, Yle*

Overall then, such views only confirm Pond's (2016) claims that social media can also help to draw attention to content from the public broadcaster in a non-linear fashion during any possible time. Furthermore, this strategy of creating native social media offering also links up with other native online content, such as web series on the public broadcasters' VOD platforms or their online only channels. Consequently, these strategies of promotional content and native content also link up quite well with Doyle's (2010) notions of the re-use of content and the creation of original web content as a multi-platform strategy. The second-screen usage of social media does not really fit in with Doyle's theory of multi-platform distribution, but is

an interesting way of engaging more with existing audiences nonetheless, as Moe (2013) saw as a great opportunity for social media.

4.3.2. Other success stories and issues on social media

Next to these strategies of using second screen functionalities, promoting their own platforms and publishing native content, other interesting examples of or issues with social media usage were also found. To begin with it was found that several interviewees used major events to experiment with new social media platforms and strategies. The recent Eurovision Song Contest was mentioned by several interviewees as a way to experiment with new features, for instance by the Swiss who used it to experiment with Snapchat or the Irish who also used the central @RTÉ accounts for unique Eurovision Song Contest coverage. The Estonian ERR experimented with the new Facebook Live feature during the Eurovision Song Contest to provide exclusive behind-the-scenes content of the red carpet and the stage for their Facebook fans. In Sweden a major yearly charity radio event is used as a period for experimentation with new platforms, most likely because the audience reach during such special events is higher than usual:

> "Once a year we have this large event, I don't know if you've heard of it, Musikhjälpen, it's Music Aid. (…) and that's, that is Sveriges Radio's great success in social media we'll say... (…) Musikhjälpen, the music aid show, is used as an experimental unit... we have tried for example Vine in Musikhjälpen, we have tried Google+, we have tried Snapchat as well." – *Swedish, SR*

A second element that several broadcasters mentioned was successfully moderating the comment sections to improve the interaction with the audience. Controlling the audience flow (Doyle, 2013) like that seems to be one of the most valid attempts at actually creating customer relationships with individual consumers, instead of just viewing social media platforms as additional distribution channels. Although this takes quite some time for most of the parties that do it, they argued that they saw social media as a way to extend the public service mission for a more interactive discussion with audiences, instead of only communicating via the linear channels. Such social media two-way communication is subsequently used to create a higher customer loyalty, as for instance Lim et al. (2015) found. In a way then, this also links up with the second screen functionalities discussed above, since

it enables users to actively discuss broadcast content as well as contribute to conversations in the public media.

> "In the past, TV and Radio channels, it was really hard to reach them, to talk with them (...) you could call them and you could write letters or emails, but now it's easier to interact with us on social media networks and that's the most important that you take your audience seriously, that you inform them, that you educate them, that you interact with them, that you make jokes with them, that you have a good relationship with them, that's the key issue for us." – *German, ARD*

> "There is one person full time on our Finnish language Facebook page doing the moderating actively, so we are putting an effort there to keep the conversation civic, yes, it is taking some human work from us..." – *Finnish, Yle*

Interestingly, as the Swedish respondent argued, this possibility to moderate comments is something that has stayed mostly the same for page owners on social media: "How you moderate the comment section successfully isn't very different now than two years back for example." Thus, it seems that while newer social media platforms such as Snapchat may enter the market or new features such as Facebook Live are introduced, some core functions for public broadcasters to use social media such as engaging with existing audiences (Moe, 2013) have remained fairly similar.

Not every feature of social media or possibility can be fully exploited though going by some other comments from the respondents. Sørensen's (2014) notion on multi-platform curation strategies for instance does not seem to apply to social media. All respondents used social media to bring the public to their own platforms, since they found it quite hard to drive people to different pieces of their own content on third-party platforms themselves:

> "One of the main reasons we don't make our body of long-form content available on social platforms is it's quite difficult to curate on those platforms. You can upload stuff and it'll appear in certain order, but it's uhm... you have no means of taking somebody from program A to program B, which we feel is something that is quite important with TV." – *British, BBC*

Furthermore, it was also found that active individual targeting via social media was not something most broadcasters were doing yet. The Irish interviewee from RTÉ was an

exception to this, with a very interesting and successful example of specifically targeted native social media content with a public service theme:

> "Earlier this year was the one-hundredth anniversary of Irish independence... to coincide with that there are 32 counties or jurisdictions in Ireland and RTÉ produced a short one-minute film for each county... we ingested those into our Facebook and Twitter platforms and then we targeted them to users, Facebook users in those counties or Facebook users who had ever mentioned, who were from those counties originally but maybe living somewhere else in Ireland or being somewhere else in the world... (...) and that actually worked phenomenally well in terms of the 32 videos achieved nearly I think, nearly a million and a half views on Facebook by the time the campaign ended, so it did well." – *Irish, RTÉ*

The Irish respondent also was the only one who explicitly admitted to sometimes using advertizing features on social media to target also those users who are not already part of the RTÉ social media ecosystem:

> "Organically we will only keep appearing on the feeds of people who are already following us and on the feeds of people that they like and retweet or push out to, so we did put a paid push behind those to... in order to that we can push it much further and appear in timelines and feeds of people who are not following us..." – *Irish, RTÉ*

Nonetheless, overall it seems that Helberger's (2015) views that public broadcasters should actively employ personalization strategies through social networks as well is not something that is actively happening yet across Europe, neither through free features or through paid advertising. It was of course found though that this actually was a trend for the organizations' own VOD platforms discussed earlier, so possibly this will also become more accepted on social media in the coming years. A related issue to such practices of personalized targeting is the lack of good metrics on social media platforms compared to TV metrics according to one respondent. That is one of the main reasons why some broadcasters also use their own focus group studies next to the social media data, thus already practically confirming Hasebrink's (2009) argument for more non data-scientific audience research. This respondent from ZDF argued that social media have actually made it harder to measure which audiences are being reached on social media:

"We don't have the same quality of metrics on social media that we used to on television, and this makes a lot... creates a lot of problems because we're not knowing the same, the same way what people are doing, how reliable this is, and it makes it also harder to compare usage between the different distribution outlets..." – *German, ZDF*

Finally, some respondents complained about the limiting organizational structure in terms of their ability to do things on social media or not. The question arose if it was necessary to be active on every social media platform with its own page for every program. In Sweden the company policy is that every local department should be active on at least one social media platform, although they might not even have the resources to do that. The Spanish respondent argued that it might be better to focus on good content for one platform only, instead of just doing something similar on every platform that does not really work. The Swiss and Finnish respondents were also thinking about potentially closing pages again:

"I think I'm afraid we in the past year opened a page for every program, but we are now in the situation of cutting them down and closing them, because every single page is not generating reach obviously, but we are looking into each page if there is another reason for them to be there obviously…" – *Finnish, Yle*

"Now we observe it and maybe we decide during the summer okay, we're going to shut down the Facebook-page for the kids program for instance, because we see more attention on Instagram." – *Swiss, SRF*

As such, it seems that public broadcasters need to make conscious decisions on if they actually feel that their social media activity adds something valuable for their wider public mission. If that is not the case, the decision should be made to stop the activity on some pages or platforms to make sure it is not a waste of time and resources.

4.3.3. The different social media platforms

In the discussion above, several different platforms were already mentioned in relation to other topics, but the social media platforms themselves are also an important element in devising a social media strategy, simply because they all have different features and audiences. All respondents stated that Facebook was the biggest and most important platform for them at the moment, which seems logical since it has by far the most users (Constine, 2016). As the Dutch respondent also acknowledged, Facebook started out as simply a social network for

friends, but is now also moving more and more towards a short-form video platform like YouTube. YouTube itself is also used by all parties, although mostly for promotion and shorter video fragments, but not as its own VOD platform where public broadcasters uploaded full broadcasts. This VOD potential of YouTube is also the reason why some respondents were hesitant to put YouTube directly in the same category as the other used social media platforms, although YouTube most often in fact was a part of the social media strategy as for instance the respondent from ARD explained. Instagram was used similarly to Facebook in Sweden to connect with audiences, but the Swiss and Estonian respondents really cited the younger audiences on Instagram as a distinctive characteristic. Twitter was also used by all respondents' organizations, but they mostly saw it as kind of limited and only being used by specific parts of the population like journalists and politicians in Switzerland, while the ERR in Estonia also only uses Twitter for news. In Ireland though, RTÉ's central corporate Twitter account was much more successful than their central activity on any other platform, although it was the other way around for the main RTÉ One TV channel:

> "So our @RTÉ has over 300 thousand followers on Twitter, @RTÉOne I think maybe has 40 thousand, so significantly less, but whereas @RTÉ has 70 thousand followers on Facebook, @RTÉ One has over 300 thousand followers on Facebook (...) So it seems to me that certainly television is very suited to the highly-visual video and stills environment of Facebook and Instagram, that's where they have really excelled, and on Twitter they have been less successful." – *Irish, RTÉ*

Consequently, most respondents very clearly mentioned that they used a different tone of voice and different types of content on the different platforms. This sentiment is explained quite clearly by the British respondent:

> "It's approaching each one of them as a uhm... as its own individual type of media. The thing that works well on Snapchat is not something you can necessarily transpose onto Facebook, you can't necessarily expect to have a runaway success on YouTube with something that's big on broadcast, they tend to be quite specific in the content that works on each one, so it's kind of making content suitable for the platforms, not trying to just shoehorn your existing content onto new platforms." – *British, BBC*

Next to these more established platforms, Snapchat was mentioned the most as an exciting new platform public broadcasters are experimenting with. In general though, most broadcasters were quite reluctant to directly experiment too much with new platforms. The general tendency subsequently was to first observe what other parties are doing and learn from that before opening up their own accounts on new platforms. A lack of resources was also quoted quite some times when talking about starting to use newer platforms, with the organizational leadership not yet ready to adapt to such newer platforms:

> "We haven't been able to find enough resources to experiment on Snapchat yet, we are looking at the numbers, how it grows in Finland, we have some talent experimenting with Snapchat, but nothing you could call serious publishing yet..." – *Finnish, Yle*

> "Our current board members are not very much into social media, and they have uhm... they're older guys is maybe the right way to put it, but I don't think they actually understand the importance of social media, so that's why we are really struggling with the manpower (…) they don't really see the strategic uhm... importance (…) I think they used to consider that [the own website and VOD platform] a step too far, but now they see that VOD culture and maybe it will..." – *Estonian, ERR*

As can be seen though in the Estonian example, the views on VOD and web activities also changed over time, which is a trend that might also happen with the attitude towards social media in the coming years. It seems that the organizational structure was aligned more to create better performances (Jennings & Seaman, 1994) as the VOD service was implemented in the organization, and such a strategic move might also happen with social media platforms. Another part of this slow adaptation of newer platforms like Snapchat were questions about the suitability of each platform for the organization's goals. Stated problematic issues include the lack of features to link people back to your own video on demand platform and website on Snapchat and Instagram, although the German respondent from ARD also mentioned this situation might change in a few weeks or years. The Irish respondent added the fact that public service accounts of platforms or services that do not create any real content are limited on these platforms:

> "Yeah Snapchat is very challenging for a part of the brand that isn't outputting any content... and you know we are, at the center here, we are not making programs, we are not making

radio, we are not making TV, we're pushing out digital products, so it's limited I think on platforms like Snapchat." – Irish, RTÉ

Nonetheless most interviewed employees did approve of trying to innovate as much as possible, with for instance a specialized Lab department active in Spain solely responsible for innovating content and distribution channels for the multi-platform market. As such, all the public broadcasters are aware of these new platforms and try to adapt their social media activity accordingly.

4.3.4. The public mission versus commercial interests

The final debate regarding social media is the tension between the public nature of the broadcasters and the commercial goals of the third-party social media platforms. This issue is seems to be very important for the current social media activities of public service media, as Van Dijck & Poell (2015) argue. Entertainment, one of the main gratifications of social media users (Karnik et al., 2013), was not encountered as a very important problematic issue by most respondents, claiming that they were usually able to present their informative or educational content in an entertaining way as well. The Swedish respondent was aware of the risk though, saying that "if every media actor around us is starting to make clickbait, that might stick to us as well...," pointing to the possible danger that public service content might become out of touch with other content on social media if that all turns up as clickbait.

In terms of their general activity on these commercial platforms, most public broadcasters stuck to the argument of the 'follow the audience'-strategy (Leurdijk & Leendertse, 2009):

> "Yeah it is, sometimes you have to argue why are you on Facebook, and why are you sometimes pushing posts on Facebook, why are you paying them any money, but then still you can answer with: people are there, we have to go there where the people are, we have to deal with new options of bringing content to different people." – *Swiss, SRF*

Nonetheless, such a strategy of going where the audiences are is not always something that is really the desired action for some of the interviewed broadcasters. As the respondent from ARD explains, he is not willing to give all content paid for by license fees to Facebook or other platforms so that they can do with it whatever they want, which is why they mostly use these platforms to link back to their own platforms. His German colleague at ZDF also

explains that the most important platform in their strategy is still their own website or VOD service, an argument that also influences their current strategy:

> "The ideal for us is the Mediathek, but it's about the users choosing the platforms, and we just have to realize and to respect that the users are choosing Facebook for many things that they're doing. (…) I think we don't have really a choice. Of course we could decide not to go on Facebook... I think that we would pay a price, and the price is in potential reach, and is it worth paying this price? I don't think so." – *German, ZDF*

The price paid though through not being active on social media platforms, is something these organizations are not yet willing to pay going by these comments. Nevertheless, the public parties also acknowledge the danger of these platforms changing their algorithms to something that is less accommodating to media companies:

> "So it's about a balance of interests, and at the moment I have to say that from the social media networks that I am aware of this balance of interests is quite okay... but we don't have a guarantee, we don't know how it will evolve, and perhaps we'll have to change it sometime and perhaps we have to also face the situation eventually that we will have to pull our content back, and say: 'no, under the conditions that are available it doesn't make sense for us anymore.' " – *German, ZDF*

Another danger is the possibility of these platforms disappearing altogether. One Estonian respondent cited the example of Orkut, which was really big in Estonia, suddenly disappearing in 2014 resulting in a loss of many communities for the Estonian audience. According to him, such a thing might also happen with other platforms on which ERR is active now, while also claiming that their own ERR.ee website will never disappear. Furthermore, because of the commercial nature it might actually be better to use multiple social media platforms, as is compulsory at Sveriges Radio, to not favor only one particular platform and disturb any commercial market forces too much.

In terms of losing the audience altogether by making too much content available on social media and thus making their own platforms less interesting, reactions were mixed. The Finnish respondent replied by saying they never really had control of the audience in her opinion, while one Estonian respondent said not to see that danger. On the other hand, some respondents were not very fond of the power Facebook and other platforms have over their content through their terms and conditions. The German respondent from ZDF claimed to be

furious at the possibility that Facebook might change their algorithms, while the Dutch respondent gave a clear example of Facebook already harming their public independence and pluriformity:

> "You know, a good example is The Garden of Earthly Delights by Hieronymus Bosch, we have that online in very high detail, really beautiful with several fragments in between (…) but there are breasts in it, so we put a promo online on Facebook, and Facebook blocked it. Well, there goes your independence, you know…" – *Dutch, NPO*

Thus, it seems that most public broadcasters are very much aware of the dangers of using social media as a public party. That is also the reason why social media needs a lot of attention and specialized work, as the Irish respondent summarizes it below:

> "What we realized very early on was that we would have to work very, very hard at creating social channels that felt like channels, that felt like compelling audience offers, that felt like places that people needed to follow or like and return to. And once we realized that and once we started to develop content calendars, competition calendars, bespoke graphics, bespoke social only videos and really invest in those channels we began to see our follower numbers just take off and explode and really gain a huge amount of momentum and I think that's, that's really the core insight I would have is that you know good social curation is not something that happens you know on somebody's lunch break when they get five minutes to jump on Twitter." – *Irish, RTÉ*

Using social media successfully consequently requires a lot of dedication and planning and is not something that can just be done as a side activity. That seems especially true for public service media who are by their presence on social media occupying a space that does not belong to them, and subsequently need to be very careful with how they approach these platforms. In the end though, almost all interviewed organizations valued social media as a new way of reaching audiences, claiming their public value of reaching all national audiences (Nissen, 2006) as very important. As of now, the particularities of their complicated public-funded structure often still allowed them to do that to a great extent as well.

5. Conclusion

In the results section above several interesting findings were described that can help to analyze the strategy of public broadcasters in the online realm. Those findings make it possible to answer the research question which was posed in the introduction of this master thesis: *How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?* The answer is presented here by first focusing on the public service media organizations, then looking at their online activities and lastly discussing their social media activities in particular.

First of all, the context of public service media organizations and their public service mission has stayed largely the same. Inform, educate and entertain: some of the core tasks of public service media as for instance described by Nissen (2006) are still relevant for all interviewees with only in some cases a lesser emphasis on the entertainment task. In that sense the researched broadcasters also supported Meier's (2013) views that public broadcasters and commercial media companies will continue to be two distinctive operators in the market, instead of converging more towards a similar content offering. In terms of funding all broadcasters still get the vast majority of their income via either a license fee or a tax system, with the amount of allowed commercial income both decreasing and increasing in different cases in recent years. Looking in particular at how online activities have been added to the organizational structure next to their core radio and TV presence though presents some more interesting findings. It was found that several attempts were made by public broadcasters across Europe to implement innovative new media departments, but such initiatives often did not last. Zand's (2009) notion that a strategy only works if the organizational structure allows it subsequently seems proven, as several opportunistic plans of interviewed broadcasters turned out to be unfeasible in the end. As a consequence the online and social media departments in many cases still fall under TV or are a part of communication and marketing, in a sense still underestimating the potential value stand-alone online activities could have for traditional broadcasters as well. Better alignment of the organizational structure with the different online and social media strategies should subsequently also be able to lead to better performances for these organizations altogether, going by Jennings & Seaman's (1994) point, which should make it easier for public service media to utilize social media as a part of their overall strategic goals.

As a second point, the specific online strategies and activities from European public broadcasters were investigated more closely. Here it was found that for most public service

media organizations their video on demand service is the most important activity, as they want to make all broadcast content available there as long as the licensing rights allow it. Furthermore, a tendency towards centralization was found with all parties mostly linking separate websites of for instance shows and series back to the main overarching public service media organization's platform, for instance through a standardized player. Most public broadcasters actually were the first to move into VOD activity in their national markets, in that sense creating the "on demand culture" Ellingsen (2014, p. 106) speaks of. Within this online realm, public and commercial broadcasters engaged both in similar and different activities, while they also practiced co-opetition (Evens, 2014) in some situations as well. Another thing that came forward in the interviews is that there is a slow development towards more web-only content being created. That includes behind-the scenes or other bonus content linked back to broadcast programs, but also some unique content created especially for the web, which not necessarily was re-used for later broadcast distribution as well. Interestingly, for this PSM actually took most of their inspiration from online-only media companies without a traditional linear distribution legacy like Netflix and Buzzfeed, once more confirming that they view online and social media as quite different from television and radio distribution. So although it is very resource intensive (Doyle, 2010), most of these organizations have successfully started to use multiple platforms for their content distribution with a primary focus on their video on demand services.

Social media platforms were the third point and main focus area of this study. These platforms just like Netflix and Buzzfeed also do not have the traditional media legacy and are much more experimental and flexible than public service media as Enli (2008) noted. Nonetheless all interviewed public broadcasters have started using social media by now with various strategies. First, the second screen features of social media have become implemented in broadcast content as well, as a way to engage more with broadcast audiences (Wilson, 2015). Second and most prominent, social media platforms are used as platforms to promote content available on the public service broadcaster's own platforms. This either happens as a public service navigator by just lending exposure to available content (Burri, 2015) or by making content partly available on social media with the implied link back to the public service organization's own platforms. Finally, something that does not happen in all countries due to regulations or a lack of resources, but which is the strategy most people who are able to do it were in fact the most enthusiastic about, is the production of native content for social media. Hence, public broadcasters do not only extend their content to web-only content as Doyle (2010) suggested in her article on multi-platform strategies, but are now also taking

that a step further by creating specialized native content for social media as well. Through such activities they try to extend their public service mission to these different platforms, arguing that a large part of their national audience can be reached on these platforms.

Next to those three distinctive strategies for social media usage some other issues were also found to be important. First of all large multi-platform media events seem to offer good opportunities to experiment with new strategies and social media, since they have a large reach or additional cultural public value. Second, some respondents argued that active moderation and interaction in the comment sections could make a real difference in engaging audiences, something Moe et al. (2016) and Lim et al. (2015) also claimed as important. On the other hand some respondents also disliked some features of social media, most notably the lack of curation possibilities and flawed metrics. Those points both relate to the traditional TV channels, in which it is much easier to bring audiences from one public media show to another public media show, while the measuring instruments to find out who exactly the audiences are, are also more meticulous. Subsequently, personal targeting on social media platforms as Helberger (2015) suggested could be an exciting option was not something that was actively practiced yet by public broadcasters, often claiming that they did not want to exclude certain audiences from having access to content by only targeting it to specific audience segments. As a consequence of this public ideal of universality the interviewed organizations also tried to be active on all social media platforms, of which Facebook was the most used, followed by the more focused Twitter, Instagram and YouTube. All these platforms do require different strategies and expert staff though as most interviewees acknowledged, making it more complicated again looking at the organizational structure of these organizations which still inherently have a TV and radio mindset.

The final researched discussion with regards to social media dealt with the third-party nature of these platforms. This proved to be an issue all interviewees were aware of, but they valued the risk of losing the audience as less dangerous than the importance of employing a 'follow the audience'-strategy (Leurdijk & Leendertse, 2009). Moreover, public service media try to mediate that risk by still placing their own online platforms at the top of the pyramid for their online strategy. By focusing predominantly on improving their own platforms they attempt to draw the audiences there as well using both promotional and native content on social media to increase the appeal of the public service media organization's brand. In that sense they do not yet employ the strategy of a public service anything (Donders et al., 2012), but they have started expanding their services to various other platforms to increase the reach of their public content.

Subsequently, the current answer to the research question of this master thesis can be phrased as follows: European public service media use commercial social media platforms as a not yet integral part of their online strategy. The main reason for doing so is that they currently value the position of their own platforms as more important, with the commercial nature of social media platforms only playing a minor role in that decision. Nonetheless, most employees actively working with social media do agree on the promising features of these platforms such as better audience engagement (Moe et al., 2016), as they hope to expand their offerings there in the future for those customer segments active on these third-party platforms. In that sense, they are also strategically positioning themselves more towards the audiences than they are towards their political regulators and funders. Using Porter's (1997) strategic framework one final time, it seems that public service media continue to differentiate themselves through their public service content, as they look to promote their public service mission on social media as well. While actual regulation for the utilization of third-party social media platforms is minimal, the organizational structure of the public service media and the related allocation of resources through their political supervisors and their own management still plays a major role in what opportunities can be taken on social media. Currently this structure seems to have a slightly restraining strategic influence instead of enabling a complete social media presence with room for experimentation, simply because the core of these organizations is still being a broadcaster. Consequently, if public service media really want to continue to get the most out of their social media activity for themselves and for their audiences, they need to treat every element of social media utilization as a core activity within the wider strategy of their organization.

There also were several limitations to the current study. First of all, the number of respondents is too small to be able to draw conclusions on different strategies that are in use at all public broadcasters across Europe and beyond. Moreover, it seems likely that those broadcasters who actually use social media to a greater extent would be more interested in sharing their stories on their social media activity with researchers than those who are more limited in their usage, thus possibly giving a slight bias to the results presented in this study. As a second point of critique it must be noted that social media usage for public service media organizations and beyond is still very much in development. New platforms are still emerging and the different opportunities with the various platforms are not completely clear as of yet, leaving much space for improvement and further social media expansion. As a consequence, current strategies might become more elaborate in the future or what is done at this moment

by public broadcasters might be considered a bad strategy in a few years time, as the organizational structure could also become more accommodating for social media usage.

Following from these limitations there are also several suggestions for future research that are interesting to investigate. A logical suggestion is first of all to try and include the views from multiple other public broadcasters across Europe and beyond to see how they use social media. This might shed light on some yet undiscovered strategic approaches or social media features that are deemed important by public broadcasters. Furthermore, for a better comparative perspective it might also be interesting to examine how commercial broadcasters approach social media, as the current respondents already observed some differences between the two. Secondly, a major gap of research into the workings of native content for media companies on third-party platforms was discovered when the results of this study became clearer. While most respondents viewed this as the most promising and exciting strategy for social media platforms, this idea was not really addressed yet in existing academic literature, apart from maybe Doyle's (2010) notion of web-only content as part of a multi-platform strategy. Finally, since the organizational structure of most interviewed public broadcasting organizations placed online and in particular social media activities quite low on the metaphorical organizational ladder, it might be interesting to research how that plays a role in what public broadcasters can and cannot do on social media platforms. Only if such research projects are also carried out, the true value of social media platforms for public service media will become apparent. For now though, it seems that most European public broadcasting organizations are happy to experiment with social media platforms as they develop.

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Appendix A: Topic list for semi-structured qualitative expert interviews

Main research question:

How do European public service media strategically utilize commercial social media platforms as part of their online activities to meet their public objectives?

Main topics and interview questions:

Personal details and function description of the interviewee

1. Who are you and what kind of work do you do?

2. What organization do you work for?

3. What is your function for this organization?

    a. How long have you worked here?

    b. Any previous relevant positions for media companies?

The public service media organization

4. What are the core public mission and the core values of your public service broadcaster?

    a. Are these self-imposed or regulated by government or other institutions?

5. What regulations are in place to protect the independence of the public broadcaster?

6. What, if any, commercial revenue streams does your public broadcaster use?

    a. Have you become more dependent on such commercial income in the past ten years?

Strategic decisions in a competitive digital media market

7. What is the main strategy of your public service media organization to survive in the current commercialized multi-platform media landscape?

    a. What are the main goals you want to achieve as a public service media organization? *(e.g. audience engagement, high viewing figures, producing quality content, remaining financially independent, etc.)*

    b. How do you strategically compete with commercial broadcasters and video on demand services in your country?

    c. Do you try to differentiate yourselves from other media organizations? How?

    d. Do you try to focus on specific audience groups? How?

8. How do you deal with any current regulations in place that limit you in executing this strategy perfectly?

    a. What kind of national regulations for public service media do you have that can for instance limit the extent to which you can compete with competitors?

    b. What do you think about the current European Audiovisual Media Services Directive that became active in 2007?

9. Do you think public service media and commercial broadcasters will converge in the future or do you think they will remain clearly separated?

    a. Why do you think this will happen?

    b. On what levels of the media market will such a convergence/divergence develop?

    c. Is this related to the country-specific market structure? I.e., could there be different developments in other countries?

Key activities within the competitive digital media market

10. What are your own activities when it comes to starting and managing your own digital platforms as a public service media organization?

    a. Do you have any examples of successful online projects? What made them successful?

    b. Are there also some projects that failed? If yes, why do you believe they failed?

11. Do you look at best practices from other (inter)national parties to improve your own offerings?

    a. Do you have any examples of best practices you have used?

12. Do you believe you provide different content than competing commercial broadcasters in your country?

    a. Are there any specific genres or types of programming that are different?

    b. Do you also offer similar content to audiences?

    c. Do you possibly strategically cooperate with commercial broadcasters to for instance reduce production costs or to increase the reach of your content?

    d. Are there any limitations when it comes to cooperating with commercial competition?

13. How do you view the arrival of new digital competition in the form of video on demand services like Netflix and Amazon Prime?

    a. Do you actively try to compete with them, for instance with your own video on demand platform?

b. Or do you possibly attempt to cooperate with these companies, for instance by having your PSM content available on these platforms as well?

14. What would the strategy of your public service media organization be in an ideal market situation?

a. What kind of activities do you really want to execute that you currently cannot due to regulations or other limiting factors?

Social media platforms

15. Does your public service media organization use social media platforms like Facebook, Twitter and Instagram?

a. If yes, which channels and platforms do you actively use?

16. For each of the social networking sites you mentioned you use, could you explain how you use these channels?

a. Do you have different strategies for these different social networks? Which ones?

b. In the case of multiple broadcast channels: Do your strategies also differ for your different TV and radio channels relating to the different identity of these channels?

17. How do you fit the use of these platforms into your wider (online) strategy?

a. Is using social media a core activity for your online strategy or is it just a side-activity?

18. Scheduling strategies for linear TV channels and non-linear social media channels are probably very different. How do you try to manage such differences in light of your overall strategy?

a. How do you connect your social media content to the linear schedules of TV/Radio programming?

b. Or do you have a specific stand-alone schedule for distributing content via your social media channels?

19. Do you experience different types of audiences on the different social media platforms?

a. Are there differences in the success rates of targeting specific audience groups across these various platforms?

b. How does your social media audience reflect your general public service media audience?

c. Do you employ strategies of personalization to target specific parts of the audience on social media? If yes, which ones?

20. A main incentive for social media users to use social media platforms is entertainment. Does this conflict with your public service mission? (I.e. you may not produce that much entertainment content.)

    a. Is your social media strategy also based on such research regarding the main interests and causes of audience engagement on social media? What are your own findings on things that work and do not work on social media?

The public service mission on commercial social media platforms

21. How do you feel about using these commercial social media platforms like Facebook and Twitter for your public service media goals?

    a. Are you as a public service media organization limited in doing stuff on social media because of their commercial nature?

    b. Do you have any examples of regulations and things you can and cannot do on social media?

    c. How do you feel about such regulations?

22. Are you afraid of losing the control over your audiences on social media? I.e., these social media platforms are not owned by your organization, and users could stay on these platforms instead of going to your own online platforms or broadcast channels.

    a. How do you use consumer data you collect on social media?

23. Do you also follow social media postings from other commercial broadcasters, or commercial companies in general?

    a. Do you see differences in the type of posts they use and the type of posts you publish? What kind of differences?

    b. Do you think these commercial organizations are better equipped to use social media than public service media? Why?

Concluding questions and remarks

24. Are there any other remarks or things yet unmentioned on the topic of social media that you think are really important for how you can use social media platforms?

25. Do you have any other remarks you want to make about the public service media in an online, commercialized environment?