

Embracing audio in Nordic public service media

How Nordic public service media have transformed their radio and audio services

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ABSTRACT

This chapter examines the radio and audio landscapes in Denmark, Finland, Norway, and Sweden in the late 2010s. How did the Nordic public service media (PSM) transform themselves from analogue radio broadcasters to digital audio providers, and how did they respond to the challenges of a changing media landscape? In addition, we investigate how Nordic PSM have strategically positioned themselves in the field of digital audio and what their distribution strategies have been in the age of digital platforms. Our thematic analysis of strategy papers and annual reports of four Nordic PSM organisations reveals that different countries' communication policy solutions involved different directions for the development of audio services, particularly in terms of the distribution of audio content and digital audio broadcasting (DAB) radio development. The organisations' strategic future directions exhibit a strong ethos of universal broadcasting. However, audiences are fragmenting, and Nordic PSM organisations are accordingly targeting smaller audiences, especially with their podcast offerings.

KEYWORDS: Nordic media systems, radio and audio services, public service media, Nordic broadcast media

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Introduction

Public service radio has served Nordic audiences for almost a hundred years. However, by the late 2010s, the traditional role of radio and audio services had changed. As Fehlmann notes (see Chapter 2 in this volume), the profound processes of social change brought about by the digital age have had numerous effects on public broadcasters. The emergence of international platforms and changes in media consumption have made competition more diverse, and broadcasters have had to invent new ways of reaching their listeners. Therefore, it is crucial to study what contribution public service radio can offer to Nordic societies in the 2020s.

Although the challenges related to radio and audio services are the same, the Nordic public service media (PSM) lack a common strategy for digital audio development, and sometimes, their policies even contradict one another (Ala-Fossi, 2020). In this chapter, we examine how PSM organisations in Denmark, Finland, Norway, and Sweden have responded to a changing media landscape by transforming broadcast radio to include digital audio services and podcasts.¹

More specifically, we compare Nordic PSM organisations and their audio strategies and decisions in recent years. We examine the media landscapes of the four Nordic countries in the late 2010s and map the radio and audio development strategies and markets. Furthermore, we look at how Nordic PSM have strategically positioned themselves in the field of digital audio and what their service distribution strategies have been in the age of digital platforms. Such comparisons of countries and media systems allow us to identify shared characteristics and traits across borders and over time.

The purpose of this study is to answer the following research question on the digital audio development of Nordic PSM:

- RQ1. How are Nordic PSM transforming themselves from analogue radio broadcasters to digital audio providers, and how have they responded to the challenges of a changing media landscape?

The primary research question focuses on digitalisation-related changes in PSM and is followed by two sub-questions.

- RQ1a. How have Nordic PSM positioned themselves in the field of digital audio?
- RQ1b. What are the distribution strategies of Nordic PSM in the age of digital platforms?

The first sub-question is aimed at shedding light on organisations' understandings of audio market developments. Nordic PSM are leaders in the radio markets of their respective countries. However, emerging international competition in the digital audio market is changing the existing landscape.

We were interested in examining how the organisations described their current and future positions in the field of digital audio services. The second sub-question concerns distribution strategies. The digital audio market has changed profoundly as digital platforms and streaming services, such as Spotify, have entered the audio market. Radio audiences are declining across all age groups (EBU, 2021), with young listeners in particular turning away from traditional FM broadcasting. Therefore, we investigated Nordic PSM strategies for reaching audiences on different platforms.

In short, we examined strategic decisions regarding the future of radio broadcasting in the four countries and how these decisions are reflected in PSM strategies and annual reports. The structure of this chapter is threefold. First, we outline our study how Nordic PSM have developed their radio and audio services in the 2010s. Second, we analyse their organisational strategies in developing radio and audio services. Third, we discuss the role of Nordic PSM in national audio markets in the digital age.

Public service media in the Nordic countries

Particularities of Nordic countries

Our theoretical perspective combines historical institutionalism (e.g., Galperin, 2004) with Hallin and Mancini's (2004) classical media systems typology. The historical institutionalism approach adopts a broad view of institutions by looking at political structures and informal arrangements. This approach is particularly useful for international comparisons and the study of long-term policy patterns (Galperin, 2004). Moreover, it is suitable for analysing how PSM organisations handle digital disruptions caused by new technologies. We need to understand that the reconfiguration of new technologies, rather than following technological logic, is politically and socially contested (Katzenbach, 2012). This perspective allows us to look at the historical developments of PSM organisations in particular circumstances, including their relationship patterns with other institutions (Sjøvaag, 2019).

In Hallin and Mancini's (2004) iconic study of media systems, Nordic countries' media systems exemplify the democratic corporatist model of media. Nordic countries are considered the most similar with each other within the democratic corporatist model, in contrast to the liberal and polarised systems. Although the model is based on data from the development of printed press and does not consider the current hybrid, or digitalised, media systems, Hallin and Mancini's typology is still influential, especially in Nordic media research, where it has been used to highlight Nordic exceptionalism (Ala-Fossi, 2020; Skogerbø et al., 2021; Syvertsen et al., 2014).

Scholars agree that Nordic countries are stable democracies with solid infrastructures for democracy and media freedom, and they share a high level of public trust in the news media and political institutions (Newman

et al., 2019). Common features of Nordic political systems include strong rational-legal authority with established rules and procedures, a high level of state intervention, and a tendency to seek cooperative solutions. The mixed-media system means that a highly legitimate public media system coexists with successful commercial media outlets. The early digitalisation of communication infrastructures has resulted in high media use across the region (Benson et al., 2017).

In this context, it is unsurprising that the Nordic countries – with their largely shared history and culture, democratic corporatist media systems, and mostly social democratic welfare states – have been seen as a distinct group with unique features – the Nordic media system being one of them. These media welfare states rest on the four pillars of universal communication services, editorial freedom, a cultural policy on media, and a preference for lasting policy solutions based on cooperation between major stakeholders (Syvertsen et al., 2014). As the Nordic cultural policy framework emphasises continuity and stability, public service broadcasting, with its cultural mission, is an important policy instrument (Sjøvaag, 2019). Although the idea of the Nordic media welfare states is based on evidence from the twentieth century, scholars have claimed that Nordic countries share the same main principles in the digital age. However, more recent evidence suggests that the situation may be more complex (Ala-Fossi, 2020).

In our analysis, we focused on the following four organisations: Finnish Yleisradio (Yle), Norwegian Norsk Rikskringkasting (NRK), Danish Danmarks Radio (DR), and Swedish Sveriges Radio (SR). It is important to note that although all four organisations provide digital services, SR is a radio broadcaster and an audio publisher, while the other three organisations also broadcast television and publish videos online.

Media policy debates over public service media funding and remit

After decades of stability and strong support for welfare media policies in the Nordic countries, in the last few years, both the funding and the remit of PSM have come under increased scrutiny. All four countries have adopted tax-based PSM financing in the last ten years (Finland first in 2013 and Denmark most recently over a period of four years from 2019 through 2022), replacing the traditional licence fee with general taxation. Finland and Sweden have an earmarked tax, whereas Norway and Denmark fund PSM from the regular state budget.

Moreover, there have been debates about the remit of PSM in all four countries. In Finland, the private media advocacy organisation Finnmedia lodged a complaint about Yle's online text services with the European Commission in 2017, which resulted in a narrower legal definition of Yle's remit

in 2022. More recently, the Sanoma corporation has also complained to the European Commission about Yle's online video services, while the association of commercial radio, RadioMedia, requested a pre-evaluation of Yle's audio publishing plans (Finnmedia, 2017; Pullinen, 2021; Yle, 2022). Similarly, in Denmark, DR's remit has been questioned during the negotiations for the current Media Agreement (Kulturministeriet, 2018). At the end of March 2021, Danske Medier, representing Danish commercial media companies, lodged a complaint with the European Commission regarding DR's online news service and its news application DR Nyheder [DR News]. Danske Medier has asked the Commission to investigate whether DR's textual content infringes on state-aid rules (Danske Medier, 2021). In Sweden, the strong position of PSM has been criticised by the commercial media sector and right-wing politicians (Nord & Ots, 2019). And in Norway, NRK's online offer has been criticised by commercial media companies as well. However, the Norwegian Media Authority reviewed NRK's services in 2021 and found no reason to restrict NRK's digital news and current affairs offerings (Medietilsynet, 2021).

Radio and audio in the Nordic countries

Aside from political pressure, PSM organisations in the Nordic countries – and elsewhere – are confronted with changes in media use due to digitalisation. The daily reach of radio among the entire population has decreased by approximately 10 percentage points in all Nordic countries over the last ten years (Nordicom, 2022a). Over the last twenty years, daily listening time has halved in the worst cases; for instance, in Denmark, the average daily listening time has shrunk from 197 minutes to 104 minutes (Nordicom, 2022b). However, the relative share of PSM in the radio market remains unchanged – or is even larger than before. In 2020, public radio received 78 per cent of total listening time in Denmark, 73 per cent in Sweden, 64 per cent in Norway, and 51 per cent in Finland (Nordicom, 2022a).

At the same time, podcast listening has been increasing. In 2020, the percentage of daily listeners of all ages consuming podcasts and audio-on-demand was 22 per cent in Sweden, 14 per cent in Denmark, and 12 per cent in Norway (Nordicom, 2022c). In Finland, podcast listening is measured over a three-month period, and in 2020, the percentage of listeners of all ages was 30 per cent (Statistics Finland, 2021).

While broadcast radio remains strong among older listeners, it has trouble attracting younger audiences. Despite the different methods for tracking radio listening in different countries, the declining trend of broadcast radio listening among younger generations is clear (EBU, 2021; Nordicom, 2022a). For instance, in Finland, under-24-year-olds listen more than twice as much to other audio services than to radio (Brun, 2022).

FM and DAB radio in the Nordic countries

Despite these common trends, one factor that differentiates Nordic PSM is Digital Audio Broadcasting (DAB). Finland and Norway have chosen simpler paths in DAB development, while Denmark and Sweden are dealing with more complex situations. FM radio remains strong in Finland, and DAB has been halted completely. The new FM licences for commercial and private radio (2019–2029) were granted for free through a political process. There is no digital radio broadcasting in Finland and no plans for any kind of switchover (Ala-Fossi et al., 2018). In contrast, Norway is the only Nordic country whose nationwide radio is based entirely on DAB, with only local channels still using FM. In Norway, geography constituted a powerful economic motive for different actors in the radio industry to develop DAB, as radio digitalisation was expected to save money and reinvigorate radio as a medium.

The situation is more nuanced in Denmark and Sweden. In Denmark, after a decade of DAB, the parliamentary Media Agreement of 2012–2014 (Kulturministeriet, 2012) contained two proposals regarding digital radio. First, it was suggested that Denmark abandon the original DAB digital standard completely and replace it with DAB+. The second suggestion was to close all FM radio services within a few years with certain conditions based on the share of digital radio listening. The transition from DAB to DAB+ was completed in 2017. However, the decision to shut down FM radio in 2021 was cancelled in 2018. The Media Agreement 2019–2023 (Kulturministeriet, 2018) still included an FM switch-off, but as the idea lacks political support, it has not returned to the agenda by 2023. (Ala-Fossi, 2013; Irwin, 2018; Kulturministeriet, 2022). And in Sweden, even though there is both FM and DAB broadcasting, the government is determined to keep FM radio on air. The future of DAB remains unclear: although SR has recently closed three DAB channels, DAB transmissions continue for the time being. The closure of the DAB channels was related to the organisations' decision to develop a P3 FM channel and a podcast offering for young audiences (SR, 2020).

Online services of Nordic public service media

While the situation differs with respect to the digitalisation of terrestrial broadcasting, all four Nordic PSM organisations offer audio content over the Internet, such as podcasts, audio-on-demand (AoD), and live-radio streaming. While Finnish Yle Areena offers video and audio content via the same application, the PSM organisations in the other three countries have separate applications for audio services (Swedish SR Play, Norwegian NRK Radio, and Danish DR Lyd).

Nordic PSM maintain a comprehensive and growing set of online activities, which entails more competition among public and private sectors in each country, as audiences are enticed to subscribe to different services. For

example, the Swedish music-streaming giant Spotify has a stable presence in the Nordic audio market. Among those who listen to podcasts on a daily basis, 37 per cent listen via Spotify and 20 per cent via Apple Podcasts. The public service AoD services run by Yle, DR, NRK, and SR are the third most popular streaming services in their respective countries (Mediavision, 2021).

Methods

Given this situation, we were interested in investigating strategies for radio and audio development in Nordic PSM organisations. Our primary research method was qualitative document analysis. We analysed 30 documents in total, including Nordic PSM annual reports from 2016 to 2020 and corporate strategies from each PSM organisation published between 2014 and 2021 (see Tables 8.1 & 8.2). The number and length of the documents published by each PSM organisation varied, but they were all publicly available for download on the organisations' websites. Quotations included in this chapter have been translated into English.

We chose to use qualitative document analysis because the examined documents differed in terms of length, style, and writing manner, requiring close qualitative reading to identify underlying themes and to understand *how* Nordic PSM organisations describe and report on audio-related developments.

By analysing documents, we can uncover determinants behind policy developments and understand the organisational aspects of the documents (Altheide & Schneider, 2013; Karppinen & Moe, 2019). We were interested in how the documents portrayed the digital development of audio services in PSM, and we wanted to identify the differences and similarities in the policies of the four PSM organisations. Finally, we examined how the analysed documents were related to the cultural, historical, and political developments of the studied countries.

Table 8.1 Annual reports gathered for analysis

Organisation	Year	Document language	Number of pages
Yleisradio	2016	Finnish	39
	2017	Finnish	44
	2018	Finnish	40
	2019	Finnish	40
	2020	Finnish	45
Sveriges Radio	2016	Swedish	175
	2017	Swedish	177
	2018	Swedish	169
	2019	Swedish	174
	2020	Swedish	232
Norsk Rikskringkasting	2016	Norwegian	115
	2017	Norwegian	97
	2018	Norwegian	86
	2019	Norwegian	38
	2020	Norwegian	42
Danmarks Radio	2016	Danish	68
	2017	Danish	68
	2018	Danish	72
	2019	Danish	72
	2020	Danish	72

Table 8.2 *Organisational strategies gathered for analysis*

Organisation	Year	Document language	Number of pages
Yleisradio	2015–2017	Finnish	3
	2017–2020	Finnish	7
	2020–	Finnish	6
Sveriges Radio	2014–2019	Swedish	Included in annual reports.
	2020–2025	Swedish	Included in annual reports.
Norsk Rikskringkasting	2015–2020	Norwegian	10
	2019–2024	English	5
Danmarks Radio	2015–2018	Danish	5
	2017–2020	Danish	5
	2021–	Danish	17

During analysis, data were classified and sorted according to different themes (Kuckartz, 2014). The analysis consisted of three stages. In the first stage, we read the entire set of documents and concentrated on the textual content to establish an overall picture of the material.

In the second phase, we re-read the documents, identifying recurring abstract categories. Then, separate passages were associated with the categories. At this stage, the passages and quotations from the documents added up to 17 pages. We identified the following six recurring categories: 1) current media policy changes, 2) PSM's role in society, 3) technological drivers of change, 4) PSM digitalisation, 5) the role of audio development in the organisation, and 6) future predictions and distribution plans. As the analysis progressed, the observations made during the second phase were examined from the perspectives of the research literature and the research problem. Our analysis concentrated on radio and audio developments in the PSM organisations – that is, how the cultural policy framework (Sjøvaag, 2019) and its ideals of continuity and stability were represented, and how the principles of the media welfare state (Syvertsen et al., 2014) were interpreted.

The third phase consisted of synthesising the categories that were identified in the second phase into three main themes. We once again read the documents and categorised the findings from the second phase, concentrating on audio and radio developments and descriptions of digitalisation-related changes and challenges. The three main themes identified during the third phase were as follows: 1) digital development, 2) fragmented audiences, and 3) challenges and future predictions.

Four Nordic public service media organisations – four approaches to audio development

In this section, we report our findings regarding the three themes. According to our analysis, Nordic broadcasters are increasingly paying attention to the digital development of audio services while balancing the need to maintain traditional broadcast radio. Moreover, there are significant differences between the organisations in terms of DAB radio.

Digital development

In 2018, DR will continue the digital transition, so both users on the more traditional platforms and users of digital media are served in the best possible way. (DR, 2017b: 22)

As the quote above illustrates, the strategic approaches of all organisations primarily emphasised that broadcasting and digital publishing work side by side. In their annual reports, the organisations underlined that broadcast radio still enjoys large audiences; thus, the PSM organisations saw a need to maintain broadcast offerings and linear radio channels. Yle was the only organisation that brought up the possibility of “assessing the number of linear channels according to changes in the operational environment” (Yle, 2020b: 3). Meanwhile, in 2018, DR reported shutting down three DAB radio channels due to budget cuts. At the same time, our analysis shows that the need to invest in the digital environment has been identified by all Nordic organisations since at least 2016. This was explained both by changes in the operational environment (especially in the case of Yle) and by changes in audiences’ usage patterns and needs (especially in the case of DR). The importance of digitalisation and associated investments was emphasised more strongly the closer we got to the 2020s. The accelerating technological development was mostly seen as a positive force for PSM organisations and their content, as NRK described this change in 2017:

Technological developments and the changing media habits of the audience have given us new opportunities to convey our content. It is both about technology and the way we use new opportunities. (NRK, 2017: 134)

Nordic broadcasters have closely followed the development of streaming services in their respective markets. The rise of international streaming services was another reason why developing their own on-demand services was important for all PSM organisations. The importance of having one’s own services was mentioned on several occasions. For instance, DR predicted in 2017 that “more and more people will use online services as their primary gateway to radio, television and other media content” (DR, 2017a: 4). However, there were differences in the priority attributed to the digitalisation of

audio services. For example, in 2016, DR stated that it would first invest in the development of its video-streaming service, DRTV, mentioning growth in digital audio consumption for the first time in 2018, while one of eight strategic development targets in Yle's 2015–2017 strategy was “bringing radio to the digital environments and developing easy-to-use audio services, especially for mobile and in-car devices” (Yle, 2015: 4).

According to our analysis, podcasts have become a main staple for Nordic PSM. All organisations had the same notion of increased podcast consumption, especially from 2018 onwards, and particularly by younger audiences. Other technology-driven developments in audio services were discussed as well. Yle was the most technology-driven of all the organisations: Its documents mentioned several development projects, such as content development for smart speakers and immersive audio (Yle, 2018), 5G technology (Yle, 2019; for a discussion of PSM and personal mobile communication, see Rashid & Simpson, Chapter 9 in this volume), and voice-controlled assistants for cars (Yle, 2020b). The other organisations also recognised the need to research and develop new audio-related applications, even though they did not mention as many development projects as Yle did. For instance, SR was investigating voice-related media use:

In 2018, work has continued developing the Swedish Radio Play app to become the company's primary digital platform, with more personalised content. Voice control, voice assistants and smart speakers are becoming increasingly popular and gradually changing the audience's media use. (SR, 2018: 40)

Despite the fact that all four Nordic PSM organisations have been investing in digital audio, their strategies of radio and audio distribution differed. Yle was the first to talk about drastic changes in broadcasting, anticipating the digitalisation of audio and radio services as early as 2016. In 2020, it stated in its annual report that Yle Areena, the Finnish PSM's video- and audio-streaming offer, was one of the organisation's main services, while none of the other organisations described their digital offers as the main service during the examined years. However, SR based its operational strategy on the following three pillars: linear, digital, and social presence. Other organisations did not have such clear guidelines for separate developments on different platforms, with digital integration being part of the overall strategy.

The biggest differences between the analysed organisations were related to radio distribution. Of the four Nordic countries, Norway was the only one to use DAB for nationwide radio broadcasting, with local stations remaining on FM (Libell, 2017). However, the results of the digital switchover in nationwide radio broadcasting have not been very encouraging. In 2018, daily radio-listening numbers were the lowest ever recorded in Norway, and in 2021, daily radio listening (49%) was still below what it had been

in 2017 (54%). In 2018, DAB radio listening (39%) had increased by only one percentage point since 2017 (Statistics Norway, 2022). Nevertheless, in the NRK annual reports, the effects of the transition to DAB radio were not given much prominence; the transition from FM to DAB was mentioned only in 2017, when radio-listening figures fell sharply due to the transition. Despite significant investments in digital broadcast radio, NRK described the future of audio services as an opportunity for the public to choose the content that they listen to: “NRK works on the assumption that the use of ‘radio-on-demand’ will increase over time” (NRK, 2017: 80). In Sweden, DAB broadcasts will continue at least until 2025 (SR, 2019). SR had no desire to develop digital radio further: “It is unfortunate that no [political] decision has been made on whether Swedish Radio should be included in a digital radio expansion [...]. That means that there are no reasonable conditions for Swedish Radio to develop digital radio” (SR, 2019: 34). In Denmark, although there have been many discussions at the political level regarding the future of DAB radio, there was no mention of DAB radio’s future in the analysed documents, with the exception of yearly charts focusing on radio and audio consumption. Therefore, it appears that DR’s audio development and national communication policies are not in line with their objectives, as DR has strongly focused on Internet-based developments – for example, as evidenced by the DR Lyd application launched in 2020.

As noted earlier, in Finland, DAB development has been halted completely, and Yle has been investing in developing an Internet-based audio streaming service on Yle Areena.

Fragmented audiences

According to our analysis, all Nordic PSM deem it important to retain a large audience for radio and audio services, because such services are considered to be the foundation of their operations. This common goal was described slightly differently among the studied organisations. For example, Yle described its aim as serving both large audiences and small target groups, while DR and SR established strategic goals measured by the use of public services on a weekly or daily basis. NRK described its audience-related mission as “staying close to the public” (NRK, 2021: 1).

Therefore, all four PSM organisations paid attention to the fragmentation of audience behaviour and the strong changes in media use patterns. The organisations are developing their services to fit the needs of changing media use, such as NRK’s predictions on the rise of streaming services in 2019:

Media use and technology are changing. The audience can decide for themselves when they want to watch the programmes. Media use is increasingly on its way to streaming services where the public chooses content, whether video or audio. (NRK, 2019: 5)

The strategy of Swedish SR, however, differs from PSM in the other countries: As SR provides radio and audio services only, it is thus able to focus on radio and audio services alone. Its stated aim is to have “the listener in focus, regardless of the content being on linear radio, digital audio or social [media]” (SR, 2018: 9)² – and no other factors were mentioned that could have a particular impact on the relationship between SR and its radio and audio audiences. For the other PSM, video and television services have been more important development targets than audio services, perhaps due to the more strongly changing competitive situation in the online video markets during the years reviewed. However, podcasts are a way for all organisations to reach younger audiences, and specific podcasts popular among young audiences were even named in DR’s annual reports (e.g., DR, 2018).

All PSM organisations referred to the decreasing listenership figures for radio only briefly. In its 2017 strategy, Yle stated that “the importance of radio in the daily lives of different audience groups must be ensured” (Yle, 2017: 2), which suggests that broadcast radio was understood as central to reaching audiences.

The increasing personalisation of content in response to audience fragmentation was seen as an important factor, especially in Yle and SR documents. However, personalisation was not as apparent in NRK and DR documents, where changing audiences were addressed slightly differently. NRK highlighted changes in media use and the need to understand audiences’ changing consumption habits: “We don’t see the same content, at the same time, on the same platform to the same degree as before” (NRK, 2018: 5). Competition for audiences was mentioned by DR for the first time in 2019. The organisation stated it would respond to the competition by developing its digital channels and providing content that Danes know and use.

Based on our analysis, the organisations saw the continuation of broadcast radio as a rational act for keeping large audiences tuned in. The organisations understood that media use patterns have been undergoing a dramatic change, which also affects audio and radio audiences. We did not find a strong emphasis on building audio-specific digital offerings, except for the notion of encouraging podcast use. This finding can potentially be explained by the limitations of the studied data, as strategies and annual reports have limits in describing internal changes in a detailed manner.

Challenges and future predictions

Traditional media is having its date with destiny. (Yle, 2020a: 1)

Concerns about the future of traditional broadcast media were common in the analysed documents, as the quote above from Yle shows. All four organisations were also the subject of media policy debates during the studied period, which influenced the analysed documents in terms of justifying the

relevance and strategies of PSM. Such debates and the changes they bring to PSM played a part in how the organisations described their future possibilities and challenges in their strategies and annual reports, as evidenced by NRK:

Rapid technological development and digitalisation have changed the entire population's media habits. [...] Global and boundless competition from strong players demands even higher innovation. (NRK, 2018: 8)

Global actors and the change they bring were considered by all organisations as a big challenge for the future. Our analysis showed that the digitalisation of media use and content significantly challenged Nordic PSM during the studied period. All organisations named digitalisation, changing media use patterns, and technology as significant factors in their operations that challenge both their existence and day-to-day operations. While the organisations saw digitalisation of media use having a particular impact on television and video services and content, audio and radio services received significantly fewer mentions throughout the documents, although all organisations reported an increased consumption of podcasts. For example, DR reported that podcasts strictly aimed at target groups resulted in listening growth:

Custom-produced podcasts generally achieve a large digital audience compared with the regular programs produced for broadcast radio [on the web application]. (DR, 2019: 12)

With the digitalisation of society and media use, all four organisations saw the growth of global competition as a challenge to their operations and national markets. During the studied period, the PSM organisations focused on the global video and television markets, as the change has been more dramatic there than in the audio market. Only SR mentioned changes in the audio market with the rise of audiobooks and popularity of podcasts:

Companies that previously offered large distribution platforms are now increasingly investing in making their content. This includes companies such as Spotify and Apple, which invest in audio content, [...] and the audiobook and podcast markets are growing in Sweden. (SR, 2019: 5)

The Nordic PSM organisations had different understandings of the importance of their own offers versus third-party platforms. Yle had the clearest position of preferring its own on-demand services over those of others. The organisation stated that broadcast media – in both television and radio – are important outlets, but that more and more content is published digitally or via mobile services. Yle decided to publish all of its content primarily on its own offers (Yle, 2020a). Meanwhile, SR had a publishing strategy resting on the following three pillars: linear radio, digital audio services online, and social media. SR attached great importance to reaching audiences via diverse channels. SR also found it important to continue publishing its content on both its own offers and external, third-party platforms.

For DR and NRK, the question of digital distribution was not as clearly defined as for Yle and SR. In 2016, DR stated that the organisation cannot and should not dictate how its content is used, but should offer quality content on the platforms and services used by Danes. No further discussion of its own versus external offers was detected in our analysis. DR has been more concerned with the digital reach of its content than with defining the priority of platform use. In its 2021 strategy, DR noted that Danes are spending less time on domestic content, which puts pressure on the organisation to create interesting content. For NRK, NRK TV and NRK Radio are becoming increasingly important streaming services (NRK, 2018), and the organisation has invested in building its own apps beyond established media platforms (NRK, 2019) to reach target audiences. While NRK did not express any plans for delivery on external platforms, its intention has been to bring the audience back to NRK’s own services.

Discussion

Our intention was to study how Nordic PSM organisations are transforming from analogue radio broadcasters to digital audio providers and how they have responded to the challenges of a changing media landscape. In addition, we wanted to analyse how Nordic PSM organisations strategically position themselves in the field of digital audio services and what their distribution strategies are in the age of digital platforms. In the following, we examine the results by answering our research questions and discussing our central findings (see Table 8.3) to understand why Nordic broadcasters have chosen different paths in their audio-service development strategies.

Table 8.3 *Main findings*

Digital development	Fragmented audiences	Challenges and future predictions
Investments in digital platforms and content	Digital audiences are smaller, and the needs of the audiences are fragmenting	Digitalisation is a key challenge for all PSM organisations
Balancing broadcast radio and digital presence for the time being	Broadcast radio is still important for keeping the relationship with the public alive	Global actors and platforms are seen as big game-changers
Podcasts are a viable medium, especially for reaching younger audiences	Personalisation and development of digital content are seen as important factors in reaching new audiences	The role and importance of third-party platforms varies among the PSM organisations

Regarding the main research question (RQ1), about how Nordic PSM are transforming themselves from analogue radio broadcasters to digital audio providers, our analysis shows that all four PSM organisations had a clear digital approach to audio distribution for the future. Broadcast radio is still an important medium with an impressive share of listenership, and this listenership was seen as vital for the time being. Nonetheless, the organisations were also working on improving digital audio services and developing their own digital offers. The role of DAB, which is still unclear in Sweden and Denmark, was discussed surprisingly little in the documents of the studied organisations. PSM organisations continue to be strong players in national audio markets with significant market shares in audio listening; however, PSM must increasingly link their future with digital services, as all the studied organisations mentioned digitalisation as the main challenge to their future existence.

In Sweden, a dedicated radio PSM organisation closely focuses on audio service development, aiming to “keep sound in focus for all content development” (SR, 2017: 46). The idea of reaching an audience on multiple platforms was most strongly present in SR’s strategies.

Norway chose DAB as its direction in broadcast radio. This decision has had a strong impact on the listenership figures of broadcast radio (Libell, 2017; Statistics Norway, 2022). However, NRK seems to believe in the growth of podcast content and on-demand listening, even though the DAB transition has not achieved pre-transition numbers for radio listeners.

In Denmark, cuts in public broadcasting resulted in the downsizing and closing down of DR radio channels. Moreover, the decision to switch off FM radio has been postponed. (Kulturministeriet, 2018). DR does not have strong enthusiasm for DAB, as the organisation has invested in Internet-based distribution, for example, via its audio application DR Lyd.

Although FM radio remains important in Finland, Yle has strongly invested in digital audio services. According to organisational documents, Yle has been the strongest of the four organisations in terms of technological experiments with audio, for example, by building and testing voice applications for smart-car technology. Finland seems to be more technology-driven in its audio broadcasting policy than the other Nordic countries. This may be at least partly due to the fact that, for example, spectrum policy decisions are made solely by the Ministry of Transport and Communications instead of, as in the other Nordic countries, by the Ministry of Culture (Ala-Fossi, 2020). However, Yle’s technology-driven approach may be slowed by Finland’s dependence on mobile broadband and the slowest network connections among the Nordic countries.

With respect to the first sub-question (RQ1a), about how Nordic PSM positioned themselves in the field of digital audio, results show that all four PSM organisations have invested heavily in audio applications and the

growth of digital Internet-based audio services during the studied period. The organisations have also stressed changes in listenership: Audiences' needs are fragmenting, and, for example, podcasts are produced to attract younger audiences. Digitalisation is seen as particularly important for reaching young people, and the podcast offerings of all organisations are aimed at younger age groups. Third-party platforms were not addressed in detail in the strategies other than in relation to intensifying competition.

More specifically, SR's strategy showed that the organisation bases its operations on three pillars for reaching the public: linear radio, digital presence, and social media platforms. The organisation's use of social media platforms raises the following questions: How can large technology giants be kept at a necessary distance from national players? Is audience reach as essential as controlling your own platforms? These strategic choices may have increased the dominance of platforms, as media organisations try to adapt the operations of the platforms to, for example, maximise the dissemination of their contents (Rashidian et al., 2019).

The Nordic political system has had a significant impact on the structural conditions and developments in the media sector in the early days of digitalisation. The dominant institutional force in the emergence of broadcasters has been the Nordic welfare state. However, the gradual shift to Internet-based media systems is challenging and transforming the institutional logic that has regulated the structural conditions of mediated communications of the last century (Flensburg, 2021).

Due to international competition, broadcasters have become increasingly detached from state regulation, for example, as shown by our findings on DAB development. However, broadcasters still consider themselves as actors at the national level, in line with the principles of the media welfare state model. At the same time, the competitive situation is determined in the international arena, which affects PSM operating logic.

Although Nordic policy-makers continue to support their PSM organisations, the Nordic system appears to be increasingly vulnerable due to globalisation, digitalisation, and personalisation. As Nordic media policies are largely reactive, regulators have struggled to adjust the policy framework to effectively address the effects of the Internet, such as more fragmented audiences and powerful platforms like Google and Facebook. It is possible that the Nordic countries are approaching more segmented markets (Sjøvaag, 2019).

Finally, considering the second sub-question (RQ1b), about what distribution strategies Nordic PSM employ, it becomes evident that the four organisations are market leaders in audio services in their respective national arenas, and radio is important for keeping listeners tuned in to broadcast channels, whether using DAB or FM. Nevertheless, PSM also recognise changes in the competitive situation. In the field of Nordic audio, international competition and changes in audiences' media use habits intensified during the studied

period, which has led to the organisations seeking new ways of reaching audiences. Particularly Yle and SR have emphasised the personalisation of their digital offering as an important way of responding to their audiences' changing needs.

The most notable variation in PSM digital strategies had to do with the organisations' approaches to third-party platforms in content publishing. SR chose the strategy of publishing content on all available external platforms to help users find their content, whereas Yle decided in 2020 to launch its own streaming service, Yle Areena, as the main tool for expanding its online presence. For DR and NRK, the question of digital distribution was not clearly addressed.

During the studied period, all four countries witnessed discussions over PSM financing. It is noteworthy that despite the long PSM tradition and strong audience relationships, PSM organisations were being questioned in the Nordic countries, both by politicians and commercial competitors. Therefore, PSM organisations have had to justify their new services and roles more strongly, which has also impacted PSM influence over audio developments in the new competitive environment.

Conclusion

This chapter focused on radio and audio developments of Nordic PSM. More specifically, we analysed how the cultural policy framework of Nordic media systems (Sjøvaag, 2019) and the ideals of continuity and stability are represented in PSM strategies, and how universal communication services, editorial freedom, cultural policy for media, and consensus-seeking media policies – the pillars of the media welfare state model (Syvertsen et al., 2014) – are interpreted.

Based on our results, continuity and stability are emphasised in the Nordic PSM strategies for development of radio and audio services, with the PSM organisations considering reaching large audiences an important goal and believing that this mission unites societies. Broadcast radio still has a fairly strong position and a stable listenership. In addition, incumbent positions have enabled legacy media organisations, including PSM, to maintain strong positions in the digital market and to innovate (Sjøvaag et al., 2019). This has allowed PSM to change and develop new digital services; there is a clear turn towards Internet-based distribution strategies in the operations of all four organisations. However, it is important to note that the analysed documents only indicate what the organisations want to say *publicly* about their activities. For example, very little was said about the actual situation of DAB radio in Norway, although DAB has met much opposition there (Saugestad Hatlen, 2019).

It is difficult to say how strong the ideals of continuity and stability will remain in the future. PSM are facing a new phase in the development of

radio and audio services in a more complex media environment with more actors and increasing competition. While closely following tendencies of the international competitive audio market, we consider the current state of Nordic PSM organisations' audio and radio services development and their emphasis on Internet-based means in their distribution strategies to be somewhat conflicting with their respective national communication policies and the traditional Nordic media welfare state model.

In many countries, attempts have been made to reevaluate and restrict PSM (Sehl et al., 2020). Although these attempts are usually not directly targeted at audio or radio activities (except for Finnish RadioMedia's request in 2022), these campaigns against PSM may also affect what new technologies PSM organisations can try to adopt, which can further affect their competitiveness in the audio market. As Lassen and Sørensen noted (see Chapter 5 in this volume), the changes and challenges that DR has faced over the last five years have been partly driven by technological and media use changes and partly by the initiatives of Danish politicians. In our analysis, we came across similar findings. The challenges that Nordic PSM organisations face in radio and audio development are related to global actors, platform and media use digitalisation, and audience fragmentation, coupled with pressure from commercial media outlets challenging the justifications of PSM presence in the markets. This combination of external and internal pressures, together with the limited power of national media policies, has made media welfare in the Nordic countries more vulnerable, as the pillars of universal communication services and consensus media policies are threatened.

Although nation-states remain critical in shaping media policies (Flew & Waisbord, 2015), their abilities to regulate global players are limited. As long as the media policy decisions made in response to acceleration in media use digitalisation, global digital platforms, and audience fragmentation are aimed at national players, media welfare in the Nordic countries will remain vulnerable if the values of universalism and consensual and durable media policies are questioned.

To conclude, the shift from nationally controlled broadcast radio markets to the era of global streaming has been rapid. That was reflected in PSM strategies and annual reports, where this issue has been extensively addressed since approximately 2017–2018. Our study shows that the radio and audio developments of Nordic public broadcasters have involved establishing a digital direction, although broadcast radio remains an important channel for reaching large audiences. Different national communication policy solutions have, to some extent, led to broadcasters going in different directions, especially in terms of distribution and DAB development strategies. The organisations' strategic directions for the future still show a strong ethos of universal broadcasting, evidenced by the fact that radio and audio services continue to be available to everyone. Nevertheless, audiences are fragment-

ing, and Nordic PSM are aiming to attract also smaller and more specific audiences, especially with their podcast offerings.

Public service radio has been and continues to be an important contribution to society in all four studied Nordic countries. It first served as a tool for nation-building by providing the same trustworthy information and high-quality entertainment to everyone across each country.

However, it is an important task to rethink the role of PSM and the role it serves in the society, as universal broadcasting is facing accelerating competition due to audience fragmentation and media digitalisation. While the core mission of PSM remains the same as before – to increase social cohesion and strengthen democracy – its value and importance are just increasing.

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Endnotes

¹ In this chapter, we use the term broadcast radio to refer to both FM and DAB broadcasting. The terms digital audio and podcasts are used when the audio content is intended to be listened to over the Internet.

² SR uses the term linear, as it covers both broadcast FM and DAB radio as well as streaming over the Internet.