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UNIVERSITY OF OXFORD

Old, Educated, and Politically Diverse: The Audience of Public Service News

Anne Schulz, David A. L. Levy, and Rasmus Kleis Nielsen

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Contents

About the Authors

Dr Anne Schulz is a Research Fellow at the Reuters Institute for the Study of Journalism. Her doctoral work focused on populism, media perceptions, and news consumption. She is researching questions surrounding news audiences and digital news.

Dr David A. L. Levy is a Senior Research Associate of the Reuters Institute for the Study of Journalism, where he was Director 2008–18. An expert in media policy and regulation, he was editor of the *Reuters Institute Digital News Report* between 2012 and 2018, and joint author or editor of several other publications at the Reuters Institute for the Study of Journalism (RISJ). He was a member of the Content Board of Ofcom, the UK Communications Regulator, from 2011 to 2017, and was Controller, Public Policy, at the BBC, prior to joining RISJ.

Professor Rasmus Kleis Nielsen is Director of the Reuters Institute for the Study of Journalism and Professor of Political Communication at the University of Oxford. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

Acknowledgements

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Executive Summary

Public service media are often widely used, highly trusted, and do not face the business pressures with which their private peers have to contend. But a closer look suggests that the challenges that face public service media news provision are bigger – much bigger – than is commonly acknowledged, even in countries with a long history of strong public service media.

In this report we analyse survey data from a sample of eight countries to assess the reach of public service news. We find that the audience for public service news is old, educated, and politically diverse, and that public service media in many countries fall far short of the ambition to provide a near-universal news service, especially online. While they are among the most widely trusted news sources, they are often less trusted by people on the political right and people with populist attitudes.

We document how, more than two decades into the move to a more digital, mobile, and platform-dominated media environment, public service media remain heavily reliant on declining offline broadcast channels in terms of audience reach, and that their online news offers in most cases deliver little additional reach because, although they are sometimes widely used, they mainly reach the same audience as broadcast news.

Further, we find that public service news audiences both offline and online are heavily skewed towards older people and people with higher levels of education, whereas younger people and people with more limited formal education in many countries rely more on news found via platforms like Facebook and YouTube. This means public service news often primarily reaches people who are also avid consumers of news from private media, but frequently struggles to reach those less interested in news and less well served by existing offers.

We also show that public service media are often – despite frequent assertions to the contrary – relatively successful at reaching politically diverse audiences across the left–right political spectrum and appeal to both those with populist attitudes and those without. Our findings around trust are more complex, as public service media are often among the most trusted sources of news, but also in many cases are less trusted by people on the political right and people with populist attitudes.

With traditional linear broadcasting in inexorable structural decline, public service media will increasingly have to reach people online in a media environment characterised by (1) far more intense competition for attention due to much greater choice and (2) the role platforms – ranging from search engines to social media and messaging applications and in the future perhaps voice assistants – play in how people access and use news.

Our analysis suggests that many public service media, despite their wide offline reach and their often relatively more robust funding arrangements (compared with private sector peers), struggle to effectively reach beyond their ageing and educated core audience in this online environment. This problem will only grow more pronounced and consequential as the move to a more digital, mobile, and platform-dominated media environment continues.

While their ability to serve audiences across the political spectrum and across different attitudes is a valuable asset, the continued decline of television and radio as sources of news underlines the urgency of a thorough reinvention of public service news delivery fit for a digital media

environment and better able to serve younger audiences and audiences with limited formal education.

The alternative to this is not the status quo but continued decline and ultimately the very real risk of irrelevance to much of the public – an irrelevance that would undermine the legitimacy of public service media as an institution, leaving them unable to deliver on their public service mission.

Introduction

Public service media organisations (PSMs) generally aim for near-universal reach. They seek this as a way both of performing their social, political, and cultural mission to society as a whole and of demonstrating their value to citizens and policymakers in return for their licence to operate and the public funding they receive.

That universality is harder to achieve now than ever before. The main challenges facing PSMs today are clear. In addition to (1) competing with private sector peers for audiences, PSMs also (2) have to contend with platform companies who account for a large share of people's media use, even as (3) political and social upheaval in many countries complicates the ambition to provide a shared, widely trusted, universal service. Beyond these challenges, the role and remit of PSMs are under scrutiny. In some countries funding has been cut, in others online activities have been restricted, and, in some cases, independence undermined.[1]

This report sets out to assess the reach of public service news across offline and online offers, examine PSMs' ability to reach younger audiences, audiences with limited formal education, and politically diverse audiences, and to identify implications for future public service media strategy and public service media policy. It is important to understand both current performance and likely future trends. Independent research documents that, provided it can reach people and earn their trust, public service news at its best has been able to help ensure a more informed and engaged, and more equally informed and engaged, public (see e.g. Aalberg and Curran 2012). Most independent research in this area, however, has focused primarily on broadcast news, especially television, which, while still very important and widely used, by now accounts for less than half of all media use in many high-income democracies as people embrace online media at the expense of offline media.

Assessing the reach of public service news today therefore necessitates looking across an increasingly digital, mobile, and platform-dominated media environment. To do that, we draw on survey data from the 2019 *Reuters Institute Digital News Report* (Newman et al. 2019). The distinct advantage of this dataset, collected in January/February 2019, is that it allows for consistent comparison between countries and across platforms, both for the overall public and broken down by particular audiences by age, level of education, and on the basis of political views and attitudes.[2]

We focus on a sample of eight different countries that represent a wide range of different public service media traditions, levels of funding, forms of public service governance, and lengths of public service history. The case selection includes three countries with relatively well-funded PSMs and a long tradition of independent PSMs (Finland, Germany, and the UK), four countries with comparatively less well-funded PSMs and in some cases less insulation from government (France, Italy, Spain, and Greece), and finally one country with less well-funded PSMs and a shorter history of independent PSMs (Czech Republic). Although we could not look at many other interesting and important examples of PSMs across the world, this sample provides a good basis for taking stock of PSM performance today.

1 Our focus in this report is exclusively on the reach of public service news, and we will leave aside questions of funding, governance, and competition between PSMs and private sector peers, some of which we have dealt with elsewhere (see e.g. Nielsen et al. 2016).

2 *The Digital News Report* is based on a survey of online news users conducted by YouGov, with samples of about 2,000 respondents in each country. For more details about the methodology, see Newman et al. 2019 and the report website digitalnewsreport.org. Due to variation in question wording or in overall approach, the data will not always exactly match that collected in other ways, either in other surveys or through the use of various forms of tracking or panels.

We find that the audience for public service news is old, educated, and politically diverse, that the reach of public service news is heavily reliant on declining offline broadcast offers, that public service online news offers deliver little additional reach – while sometimes widely used, they mainly reach the same audience as broadcast news – and that PSMs in many countries fall far short of the ambition to provide near-universal news, especially online.

In the first part of the report, we look at the reach of public service news across offline and online offers. In the second, we turn to reach among young (under 25) audiences. Third, we look at reach among people with limited formal education. In the fourth part, we examine reach (and trust) across the spectrum from left-wing to right-wing political views. Fifth, we look at reach (and trust) among people with populist and non-populist attitudes, and then offer a concluding discussion of the implications of our findings for public service media strategy and public service media policy.

Table 1: Country sample and public service media organisations covered in the study

Country	Population	Internet Penetration	PSM	Total Revenue/ Capita[a]	Name Used in Report	Type
Finland	5.5m	94%	yle	86€	Yle	integrated
UK	67m	95%	BBC	102€	BBC	integrated
Germany	82m	96%	ARD ZDF Deutschlandradio	83€ 26€ 3€	ARD ZDF DRadio	separate organisations with radio and TV, only TV, or only radio[b]
France	65m	93%	france•tv radiofrance	47€ 10€	FT RF	separate TV and radio
Italy	59m	92%	Rai	41€	Rai	integrated
Spain	46m	93%	rtve	19€	RTVE	integrated
Greece	11m	70%	EPT	17€	ERT	integrated
Czech Republic	10.6m	88%	Česká televize Český rozhlas	23€ 8€	ČT ČRo	separate TV and radio

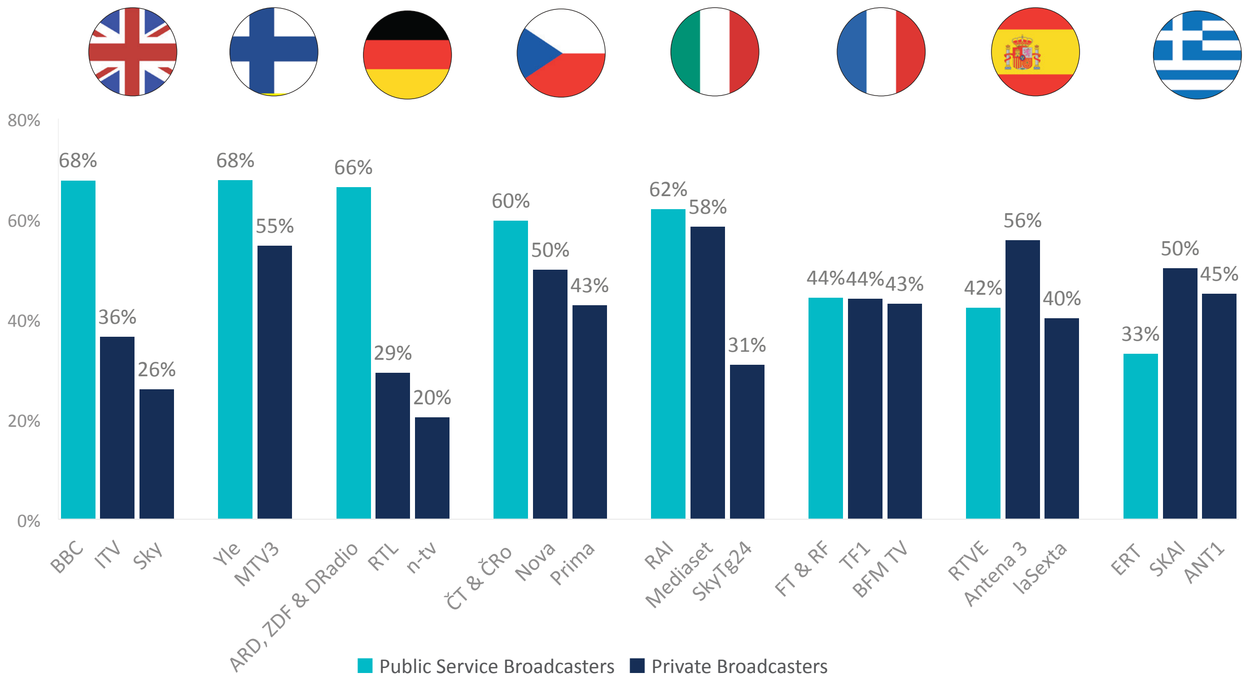
In each of the countries covered, we examine the weekly reach of different PSMs. For comparative purposes in those countries with more than one PSM news provider we have combined the figures of the leading PSM providers. This is the approach we have taken in Germany, France, and the Czech Republic. In the other countries we simply provide figures for the leading PSM news provider, e.g. the BBC in the UK but not Channel 4.

[a] For total revenues per capita: our own calculation based on EAO (2016) data on revenues in 2015 and World Bank data on the number of inhabitants per county in 2015.
[b] ARD and ZDF offer national TV broadcasting and DRadio is the national radio service. Within the ARD, further regional public broadcasting agencies exist that offer both radio and TV programmes.

1. Does Public Service News Reach the Whole Public across Offline and Online Offers?

In order to offer a first comparison we look at the offline broadcast weekly reach of PSM news in each of our eight countries and compare with select private broadcasters.[3] Although broadcasting is at the core of each of these PSM's activities, Figure 1 already reveals strong variations between countries. In five countries (UK, Finland, Germany, Italy, and Czech Republic) the PSM broadcast news services are used by well over half the population each week, but use is much lower in France, Spain, and Greece. In all eight countries, private broadcasters clearly provide significant competition for the PSM news services and in some countries they are the more widely used sources of news.

Figure 1. Weekly offline reach for PSM news and private broadcast competitors



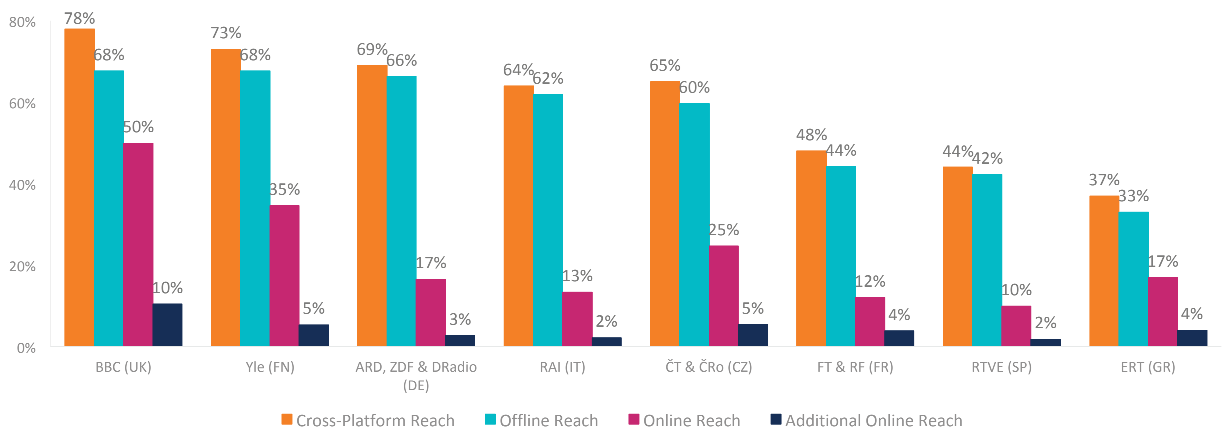
Q5A. Which of the following brands have you used to access news offline in the last week (via TV, radio, print, and other traditional media)? *Base: Total sample: UK = 2023, Finland = 2009, Germany = 2022, Czech Republic = 2023, Italy = 2006, France = 2005, Spain = 2005, Greece = 2018..*

While broadcasting activities often consume a large majority of their resources, all the PSMs we cover provide online news as well. Some have long seen this as an essential and integral part of public service provision in a changing media environment. Others have had a slower start, made more minimal investments, or been constrained by policymakers from developing their online offers. Consequently, the online reach of public service news varies significantly from country to country, as is clear in Figure 2, comparing online and offline reach of PSMs. In all cases, online reach is much lower than offline reach. Online, of course, PSMs compete not only against the

[3] In the charts that follow where there are separate PSM TV and radio operations and/or multiple major PSB providers (as with ARD, ZDF, and DRadio in Germany) we have cumulated PSM total news reach for each country. This is the case in Czech Republic, Germany, and France. In Greece, where we had no information about the reach of the PSM's radio service, we look at the figures for TV broadcasting only. Moreover, in all countries we will only be looking at the reach of each PSM's national broadcast services and have excluded regional operations. When we compare with private broadcast competitors, we are looking at those one or two that had the highest offline reach according to our data in 2019. See Appendix for full details of how we have treated figures for each country and for each organisation's individual reach.

online offers of private broadcasters, but also the online offers of newspapers, digital-born media, and countless other websites, as well as against platforms like Facebook and YouTube. This is not necessarily a zero-sum environment, but it certainly is competitive.

Figure 2. Cross-platform, offline, and online weekly reach of PSMs



Q5A/B. Which of the following brands have you used to access news offline/online in the last week? *Base: Total sample: UK = 2023, Finland = 2009, Germany = 2022, France = 2005, Italy = 2006, Spain = 2005, Greece = 2018, Czech Republic = 2023.*

Simply looking at the percentages for offline reach and online reach separately could suggest that public service news in fact delivers on the ambition of near-universal reach. If, say, two-thirds of the population get public service news offline, and another third gets it online, as in Finland, total reach could be near-universal. But in fact, as Figure 2 shows, public service news online overwhelmingly reaches an audience that also uses offline public service news. Across the eight countries covered here, the BBC is the only PSM whose combined cross-platform news reach is significantly higher than its offline reach alone (78% as against 68%). In every other case, online news offers deliver little additional reach because they mainly reach the same audience as broadcast news. In most cases, the additional online reach is 5% or less.

The challenge to reach audiences will only grow more pronounced and consequential as the move to a more digital, mobile, and platform-dominated media environment continues. While broadcast media are still widely used, and older people in many countries are spending more time watching television, overall consumption is in continuous decline, and both reach and viewing time are in sharp decline among younger people. In the UK, for example, people today watch 50 minutes less traditional TV each day than they did in 2010, and viewers between 16 and 24 have halved the time they spend watching TV even as they have embraced digital media (Ofcom 2019).

Online is therefore key to the future of public service news, and currently public service news provision online falls far short of the ambition of near-universal service. This reflects the challenges of our increasingly digital, mobile, and platform-dominated media environment, despite the opportunities it presents.

First, competition for attention is far more intense due to much greater choice. This means self-selection, where people pick on the basis of how interesting and appealing they find offers, will become more important than in a lower-choice environment often characterised by habit and smaller media repertoires and that the traditional 'hammocking' of news between popular entertainment offerings will be much less effective (Nielsen and Sambrook, 2016).

Second, it is an environment where different platforms – ranging from search engines to social media and messaging applications, and perhaps in the future voice assistants – play a central role in how people access and use news and other content. This means that various forms of algorithmic selection, often tightly tied to advertising and other commercial interests, will become more important, and automated serendipity and incidental exposure will drive more of overall news use (see e.g. Fletcher and Nielsen 2018a, 2018b).

In this environment, even the strongest public service media will have to fight harder for near-universal reach and command a much smaller share of the public's attention than they have in the past.

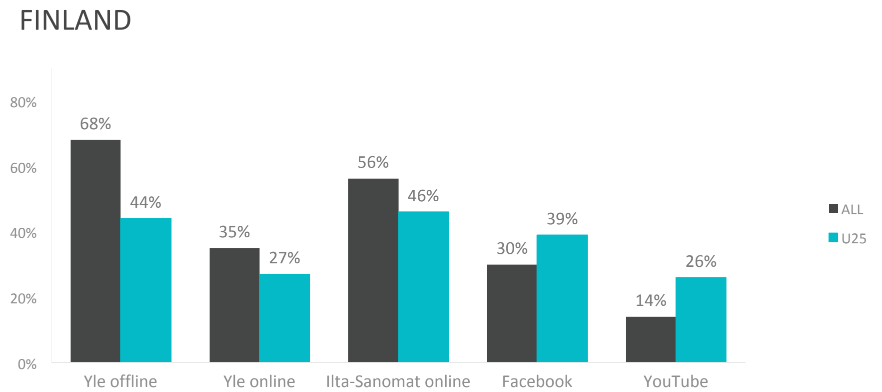
2. Does Public Service News Reach Young Audiences?

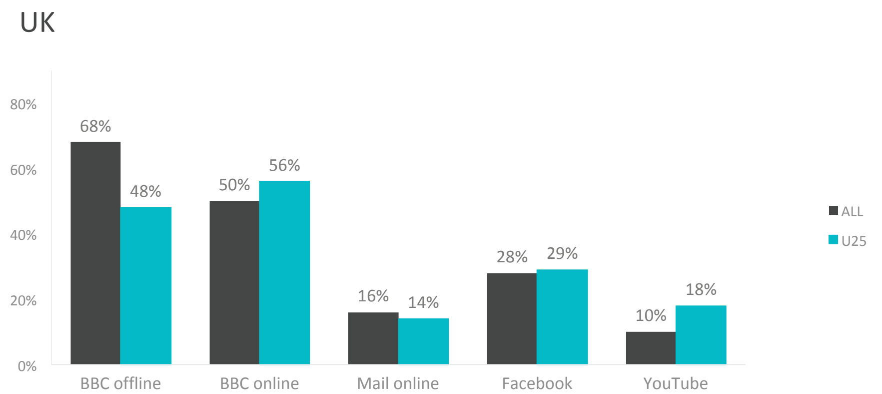
Against the backdrop of the structural decline of broadcast, especially among younger audiences, and the finding that so far, in most cases, online public service news offers only limited additional incremental reach, we turn now to assessing reach among younger audiences (under 25). This is important in terms of delivering on the ambition of near-universal service today, but also for the future, as many media habits and brand loyalties are formed early in life and retained for decades.

We compare how audiences between 18 and 25 use (1) offline public service news, (2) online public service news, and various alternatives including (3) the strongest private competitor online, as well as (4) Facebook (for news specifically), and (5) YouTube (again, for news), and how these patterns of use differ from the wider population of online news users. This provides a measure of how well public service media are doing in terms of reaching younger audiences with news. (Again, these different sources are not necessarily zero-sum choices.)

Looking at public service news offline and online, the first finding captured in Figure 3 is very clear. Despite broadcast offline public service news being much less widely used among younger audiences than in the wider public, in every case but the BBC, offline still delivers wider reach than online. Second, more strikingly, looking specifically at public service news online, despite younger audiences' consistent and demonstrated preference for online news over offline sources, the BBC is alone in our sample in having significantly higher online reach among young audiences than in the wider public. In every other country covered, reach is lower or at best roughly the same. As younger people continue to spend less time with offline media and more time online, this will become an increasingly serious challenge to the reach of public service news.

Figure 3. Sources of news among all and the U25





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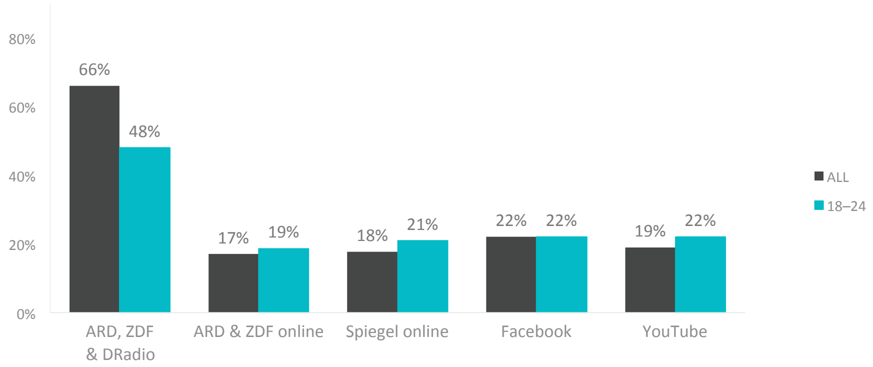

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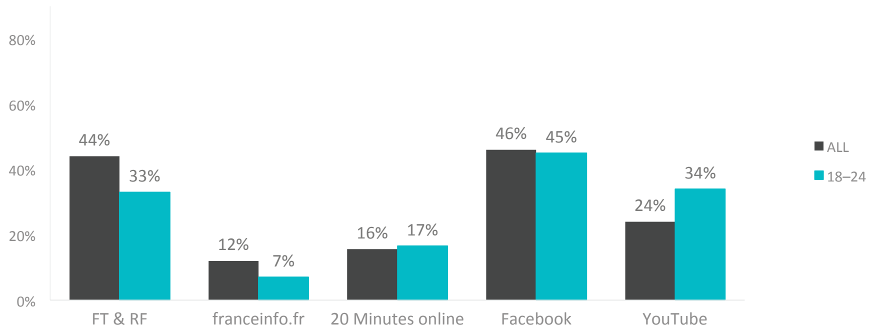
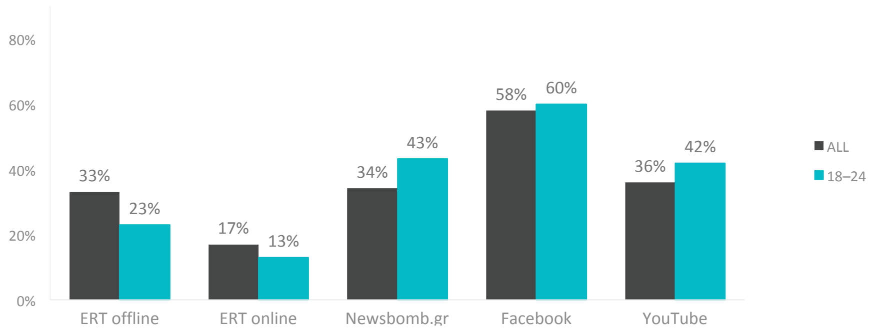


GREECE



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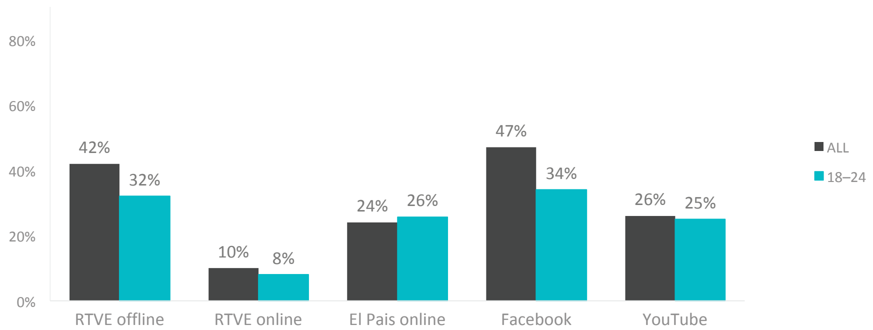
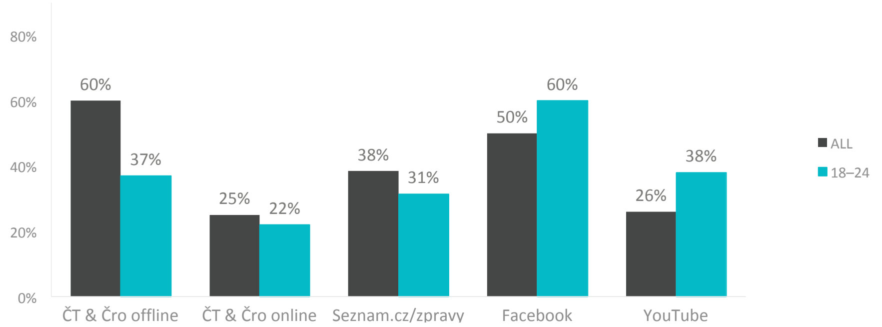


CZECH REPUBLIC



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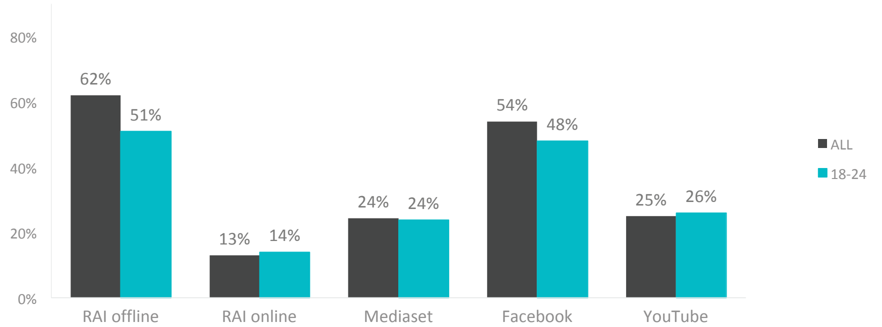


Q5A/B. Which of the following brands have you used to access news offline/online in the last week?
Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing, or discussing news in the last week? *Base: All/Under 25s: UK=2023/135, Finland = 2009/195, Germany = 2022/161, France = 2005/186, Spain = 2005/181, Italy = 2006/165, Greece = 2018/218, Czech Republic = 2023/165.*

Next, looking specifically at the relative popularity of online public service news and select alternatives, Facebook is more widely named by young audiences as a source of online news than public service media in seven of the eight countries covered, and YouTube in six of eight countries covered. Only the BBC has significantly wider online reach than both platforms (Yle is tied with YouTube in Finland, but behind Facebook). It is important to acknowledge, however, that public service news in all countries studied in this report chose to distribute content on Facebook and YouTube as well. Compared with the strongest private competitor online, this time considering competition by newspapers and digital-born outlets as well, we see yet again that the BBC is the only PSM provider in our sample that reaches more among all and the U25 than do the private operators. All other public service online operations fall behind the online reach of various news magazines, tabloid newspapers, digital-born outlets, or, as in Italy, their private broadcast competitor's digital services.

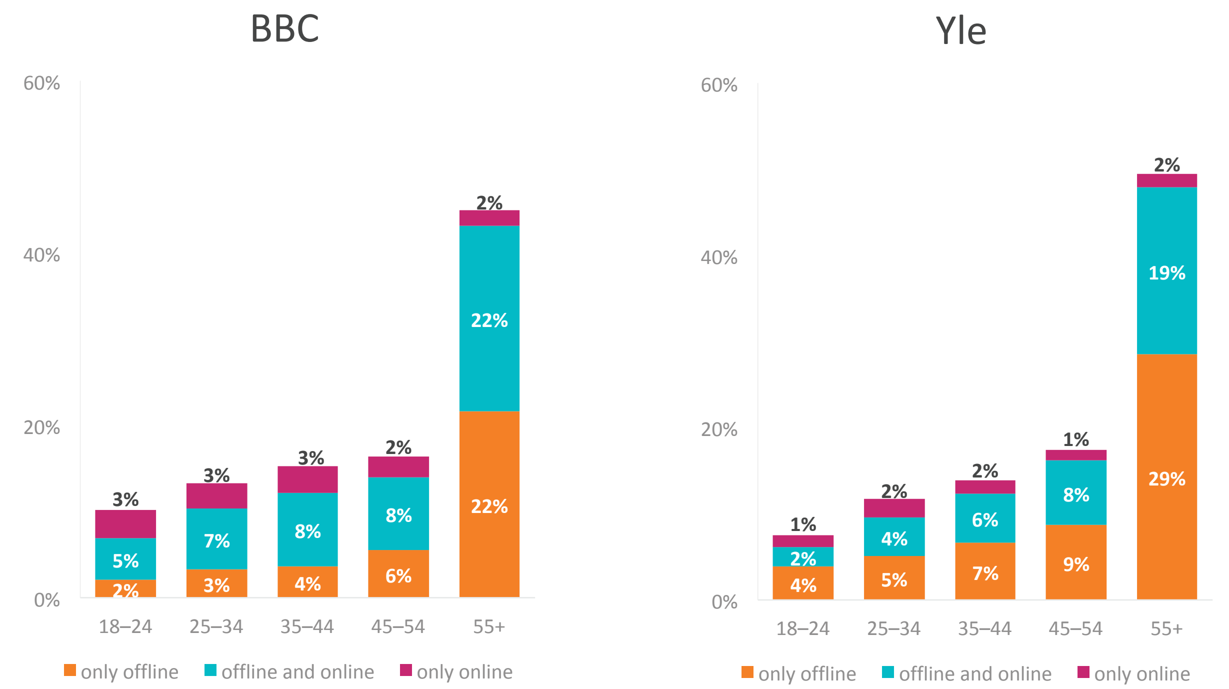
As younger people accustomed to relying far more heavily on various platforms for news than on PSMs grow older, it will be a major challenge to engage them directly with public service offers, and they will overwhelmingly have to be served digitally, on-site and off-site. Reaching young people online is not only a challenge that PSMs struggle with, it is also something many of them may in fact have grown worse at in recent years, even as the move to a more digital, mobile, and platform-dominated media environment continues apace. At least, comparing the online reach of public service news among audiences between 18 and 25 in 2016 (the first year for which we have comparable survey data on all eight countries) with reach in 2019 shows that online reach has slightly declined in seven out of eight countries (see Table 2).

Table 2: PSM online reach for U25 in 2016 and 2019 (%)

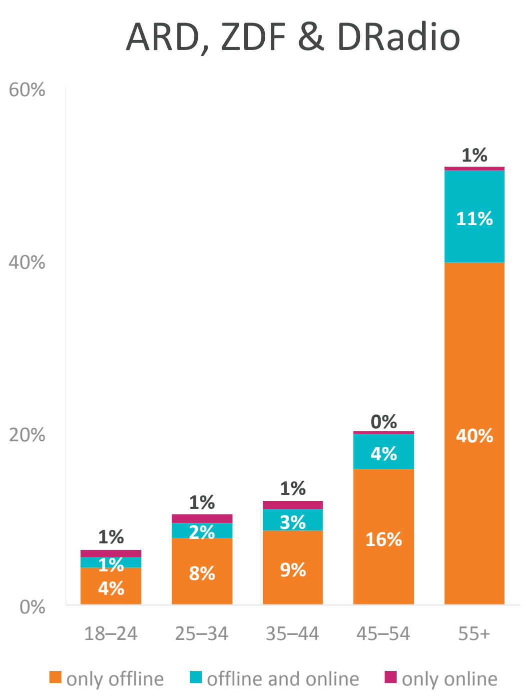
	BBC	Yle	ARD & ZDF	RAI	ČT & ČRo	RTVE	FT & RF	ERT
2016	59	29	21	18	30	16	9	12
2019	56	27	19	14	22	8	7	13
Change	-3	-2	-2	-4	-8	-8	-2	+1

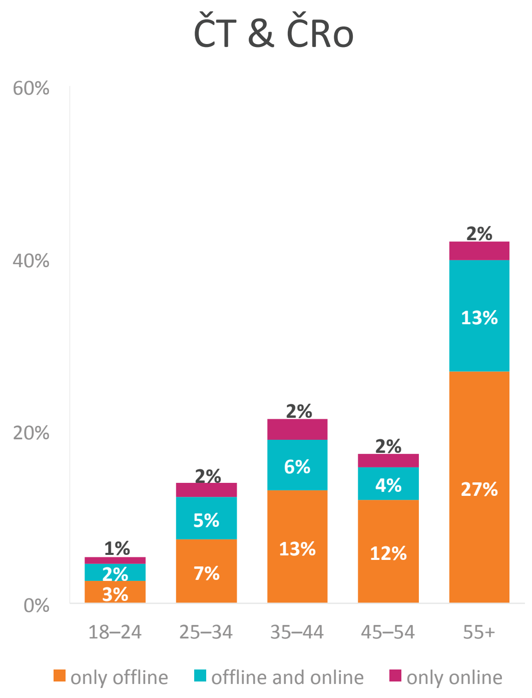
Now we break down the overall audience for public service news by age and platform, separating out those who only use offline broadcast offers, those who only use online offers, and those who use both.[4] The resulting chart (Figure 4) takes the overall weekly cross-platform reach of public service news (previously shown in Figure 2) and breaks down the whole public service news audience by age group as well as by what percentage is reached both offline and online, and only online. The figures are very revealing in two ways. First, the charts document how heavily public service news audiences skew towards older people, with those over 55 accounting for about half of total weekly reach (ranging from 42% (Czech Republic) to 52% (Germany)). Second, the charts document how PSMs, given the relatively limited popularity of their online news offers, remain heavily reliant on offline offers for reach even among younger people, with half or more of the 18- to 24-year-old audience reached offline only in most countries. As younger people continue to abandon broadcast in favour of digital media, the challenge of reaching them will become even more pronounced.

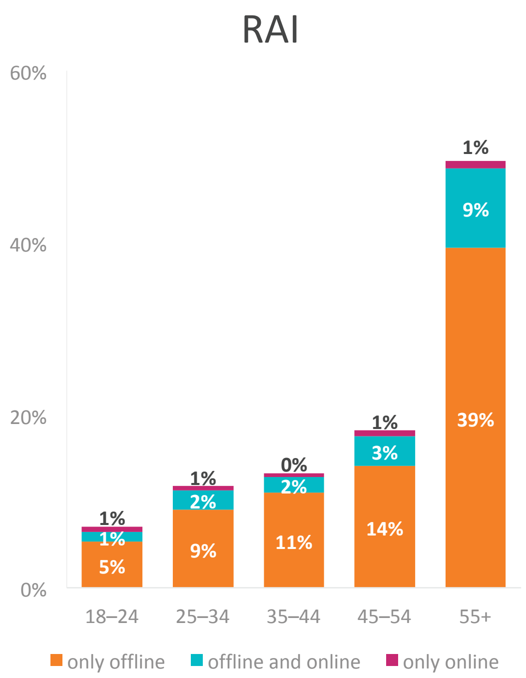
Figure 4. PSM audiences by age and platform use



[4] As this analysis requires us to break down users of any PSM service into different age groups one consequence is very low numbers in those countries where PSMs have a rather low reach across platforms. We will therefore only analyse the five countries where the PSMs have a significant cross-platform reach; that is, over 50%.







Q5A/B. Which of the following brands have you used to access news offline/online in the last week?
Base: 18–24/25–34/35–44/45–54/55+; UK = 135/278/304/323/983, Finland = 195/311/320/349/834, Germany = 161/289/295/414/863, Italy = 165/265/342/399/835, Czech Republic = 165/328/413/354/763.

In summary, we find that most PSMs struggle to reach younger audiences with news, that they remain heavily reliant on offline offers for weekly reach, that their online offers are in most cases less widely used for news than platforms like Facebook and YouTube, and that their overall audience across both offline and online skews heavily to older people, with those over 55 making up about half the audience by weekly reach.

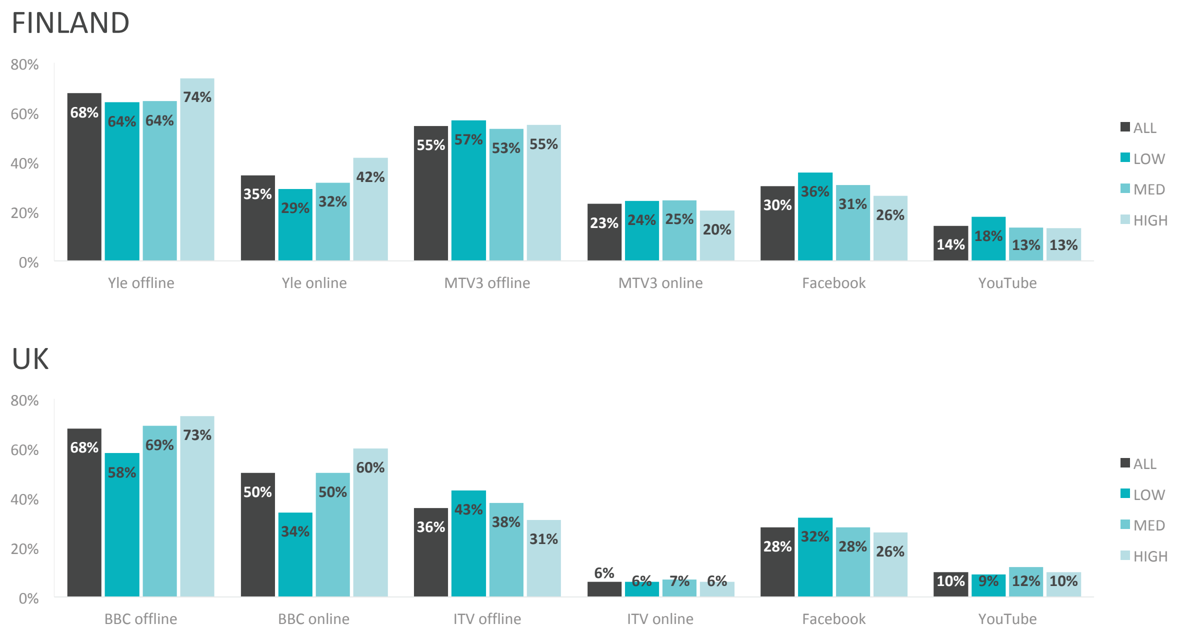
3. Does Public Service News Reach Audiences with Limited Formal Education?

Just as PSMs are concerned to reach all age groups so too the ambition of near-universal reach requires them to reach across social divides to deliver on the promise of a more equally informed democracy. There are many different divides (class, ethnicity, religion, etc.) worth considering here, but we will focus on just one by measuring the reach of public service news across different levels of formal education in the eight countries covered, comparing PSM reach with the reach of private broadcast competitors and different platforms.[5]

Our analysis shows that not only is the reach of public service news significantly higher among older people than the wider population, it is, as shown in Figure 5, also significantly higher among those with higher levels of formal education. In all eight countries covered, online as well as offline, public service news is less widely used by those with limited formal education, and this is not the case for every source of news. Given how news consumption more broadly is characterised by significant social inequality (Kalogeropoulos and Nielsen 2018), this means there is a risk of public service news exacerbating rather than equalising information inequalities.

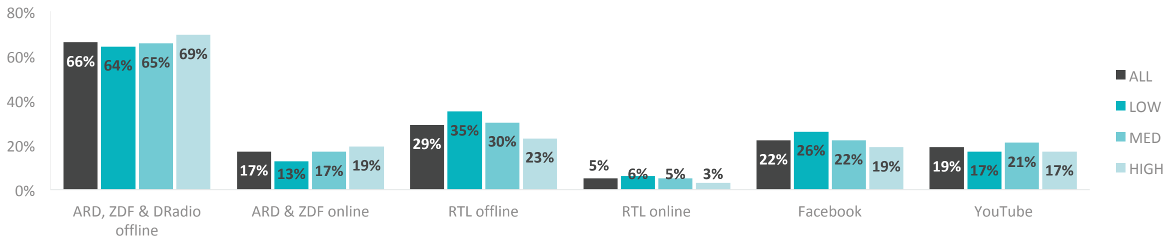
In almost all countries we find significant educational inequalities in both offline and online public service news use. The online differences are particularly striking in countries where the overall online reach of the PSM was low to start with. In Germany, only 13% of the least-educated group (compared with 17% overall) use the ARD and ZDF online services at least once a week and this number goes down to 11% for RAI, 9% for RTVE, and 8% for the joint PSMs' online services in France.

Figure 5. Sources of news by educational level

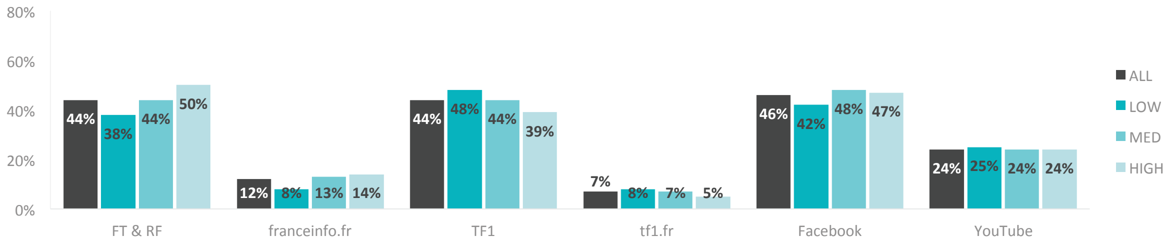


5 We attempted to categorise educational levels across countries in a comparative way. Here, those with 'low' levels of formal education are those who have at most completed lower secondary education (GCSEs in the UK or equivalent level). Those in the 'medium' category have at most completed post-secondary education (generally vocational/professional qualification in the UK) and those in the 'high' category have completed short-cycle tertiary education programmes or hold university degrees. Figures for Greece are not shown as those with 'low' levels of formal education are underrepresented in the Greek sample.

GERMANY



FRANCE



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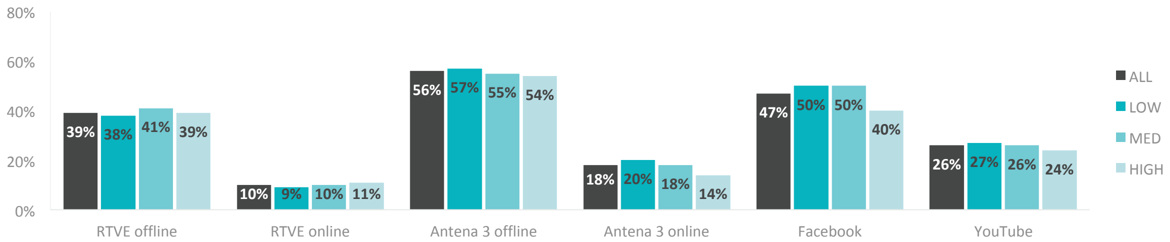
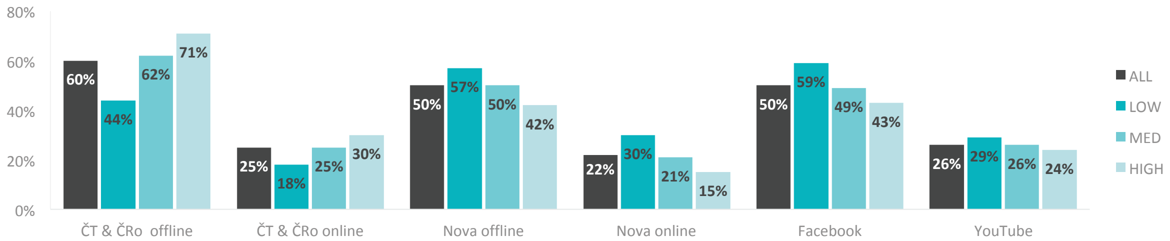
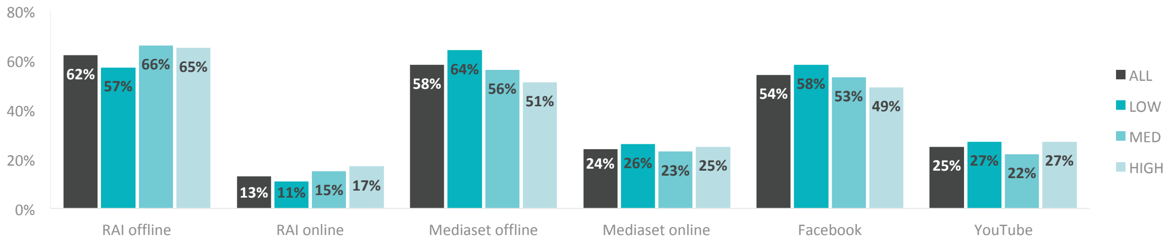


CZECH REPUBLIC



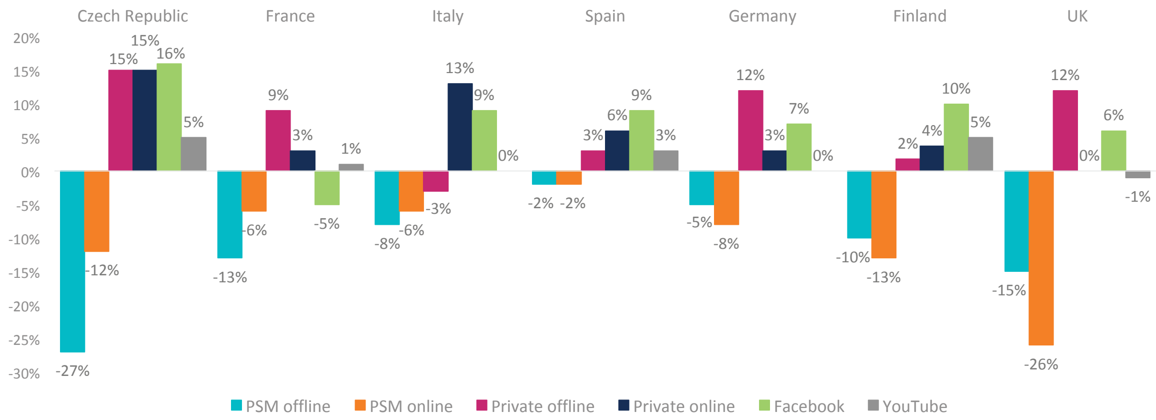
ITALY



Q5A/B. Which of the following brands have you used to access news offline/online in the last week?
Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing, or discussing news in the last week? *Base: All/low/medium/highly educated: UK = 2023/558/626/839, Finland = 2009/360/924/725, Germany = 2022/596/784/642, France = 2005/400/932/673, Spain = 2005/706/569/730, Italy = 2006/867/812/327, Czech Republic = 2023/538/1045/440.*

Looking across PSMs and a sample of their competitors, including both private broadcasters and platforms like Facebook and YouTube used for news specifically, it is striking that while PSMs have a larger audience among those with higher levels of formal education both offline and online, many of their competitors have the same or higher reach among those with limited formal education – people who are thus demonstrably interested in and actively using news, but many of whom apparently do not find news provided by PSMs appealing. PSMs in fact seem particularly bad at reaching people with more limited formal education.

Figure 6. Differences in sources of news between least and highest formally educated



Q5A/B. Which of the following brands have you used to access news offline/online in the last week?
Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing, or discussing news in the last week? *Base: low/highly educated: UK=558/839, Finland = 360/725, Germany = 596/642, France = 400/673, Spain = 706/730, Italy = 867/327, Czech Republic = 538/440. Note: The PSMs and private competitors are the same as in Figure 5.*

Comparing the difference scores in Figure 6 we see even more clearly than before that all PSMs underperform – offline as well as online – among those with more limited formal education. Strikingly, these inequalities are also very pronounced for public service media like the BBC, which did better than others in terms of reaching younger audiences.

Taken together, the analyses in this section reveal that reaching audiences with limited formal education is as hard for many PSMs in our sample as reaching younger audiences.

4 . Does Public Service News Reach Audiences across Left–Right Political Views?

Having assessed PSMs' ability to reach a wide audience across age and education differences, we now turn to their ability to reach across differences in political views and attitudes, first examining reach across left–right differences. The ability to appeal to a wide range of people – whatever their political views – is important both to deliver on the ambition of near-universal reach as well as more broadly for the mission and legitimacy of public service media.

In Figure 7, we chart each PSM news provider and select private broadcasters in terms of the size of their cross-platform weekly news audience (the size of each bubble) and how far its overall audience leans towards the left or right of the political spectrum (as compared with the population as a whole). This is based on asking each survey respondent to self-identify politically on a seven-point scale ranging from 'very left-wing' to 'very right-wing'. If a news organisation is to the right of the centre of the chart, its audience is more right-leaning than the population. The further from the centre, the more politically polarised its audience. News providers in the centre of the charts tend to have audiences that appeal equally to those on the left and those on the right.[6]

Our analysis thus shows that – despite frequent assertions to the opposite effect – most public service media we cover are relatively successful at reaching politically diverse audiences across the left–right political spectrum. The audiences of ČT and ČRo, Yle, RTVE, BBC, and Rai sit right in the centre of the maps, indicating that they tend neither to the left nor to the right when compared with the population average. We see a slight deviation to the left in France and a slightly larger one in Germany. Only the audience of the Greek PSM is strongly skewed to the left of the political spectrum.

The biggest private broadcasters that we have included in our analyses throughout can again serve as a useful contrast, as their position on the audience maps gives us a point of comparison. For most countries we see that the audiences of the private competitors lean more strongly to the political right than the left. Nova and Prima in Czech Republic represent exceptions, as does laSexta in Spain, as these outlets' news audiences are rather left-leaning when compared with the population as a whole.

Our analysis thus suggests that most of the PSMs in our sample are able to appeal to people across the left–right spectrum, and more so than (at least some) private competitors.

In order to learn more about these country differences we want to take another look, now focusing on whether different political audience segments trust PSMs. Broad reach is one thing, broad trust another.

This analysis is based on a survey question where respondents are asked how much they trust individual news brands on a scale from 0 (not at all trustworthy) to 10 (completely trustworthy). We find that in five of our eight countries PSM news services are trusted more on average than the select private brands.

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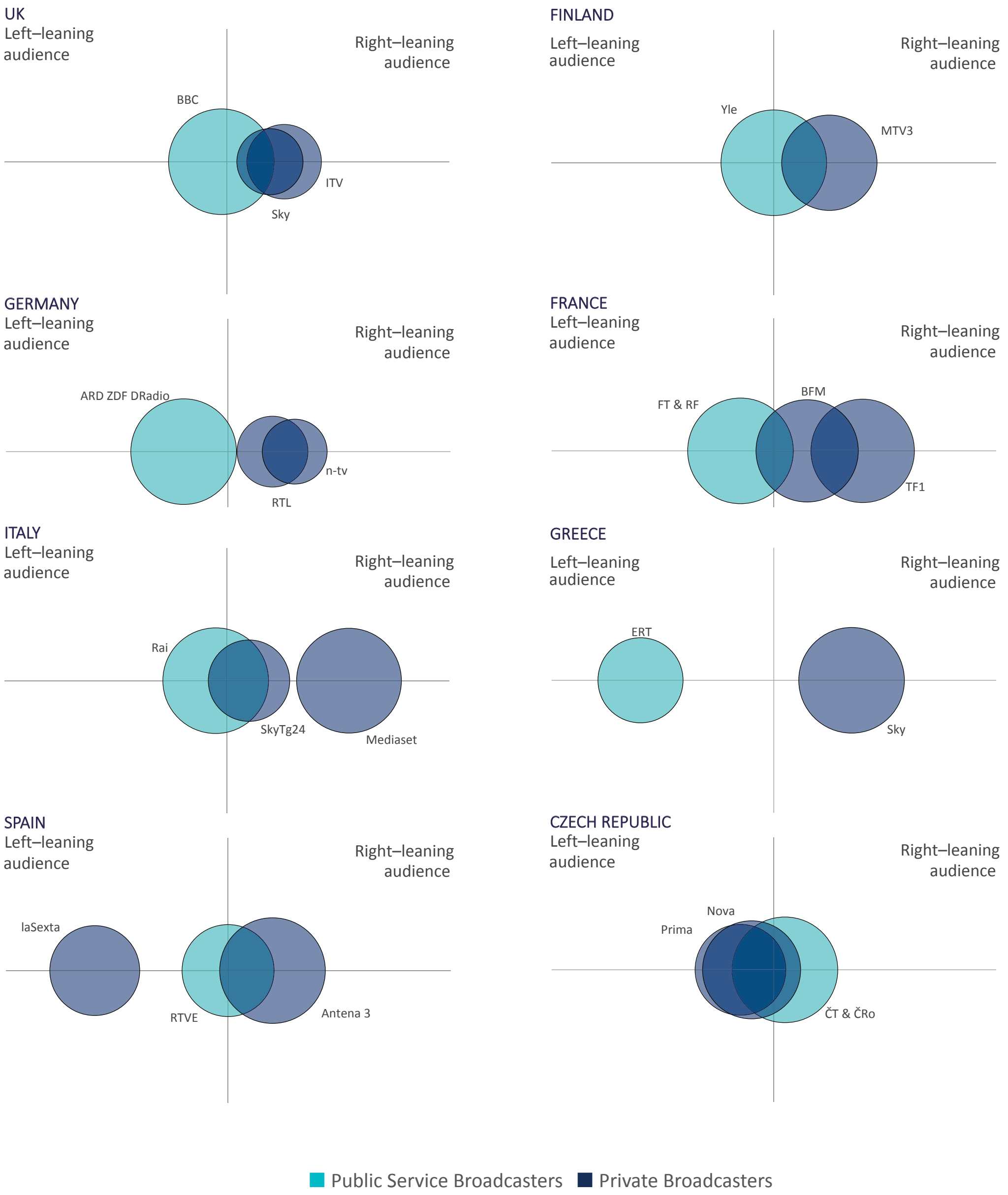
6 It is important to note that the audience maps are based purely on audience use by respondents' self-identified position on a left–right divide, rather than any assessment of the editorial stance or output of any media organisation.

Figure 7. Cross-platform audience maps for political left–right orientation

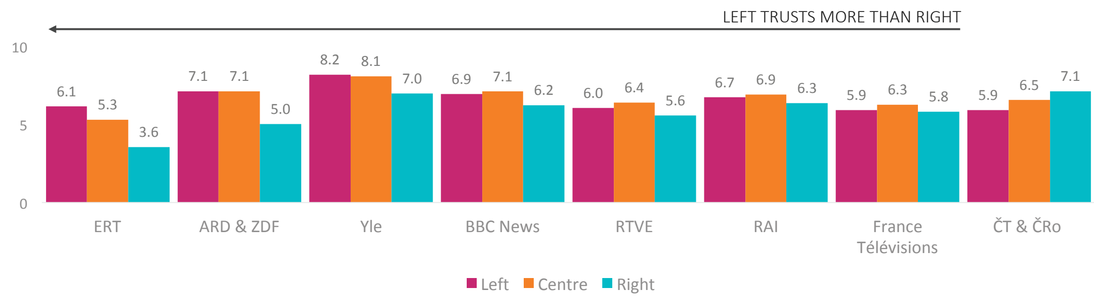


Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? *Base: Total sample: UK = 2023, Finland = 2009, Germany = 2022, France = 2005, Italy = 2006, Spain = 2005, Greece = 2018, Czech Republic = 2023.*

If we break down the trust scores for our PSMs by different political orientations and look into how people who identify themselves as being on the political left, in the centre, or on the right trust PSMs a complex picture emerges (Figure 8). In France, Italy, Spain, and the UK, PSMs have the highest trust scores among those who self-identify with the political centre. In Germany and Finland, the trust scores are equal or roughly equal among those in the centre and those on the left.

Figure 8 provides more detail. Following the arrow and only comparing the trust scores among the left- and right-leaning groups (leaving out the centre) we find that in general our PSMs are trusted more by the left-leaning audience segments compared with the right-leaning segments in every country apart from Czech Republic. The gap is smallest for France Télévisions with a difference of only 0.1 and the gap is biggest for ERT, ARD and ZDF, and Yle where the left-leaning group trusts the PSMs more by at least one trust point up to 2.8 points in Greece.

Figure 8. Average level of trust in PSM news by political leaning



Q1F. Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? **Q6_2018.** How trustworthy would you say news from the following brands is? Use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. *Base: Left/Centre/Right: Greece = 273/1246/202, Germany = 215/1416/111, Finland = 428/761/289, UK = 346/1055/373, Spain = 548/885/220, Italy = 251/903/286, France = 412/439/365, Czech Republic = 142/1325/251. Note: The trust scores for individual brands by political leaning are as follows for Left/Centre/Right: ARD Tagesschau = 7.2/7.2/5.1, ZDF heute = 7.0/7.0/4.9, ČT = 5.8/6.5/7.1, ČRo = 6.1/6.6/7.2. Trust scores for DRadio and Radio France were not available.*

In summary, most of the PSMs in our sample manage to reach a politically diverse audience, and they are often relatively highly trusted, though in some cases less so on the political right.

5. Does Public Service News Reach Both Populist and Non-Populist Audiences?

Beyond the challenge of reaching across left–right differences in political views, in recent years, many PSMs have increasingly had to think about how to fulfil their role and remit in societies where populist views are on the rise, views that have sometimes been accompanied by direct attacks on PSMs as pro-establishment, partisan, or liars. We therefore complement our analysis of reach across differences in political views with an analysis of PSMs' ability to reach both those audiences who have populist attitudes and those who do not.

To do this, we rely on survey questions that measure people's populist attitudes, following previous work on the topic (Pew Center 2018). We asked our respondents to what extent they agree or disagree with two ideas about the nature of society and politics that are commonly expressed within populist politics. The first idea is about an irresolvable antagonism that persists between a 'bad' political elite on the one side and a 'virtuous' people on the other side. The second idea articulates the notion that all politics should follow the ultimate will of the people. We measured individuals' support for these ideas by asking them if (on a five-point scale ranging from 'strongly disagree' to 'strongly agree') they believe that 'most elected officials don't care what people like me think', and that 'the people should be asked whenever important decisions are taken'. Those who selected 'tend to agree' or 'strongly agree' for both of these statements were classified as populist citizens and all the others as non-populists.

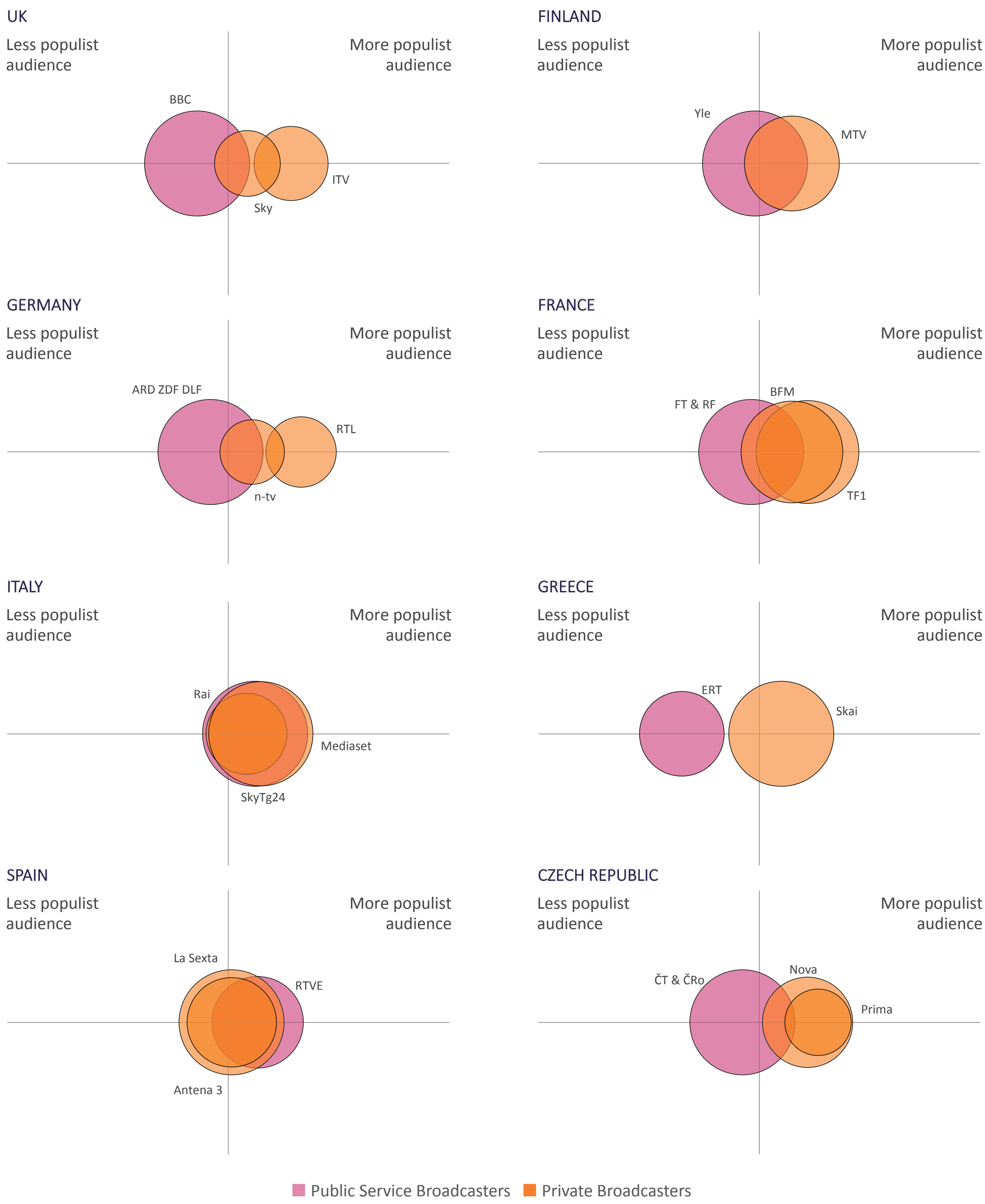
In Figure 9, we compare the degree to which the cross-platform audiences of different PSMs and their private broadcast competitors are populist vs. non-populist, again as compared with the average degree of populism that prevails in each of the investigated countries. In other words, if an outlet or a group of PSMs sits left of the vertical line in the middle, this publisher's audience is less populist than the sample as a whole, and if on the right, it is more populist.

Among the eight countries covered, we see that the deviation from the sample's mean is generally small. Yle in Finland sits almost perfectly on the vertical axis, and only slightly off towards, the less populist end we find the PSMs in France, Czech Republic, and Germany. Furthest out on the non-populist side sit the UK's BBC and Greece's ERT, the latter having by far the strongest non-populist audience. With this, we see that most PSMs in our sample have an audience that reaches across different attitudes to include both people with and people without populist attitudes.

If we compare PSMs' news services with where the private broadcast competitors sit on the populism dimension, we see that private broadcasters seem to be better at catering to populist audiences in most cases. The only exception to this pattern is Spain. Taken together, for most countries that we study in this report PSM news services cater to populist as well as non-populist audiences to roughly similar degrees.

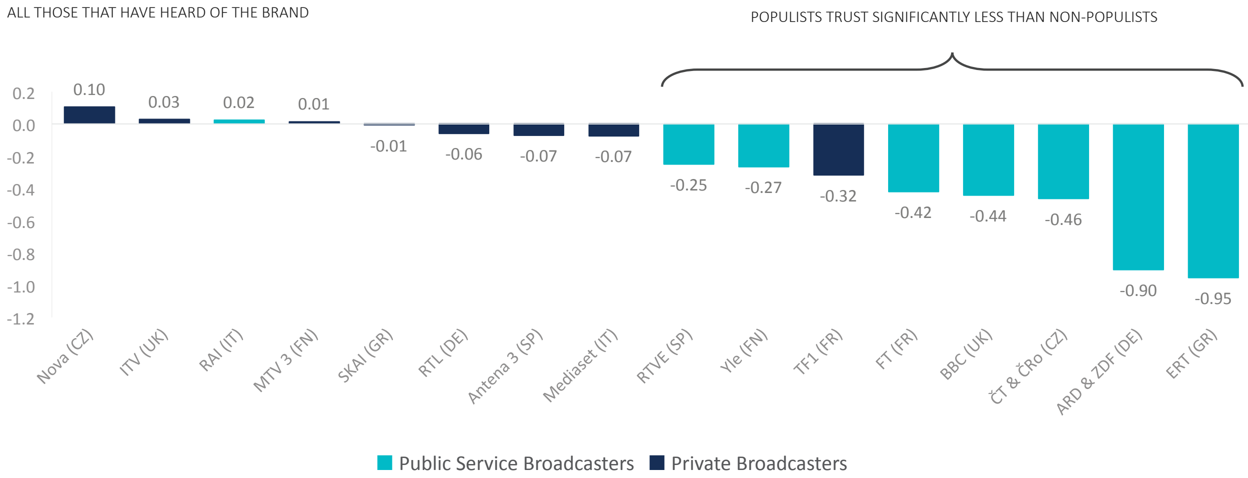
As with the difference between the left and the right, reach is one thing, trust another. So again we turn to examine whether PSMs are broadly trusted, this time across people with populist attitudes and people without. Figure 10 shows the differences in the mean trust scores that we find between our populist and non-populist groups for a range of news services across our sample countries. If the difference is negative, populist citizens trust a brand less compared with non-populist citizens; if the difference is positive, populists trust a brand more than non-populists do.

Figure 9. Cross-platform audience maps along populist attitudes



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q5A/B.** Which of the following brands have you used to access news offline/online in the last week? *Base: Total sample: UK = 2023, Finland = 2009, Germany = 2022, France = 2005, Italy = 2006, Spain = 2005, Greece = 2018, Czech Republic = 2023.*

Figure 10. Difference between average trust scores of populists and non-populists



Q2_2019_1/2. Please indicate your level of agreement with the following statements: The people should be asked whenever important decisions are taken/Most elected officials don't care what people like me think. **Q6_2018_trust.** How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. *Base: Total Sample: Non-Populists/ Populists: UK = 1148/875, Finland = 796/1213, Germany = 849/1173, France = 661/1344, Italy = 881/1125, Spain = 693/1312, Greece = 594/1424, Czech Republic = 791/1232. All those that have heard of the brand are at least 85% of the total sample. Note: As we have done before, we have combined the brand trust scores when we have separate PSM organisations in one country. The individual difference scores are as follows: ARD Tagesschau = -0.90, ZDF heute = -0.89, ČT = -1.12, ČRo = -0.26. Trust scores for DRadio and Radio France were not available.*

For about half of the brands examined here, we see no significant difference in how trustworthy populist or non-populist citizens evaluate them. However, where there is a significant difference, we always find populist citizens trust the respective brand less. What is more, most often these brands are PSMs. Indeed, all but one PSM that we study in this report are trusted significantly less by individuals who support populist ideas. The only exception is RAI, which is trusted to equal degrees by populist and non-populist citizens in our data.

Importantly, when reading these findings we want to keep in mind what we have presented in the previous section regarding the overall trust levels for PSM news and those for private broadcasters. To reiterate, in most cases the PSMs' news services were trusted more than private broadcasters. This was true in Finland, the UK, Germany, Czech Republic, and France. Nonetheless, the trust gaps between populist citizens and non-populist citizens are much more pronounced and systematic than the gaps we found when looking at left–right-wing political orientation. As populist politics seems likely to persist, addressing populist audiences will remain a challenge for PSMs.

Discussion

In this report, we have analysed the reach of public service news in a sample of eight countries and found that, while public service news often has relatively high cross-platform reach and manages to reach politically diverse audiences, it falls well short of the ambition of delivering near-universal service, and it primarily serves an older audience with higher levels of formal education.

Many of the PSMs we cover still have high weekly reach, but generally that reach is primarily driven by offline broadcast offers that are in structural decline. For all but one country covered, more than half of audience reach is offline only, and online audience reach is much smaller than offline reach. This presents an existential challenge for public service news going forward. Given the rapid decline in viewing time in many countries, especially among younger people, television's ability to serve a wide audience well will continue to erode as people turn to digital, mobile, and platform media, and public service news will increasingly have to be delivered digitally – an environment that currently gives very little additional reach.

Connecting with younger people and those with more limited formal education is a particular challenge for PSMs – particularly striking given that both private news media and platforms like Facebook and YouTube are often more widely used by younger people for news. With both younger people and people with more limited formal education, PSMs not only have lower reach than in the wider population, but they also underperform relative to competitors, many of whom have the same or higher reach with these groups.

Our finding that PSMs still have significant offline reach and are often among the most widely trusted sources of news (though often somewhat less trusted by those on the political right and by people with populist attitudes) suggests that PSMs still have distinct strengths, and especially integrated, well-funded, and independent providers have significant cross-platform audience reach (for a similar finding see also Sehl et al. 2016).

Overall, our analysis documents that the challenges facing PSMs news provision are bigger – much bigger – than is commonly acknowledged, even in countries with a long history of strong PSMs. That is even clearer if we move from the relatively generous measure of reach used here – weekly reach – and examine public service news reach by the more exacting standard of people who say they use it more than three times a week. Our survey data show that most PSMs we covered reach well under 10% of internet users with online news at least three times a week, and only the BBC reaches more than a third (39%). More than 20 years into the digital media revolution, PSMs still remain overwhelmingly broadcasters, both in terms of investment and audience. The public, however, is moving on.

In their current form, we thus find that many PSMs, despite their wide offline reach and their often more robust funding arrangements (compared with private sector peers), struggle to get effectively beyond their ageing and educated core audience, especially online. This problem will only grow more pronounced and consequential as the move to a more digital, mobile, and platform-dominated media environment continues.

With traditional linear broadcasting in inexorable structural decline, PSMs will increasingly have to reach people online in a media environment characterised by (1) far more intense competition for attention due to much greater choice and (2) the role platforms – search engines, social media and messaging applications, perhaps voice assistants – play in how people access and use news.

Just how immense the challenge is of not only securing wide reach – hard enough – but also winning a significant amount of people's attention can be illustrated by the case of the BBC, one of the best performing in our analysis in terms of reach. In the UK, the BBC in early 2019 accounted for 63% of all radio listening, and 31% of all linear scheduled television viewing, but just 1.5% of all time spend with digital media.[7] (BBC News made up 0.6%.) By comparison, Google's various products and services made up 22% of all time spent with digital media, and Facebook's 14%.

This illustrates how PSMs that may seem dominant and large to private sector competitors are at the same time demonstrably much smaller in terms of reach and share of attention than the largest platform companies. These numbers further underline the urgency of a thorough reinvention of public service news delivery fit for a digital media environment, and able to better serve younger audiences and audiences with limited formal education.

The alternative to this is not the status quo but continued decline and ultimately the very real risk of irrelevance to much of the public – an irrelevance that would undermine the legitimacy of the PSM as an institution and leave PSMs unable to deliver on their public service mission.

In its current form, public service news could be cast as an arrangement that draws funding from everybody and invests it in serving already often well-served older and more educated people, while underserving younger people and people with more limited formal education. Ultimately this risks exacerbating rather than equalising information inequalities, and, in time, especially those poorly served may reasonably question why they should pay for public service news that they rarely use.

For PSMs, our analysis thus draws attention to a number of strategic challenges.

(1) Even PSMs with relatively high cross-platform reach fall far short of the ambition of near-universal service online, and reaching younger people and people with limited formal education seems particularly challenging. Given that existing offers, often quite general and long-established, demonstrably struggle to serve these audiences effectively, PSMs may need to consider much more aggressive and targeted significant investments in cross-platform news offers specifically targeted at building higher reach and more substantial engagement among hard-to-reach groups. ('Great things for everybody' is not a strategy: choices must be made.) At a first glance, such investments may seem like niche supplements, but it is worth remembering that (expensive) flagship television news programmes with an audience in the millions effectively are niche programmes, specifically niche programmes for older people.

(2) Given the fact that most online news users, especially younger people and people with limited formal education, are at least in part reliant on search engines, social media, messaging applications, and other platforms for accessing and using news, PSMs need a much clearer approach to leveraging the opportunities afforded by platforms for 'meeting people where they are'. They need to do this without becoming overtly reliant on for-profit companies that are also competitors for audiences' attention and have their own agenda and interests (and demonstrably will from time to time change their priorities and products, sometimes dramatically, and often with no notice).

(3) Even with far more targeted investments in reaching specific underserved audiences, and a clearer approach to leveraging the opportunities afforded by platforms, it is worth at least asking how realistic the ambition of near-universal service and a large share of attention ultimately is in a far more competitive digital, mobile, and platform-dominated media environment. High reach and hours spent were perhaps useful indicators for PSM's ability to deliver on their role and remit in

[7] Radio data from RAJAR, television from BARB, and digital media from comScore.

the past, and are still important measures today. But both reach and time spent are almost certain to decline going forward as media supply (content available) grows faster than media demand (time spent). Even if the BBC increased its share of the time people spend with digital media ten-fold, it would still have a share less than half of what it currently has in linear television. What alternative metrics might help measure public service news reach and demonstrate to the public and to policymakers whether or not PSMs are delivering on their role and remit?

That is ultimately a question for policymakers who define the role and remit of PSMs. However, if policymakers decide that the objective of universal reach for public service news should be retained but conclude that PSMs alone cannot rise to the challenges they face, then it seems likely that they will be tempted to explore a range of complementary or alternative policy approaches. Many approaches might be considered, above and beyond the broader, perennial, debates about the appropriate level of funding and how to govern relations with private competitors to avoid the risk of crowding out. These raise fundamental political and policy questions that go beyond the audience research presented here, but it is worth at least briefly outlining three of them.

First, policymakers may choose to confront the issue that while, historically, spectrum allocation and regulation of electronic programme guides helped ensure that public service content including news was prominent and easy to find, currently most countries have no similar mechanism for guaranteeing the prominence of public service content on online platforms, whether on-demand video sites or other platforms. One consequence is that even the most digitally advanced PSMs face an environment where the easy accessibility of their services depends on commercial negotiations. Policymakers may be tempted to consider whether some equivalent measure for accessibility of PSM online and on-demand services could be developed and whether this can be done without (1) unduly distorting competition between private media and PSMs and (2) undermining platform companies' autonomy and ability to serve their users.

Second, in countries where different forms of private provision appear better at reaching relatively underserved groups such as younger people and people with more limited formal education, policymakers may be tempted to consider whether direct or indirect forms of public support could be made available to such operators for specific output to provide quality news content to specific underserved communities. The idea could appear attractive, though as with other attempts to deploy public funding beyond PSM organisations – whether to commercial or non-profit organisations – such measures would tend to encounter problems about how to ensure that the public money is truly in addition to what the operator might have provided anyway and how to balance accountability, efficiency, and effectiveness, along with guaranteeing the full editorial independence of the media organisation in question, as well as how to ensure the market is not unduly distorted.

Third, if policymakers are unconvinced existing PSMs will rise to the challenges identified here and effectively serve a wider audience than their ageing and declining broadcast viewership, they might consider more structural intervention designed to shake up the sector. Just as new PSMs have been established in the past to compete with and supplement incumbent PSMs, policymakers in some countries might be tempted to consider setting aside public funding for the creation of new niche public service providers. These might have specific remits, targeted for example at serving currently underserved groups with online news in a way that succeeds better in reaching them than existing PSMs. Such initiatives would face many challenges, including some of those identified above, together with decisions about how long a period to give the newly created operators to succeed or fail before their funding was reviewed. Indeed, given the challenges identified throughout, real ingenuity would be required to ensure that the creation of new niche players actually achieved the desired impact.

These three approaches are part of a much wider range of options that policymakers might consider if PSMs fail to respond to the threats identified in this report. But none of these options is easy and it seems likely that for the moment most policymakers will expect PSMs themselves to develop new strategies to ensure near-universal reach for their news services in a much more competitive and complex environment than they've faced to date. Will PSMs rise to that challenge and take charge of their destiny or risk losing the public connection that is both the key to their legitimacy and the premise of delivering on their public service mission?

Table 3: Overview of main findings

PSM	Overall Offline Reach	Overall Online Reach	Online Reach among the Young	Online Reach among the Less Educated	Overall Trust	Left–Right: Who Trusts Most?	Bridging the Left–Right Reach Gap?	Populism: Who Trusts More?	Bridging the Populist Reach Gap?
yle	68%	35%	27%	29%	7.77	left and centre	yes	non-populists	yes
BBC	68%	50%	56%	34%	6.85	centre	yes	non-populists	yes
ARD ZDF Deutschlandradio	66%	17%	19%	13%	6.97	left and centre	left-leaning audience	non-populists	yes
france•tv radiofrance	44%	12%	7%	8%	5.85	centre	slightly left-leaning audience	non-populists	yes
Rai	62%	13%	14%	11%	6.67	centre	yes	no difference	yes
rtve	42%	10%	8%	9%	6.20	centre	yes	non-populists	slightly populist audience
EPT	33%	17%	13%	–	5.25	left	left-leaning audience	non-populists	slightly non-populist audience
Česká televize Český rozhlas	60%	25%	22%	18%	6.51	right	yes	non-populists	yes

Appendix

What sources did we combine and what was their individual reach? What we list under 'Channel/ Organisation' is the wording used to tap for the respective brand in our questionnaires.

Country	Group	Channel/Organisation (* = Radio)	Individual Reach (%)	Platform Reach (%)	Cross-Platform Reach (%)
UK	BBC	BBC TV News	61	68	78
		BBC Radio News*	26		
		BBC News online	50	50	
	ITV	ITV News	36	36	39
		ITV News online	6	6	
	SKY	Sky News	26	26	31
		Sky News online	14	14	
Finland	Yle	Yle tv-uutiset	61	68	73
		Yle-radiouutiset*	24		
		Yle-uutiset verkossa (mukaan lukien uutiset Areenasta)	35	35	
	MTV3	MTV3 tv-uutiset	55	55	60
		MTV-uutiset verkossa (mukaan lukien uutiset Katsomosta)	23	23	
Czech Republic	ČT, ČRo	Ceska televise	56	60	65
		Cesky rozhlas Radiozurnal news*	15		
		Ct24.cz	22	25	
		iRozhlas.cz	5		
	Prima	Prima news	43	43	48
		iPrima.cz	19	19	
	Nova	Nova news	50	50	56
		TN.cz	22	22	
Greece	ERT	ERT1	29	33	37
		ERT3	12		
		ERT.gr News online	17	17	
	Skai	SKAI	50	50	57
		Skai online (skai.gr)	25	25	
	Ant	ANT1	45	45	
Italy	RAI	Telegiornali RAI (Tg1, Tg2, Tg3, TgR)	46	62	64
		RaiNews24	25		
		Radiogiornali RAI (Gr1, Gr2, Gr3)*	11		
		Porta a Porta	15		
		RaiNews online (Rainews.it)	13	13	
	Mediaset	Telegiornali Mediaset (Tg4, Tg5, Studio Aperto)	44	58	63
		TgCom24	30		
		TgCom24 online (tgcom24.mediaset.it)	24	24	
	Sky Tg24	SkyTg24	31	31	38
		SkyTg24 online (tg24.sky.it)	20	20	

Germany	ARD, ZDF, DRadio	ARD Tagesschau	48	66	69
		ARD Tagesthemen	29		
		ZDF heute	31		
		ZDF heute-journal	29		
		ZDF heute+	14		
		Öffentlich-rechtliche Radionachrichten (z. B. auf Bayern 1, SWR 3, WDR 2, NDR 2, Deutschlandfunk)*	21		
		Tagesschau.de (bzw. Ard.de, Daserste.de, tagesthemen.de)	13	17	
		Heute.de (bzw. Zdf.de, heuteplus, heute journal)	7		
	RTL	RTL aktuell	29	29	31
		Rtl.de (bzw.rtlaktuell.de)	5	5	
	n-tv	n-tv	20	20	26
		n-tv.de	12	12	
France	FT, RF	Les chaînes du groupe France Télévisions (franceinfo, France 2, France 3, France 4, France 5, France Ô)	37	44	48
		Radios publiques (France Inter, France Culture, Mouv', France Info, France Bleu, etc.)*	17		
		franceinfo (franceinfo.fr)	12	12	
	TF1	TF1	44	44	46
		TF1 online	7	7	
	BFM	BFM TV	43	43	45
		BFM TV online	10	10	
Spain	RTVE	TVE	39	42	44
		RNE*	9		
		RTVE online	10	10	
	Antena	Antena 3	56	56	58
		Antena 3 online	18	18	
	laSexta	laSexta	40	40	42
		laSexta online	12	12	

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