

Nordic media welfare states from a comparative perspective

Unpacking audience fragmentation and polarisation

KIM CHRISTIAN SCHRØDER, MARK BLACH-ØRSTEN, & MADS KÆMSGAARD EBERHOLST

DEPARTMENT OF DOMMUNICATION AND ARTS, ROSKILDE UNIVERSITY, DENMARK

ABSTRACT

In 2014, Trine Syvertsen, Gunn Enli, Ole J. Mjøs, and Hallvard Moe raised two central concerns as to the future of the ideal of the Nordic media welfare states regarding increasing demographic fragmentation and political polarisation. Using audience data from the *Reuters Institute Digital News Report*, we offer a comparative longitudinal perspective on how these concerns have played out in four Nordic countries (Denmark, Finland, Norway, and Sweden) from 2016–2022, compared with the US and the UK. We find that despite some fragmentation according to age, fragmentation may not be problematic per se if people’s news diets draw substantially on quality journalistic news outlets with a guarantee of relatively shared news agendas. A moderate degree of political polarisation exists for some types of Nordic news media, with public service media showing less polarisation than some newspapers and digitally born outlets.

KEYWORDS: Nordic news media, comparative analysis, news audiences, fragmentation, polarisation

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Introduction

In 2014, when Syvertsen and colleagues published their seminal book about the Nordic media welfare states, *The Media Welfare State: Nordic Media in the Digital Era*, two central concerns were raised as to the future of the media welfare state ideal. One was the possibility of a future “fragmentation” of news audiences in the form of increasing digital divides in media use with respect to age, socioeconomic status, and so on. The other was that in the years to come, users would increasingly only consume media that they agreed with, a concern that has since often been labelled as increasing “polarisation” (Arguedas et al., 2022; Blach-Ørsten & Mayerhöffer, 2021). In this chapter, we offer a comparative longitudinal perspective on how these challenges have played out in the Nordic countries from 2016–2022. We do so by comparing audience data from four Nordic countries (Denmark, Finland, Norway, and Sweden) and the US and the UK, all of which participate in the *Reuters Institute Digital News Report*, for which we the authors are the Danish partners.

Our retrospective and contemporary analytical gaze will illuminate tendencies and transformations in audience behaviours and patterns of media consumption, focusing on preferred sources of news, paying for news, and trust in the news. Focusing on trust, we consider both general trust in the news media and trust with respect to political standpoints. Here, we shall ascertain to what extent general trust in the news media is higher in the Nordic countries than in the US and the UK, with public service media often earning the highest amount of trust. In addition, we expect that users who position themselves at the political extremes trust news media less, though this tendency towards polarisation is much less salient than in other countries.

In offering a cross-Nordic comparative analysis of the national audiences’ consumption of news, our study fills a gap in the news research landscape:

There exists no common study of media habits in the Nordic countries, as the extensive national data that exist are rarely statistically compatible. [...] Questions asked of respondents often share several features, but samples, survey implementation, wording of questions, and response options vary, thus preventing analytical comparisons [translated]”. (Hellingwerf, 2021)

As we have shown in a previous study (Schrøder et al., 2020), data from the *Reuters Institute Digital News Report* can remedy this situation, because identical questionnaires are implemented across all the participating countries. Moreover, our study draws on recent Nordic research, which has analysed the degree of popular support for the Nordic media welfare state (see, e.g., Lindell et al., 2021). Our empirical study examines the four Nordic populations’ actual media consumption by comparing reported audience behaviours across the four countries, as a Nordic average, and with two characteristic

exponents of two other media systems: the UK and the US (Brüggemann et al., 2014; Newman et al., 2016, 2017, 2018, 2019, 2020, 2021, 2022).

Media systems research, national news landscapes, and audience practices

In studies of national media systems, it is widely recognised that a given media system should be understood in terms of its complementarity and reciprocity with the country's political and social parameters. For instance, Hallin and Mancini's (2004) seminal theory of Western media systems considers a country's media system – and by implication, the supranational media-systemic commonalities characterising countries' media landscapes – as deriving from several sociopolitical features and media-organisational properties. For Hallin and Mancini, the Nordic countries do not constitute a full media system, but rather a subgroup within the democratic corporatist media system.

The Nordic politics–media nexus consists of political pluralism and corporatism, state involvement in the economy and society, public service media, and early professionalisation of journalism. Theories of national and supranational media systems are thus predicated on the idea that media characteristics are correlated with the corresponding geographical entity's sociopolitical forces and relations. In this vein, Enli and colleagues (2018) extended their previous analysis of the Nordic welfare states and their national media systems (Syvertsen et al., 2014) with a historical perspective, “examining the historical preconditions for communications as well as welfare state systems, with an emphasis on mutual interdependence and those instances in which developments in one sphere represent a precondition for developments in the other” (Enli et al., 2018: 602). Analytically, Enli and colleagues (2018: 614) demonstrated how “welfare states and media systems are closely interlinked” and can thus be seen as parallel developments.

Coupled with such an agnostic stance to the question of directionality and causality between sociopolitical and media system properties (as merely “parallel”), Syvertsen and colleagues (2014) were the first to include a media use and audience perspective on media systems: They mapped the first stages of the Nordic populations' transition from traditional media to digital media, finding that, although media use (including news use) was diversifying following the advent of digital and social media in the so-called “high-choice media society”, media user patterns were at that time still characterised by commonality and egalitarianism across differences in social class and age. In our study, we build on their findings as we first explore a range of news consumption practices, and secondly analyse homogeneous datasets, which overcome Syvertsen and colleagues' acknowledged limitation of working with disparate national datasets that make valid comparison a challenge.

Because the dominant paradigm of media systems research has tended to neglect the formative role of audiences in the operation of a media system,

the analytical and theoretical work of Zrinjka Perusko and colleagues (2015) can be considered a corrective to the mainstream of media systems research, as they have argued that indicators of audience practices are a *sine qua non* of media systems analysis. Perusko and colleagues followed the work of Brüggemann and colleagues (2014) in moving beyond Hallin and Mancini's focus on mostly *press* characteristics, identifying a Northern type of digital *media* system, characterised by high political and social inclusiveness, higher globalisation, a highly developed digital media market, a moderately open creative economy, and television concentration (Perusko et al., 2015; see also Andersson, 2023). When dealing with the audience practices of media systems, however, they tended to see the relationship in one-directional causal terms, talking about “the *impact* of the macro-level of institutional structures *on* micro-audience practices” and highlighting how “the various digital media systems have a significant *effect on* all aspects of media use [emphasis added]” (Perusko et al., 2015: 360).

A similar one-way causal view has characterised other analysts who have explored the media system–audience nexus:

System differences themselves are of *independent significance* in accounting for *why* people use news the way they do and why news use differs in systematic ways even within a sample of, from a global perspective, relatively similar technologically developed, high-income, stable democracies [emphasis added]”. (Hölig et al., 2016: 103)

In our view, however, it is more fruitful to see the relationship between media systems and audience practices less deterministically and to understand this relationship as two-way traffic, where the properties of the media system or landscape and news audience practices mutually influence each other. This may happen, for instance, when the available news media ensemble certainly sets the frames for what audiences can choose to consume; but the selective choices of audiences (depending, e.g., on their degree of trust in media types and brands, their willingness to pay, etc.) also, in turn, have a shaping influence on the composition of the national media ensemble, whose actors may then respond with countermeasures to attract audiences, and so on, ad infinitum. Our comparative analysis of news audience data, therefore, does not simply consider the underlying audience practices as derived from and dependent on media systemic properties, but as organically implicated in the ongoing dynamic reformation of the respective media systems. Studying audience formation on a global scale, Taneja and Webster (2016: 163) adopted a similar perspective, leaning theoretically on structuration theory:

In a nutshell, structuration sees agents (media users) drawing on the resources of the media to achieve their own ends. These resources include the available technologies, programs, and services. As agents use media, they reproduce and alter the structural features of the environment. In this view, agency and structure are mutually constituted.

In this vein, in our previous work on Nordic news media audiences (Schröder et al., 2020), we added an audience perspective to media systems theories based more on sociopolitical and media infrastructural factors (Brüggemann et al., 2014; Perusko et al., 2015), establishing the audience-anchored existence of “a Nordic media system”:

Our study compared news audience practices in the Nordic countries with those of countries belonging to other supranational media systems. We find that while there are some internal differences within the Nordic countries, there are salient news consumption commonalities that are specific to the Nordic countries, such as preferred sources of news, pathways to news, paying for online news, and trust in the news. (Schröder et al., 2020: 23)

In that study, we therefore concluded that when seen through the lens of news audience research, it makes sense to talk about a Nordic media system.

In this chapter, we continue our efforts to explore the role of news audiences in the Nordic media system seen as one analytical unit, by adding a historical perspective which traces selected audience uses of news media over 2016–2022, in order to gauge the development of audience practices across the Nordic countries and compare the Nordic picture with audience practices in the alternative media systems found in the US and the UK. In doing so, we recognise the definitional work on the concept of media welfare state recently undertaken by Jakobsson and colleagues (2022: 307). On the one hand, they defined this entity in institutional and policy terms, as “a media policy paradigm manifested in a well-financed public service institution with extensive media subsidies, a cultural policy that covers the media and so forth”; on the other hand, it rests on a set of ideals, norms and values, which constitute “the ‘pillars’ of media welfare [...]. Concepts such as freedom, universality, diversity and quality” (Jakobsson et al., 2022: 307).¹

In our comparative analysis of news audiences, we explore whether these Nordic institutions and ideals appear to foster news audience practices, which can be argued to maintain the existence of a civically informed citizenry, who also possess other important democratic prerequisites, in ways that differentiate such media welfare states from countries that cannot be characterised with this label.

Following from this argument, we seek to answer the following research question:

- RQ1. To what extent can news audience practices be seen as contributing to the maintenance and development of Nordic media welfare states?

In pursuit of fragmentation, polarisation, and digital divides

In our analysis of several properties of the Nordic media welfare states, we also contribute to research about the development of fragmentation, duplication, digital divides, polarisation, and so on, in audiences' news consumption. As the literature shows, it has been notoriously difficult to find methods that can adequately capture and speak authoritatively on this point (for instance, tracking- and survey-based network analysis in the respective studies of Taneja & Webster, 2016, and Fletcher & Nielsen, 2017).² What we have to offer is also no more than an approximation of final insights into the issue.

In terms of nomenclature, where “fragmentation” and “polarisation” are often used interchangeably, we consider audience *fragmentation* to be the basic and superordinate term, as it covers any disappearance of common user patterns and the emergence of “digital divides”: The national news audience “fragments”, often along sociodemographic lines of age, income, education, and so on, as opposed to a situation in which the news media use of various social groups overlaps (i.e., it is “duplicated”), so that there is a certain measure of commonality in news consumption, which may ensure the news media's continued function as social glue. The concern here has to do with the possible emergence in the high-choice media landscape of “a situation where people increasingly use media they only share with small groups of like-minded individuals” (Fletcher & Nielsen, 2017: 476), resulting in the creation of so-called echo chambers. When such echo chambers form around more or less extreme political views, the literature speaks about the *polarisation* of the media–politics landscape. This occurs when “communities of opinion” arise along the spectrum of political opinions, where news consumers only seek information in media whose political slant they agree with, leading to a sociopolitical landscape characterised by a high degree of disrespect and implacability.

In our analysis, we try to exercise a measure of conceptual clarity by applying the term fragmentation to differences in media consumption along sociodemographic lines, and in our case, looking for differences between age groups across the various analytical variables. Polarisation is the term used only when we study the news consumption of groups with different political attitudes. Syvertsen and colleagues (2014: 39–40) found that “there is evidence in the Nordic countries that media user patterns are becoming more differentiated”; previously, “people from all walks of life have consumed broadly the same media”, and even if “socioeconomic status matters [...] there is little evidence of a fundamental digital divide”.

Importantly for our analysis, which concentrates on age differences and not socioeconomic class, Syvertsen and colleagues (2014: 40–42) concluded that “socioeconomic status is less important than age when it comes to explaining differences [...] and increased age differentiation seems to represent

the most significant change in user patterns in recent decades”, continuing that “although the differences are profound, the old and young do not live on different planets media-wise”.³

We hypothesise that this may be truer in 2022 than in 2014, because the quite distinctive gap that had then emerged between young and old media users has narrowed in recent years because the older groups, at risk of digital marginalisation, have increasingly adopted the media practices they, as digital immigrants, had at first not acquired (Prensky, 2010). We therefore explore to what extent news consumption patterns in the Nordic countries show signs of fragmentation, and whether digital divides have widened or narrowed in the period under investigation (2016–2022), as well as ask whether fragmentation necessarily matters for the acquisition of civic prerequisites. Syvertsen and colleagues (2014: 43) found that “to a high degree, the media continue to function as social glue and that the way users move across the media environment does not seem to produce highly polarized audiences”. Our analysis explores the developments in this respect since 2014.

Finally, like Fletcher and Nielsen (2017), we should acknowledge a common limitation that follows from the analysis of audience parameters: Research which analyses audiences’ news exposure and news attitudes begs the question of what insights audiences take with them from the news types and brands they use. This is because “many of the consequences for debate, shared public agenda, and common culture are rooted in news content and not in news sources” (Fletcher & Nielsen, 2017: 493). Following from this argument, we seek to answer the following research question:

- RQ2. From the perspective of media use, or the audience, has there been increased fragmentation and polarisation in news media use in the Nordic countries from 2016 to 2022?

Methodological design and data

As we observed earlier, comparative research about the Nordic countries has been hampered by the fact that “the extensive national data that exist are rarely statistically compatible [translated]” (Hellingwerf, 2021). Fortunately, in 2016, Norway and Sweden joined Denmark and Finland in the international line-up for the annual *Reuters Institute Digital News Report*. This means that since 2016, we have survey data based on identical questionnaires across the Nordic region, as well as more than 40 countries across the world. In addition to basing our comparative analysis on identical questionnaires, it must be considered a strength that the survey provides “single source” data (i.e., from the same individual) about each individual’s total cross-media news consumption, spanning both legacy media on traditional offline platforms and digital and social media on online platforms. Fletcher and Nielsen (2017: 485) called single source survey data “the gold standard

of audience measurement, because it does not rely on data fusion in order to produce a cross-platform, cross-media dataset”.

Of note, among the limitations of survey research, as opposed to tracking people’s online behaviour, is the fact that the data are based on recall and therefore subject to the (in)accuracy of memory. Also, because the respondents (approx. 2,000 in each country) were recruited from YouGov’s online panel, they do not constitute a completely random sample, resulting in underrepresentation of people who are not consistently online (typically older and less affluent people).

Under these empirical conditions, our analysis pursues the analytical foci of cross-national comparative analysis, longitudinal comparison, news consumption variables, and age demographics and political observation.

Cross-national comparative analysis

We base our analytical comparison on a calculated average across four Nordic countries – Denmark, Finland, Norway, and Sweden – which we compare to data from the UK and the US. This selection is based on a simple rationale: The Nordic countries are welfare states and public service media cultures; the UK has prominent public service media but is not a welfare state; and the US is neither a welfare state, nor does it have a strong public service media tradition. While we analyse the calculated Nordic averages, we follow the lead of Jakobsson and colleagues (2022: 306), recognising that “while there are important differences between these countries when it comes to media welfare, we concentrate on the broader similarities within this region”. We shall, however, be observant of potential conspicuous differences – for instance, statistical outliers – between the Nordic countries.

Longitudinal comparison

We trace developments in media use from 2016 to 2022, with a side glance at the middle year, 2019. We thus avoid potential anomalies due to the extraordinary circumstances of 2020–2021 due to the Covid-19 pandemic.

News consumption variables

We analyse audience uses of both offline and online news media. When we consider “sources of news”, we compare traditional news sources (television news, radio news, print newspapers), online news media (broadcasters’ and newspapers’ news websites and apps), and news from social media. Like Fletcher and Nielsen (2017), we also argue that fragmentation is not just a question of using different news sources, but also a question of the quality of the news source. Previous studies of news quality in Denmark have highlighted the quality of public service news (Curran et al., 2009; Willig

et al., 2015) as well as the quality of Danish newspapers, online and offline (Blach-Ørsten et al., 2015; Willig et al., 2015). As such, the print and online editions of, for instance, the Swedish newspaper *Dagens Nyheter*, carry the same curated quality journalism – often the exact same news stories. A recent study on media use and political information and knowledge in a so-called high-choice media environment concluded that “users of traditional news and public media tend to score better than any other user profile on all sorts of knowledge questions” (Castro et al., 2022: 850). The same study also concluded that this particular user profile was more common in Scandinavian and democratic corporatist systems than anywhere else.

One of the greatest challenges for commercial news organisations is how to generate revenue from audiences’ use of their online news. We look at data about people’s willingness to pay, asking them if they have “paid for online news content in the last year”, encompassing any form of digital subscription, combined digital and print subscription, and so on. The Reuters Institute survey is also interested in the societal and personal value people attach to news, one aspect of which is the extent to which people trust the news, both in general and the different news brands they know. We therefore ask directly about people’s (dis)agreement with the proposition: “I think I can trust most news most of the time”.

From a political polarisation perspective, the urgent question is whether people who hold different political beliefs generally find their way to the same news providers, or whether they live in separate political news worlds, aka echo chambers. The answer to this question determines whether the media can be said to play the role of “social glue” and establish a predominantly consensus-oriented culture, or whether they cater, centrifugally, to a potentially more divisive culture. We examine this issue from two different perspectives. First, we analyse the patterns of trust in the news media in our three geographical areas, focusing on how people’s political leaning affects their overall trust in “most of the news media most of the time”. Second, we analyse the political composition of the audiences of key news brands on the left–right political spectrum. Because this measurement deals with news brands, which are national in terms of language and content, we here leave the “Nordic averages perspective” and bring news media brands from each of the four Nordic countries into the Nordic map of political polarisation, to be compared with the UK and US news-brand maps.

To do this, we apply an index-like method developed by the *Reuters Institute Digital News Report*, based on all respondents having positioned themselves on the left–right political spectrum, and indicating which news brands they use:

We compare the left–right make-up of each news outlet’s combined online and offline audience to the left–right make-up of the national population,

allowing us to see whether each outlet's audience skews left or right from the population average, and by how much. (Fletcher, 2022: 38)

Age demographics and political observation

In this study, as mentioned above, we have chosen to analyse the fragmentation of news consumption between age groups and not pursue other demographic categories due to considerations of space. We have also decided to analyse the “polar” ends of the age continuum, which can be assumed to help us highlight relevant and salient aspects of age fragmentation. We thus compare the 18–24 and 55+ age groups for all media use variables.

Analysis

Main sources of news: Unpacking fragmentation of news types

One important indicator of the quality of news consumption can be found in the composition of people's main sources of news. As mentioned above, we follow the research literature in associating quality with both offline and online curated content from mainstream news organisations, and less with social media. Here, we analyse the development in people's main sources of news across 2016–2022, comparing the four Nordic averages (with some moderate internal differences between the four countries)⁴ with the parallel figures from the UK and the US. From the rich array of Reuters Institute data, we have chosen to focus on three types of news sources: 1) all forms of online news sources (mainstream newspapers' and broadcasting organisations' news websites, and apps); 2) social media and blogs; and 3) all traditional news sources (television, radio, and print).

As shown in Table 1.1a, the picture of preference levels emerging in the Nordics in 2016–2022 is one of relative stability, and with some fragmentation between age groups: Over this time span, the 18–24 age group plateaued for online news (around 47%) and traditional sources (approx. 28%), coupled with a small⁵ increase in the preference for news from social media (from 21% to 26%). The 55+ age group displays a stable, very low usage level of news from social media (approx. 4%), a moderate decrease in traditional news (from 75% to 66%), and a moderate increase in online news (from 20% to 29%).

Table 1.1a Nordic average main source of news, 2016–2022 (per cent)

Age group	Source	2016	2019	2022
18–24	Online	49	45	47
	Social media	21	27	26
	Traditional	28	28	27
55+	Online	20	26	29
	Social media	3	5	4
	Traditional	75	69	66

Table 1.1b UK main source of news, 2016–2022 (per cent)

Age group	Source	2016	2019	2022
18–24	Online	60	40	40
	Social media	24	32	38
	Traditional	15	27	23
55+	Online	18	18	27
	Social media	2	3	6
	Traditional	78	79	67

Table 1.1c US main source of news 2016–2022 (per cent)

Age group	Source	2016	2019	2022
18–24	Online	31	30	33
	Social media	27	37	44
	Traditional	36	33	22
55+	Online	19	22	29
	Social media	5	10	12
	Traditional	71	68	59

COMMENTS: Survey question: You say you've used these sources of news in the last week, which would you say is your main source of news?

SOURCE: Newman et al., 2016–2022

Figure 1.1 shows the magnitude of the gaps between the two age groups' preferred news media types from 2016–2022 (i.e., the fragmentation between the two groups). These developments in the Nordic patterns of main sources of news mean that fragmentation between the groups has declined considerably by 11 percentage points (pp) for online news (the gap diminishing from 29pp to 18pp) and moderately by 8pp for traditional media (the gap decreasing from 47pp to 39pp), whereas fragmentation has increased incrementally for news from social media by 4pp (from 18pp to 22pp). When this landscape is observed from a high altitude through figures like these, it can be concluded

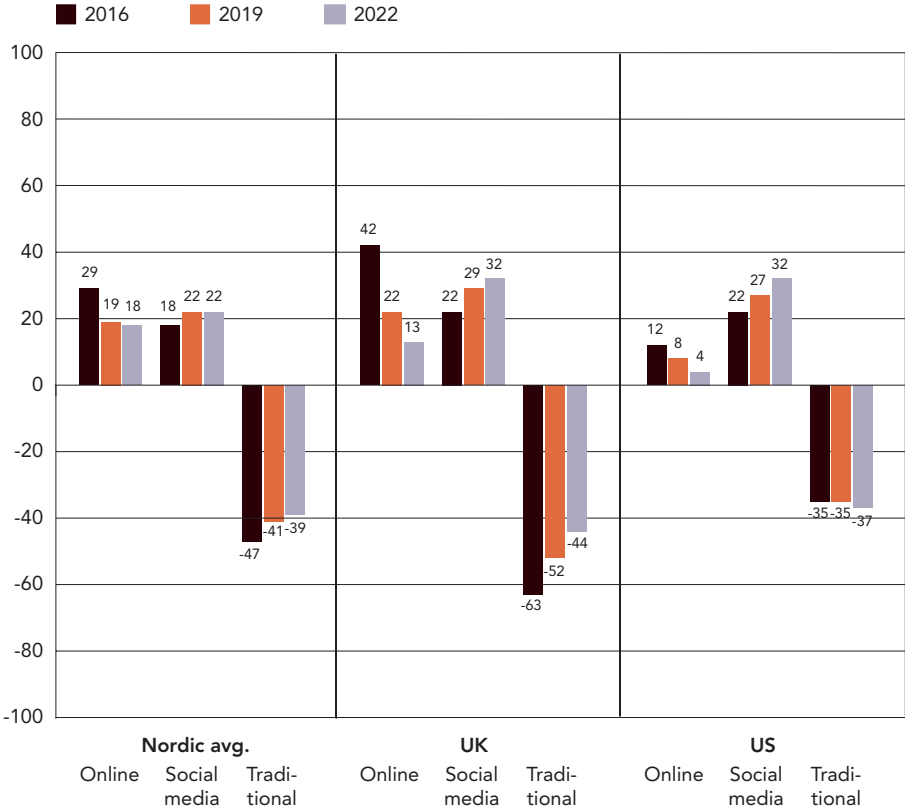
that Nordic fragmentation levels are characterised by less fragmentation in 2022 than in 2016, which knee-jerk reactions should make us applaud.

Interestingly, for our understanding of the implications of fragmentation, however, less fragmentation – meaning that young and old increasingly use the same types of news sources – can be, but is not necessarily, a good thing. In the Nordic situation in 2022, less fragmentation around online news sources is civically “good”, because it is caused by the 55+ age group increasing their use of online news media, which offer journalistically curated quality news. However, less fragmentation of traditional news sources could be seen as civically “bad”, because it stems from the 55+ age group to some extent turning away from quality traditional news media (public service media, publicly oriented newspapers), thus getting closer to the young group’s use level of traditional news media.

On balance, however, it is fair to say that these shifts, both of which are caused mainly by changes in news consumption in the older group, neutralise each other. Thus, we see the same “aggregate” level of fragmentation in 2022 as in 2016. This is also the case because neither age group relies heavily on news from social media (where fragmentation has increased slightly), where the identity and quality of the ultimate news providers are much more uncertain. What matters in terms of civic considerations is that, irrespective of the extent of fragmentation between them, both groups get their news diets to a substantial extent from quality journalistic news sources.

In Table 1.1b, the corresponding picture for the two age groups in the UK shares some similarities with the Nordic scene. However, while we found considerable Nordic stability in preferred news media types in the period analysed, the British scene is characterised by stronger fluctuations between 2016–2022. The young group shows a big drop in online news provision (from 60% to 40%), a considerable increase in news from social media (from 24% to 38%), and a moderate increase in traditional news providers (from 15% to 23%). The older group shows a moderate increase in online news provision (from 18% to 27%), a considerable drop in traditional news types (from 78% to 67%), and a small increase in news from social media (from 2% to 6%).

Figure 1.1 Difference index of main sources of news between age groups (percentage points)



COMMENTS: Survey question: You say you’ve used these sources of news in the last week, which would you say is your main source of news?

SOURCE: Newman et al., 2016–2022

Therefore, in the British fragmentation balance (see Figure 1.1), we see that fragmentation has decreased by 29pp in online news (from 42pp to 13pp), and by 19pp for traditional news (from 63pp to 44pp), because many in the 18–24 age group have deserted online news providers, and some have turned more towards traditional providers, while the older group has increased online consumption and now consume traditional media to a lesser extent. At the same time, young Britons have turned in considerable numbers towards news from social media, leading to a fragmentation increase of 10pp on this parameter.

Pursuing our argument from the Nordic situation above, in the British case it is equally dubious to draw positive civic implications from empirically established less fragmentation. For instance, less fragmentation of online news consumption should be considered civically negative, because it is due to the

younger group having turned their backs on this form of journalistic news. Addressing the question of the civic consequences of these British fluctuations in the 2022 news consumption landscape, the main difference from the Nordic scene, in terms of fragmentation, consists of the considerably larger number of young Britons basing their democratic prerequisites on news from social media, rather than from mainstream journalistic news organisations.

Relying partly on our readers' ability to now do a parallel analysis of the American figures in Table 1.1c and Figure 1.1 for themselves, we shall merely summarise the American fragmentation situation by pointing out that the period has witnessed considerable fluctuations, as the 18–24 age group shows a big leap in the use of news from social media (from 27% to 44%) and a considerable drop for traditional media types (from 36% to 22%), while on the whole maintaining their allegiance to online sources (33%). The 55+ age group has increased its preference for online news (from 19% to 29%), as they have turned away from traditional sources (from 71% to 59%) and moderately increased their consumption of news from social media (from 5% to 12%).

In the aggregate American picture, fragmentation between the age groups has become less pronounced for online news sources (the gap declining from 12pp to 4pp; see Figure 1.1), but this civic improvement has been more than offset by the increased fragmentation of news from social media (rising to 32pp). What matters more than developments in fragmentation per se, however, is the fact that Americans, young and old, have now come to rely less on traditional and online providers of quality journalistic news than especially their Nordic, but also their British, counterparts, and have turned more towards news from social media.

When we consider news-derived civic prerequisites, we suggest that we should not focus on whether younger and older citizens use the same or different news types for their daily information needs, but on what kind of journalistic quality their preferred news sources come with, in terms of setting important societal agendas and framing events in non-partisan ways. In relation to the three news media types analysed above, the important distinction is not between younger and older people's differential use of each of them (which may incidentally have been "overstated", according to recent research by Mangold et al., 2022) but the extent to which the preferred news media can be relied upon to deliver journalistic quality to the two groups. Although the news that people in increasing numbers, across age groups, encounter through social media cannot uniformly be dismissed as problematic, it is nevertheless the case that news from social media leads into an algorithmic black box of information sources, which carries news of unknown veracity and civic relevance.

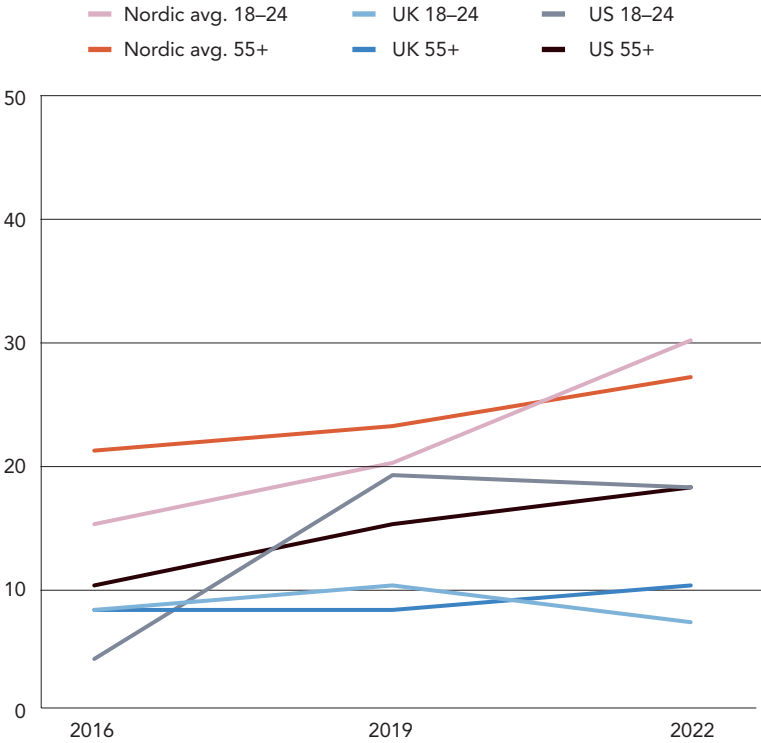
Paying for news

Looking at social economic factors related to the question of fragmentation, the question of income is often mentioned as a factor in willingness to pay, although just how much of a factor it is varies between studies (O'Brien et al., 2020). In general, however, it has been seen as an uphill struggle for the news industry, to go from almost giving news away for free at the start of the digitalisation era, until now, when paywalls and subscriptions are seen as a central part of the transition to a digital economy (Newman et al., 2022). In the debate about willingness to pay, some studies suggest that younger people will be more willing to pay than other age groups (Goyanes, 2014), while other studies question whether a transition to digital subscriptions as a new economic model for the news media will be achievable at all, at least in the US (Chyi & Ng, 2020).

In Figure 1.2, we see that there has been a general increase in willingness to pay in 2016–2019. From 2019 to 2022, the Nordic average continues to grow, especially if looking at the younger age group. Thus, willingness to pay in the 18–24 age group has increased significantly from 15 per cent in 2016 to 30 per cent in 2022. It should be noted, however, that this average covers some clear differences between the Nordic countries, with 40 per cent of this age group paying for news in Norway and Sweden in 2022, but a lesser 24 per cent in Finland and 19 per cent in Denmark.

In the US and the UK, there is growth in the willingness to pay from 2016 to 2019, especially for the younger age group in the US. However, in 2022, the same age groups drops in willingness to pay in the UK, while in the US it remains much the same as in 2019. In the Nordic countries, the younger age group is now on average *more* willing to pay for news than the older age group, thus at least partly confirming Goyanes's (2014) study that suggested that young people would be more inclined to pay for news than other age groups, while growth in both the UK and US is much lower and more in line with the more negative projections by Chyi and Ng (2020).

Figure 1.2 Willingness to pay for news by age group (per cent)



	2016	2019	2022
Nordic avg. 18–24	15	20	30
Nordic avg. 55+	21	23	27
UK 18–24	8	10	7
UK 55+	8	8	10
US 18–24	4	19	18
US 55+	10	15	18

COMMENTS: Survey question: Have you paid for online news content, or accessed a paid for online news service in the last year? (This could be a digital subscription, combined digital/print subscription or one-off payment for an article or app or e-edition).

SOURCE: Newman et al., 2016–2022

Trust in news and polarisation

Trust in news media is connected to a general trust in society's political institutions (Andersen et al., 2021; Hanitzsch et al., 2018). Thus, low trust in news media often equals low trust in political institutions and vice versa. For this reason, trust in news media also plays a part in the debate about political polarisation. One recent study found that, in most countries, the relationship between political polarisation and trust was weak, with the US as a noticeable exception (Suiter & Fletcher, 2020), while another study emphasised that political polarisation at a systematic level has a negative impact on media trust (Schranz et al., 2018). Despite the widespread focus on trust, there is limited research which analyses the relationship between news uses via different media platforms and trust. One recent study, also based on data from the *Reuters Institute Digital News Report*, found that higher levels of trust were associated with the use of mainstream sources such as television news and the websites of newspapers, as well as with the use of digital-born news websites (Kalogeropoulos et al., 2019). This study also found that using social media as the main source of news was correlated with lower levels of trust in news. Another recent study of trust and media use found that habitual consumption of news from traditional news media had a positive effect on media trust (Schranz et al., 2018). The same study also highlighted that in Germany, younger Germans trust media less than older Germans.

Looking at Table 1.2, some of these findings seem to be corroborated by our data analysis. Thus, the table shows that the younger age group, who have a clear preference for getting news from social media, also have the lowest levels of trust. In 2016, the Nordic trust average of the younger age group is lower than the trust of the same age group in the UK, but higher than in the US. Over time, the Nordic trust average for both the younger and the older age groups increases. For the younger age group, the increase is from 40 per cent in 2016 to 49 per cent in 2022, while for the older age group, the increase is from 54 per cent to 63 per cent. We know from other studies that trust in news in general increased during the Covid-19 pandemic (Newman et al., 2021). However, while this has changed in 2022 in many countries (Newman et al., 2022), it has remained at a high level in the Nordic countries (Schröder et al., 2022). Despite this level of high trust, there is still a difference of 14pp in the trust score between the younger age group and the older age group, confirming what other studies have also found regarding this age group and media trust. On the other hand, while trust in the Nordic countries has gone up on average, trust in news in both the UK and the US has gone down.

Table 1.2 Trust in news media by region, age group, and political wings, 2016–2022 (per cent)

Year	Region	18–24	55+	Left	Centre	Right
2016	Nordic avg.	40	54	51	52	46
	UK	44	51	39	55	57
	US	32	33	34	38	23
2019	Nordic avg.	41	57	54	54	48
	UK	37	43	38	43	41
	US	27	35	53	33	9
2022	Nordic avg.	49	63	59	60	57
	UK	31	39	9	38	35
	US	24	28	39	28	14

COMMENTS: The table shows the percentage that agrees with the following survey question: Thinking about news in general, do you agree or disagree with the following statements? - I think you can trust most news most of the time.

SOURCE: Newman et al., 2016–2022

Turning to the question of political polarisation, the table shows trust in news media in relation to the political position of left, right, and centre. Looking at trust in relation to political persuasions, previous studies have suggested that in general, citizens with a strong ideological persuasion either to the left or the right tend to trust news media less (Schranz et al., 2018).

Looking first at the Nordic average, we see that trust in the news media in general has increased from 2016 to 2022. While this is true for all three political positions, the increase in trust is the highest for voters who vote right-of-centre. Thus, 46 per cent of these voters trusted news in general in 2016, but in 2022, the number rose to 57 per cent. This is especially interesting because previous studies of trust and political position in, for instance, Denmark (Schrøder et al., 2020), have found right-wingers to have considerably *lower* trust in the media.

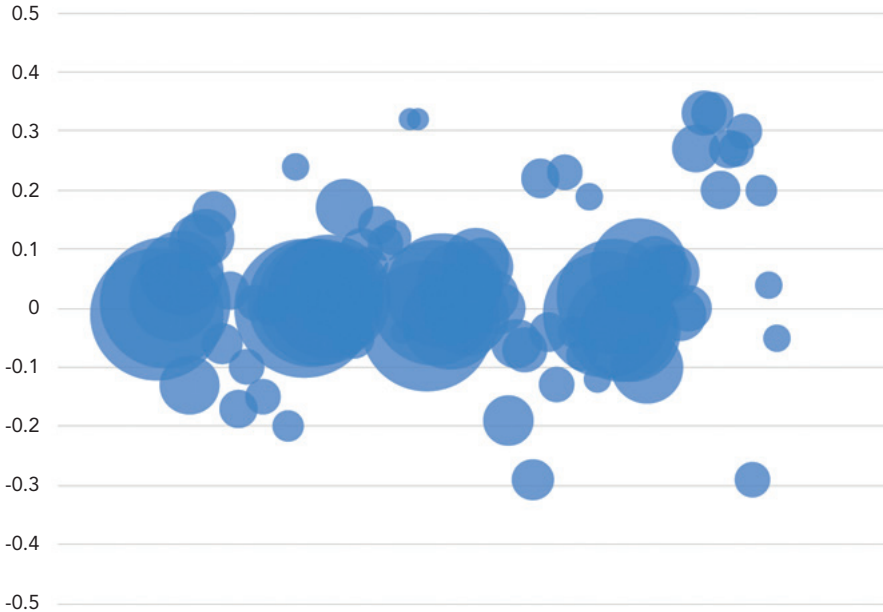
While trust is on the rise in the Nordic countries, we again see the opposite development in the UK and the US. Regardless of political position, trust has gone down, though in the UK it is the left-leaners who are least trusting, while in the US it is voters leaning to the right. However, both countries were experiencing a trust crisis in 2022 (see also Newman et al., 2022).

Now turning to our final point, we looked at the entire media landscape in relation to media use and political persuasion to investigate if political polarisation has shaped a media market where users mostly use news from news origins they feel are in line with their own political persuasion (see the Methodological design and data section for details). Here, the models below show three very distinct pictures of the three geographical areas. Looking first at political polarisation in the Nordic media market (see Figure 1.3), we see that most Nordic news media brands are converging on a “centre” position (the zero line), with a few news media also positioned more to right as well

as more to the left of the political centre (the upper and lower sections of the figure, respectively). In other words, in the Nordic media landscapes, there are news media that are predominantly used by voters from the left or voters from the right. However, most of the largest Nordic news media – both public service news media and legacy online news media – occupy the centre of the figure, leading us to conclude that in general, we see a low level of polarisation in the Nordic countries when looking at media use.

This corresponds with Fletcher (2022), who, based on a measure that compares the left–right make-up of each news outlet’s combined online and offline audience to the left–right make-up of the national population, calculates a so-called polarisation score. The polarisation scores of each of the four countries are as follows (with 50% indicating maximum polarisation): Norway (15%); Finland (11%); Denmark (15%); and Sweden (22%). Thus, while there is low polarisation on average, there is more polarisation in Sweden than in the other Nordic countries due to a higher number of alternative news media that mostly serve readers from the right.

Figure 1.3 Polarisation of Nordic media, compound of brand score across off- and online media



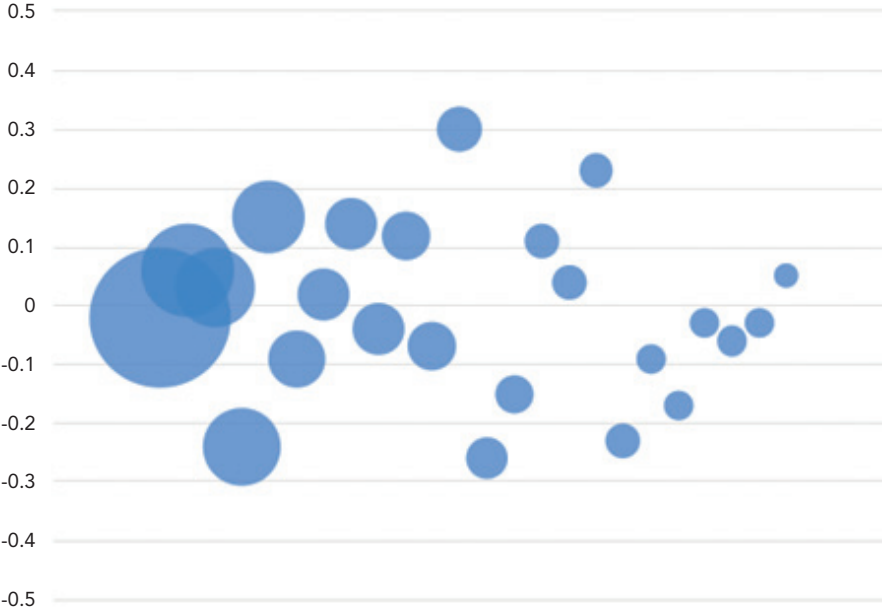
COMMENTS: 2022 data only. Y-axis shows polarisation, positive values indicating right-wing audience media use. Bubble size indicates audience size.

Survey questions: 1) Which of the following brands have you used to access news offline in the last week (via TV, radio, print, and other traditional media)? Please select all that apply. 2) Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of Internet access)? Please select all that apply.

SOURCE: Newman et al., 2022

Turning to the UK, the equivalent Figure 1.4 shows that a good deal of the news media are clearly positioned to either the left (lower area) or the right (upper area), though often not very far to either side.

Figure 1.4 Polarisation of UK media, compound of brand score across off- and online media



COMMENTS: 2022 data only. Y-axis show polarisation, positive values indicate right wing audience media use. Bubble size indicate audience size.

Survey questions: 1) Which of the following brands have you used to access news offline in the last week (via TV, radio, print, and other traditional media)? Please select all that apply. 2) Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of Internet access)? Please select all that apply.

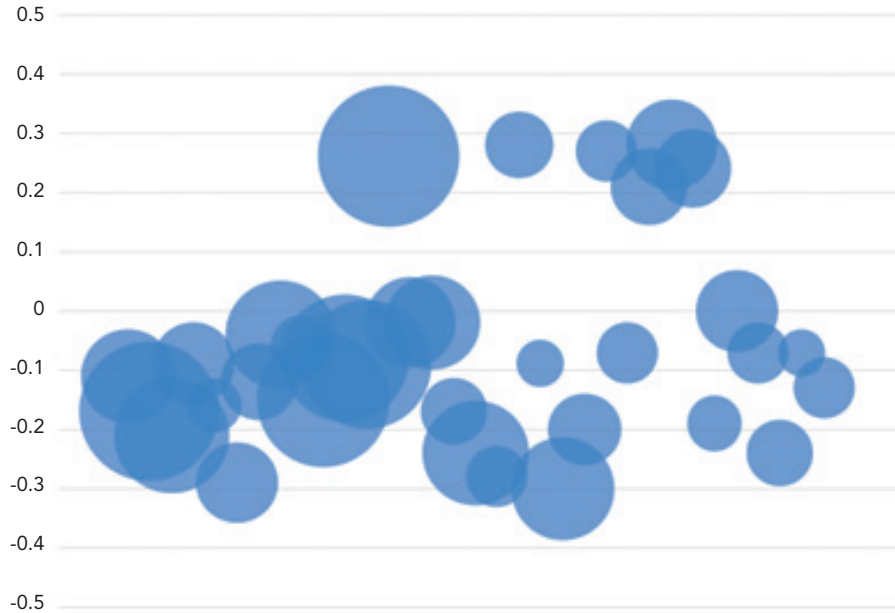
SOURCE: Newman et al., 2022

At the same time, the BBC occupies a central position in the middle together with other television news outlets like ITV and Sky. The aggregate British polarisation score is 25 per cent (Fletcher, 2022).

Turning to the US, in Figure 1.5 we see a much clearer image of polarisation, as the political middle in the US consists of much fewer media outlets than both the UK and the Nordics. Thus, as previous analysis has also suggested, the US appears to present as a “worst case” when looking at many of the parameters that we focused on in this chapter. Still, the US can also be considered somewhat more nuanced than the public debate would sometimes suggest, with a large number of news media positioned only a little to the left of the centre (lower area) and an outlet like *The New York Post* placing

itself clearly in the middle. The aggregate American polarisation score is 34 per cent.

Figure 1.5 Polarisation of US media, compound of brand score across off- and online media



COMMENTS: 2022 data only. Y-axis show polarisation, positive values indicate right wing audience media use. Bubble size indicate audience size.

Survey questions: 1) Which of the following brands have you used to access news offline in the last week (via TV, radio, print, and other traditional media)? Please select all that apply. 2) Which of the following brands have you used to access news online in the last week (via websites, apps, social media, and other forms of Internet access)? Please select all that apply.

SOURCE: Newman et al., 2022

Conclusion and discussion

In this chapter, we have asked two questions about media use and the Nordic media welfare state. The first research question states the overall question that we sought to address this chapter, and it relates to the democratic ideal that media use is a crucial dimension of the Nordic media systems, as the ideal of an enlightened public with equal access to information has been a key aspect of the Nordic welfare states. Thus, the first research question asked: To what extent can news audience practices be seen as contributing to the maintenance and development of Nordic media welfare states? The second research question addresses the more practical way in which we want to analyse the overall question: From the perspective of media use, or the

audience, has there been an increased fragmentation and polarisation in news media use in the Nordic countries from 2016 to 2022?

Addressing the second research question first, our answer derives from having analysed fragmentation from an age group perspective with respect to the following: 1) the main news source, 2) the willingness to pay for news, and 3) trust in news. With respect to polarisation, we have looked at trust in news in general and from an aggregated index of news brands and the political orientation of the media users. In the Nordics, we find age fragmentation across all three focus points, however not at a very high level. Thus, with respect to the main source of news, we find that over 2016–2022, the younger group has plateaued for online news (around 47%) and traditional sources (approx. 28%), coupled with a small increase in the preference for news from social media (from 21% to 26%). The older group displays a stable, very low usage level of news from social media (approx. 4%), a moderate decrease in traditional news (down 9pp to 66%), and a moderate increase in online news (up 9pp to 29%).

As we argued above, however, rather than bemoaning age fragmentation as problematic in itself – which has been almost mandatory in the research literature – we invite readers to consider the composite pictures of patterned news preferences across the three regions with respect to the civic prerequisites that users may derive from them. Low fragmentation appears to be a misleading indicator of civic news quality, because the actual exposure figures may tell a very different story about the underlying journalistic quality of the different main sources of news.

Looking at willingness to pay, we find a shifting pattern between the age groups. While in 2016, the older age groups were more willing to pay for news, this has shifted in 2022, with the younger age group now being more willing to pay for news. Turning to trust, in the Nordics we find a stable difference between the age groups, with the older age group being more trustful than the younger group, and although trust has gone up in both age groups from 2016 to 2020, the differences between age groups remain. Finally, regarding polarisation in the Nordic countries, we find that while there are differences in trust regarding news in general between voters from the left, the centre, and the right, differences between the levels of trust between right-wingers and left-wingers have diminished from 2016 to 2022. Looking at the Nordic media landscapes from a high altitude, we also see that most news brands are placed at the centre, with some outliers both to the left and the right; but all in all, it shows a relatively pluralistic and consensual media landscape with a low level of polarisation,⁶ although Sweden tops the other Nordic countries in this regard. Comparing the Nordic countries to the UK and the US regarding fragmentation and polarisation, we find that both these phenomena have deeper roots in both places than in the Nordic countries – although the level of fragmentation and polarisation, especially

in the UK, is not so pronounced as one might expect from recent public and academic debates. Still, the US is very low on trust and the UK very low on willingness to pay, with social media playing a still more dominant role in both countries.

This brings us to the first research question and the overall question of the extent to which news audience practices can be seen as contributing to the maintenance and development of Nordic media welfare states. Based on the parameters explored in this chapter, we argue that Nordic audience practices do indeed contribute to the overall ideal of an enlightened public. Thus, the young Nordic news audiences are today more likely than especially their American counterparts to acquire civic prerequisites that support the maintenance of Nordic media welfare states, due not least to the preferred main sources of news in the Nordic countries, which we argue are more conducive than social media to the maintenance of a media welfare state with a civically informed citizenry. This is supported by the comparatively high degree of willingness to pay in the Nordic countries in general, especially by the young audience. Adding to this fact, the Nordic media landscapes are far less polarised than especially the US, as our study suggests a media welfare state with a majority of politically unbiased news media and only minor elements of fragmentation between age groups. It is tempting to see a parallel between the analysed news audience practices in these three geographical areas and the fact that the Nordic countries are welfare states with widely trusted public service media, whereas the UK is a non-welfare state with trusted public service media, and the US is neither.

Thus, looking to future consequences or scenarios for the Nordic media welfare state from our perspective, it is vital to keep the comparative, empirical perspective in mind. As already mentioned, the study by Castro and colleagues (2022) on political information and civic knowledge in a high-choice media environment concluded by highlighting the positives of the Nordic and democratic corporatist countries, especially the high use of quality journalism from traditional news media and public service news media. The study also argued how this may even have broader ecological effects on other news organisations in the media system, making them increase their quality.

Another recent study on the developments of media systems by Humprecht and colleagues (2022), which included 30 countries, argued that political polarisation and threats to professional journalism are changing media systems, with the US, as well as southern and eastern Europe, becoming more polarised, while also seeing a rise in political parallelism and a decrease in journalistic professionalism. The same study singled out the countries in the democratic corporatist model as having more stable media systems with strong media organisations, high journalistic professionalism, and low political parallelism.

Finally, the most recent version of the *Reuters Institute Digital News Report* (Newman et al., 2023) also underlines the increasing difference between the Nordic countries and most of the other countries under study, especially with respect to use of traditional news media, high trust, and high willingness to pay for news.

From this internationally comparative point of view, it seems clear that the Nordic media welfare state has something special to offer democracy: a less polarised and more well-informed citizenry. And while this informed citizenry also owes a huge debt to both relative income equality and free education, it also hinges on a media system where the quality of news and information remains high and relatively free of polarisation, misinformation, and threats towards news media and journalists. Thus, the media subsidies to traditional news media and amply funded public service news media seem more important than ever, as does the protection of media freedom and the increasing regulation of social media at both a national and European level.

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Endnotes

¹ The four Nordic countries analysed in this chapter are all media welfare states in the sense of having similar media institutional arrangements and ideals. However, their media welfare systems should also be seen as variations on a common theme. As Ala-Fossi (2021) has observed, for instance, the Finnish media landscape has a distinct shape in comparison to the other Nordic countries.

² For instance, the interesting study by Fletcher and Nielsen (2017) advances the counter-intuitive argument that, although there is a high level of fragmentation and a low level of news source duplication among news audiences in the UK and Denmark, this does not pose a threat to diversity or the democratic well-being of these countries, because the content massively consumed from public service news media is both politically and culturally diverse and balanced. Thus, a high level of “fragmentation”, as defined in their study, did not lead to the high level of potentially polarised echo chambers that the authors had expected.

³ We do recognise that class and socioeconomic status also constitute important factors in patterning the use of news media and media in general. As Lindell and Hovden (2018: 641) put it for the case of Sweden, “class structures have created different audience and user segments in the Swedish population” (see also Lindell, 2018). The same point was made for Denmark by Schröder and Phillips (2007). It may be an exaggeration, however, when Lindell and Hovden (2018: 650) concluded that “social groups orient themselves in diametrically different ways in the media environment”, as their study seems to underplay the wide reach and trust of news media that serve as bridges between what they see as separate “audience islands”.

⁴ For the 55+ age group, all four Nordic countries are very close (1–4 percentage points) to the Nordic average across the years studied. Among the 18–24-year-olds, Norway and Sweden are close to the average throughout, while Denmark and Finland sometimes deviate by 5–6 percentage points, and in a couple of cases by up to 10 percentage points.

⁵ We label the found increases and decreases following this descriptive legend: “small” = 0–5 percentage points; “moderate” = 6–10 percentage points; “considerable” = 11–15 percentage points; “big” = 16+ percentage points.

⁶ This complies well with the findings of Miriam Brems’s forthcoming study of alternative news media audiences in Denmark, to the effect that users of alternative news media are also frequent users of mainstream media (Miriam Brems, personal communication, 25 August 2023).