

Is There a Nordic News Media System?

A descriptive comparative analysis of Nordic news audiences

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Abstract

In media systems theory, the Nordic countries are often held to constitute a specific media system (Brüggemann et al., 2014). In this article, we put this claim to the test in the area of news consumption. Based on findings about the four Nordic countries Denmark, Norway, Sweden, and Finland in the annual Reuters Institute Digital News Report (Newman et al., 2019), and inspired by previous studies of the audience dimension of media systems (Hölig et al., 2016; Peruško et al., 2015; Van Damme et al., 2017), we undertake a descriptive empirical analysis of the 2019 data of this 38-country study. Our study compares 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 media system, 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.

Keywords: news audiences, media systems, Nordic countries, comparative analysis, online survey

Introduction: A Nordic media system?

In many recent studies on media systems, Nordic countries stand out, either as an independent media system unto themselves (Brüggemann et al., 2014; Peruško et al., 2015; Sjøvaag, 2019; Syvertsen et al., 2014) or as a cluster of countries uniquely embodying the described characteristics of a specific media system (Hallin & Mancini, 2004; Willig, 2020). That the Nordic countries stand out in comparative studies of various “systems” is a well-known fact in the study of, for instance, comparative political systems (Kristensen & Lilja, 2011) – this is becoming increasingly acknowledged in media and communication studies.

Schrøder, K. C., Blach-Ørsten, M., & Kæmsgaard Eberholst, M. (2020). Is there a Nordic news media system? A descriptive comparative analysis of Nordic news audiences. *Nordic Journal of Media Studies*, 2, 23–35. <https://www.doi.org/10.2478/njms-2020-0003>

In Hallin & Mancini's seminal book *Comparing Media Systems* (2004), the Nordic countries do not immediately stand out as a media system of their own – they are part of the democratic corporatist media system also including Germany, Austria, Switzerland, Belgium, and the Netherlands.¹ According to Hallin and Mancini, the democratic corporatist media system is characterised by both political system variables and media system variables. Political system variables include early democratisation, a history of organised political pluralism and corporatism, and involvement of the state in economy and society. Media system variables include early development of a mass-circulation press, high newspaper circulation, early professionalisation of journalism, media protection of press freedom, prominent public service media, and direct and indirect press subsidies.²

Though the democratic corporatist model includes nine different countries, the Nordic countries were singled out by Hallin and Mancini (2004) with regard to, for instance, public service media, political parallelism, the professionalisation of journalism, and the overall relationship between media and democracy (Kristensen & Ørsten, 2007). While Hallin and Mancini's study was largely a historical study of the development of different media systems – or rather press systems – it started a wide-ranging and still ongoing trend for media system research. One shared purpose of this research was to critically examine Hallin and Mancini's theoretical model, to extend it beyond its Western focus, and not least to operationalise their defining variables for rigorous empirical scrutiny. One authoritative voice in this endeavour was the study by Brüggeman and colleagues (2014). In this study, the democratic corporatist model was split into two: The Northern type, consisting of the four Nordic countries, and the Central type, consisting of Austria, Germany, Switzerland, and the UK. Their model also comprised a Western system (Belgium, Netherlands, Ireland, Portugal, and the US) and a Southern system (Spain, France, Italy, and Greece). Whereas Hallin and Mancini's study was historical, the study by Brüggemann and colleagues (2014) was based on fairly recent statistical data and quantitative analysis. In this analysis, Denmark, Finland, Norway, and Sweden were grouped in a Nordic cluster, due largely to the fact that these countries have a higher degree of journalistic professionalism and a highly developed system of press subsidies.

A third attempt to theorise the Nordic countries as a special media system came from Syvertsen and colleagues (2014). Here, the socioeconomic and political phenomenon of the Nordic welfare state is central to the understanding of the national Nordic media systems characterised by a prominent role for public service television and rapid digitalisation of both society and the media. Syvertsen and colleagues (2014) were the first to include a focus on media use, and thus on audiences. Based on data about media use dating back to 2010, they concluded that “the case studies cited do not indicate that there is strong segmentation or a fundamental digital divide in the Nordic countries” (Syvertsen et al., 2014: 43) with respect to media use. Recently, Helle Sjøvaag (2019) has used the analysis

of Syvertsen and colleagues as a foundation for exploring the present challenges facing journalism between the state and the market. Strangely, however, without any argumentation, Sjøvaag excludes Finland and reduces the Nordic system to a Scandinavian media system of three national media systems (Sweden, Norway, and Denmark).

Also taking his point of departure from Syvertsen and colleagues, Hallvard Moe (2019: 236) takes the status of the Nordic countries as a well-defined transnational media system for granted, stating that “the Nordic countries together stand out globally”. Using Reuters Institute data from 2016–2018 – and curiously excluding Sweden from the analysis – he concentrates on analysing differences, rather than similarities, between Norway, Finland, and Denmark with respect to “interest in news” and “willingness to pay” for print and online news, finding that willingness to pay “is tilted towards those with higher education” (Moe, 2019: 242). Moe does not compare the Nordic system with other supranational media systems.

In sum, recent studies of media systems have either highlighted the Nordic countries as exemplary of a specific media system, or as a media system in their own right. This article builds on these studies, but adds an audience dimension to the study of media systems. Without speaking specifically about a possible Nordic media system, the authoritative annual Reuters Institute Digital News Report has consistently reported since 2013 that the Nordic countries collectively stand out with a clear news use profile in such areas as the rapid adoption of digital devices for news, high levels of trust in the news media, willingness to pay for online news, and loyalty to familiar news brands. This article scrutinises some of these aspects of news consumption through a descriptive comparison with selected countries from two other media systems from Brüggemann and colleagues’ (2014) study: the Central and Southern European media systems. Through this comparison, our overall purpose is to answer the following question: Is there a Nordic Media System seen from an audience perspective?

Audience and media systems

As we have seen, the works listed above for advancing media system models theoretically have devoted at best a fleeting attention to the audience dimension of the (news) media. For Zrinjka Peruško and colleagues (2015), however, alongside their aim to develop the scope of media system theory to include both Eastern European countries and indicators of the globalised digital media culture, any media system theory that did not include indicators of audience practices in its empirical foundation would inevitably be flawed.

Leaving a critical discussion of their design and method for another time and place, we wish to emphasise two aspects of their findings. First, like the model of Brüggemann and colleagues (2014), they also identified a Nordic media cluster (Denmark, Sweden, and Finland)³ alongside a Western European cluster (southern

and western countries) and an Eastern cluster (primarily post-socialist countries). Coming from of a Europe-focused COST network, their analysis did not include North America. The Nordic cluster was characterised by “high political and social inclusiveness, higher globalization, highly developed digital media market, moderately open creative economy and TV concentration” (Peruško et al., 2015: 353).

Second, they demonstrated a clear correlation between media systems and patterns of audience use, documenting “the impact of the macro-level institutional structures on micro-audience practices: the various digital media systems have a significant effect on all aspects of media use” (Peruško et al., 2015: 360). While this may be seen to approach a form of media system determinism on audience practices (cf. the terms used in the quotation: impact and effect), our analysis below will be looking to explore more modest correspondences between media systems and audience practices, not considering possible causal factors.

However, we do appreciate their admonition to maintain a balance between national and supranational perspectives. In media systems theory, while “the intention is clearly to transcend the level of the nation or state”, one should not lose sight of the continuing centrality of the nation: “the nation or state as a unit of analysis appears increasingly insufficient because of global media flows, but still necessary” (Peruško et al., 2015: 346).⁴

The study we present below can also be seen as following in the footsteps of Sascha Hölig and colleagues (2016) – although with different methods. Based on the 2015 edition of the Reuters report (Newman et al., 2015), they demonstrated the role played by media system properties on audiences’ news consumption by comparing news accessing behaviours and participation practices around news:

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. (Hölig et al., 2016: 103)

Checking systematically through regression analysis for the possible intervening effects of demographic and educational causes, they documented how “inherited cross-national variations in the media systems within which people act also shape their news media use” (Hölig et al., 2016: 103).

Our descriptive comparative study of Nordic countries below follows their example in the selection of country representatives from Brüggemann and colleagues’ Central and Southern systems, consisting of Germany (DE) and the UK, and Spain (ES) and France (FR), respectively. However, while their Nordic sample was made up by Denmark and Finland, we consider four Nordic countries: Norway (NO), Sweden (SW), Finland (FI), and Denmark (DK).

Concretely, Hölig and colleagues (2016) found that Northern media users accessed news significantly more often than audiences from the Southern

system, with audiences in the Central system somewhere in between. On the participation-in-online-news variable, it turned out that Southern audiences participated significantly more in online news communication than, especially, Central audiences, but also more than Nordic audiences to a considerable extent (Hölig et al., 2016: 116–117).

With a secondary knowledge interest in media systems, the main purpose of Van Damme and colleagues' (2017) comparison of European citizens' media repertoires across nations was heuristic, as they wanted to explore bottom-up in what ways national news "repertoire ensembles" found in nine European countries would become reclustered when systematically compared with each other across borders. Using a qualitative approach based on Q methodology (factor analysis of small samples), identical studies were first carried out in the nine countries (e.g., see Swart et al., 2017, which found five national news repertoires in the Netherlands, and Peruško et al., 2017, which found six national news audience repertoires in Croatia). Across the nine countries emerged a total of 49 national news audience repertoires, which were subjected to a second-order Q methodological factor analysis in order to discover transnational audience repertoire clusters. Eight such trans- or supranational repertoires were found, with descriptive labels like "Social media news explorers" and "Quality news omnivore".

As a secondary research purpose, Van Damme and colleagues (2017) were curious to see how these independently established trans-European audience news repertoires might or might not align with the supranational media systems of Peruško and colleagues' (2015) model. Would a supranational news repertoire like the "Traditional local news consumer" be constituted mainly by a set of national news repertoires coming from countries in the same supranational media system, or would such supranational news repertoires be populated by national audience repertoires from two, three, or four national media systems?

The latter turned out to be the case, although some supranational repertoires brought together three or four national repertoires from the same supranational media system, along with typically a couple of repertoires from other supranational media systems. Van Damme and colleagues (2017) therefore had to conclude that supranational media systems played little formative role in determining audience news repertoires. Those coming from a national news audience repertoire would typically have news preferences in common with like-minded people from other countries, irrespective of media system.

However, this finding does not preclude that other manifestations of audience news practices do cluster in alignment with transnational media systems, as the studies of Peruško and colleagues (2015) and Hölig and colleagues (2016) demonstrated. We now, based on Reuters data from 2019, turn to our comparative analysis of audience practices in the Nordic media system in relation to those found in two other media systems.

Methodology

Our research question aims to find out if selected audience practices around news consumption can be seen to align with supranational media systems. If this is the case, we believe that our analysis gives support to the claim that a Nordic media system can be empirically distinguished from other European media systems in relation to the following selected news audience behaviours:

- main sources of news
- pathways to online news
- willingness to pay for online news
- trust in the news

In contrast to Sjøvaag (2019), who excluded Finland from the Nordic system, and Moe (2019), who excluded Sweden, we include all four Nordic countries belonging to Brüggemann and colleagues' (2014) Northern media system. We compare the audience patterns of the Nordic system with those of two other European media systems –the Central and Southern European media systems – also drawn from the model proposed by Brüggemann and colleagues (2014), and based on the most similar principle. We thus exclude their fourth, less similar, Western media system, whose constituent countries “share a non-interventionist state, which manifests most clearly in relatively weak public broadcasting” (Brüggemann et al., 2014: 1056), against which we assume that the Nordic countries would clearly differentiate themselves.

The data comes from the latest annual Reuters Institute Digital News Report (Newman et al., 2019), which investigates audience news practices and attitudes in 38 countries around the globe. This study is based on online surveys, conducted by YouGov on nationally representative samples of people, who said they had used news at least once in the past month. As is well known, online samples tend to underrepresent people who are not online (typically older and less affluent); however, this is unlikely to affect our comparison substantially, as the countries selected for comparative analysis in our study are fairly similar in terms of Internet penetration, ranging from 93 per cent (France and Spain) to 99 per cent (Norway). Although surveys are based on recall, and therefore subject to bias, they are a good way of capturing fragmented media consumption across online and offline platforms (Newman et al., 2019).

Findings

Main sources of news across media systems

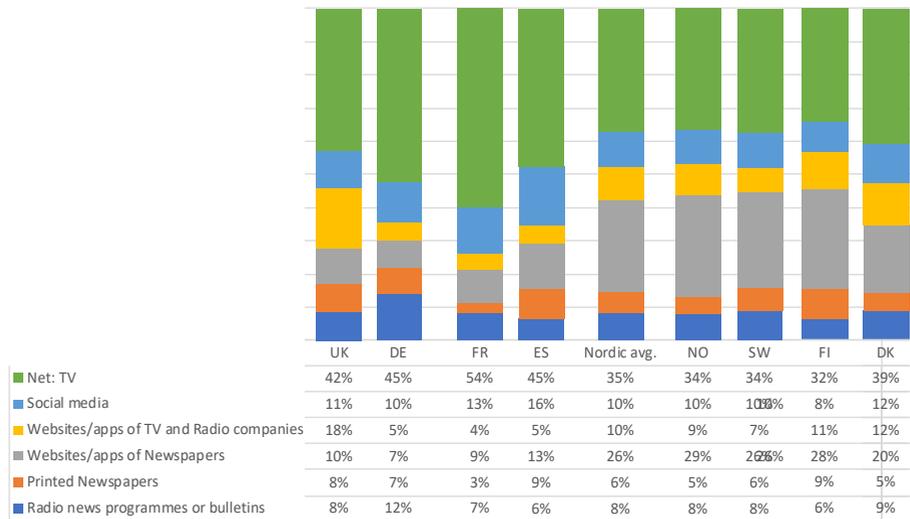
Historically, the populations of the Nordic countries have relied extensively on newspapers to inform themselves about the world. While Nordic newspapers, as elsewhere, have witnessed a continuing decline in print readership over several

decades, the Nordic countries remain a relative stronghold for newspapers, now in the form of e-papers and apps, which carry the news produced by the online editions of largely the same newspaper houses as in the days of print. Figure 1 shows that an average 26 per cent of the population in these countries regard websites and newspaper apps as their main source of news, with Denmark trailing the other three countries by 6 percentage points. This picture contrasts markedly with that of the Southern and Central systems, where only 7–13 per cent prefer online newspapers to deliver their news, with television news far ahead with 42–54 per cent of news users. Television news still leads the pack in the Nordic countries, but by a much smaller margin.

Online news produced by television organisations maintains a relatively strong position in the Nordic system (average: 10%) and the UK (18%), with their prominent public service tradition, while this news platform is ranked around 5 per cent in the Southern system and Germany.

Demographically, the preference for newspapers’ online editions is spread fairly equally over the age groups in the Southern and Central systems (and in Denmark), while the age groups 25–34 and 35–44 show the greatest allegiance to this platform in Sweden, Norway, and Finland, which bodes well for the future of these news houses (age group percentages not shown here).

Figure 1. Main source of news, 2019



Survey question no. 4. You say you’ve used these sources of news in the last week, which would you say is your main source of news?

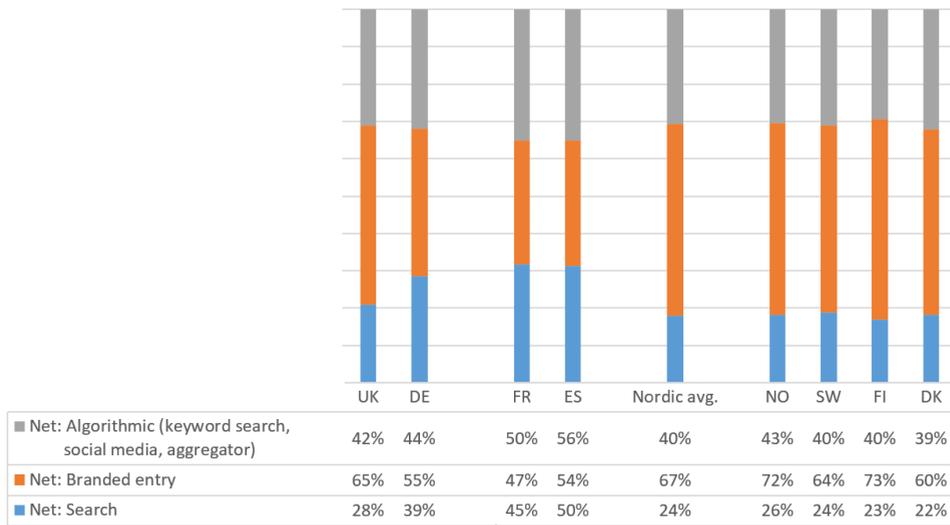
Within the social media universe, some salient differences stand out between the three media systems (figures not shown here). Notably, in the Southern system, three quarters of the population use social media for news; this is in contrast to the Nordic and Central systems, where around half the population report using social media for news. Across all three systems, the rank-order of different social

media platforms is fairly similar, with Facebook clearly in the lead and YouTube in second or third place. Denmark, Norway, and Sweden are similar by all having Facebook Messenger in third place, with a more diverse picture characterising the countries in the other two systems; in Germany and Spain (and to some extent Finland), WhatsApp plays a prominent role, and Twitter is placed second in the UK.⁵

Pathways to online news across media systems

In addition to asking people which news sources they have used, the Reuters survey also asks, “which were the ways in which you came across news?” Figure 2 shows: 1) the proportions of respondents who went directly to a known news website or app, or who searched for a known news brand (branded entry); 2) people who searched for a particular news story or a news brand (net search); and 3) people who relied on social media, keyword search, and aggregators to find news (algorithmic path).

Figure 2. Pathways to online news, 2019



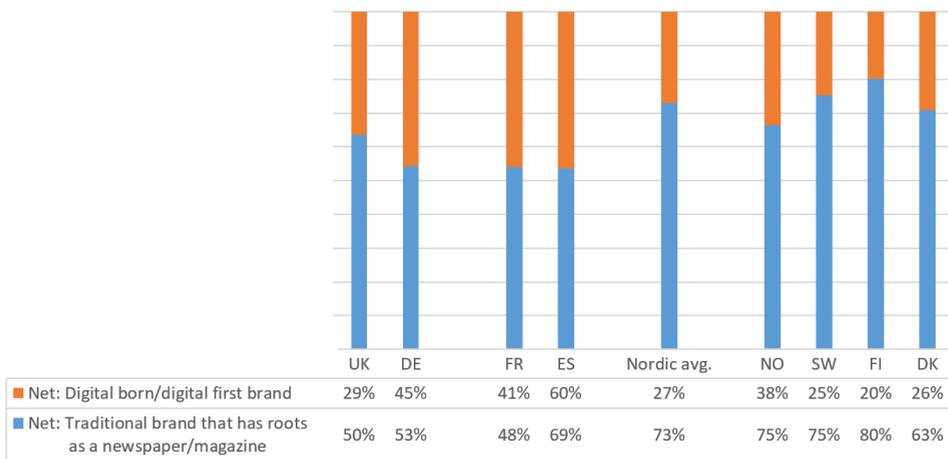
Survey question no. 10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply.

With an average of 67 per cent, the Nordic countries are clearly in the lead with respect to brand loyalty, especially compared with the Southern system. Conversely, when it comes using search engines for news, around half the news users in the Southern system rely on search to find news, against a Nordic average of 24 per cent. In both these respects, the UK tends towards a Nordic pattern, while Germany leans more towards the Southern pattern. The Nordic countries and the Central system stand out vis-à-vis the Southern system in relation to the use of algorithmic pathways. These brand-loyalty patterns chime well with the above

finding about the historical role played by a strong printed press coupled with prominent public service media in the Nordic countries. In the UK, brand loyalty reflects the lasting prominence of the BBC rather than allegiance to newspapers.

This picture is confirmed when we consider the balance online between use of traditional newspaper brands and digital-born brands (see Figure 3). In 2019, an average of around three fourths of the Nordic populations used a traditional newspaper's online edition (with Denmark lagging by 10%), against 27 per cent using a digital-born news brand (with Norwegians soaring to 38%). In the Central system and France, half the population accesses traditional brands, while Spain (69%) lies close to the Nordics.

Figure 3. Adoption of born-online news brands, 2019



Survey question no. 5B. 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.

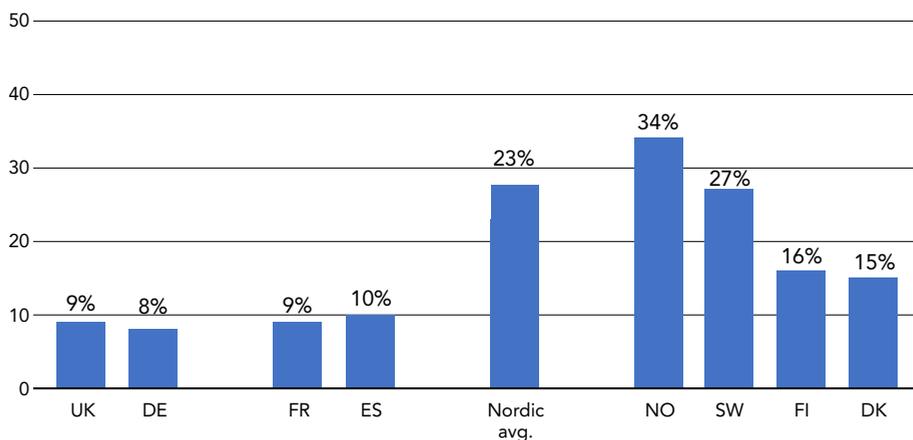
In the Southern system (and Germany) people more broadly have taken digital-born news brands to heart, while the UK (again) resembles the Nordic pattern – but with Norway (38%) as an internal outlier.

Paying for online news

As shown in Figure 1, the Nordic countries remain a relative stronghold for newspapers, a finding that is further supported when looking at the willingness to pay for online news (see Figure 4). Here, the Nordic system clearly stands out from both the Central and Southern systems with a 23 per cent average of users paying for news against 8–10 per cent of news users paying for online news in the Central and Southern media systems. A closer look at the specific Nordic countries, however, also highlights a clear difference in the willingness to pay between Norway (the highest number of online subscribers in the entire Reuters survey) and Sweden (a close second), and Finland and Denmark. These figures in some way mirror Figure 1, where online newspapers were a more preferred news

source in Norway and Sweden than in Denmark. The same, however, does not apply to Finland, where 28 per cent preferred newspaper websites and apps, but where still “only” 16 per cent pay for news.

Figure 4. Paid for online news in the last year, 2019



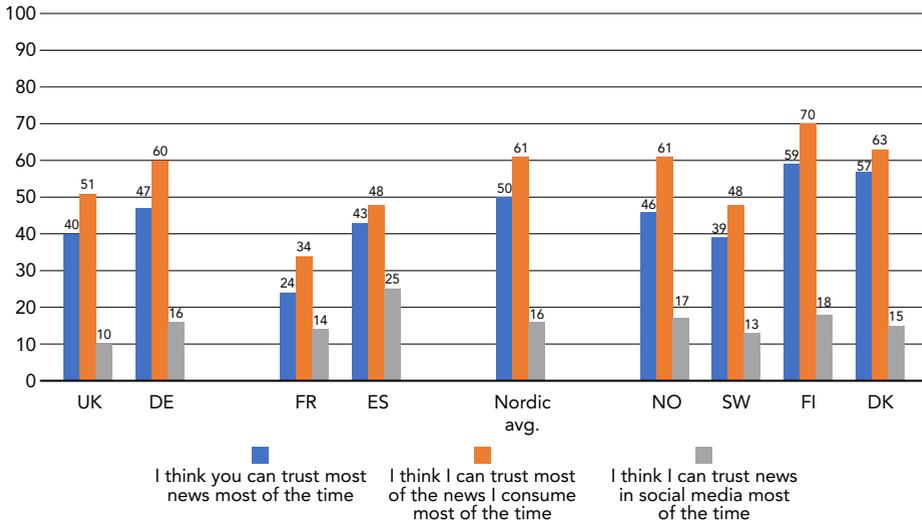
Survey question no. 7a. Have you paid for online news content, or accessed a paid for online news service in the last year? (This could be a digital subscription, combined digital/print subscription or one-off payment for an article or app or e-edition.)

Looking demographically at who pays for online news in the Nordic countries, users who belong to the younger demographic (18–24) make up only 15 per cent of the users paying for online news in Denmark and Finland, whereas the same demographic accounts for 24 per cent of users who pay for online news in Norway, and 28 per cent in Sweden. However, even with the smaller percentages of younger news subscribers, Denmark and Finland fare slightly better than the UK (10%), Germany (11%), and France (14%) in this age group.

Trust in news

Finally, we turn to the question of trust and news consumption. Traditionally, the Nordic countries are known for a high and relatively stable level of trust in political institutions (Zmerli & Hooghe, 2013) and social trust in general (Delhey & Newton, 2005); this also seems to apply to trust in news media. Figure 5 shows an average Nordic trust score of 50 per cent trusting the news in general. The average, however, covers the difference between a rather high general trust in news media in Finland (59%) and Denmark (57%), and a somewhat lower general trust in news in Sweden (39%).

Figure 5 also shows that an average of 61 per cent in the Nordic countries trust the news that they use most of the time. This average, however, covers the difference between very high trust in Finland (70%) and lower trust in Sweden (48%). In sum, these scores show that the Finns and Danes have the highest trust scores, whereas Norwegians and especially Swedes seem to exhibit less trust in

Figure 5. Trust in news, news consumed, social media, and search engines, 2019

Survey question no. 6a. We are now going to ask you about trust in the news. First, we will ask you about how much you trust the news as a whole within your country. Then we will ask you about how much you trust the news that you choose to consume.

Survey question no. 6b. It is now possible to get online news in many different ways, including from search engines and social media sites. With this in mind, please indicate your level of agreement with the following statements.

the news. Looking more closely at the different media systems, three countries from the Nordic system – Finland, Denmark, and Norway – stand out from the UK (Central system) and France and Spain (Southern system). Germany (Central system) seems to be more in line with the Nordic countries on this question, whereas Sweden is closer to the Southern system, when it comes to the question of trust in “news I consume”. There are hardly any differences between media systems with respect to trust in news from social media, with the exception of Spain, where 25 per cent trust this news source, against 10–18 per cent in the other seven countries.

Conclusion

In this article, we set out to investigate whether it is possible to talk of a specific Nordic media system from an audience perspective. Through a descriptive comparison of media use with selected countries from two other media systems – the Central and Southern European media systems – we have shown that from an audience perspective there are clear differences between the three supranational media systems.

Hallin and Mancini (2004) predicted that over time, the two other media systems would converge towards the Liberal model, with its more market-driven, rather than public service, dynamics. Although our fairly small-scale descriptive

comparative analysis does not enable us to offer strong generalisations, it appears that considerable differences in three supranational media systems persist. On the whole, therefore, the overall conclusion to our comparative analysis is that in significant respects, the Nordic media system *does* stand out from the other two systems considered here.

In some respects, there are also salient differences between the national media systems within a supranational media system. This is the case, for instance, when the UK leans more towards the Nordic system in some respects, and the use of WhatsApp for news makes Spain stand out in the Southern system, and Finland in the Nordic system.

However, in some cases, substantial differences remain within the Nordic system, sometimes between Finland, on the one hand, and Denmark, Norway, and Sweden on the other – at other times between Norway and the three others. Following path dependency theory to explain “historically grounded national institutional differences” (Moe, 2019: 232), this intra-systemic difference between the Nordics may have to do with the quite dissimilar historical trajectories followed by these countries. Among other things, the countries have very different geographical conditions (size, geology, and transport), with strong allegiance to (and willingness to pay for) local news media developing especially in Norway. They have belonged to different geopolitical alliances (Finland’s vulnerable relationship to the Soviet Union; and Norway’s political dependency historically on first Denmark from 1537–1812, then Sweden from 1812–1905), and there are communicative barriers based on the different linguistic-communicative anchorage between Finland and the other three countries.

On balance, however, although we agree with Flew and Waisbord (2015: 626) on “the continuing centrality of the nation state to media processes”, our comparative analysis shows that it still makes sense to see the four Nordic countries as belonging to their own supranational media system.

Notes

1. Hallin and Mancini’s model, which theorised only Western European countries and North America, also included a polarised pluralist model (with Mediterranean countries) and a liberal model (UK, US, Ireland, and Canada). For reasons of space, we concentrate on the analytical treatment of the Nordic media system in this article.
2. The complete set of Hallin and Mancini’s economic, political, and journalism-professional dimensions used to define media systems is summarised in Sjøvaag (2019).
3. Norway was not included in their empirical study.
4. See also the convincing argument of Flew and Waisbord (2015: 626) to the effect that “a strong case can [...] be made for the continuing centrality of the nation state to media processes”.
5. For the exact figures about use of different social media platforms, see the country pages of The Reuters *Digital News Report 2019* (Newman et al., 2019).

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