**Public Service Media as ‘keystone’ news media across challenged media ecologies: a four-country comparative analysis of the role of PSM for news audiences**

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Media systems around the world are changing due to digitalization, fragmentation and polarization (Humprecht et al., 2022; Schrøder, Blach-Ørsten et al., 2024). In many countries, these changes have left national Public Service Media (PSM) struggling; but some PSM providers still play central roles in the national media ecologies (Puppis & Ali 2023); this is the case, for instance, in the Nordic countries.

Borrowing Nielsen’s concept of ‘keystone media’(2015), which describes the critical importance of particular news outlets in national media system, we undertake a comparative, empirical analysis of the role of PSM across four national media markets (Denmark, Sweden, Belgium/Flanders, Germany), selected from two different supra-national media systems: the democratic-corporatist system and the hybrid system (Hallin & Mancini 2004; Humprecht et al. 2022). Our analysis is based on data from the annual Reuters Institute Digital News Report (Newman et al. 2023), which surveys news use cross-nationally in 46 countries globally across all media platforms (legacy, digital, social media).

Our analysis aims to map the landscapes of news repertoires in these four countries. This is done by undertaking a Latent Class Analysis of data from the Reuters survey where we cluster respondents based on their response patterns for the following variables: (1) overall frequency of news use, (2) news sources used last week, (3) main news source used last week, and (4) the frequency of use of both offline and online news brands within the respective market. The resulting repertoires thus represent the patterned relations of PSM news and other news outlets for news users. They will be further correlated with sociodemographic variables, trust in news media, views of PSM news, and willingness to pay for news, first within each national media landscape separately, secondly between the two national media landscapes from the same media system, and thirdly across the two supranational media systems.

The comparative perspective will enable us to determine whether, to what extent, and how, the PSM play the role of keystone news media in the respective national media ecologies, and how this affects citizens’ use of and willingness to pay for commercial news media. In doing so, the analysis can address the issue of public service media’s functioning as ‘keystone (or less dominant but still prominent) news media’ within their national media ecologies, without such centrality necessarily causing for-profit news media to be ‘crowded out’ from the news landscape.