

## **James Frayne, founding partner, Public First—written evidence (FON0060)**

### **House of Lords Communications and Digital Select Committee inquiry: The future of news: impartiality, trust, and technology**

#### **1. Introduction**

##### **(a) About this note**

This short submission reflects the research James Frayne and Public First have been involved in on the issues of trust in the media and politics over the last 20 years. More specifically, it reflects new polling research conducted by Public First with this inquiry in mind: a nationally- representative poll of 2,010 adults, conducted between 7<sup>th</sup> and 13<sup>th</sup> February 2024. We cite a number of statistics from this poll, but elsewhere this narrative is informed by James Frayne and Public First’s broader research experience. (You can download the full tables of our February poll on our website).

##### **(b) About James Frayne and Public First**

James Frayne is founding partner of Public First, an agency specialising in public policy research, including opinion research. Founded in 2016, Public First conducts opinion research on a wide range of issues in Britain and two dozen markets around the world. This includes both quantitative and qualitative research.

Public First is a member of the British Polling Council and is a Company Partner of the Market Research Society, which together oversee standards in the opinion research sector.

In a variety of roles in Government, politics and the corporate world, James Frayne has been running opinion research projects since the early 2000s. James is a Certified Member of the Market Research society, reflecting his long-standing expertise in opinion research.

##### **(c) Declaration of interests**

Amongst other issues, this inquiry looks at how the future of news will be affected by changes in technology and the evolving tech sector itself. While this note focuses purely on public attitudes to news – and not at all on technology and the future of the media - we should declare our interests. We have worked for numerous tech companies since our formation in 2016. You can read more about our clients on our website and on the website of the PRCA, which regulates public affairs activity in the UK. We also run regular qualitative research projects for national newspapers, and occasionally for broadcasters on political and social issues.

## 2. Public consumption of media

### (a) The fracturing of the British media market

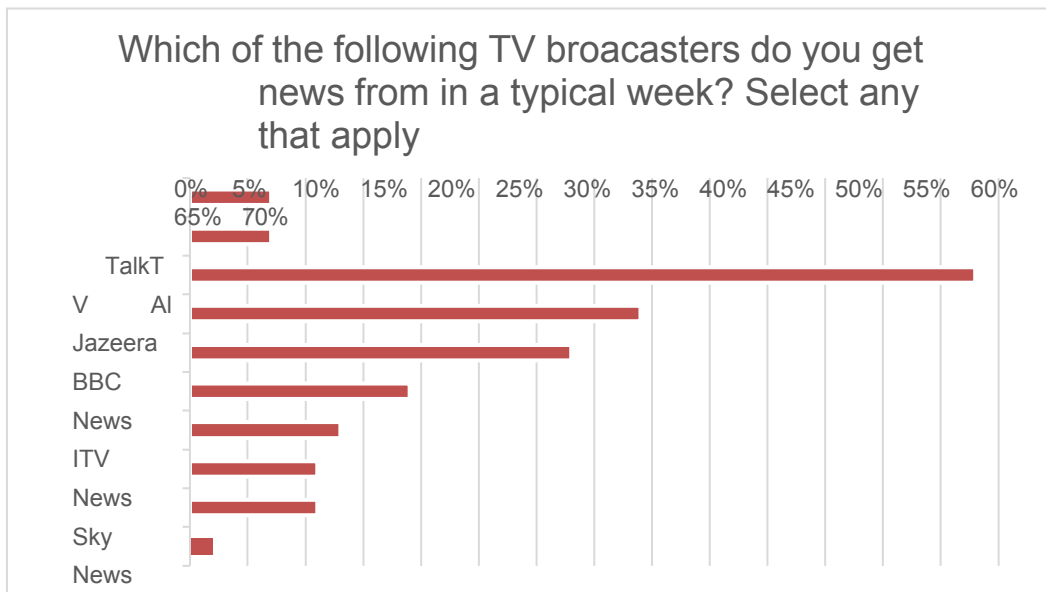
In our February 2024 poll, Public First asked people a range of questions about where they get their news from. This is a question we often ask in our ongoing focus group research too.

To be clear: the answers on media consumption in this poll should *not* be read as a challenge to (or a correction of) existing data on newspaper circulation, viewing figures, and so on. In an era of social media, when people are seeing snippets of news here and there, and with people's memories always imperfect, it is hard to get completely accurate figures on media consumption from a poll like this. Did someone, for example, watch a TV show in real time, or merely see something shared on X (formerly Twitter) from a particular news outlet?

Rather, these questions and answers provide us with useful data on people's general sense about where they are getting news from, and the sources they associate with news reporting and analysis (which in turn means they are more likely to notice them in the future).

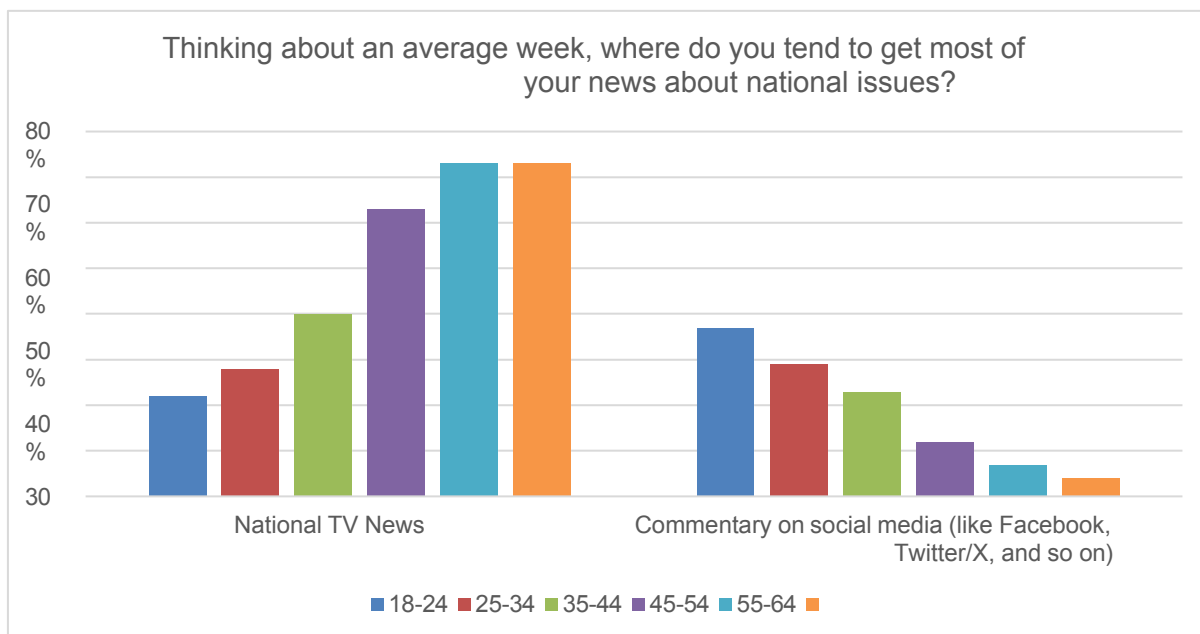
These caveats aside, the bottom line is: the poll confirms the continued fracture of the British media market, as new media outlets emerge and, more importantly, as social media continues to grow.

The fact that such significant numbers are at least *noticing* the likes of GB News and Talk TV signifies continued change. For the last six months, we have heard people, without prompting, talk about watching GB News. This is becoming more common. The chart below surely overstates how much people are seeing from the likes of GB News - even with the amplification that comes from shares on social media etc - but it signifies that people are at least noticing new outlets now.



The real change in people's consumption of news is, of course, being driven by social media. In our qualitative research, which sees us typically run several focus groups a week, most people say they at least see some news and comment on social media – and this is naturally particularly true for younger voters.

In our poll, while 73% of over 65s say they primarily get their national news from TV news broadcasts, just 22% of 18-24 year olds say the same. This younger cohort are *much more likely* to cite the importance of social media commentary – by far their most important source of news.



While change is happening, this is not to dismiss the current importance of the BBC and the PSBs more generally. As of this moment, the BBC remains dominant in British news overall, despite its downward trajectory. Nearly 70% of our sample said they got news in part from the BBC in a typical week (to be fair this includes News Online).

And the BBC is reasonably dominant across all demographics. It is certainly dominant amongst different social groups and regions; it is only on age, where significant differences emerge. That said, 59% of our sample of 18-24 year olds said they watched the BBC, even if 77% of over 65s said they did. In other words, the BBC dominates, but the nature of its domination is different by degree.

Broadcast news is currently still the place where most people get most of their national news from. Overall, given a list and asked to choose their main sources of news, TV news bulletins topped our list, with significantly more than double the number overall choosing broadcast TV news over national newspapers.

Finally, a note on local news. The collapse of local news sources has been well-documented in recent times. Twenty years ago, in focus groups we observed or ran, most participants said they read a local newspaper at least once a week. In some parts of the country, almost everyone seemed to read a local paper. Now, it's extremely rare, outside a small handful of cities, for anyone to say they take a local paper. And this was reflected in our new poll: just 17% said they got their local news from a local newspaper. As with national news, TV still dominates: 47% said they got local news from local TV; second highest was word of mouth from friends and family.

While we explore trust in detail below, we note here that this decline in local news is likely to have an effect on trust in the media. Historically, local media outlets have enjoyed very high levels of trust. While it is difficult to say that the decline on local media has dragged overall trust levels in the media down, it is a reasonable assumption to make.

(b) What drives different media habits

As we note above, unsurprisingly, the biggest marker of media habits is age. Simply put, older people are more likely to consume media in “traditional ways” – via the BBC (and other PSBs) and newspapers – while younger people are more likely to get their news from social media, at least initially (although everyone seems to use BBC News Online). However, other differences emerge too.

In our experience, how long someone has been living in Britain also plays a major part in determining media habits. (We do not use the term “ethnic minority” here, because in our experience, differences in media consumption are driven by how long someone has lived in Britain, rather than their particular ethnic background). While the polling and, to some extent, the official broadcast and circulation figures, do not bring this out strongly, it has been a heavy feature of our qualitative research in the last few years. Our most recent work in this area has been our “New Citizens” research, which has looked at the political attitudes of those who have recently moved to Britain and are actively seeking citizenship, or who are considering applying for citizenship.

It is hard to make general statements about where recent arrivals to Britain tend to get news from – with these new arrivals coming from an array of different countries, – but there appears to be a much greater reliance on, for example, community WhatsApp groups, international media outlets, and other less commonly-known sources.

From our recent polling, one very clear trend, although perhaps less predictably, is that older, provincial, working-class leave voters are actively turning off the PSBs – and the BBC in particular.

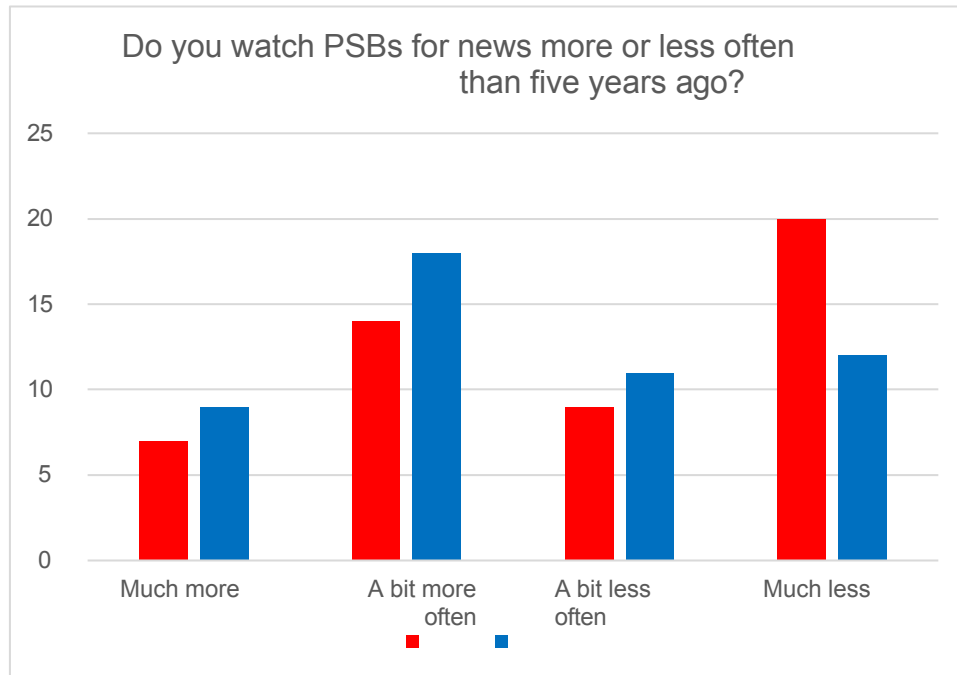
*This is the most important finding in this research; this group of Leave voters are those who have consciously lost the most trust and who are most sceptical about media impartiality.*

In our poll, these voters appear one of the groups watching the BBC and the PSBs less – and indeed a group most likely to say they are turning to newer broadcasters, in the form of GB News and Talk TV – but they are the group for whom irritation and anger seems to be driving their decision.

In our poll, there are a few other demographics who say they are turning off the PSBs more. 18-24 year olds were the most likely to say they were watching the PSBs less in the last five years (36%). However, our sense from this is that

they have actually just never formed the habit to watch BBC News and the other PSBs' news. The same is true for other age groups and social groups: it is hard to discern any active causes for their switch off.

Leave voters', on the other hand, seem to be switching off *actively and consciously* – driven by irritation and the PSBs' – and above all the BBC's – attitudes to those issues they hold dearest.



Should the PSBs – and the BBC in particular – care about this apparent trend? This is difficult to answer. The broadcasters could argue that they cannot please everyone, and that this group of provincial Leave voters is especially hard to please.

The reason we think this trend is significant – and that the broadcasters ought to take notice of it – and indeed why everyone engaged in the public conversation should take notice of it – is because this general loss of trust *is likely to drive important political change*. This is reflected in the growth in parties like the Reform Party, which is arguably a protest party to a large extent. We may see this trend emerge into the open in the latter half of this year as the election approaches.

### 3. Public trust in the media

(a) The nature of “trust”

Can we even say anything sensible about “trust” and the media at all? Is it just an abstract concept which has little practical relevance? Is it possible – or even

desirable – to trust the media generally, or individual journalists specifically? The committee has certainly heard scepticism about researching “trust”.

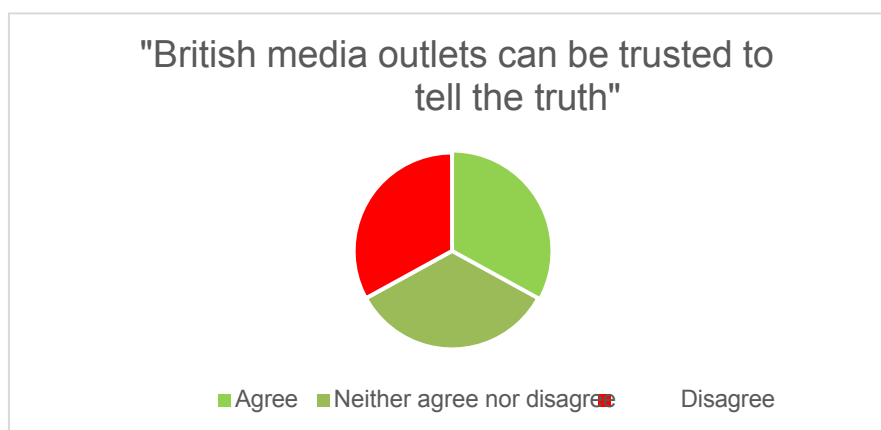
We believe measuring trust in the media is possible and worthwhile. This is because *actual behaviour on media consumption is changing right now, apparently as a result of declining trust*. In other words, our research suggests ordinary people take trust in the media seriously. In our view, it is declining trust which is speeding up the fracture of the British media market.

(b) What trust looks like

In January 2024, we conducted a brief poll on attitudes to media ownership. In this poll (the tables for which are available on our website), people said they recognised the fundamental importance of the media in the UK; they recognised its role holding the Government and the powerful to account.

In this poll, there was near-unanimous agreement that independent media outlets holding the Government to account was an important part of protecting our democracy. Given a list of prospective benefits of an independent media, the top choice was that it can hold the Government to account. With this in mind, the media is not starting from a bad place; people see its importance.

In our February poll, most of the public said they trust the PSBs and the established newspapers. 39% said they trust the content of stories in national newspapers, on national radio and on national TV shows, compared to 16% who disagreed (40% said they “sometimes” trust the content of these stories). And the public overall are essentially tied on whether they agree with the statement “British media outlets can be trusted to tell the truth”: 32% agree; 32% disagree; 33% neither agree nor disagree; and the remainder said they were unsure.

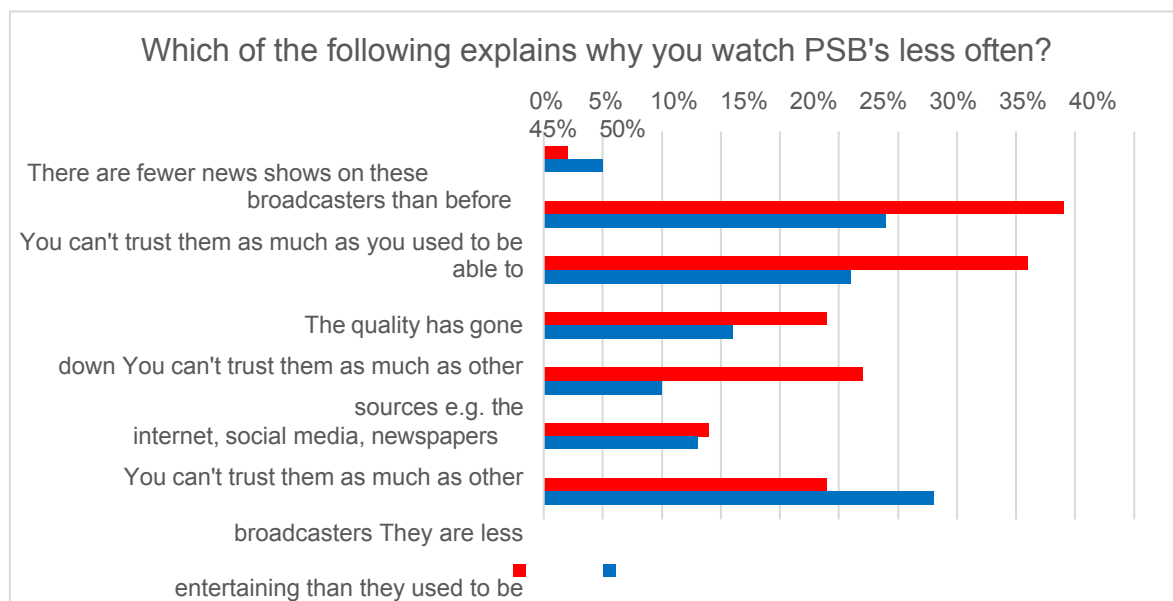


Interestingly, trust is one of the few areas where age makes little difference. On these fundamental trust questions, there is remarkably little difference in opinion on age. Nor is there much difference on age, gender or class. No, on the issue of trust, it is politics which defines outlook. And this is why we have

amplified the importance of these Leave voters in this analysis.

There appears to have been a very significant decline in trust in the broadcasters specifically amongst the working-class, provincial Leave voters we describe above. They are turning away from the PSBs in large numbers, in apparent irritation about the they operate. They are mainly irritated with the BBC.

When asked why they were watching the PSBs less than they used to, 44% said it was because “you can’t trust them as much as you used to be able to”. This was significantly higher than almost every other demographic (a couple of random demographics were essentially statistically-tied with these Leavers, although occasionally on cross-breaks with tiny numbers, which cannot be reliably trusted).



To be clear, this is not all Leave voters – and it is emphatically not all working-class voters. In our view, this group of disgruntled Leavers accounts for around a third to a half of the total number, which is roughly 15-20% of the population as a whole. We give this group particular attention because they are relatively large in number and *politically very motivated*. As we note above, this group of voters is likely to drive political change in the course of the next five years at least (and probably longer).

The rest of the poll helps explain why these working-class voters are losing trust. The reasons are mixed, but can be characterised in the following way:

- *Irritation over the reporting of Brexit.* This group of people thinks the media as a whole – although mostly the BBC – has been unremittingly and unfairly negative towards Brexit. There is a sense that the BBC



particularly has been ideologically hostile to Brexit and is seeking to make it fail. This might be unfair – the BBC, after all, came under massive criticism for apparently naïve even-handedness during the referendum campaign itself – but it is nonetheless strongly felt. This feeling was exacerbated by the way many Leavers felt Boris Johnson was treated in the latter stages of his Premiership; a significant minority of Conservative Leave voters volunteered in our qualitative research that the media (the BBC above all) effectively chased Boris Johnson out of Downing Street because he led the Brexit campaign, using “partygate” as the excuse. No, this is not a universally-held opinion; it is a minority-held opinion, held by a group of angry Leave voters. But it helps explain this loss of trust.

- *Irritation over story choice.* In our poll, when asked what they thought the media reported too much on, a significant number said immigration; they think the media reports too much about it. But this significant minority of Leave voters who are annoyed with the media about Brexit, strongly believe the media also underplays the importance of both conventional “legal” migration, and those they consider to arrive “illegally” on small boats (not a definition that is even vaguely agreed on).
- *Irritation over “woke” and “political correctness”.* While the concept of “woke” has been raging in politics for several years now, it has only really started to become part of the public conversation for the last year or so. For the first time, the term “woke” is now used by a sizeable chunk of the population although, even now, *caring* about “woke” actively is a relatively niche affair. And so it was in this poll – *but it was a feature, and it is an issue for a proportion of these working-class Leave voters.* To them, the media, and, again, above all the BBC, obsess over trivia to project a woke outlook.
- *The collapse in trust of the political class.* While this note focuses on trust in the media, we need to say something about the “political class” more broadly. We do not believe it is possible to talk about the loss of trust in the media without looking at the similar decline in trust in politicians and the Government. In our poll, we found very substantial agreement that politicians and the media were the same sorts of people, shared the same interests, and so on; in short, many people think they are in the same class. As such, the decline in trust in politicians is mirrored by that in the media – again, in our experience, amongst a significant minority of working-class Leave voters.

A final note on trust: in our January poll on media ownership, by 76% to 11% people agreed that it did matter who owned British media outlets. Given a list of options of who should not be allowed to own British media outlets like newspapers, the top answer (from a list of options) was foreign Governments in non-democratic countries.

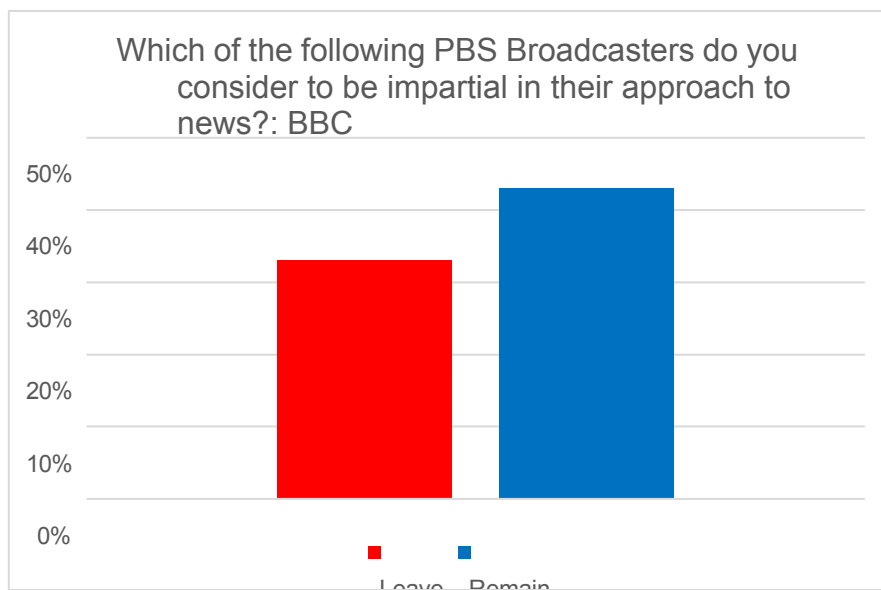
With the sale of the Telegraph currently in the public eye, and one of the prospective buyers closely linked to a foreign Government in a non-democratic state, it is worth dwelling on the impact that such a decision will have on public trust. It hardly seems likely to build trust.

#### 4. Public attitudes to impartiality

##### (a) The links between trust and impartiality

To much of the public, there is a difference between trust and impartiality. The numbers on these two issues are not wholly aligned. It appears the public are prepared to tolerate *some* partisanship as long as they consider the news to be of high quality. (That said, clearly some people are less likely to say a news outlet is impartial if they disagree with it).

Only minorities of the population believe the broadcasters to be impartial. Given a list, 36% of people said they thought BBC1 news was impartial, and only 23% thought ITV or Channel 4 News were impartial. These numbers were dragged down by these Leave voters: while 43% of Remain voters said they thought BBC1 news was impartial, only 33% of Leavers thought the same.



Interestingly, overall, the BBC fares better on its attempts to be balanced. People agree by 48% to 25% that "BBC News always tries to be balanced". Again, the numbers are dragged down by the Leavers: Remain voters agree with this statement by a resounding 56% to 20%, while Leavers agree much more narrowly by 43% to 33%.

## (b) What impartiality looks like

Ofcom has a stated view on impartiality, which the PSBs are required to accept. Fundamentally, this is that the broadcasters must demonstrate impartiality over time; not always impartiality in a single broadcast, but certainly impartiality overall. This is a broad definition – perhaps necessarily – and it is rare for broadcasters to breach these rules.

However, these broad guidelines are not producing news content that everyone wants to see. It would be too much to suggest that people disagree with the rules; on the contrary, most people will have no idea at all about them. But it is reasonable to suggest that Ofcom's and the broadcasters' attitudes to impartiality differ to the public's attitudes.

When asked what things a news outlet would need to offer to be considered impartial, the top answers were: (a) having presenters and commentators that explain both sides of the story; (b) holding guests to account when they disregard objective facts; (c) promoting objective facts and truth through all of their reporting; (d) having roughly the same number of guests from different political viewpoints; and (e) not having presenters who come from party political backgrounds.

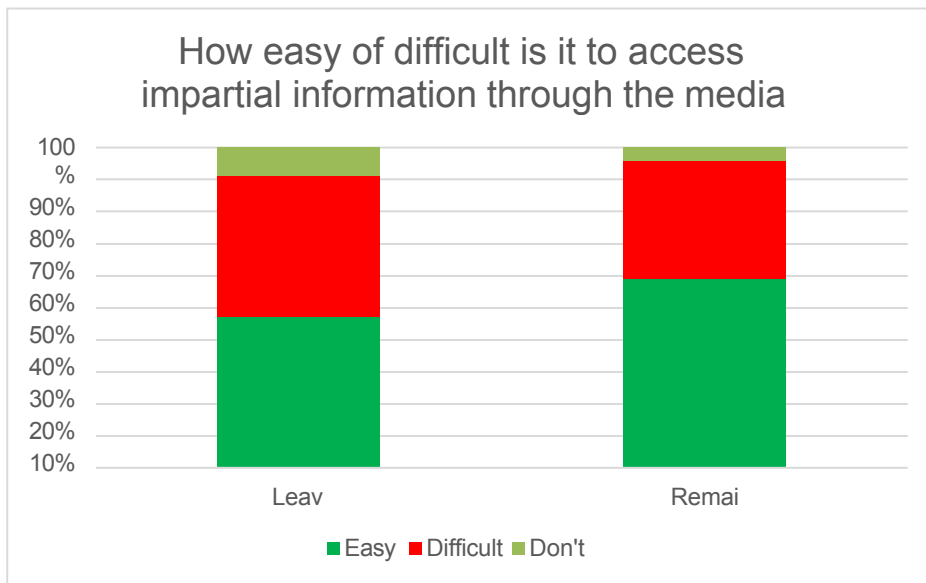
Increasingly, although by no means universally, media outlets are moving towards more adversarial debates between guests with polar-opposite views. And they are moving towards more emotive commentary by presenting teams. This is not in line with what the public want to see. It would be a simplification to say most people want something that resembles news in the 1990s and before – where a newsreader would deliver the bulk of the news, with a handful of specialist analysts – but they appear to be keener on news which is more self-consciously objective, sober and calm.

## (c) Impartiality in an election year

While there have been an increasing number of stories about the possibilities of misinformation and "deep fakes" playing a role in the forthcoming election here in the UK, and while we have seen deep levels of concern about trust in the media, more people than not say they think it will be easy to access impartial information about the election. 38% of the population say it will be easy to access impartial information through the media and social media this year, 26% say it will be difficult, and 30% say neither easy nor difficult.

Interestingly, it is the youngest voters, between 18 and 24 who express the most confidence in their ability to access impartial information: they think it will be easy by a margin of 53% to 18%. Older people are the least confident: they think it will be hard by 32% to 24%, with 37% saying neither hard nor difficult. This is one of the biggest gaps between old and young we found across the poll.

Once again, this question throws up differences between Leave and Remain voters. Remain voters agree it will be easy to access impartial information by 42% to 26%; Leave voters agree by just 32% to 30%.



Asked which media outlets will give voters the best chance of accessing fair and impartial information about the coming election, the top answer (42%) chose the PSBs. Newspapers came in well below (23%) and social media channels (22%) around the same.

*February 2024*