



Executive summary

In France, representative democracy is experiencing a growing mistrust that also affects the media. The latter are facing major simultaneous challenges:

- a disruption of their business model in the digital age;
- a dependence on social networks and search engines to gain visibility;
- increased competition due to the convergence of content on digital media (competition between text, video and audio on the Internet);
- increased competition due to the emergence of actors exercising their influence independently from the media (politicians, bloggers, comedians, etc.).

In the United States, these developments have contributed to the polarization of the public square, characterized by the radicalization of the conservative press, with significant impact on electoral processes.

Institut Montaigne investigated whether a similar phenomenon was at work in France. To this end, it led an in-depth study in partnership with the Sciences Po *Médialab*, the Sciences Po School of Journalism as well as the MIT Center for Civic Media. It also benefited from data collected and analyzed by the Pew Research Center*, in their report “News Media Attitudes in France”.

Going beyond “fake news”

The changes affecting the media space are often reduced to the study of their most visible symptoms. For instance, the concept of “fake news”, which has been amply commented on, falls short of encompassing the complexity of the transformations at work. In numerous countries, focusing on such symptoms has led to the adoption of regulation with mitigated results. Institut Montaigne went further and took a step back in order to look at the French media ecosystem as a whole. To do this, it analyzed 18 million

* Note: Pew Research Center does not take policy positions. The opinions expressed herein, including any implications for policy, are those of Institut Montaigne and not of Pew Research Center

tweets and 65,000 articles from March 2018 to February 2019, looking at how the media cite each other, how they are cited by users on Twitter, and grouping media together according to their citation behaviors.

Towards a polarization “à la française” opposing institutionalists to “anti-elites”?

Polarization in the United States

A 2017 study by researchers at Harvard University and the MIT Center for Civic Media demonstrated the growing polarization operating within the American media space. This study concludes that:

- the polarization of the American media space unfolds on a horizontal political axis opposing the left to the right;
- it takes place within the traditional media space: Fox News is opposed to CNN;
- it is aligned with the opposition between political actors and the institutions they represent (Fox News opposes CNN in the same way that Donald Trump opposes Hillary Clinton);
- this phenomenon of polarization has been emphasized by the emergence of new media to the right of the political spectrum. For example, the media Breitbart has pushed Fox News much further to the right ideologically (the American polarization is therefore asymmetrical: right-wing media have moved away from the center more than left-wing media have).

Polarization in France

In this study, we mapped the structure of the French media space in order to measure its potential polarization and evaluate the influence of social networks on this structure. Here are the main conclusions:

- the polarization of the French media space is unfolding on a **vertical axis opposing institutionalists to those who could be considered “anti-elites”**;
- it **does not take place within the traditional media space** (traditional media such as *Le Monde*, *Libération*, *Le Figaro*, *Les Echos*, *L’Obs*, etc.), **but between this traditional space and new media that can be considered “partisan”** (such as *Les Crises*, *Egalité et Réconciliation*, *Fdesouche*, *Sputnik*, etc.), which are situated outside this space and express opinions against the elites. Indeed,

- the French media space remains structured around a central “Core” composed of the main newspapers, websites, radio and TV channels;
- this “Core” is composed of left- and right-wing media (from *Libération* to *Le Figaro*);
- while all media refer to this “Core”, including media that could be considered “partisan”, the “Core” almost never refers to media that are outside the “Core”.
- the polarization of the French media space is less aligned with that of political actors than in the United States, due to the multiplicity of political actors in France;
- the polarization is likely to be emphasized by the emergence of new partisan media (see below).

Studying the structure of the French media ecosystem

In order to map the French media space, we analyzed how media cite each other, by counting the number and looking at the direction of citations in their articles (a “citation” is a URL link present in an article and redirecting to another media).

This analysis allowed us to identify four media groups, with different behaviors, that structure the French media space:

- **Core media:** a set of publications that are widely cited by other media categories, but which rarely cite them in return (*Le Monde*, *Le Figaro*, *Libération*, *Le Parisien*, *20 Minutes*, *Les Echos*, etc.).
- **Ring media:** a set of publications that cite the Core and Satellite media. They are sometimes cited by the Core (*Russia Today*, *Fdesouche*, *Valeurs actuelles*, *Sputnik*, etc.).
- **Satellite media:** a set of publications that widely cite all other media groups but that are never cited in return (*Les Crises*, *Egalité et Réconciliation*, *Fawkes News*, etc.)
- **Niche media:** a set of local papers and magazines that receive some attention from other media categories (local press and specialized magazines)

The yellow vests, an example of polarization “à la française”

By analyzing 65,000 articles from a corpus of 391 media over a period from September 2018 to February 2019, the Sciences Po Médialab highlighted the main themes in the coverage of the yellow vests movement. The maps obtained show a clear distinction regarding the importance different media groups give to these themes:

- it appears that Core media were mainly concerned with the consequences of the social movement for the government, political parties, and the police;
- the issue of the yellow vests’ values and demands was prioritized by Satellite and Ring media.

Changes at work with social networks and the emergence of new partisan media

If France does not experience a polarization similar to the one observed in the United States, it seems to be due to the relationships existing between Core media. They regularly cite each other, rarely cite partisan actors outside their sphere, and seem to share common practices and values, as the CrossCheck initiative during the 2017 presidential campaign showed.

However, this does not mean that the media space is protected against more profound changes. Institut Montaigne has thus noted four major factors of evolution:

1. social networks have given rise to a conversational space that, *via* network effects and virality, increasingly influences the traditional media space. In concrete terms, information made popular on Twitter can now be recycled by “traditional” media;
2. new media that could be considered partisan quickly gain in audience and influence (such as *Russia Today*, *Fdesouche*, *Sputnik*, etc.);
3. some links exist between right-wing partisan media (*Fdesouche*, *Sputnik*, *Russia Today*) and satellite media (*Français de France*, *La Presse Galactique*, *WikiStrike*, *Stop Mensonges*). The former cites the latter, thus making visible doubtful information that otherwise receives little attention;
4. polarizing polemicists act as “laundering” agents when they highlight disinformation produced by such media.

These changes may, in the long term, have an impact on the Core media, as has been observed in the United States.