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HAVE DIGITAL COMMUNICATION TECHNOLOGIES DEMOCRATIZED THE MEDIA INDUSTRIES?

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Introduction: some key terms

In media, communication and cultural studies these days, as in much of the rest of life, it's more or less impossible to avoid the term 'digital'. One important question, often raised but rarely explored in depth, is whether digitalization has *democratized* the media industries and media production. In order to consider this question, we need to seek clarity concerning the main terms.

The term **media industries** refer to those industries involved in the production and circulation of cultural products via communication media such as television, radio, film, newspapers, magazines, recorded music and others. The various processes of **media production** that are pursued by these industries matter because they shape the kinds of knowledge, culture and entertainment that we are most likely to experience.

Digitalization here refers to electronic storage and transmission that involves converting images, words, sounds and so on into binary code that can be read and stored by computers – including those embedded in mobile phones. Digital communication technologies are simply communication devices based on such electronic storage and transmission, and computerization – including computers interconnected by the internet – is essential to the idea of digitalization

The term **democratization** is the trickiest of the three terms in my question. Etymologically, democracy of course refers to rule by and for 'the people' (*demos*, in ancient Greek). More specifically, it involves the idea that participants in something (a society, a city, an organization) exercise collective decision-making over that thing in a relatively equal way (Christiano 2018). In the context of the media, and media industries, then, democratization is often used simply to refer to an increase in access, either to making or consuming media products. There is a more radical sense of the term though, where it is used to refer to change that might improve or reform the media by bringing about greater levels of equality in collective decision-making over the operations of the media. This matters, because

undemocratic media processes are likely – at least according to the proponents of democratization – to lead to problems in media products, such as inadequate representation, voice and visibility for less powerful, marginalized groups, and this can have significant negative effects on participation, equality, justice and democracy across all kinds of other spheres in society. Yet the question of the degree of democracy in media *production* (as opposed to the degree to which media *content* might be considered democratic or progressive) has been neglected in recent years.

New media technologies as democratizing forces

Over the last century and more, since the rise of commercial media industries in the late nineteenth and early twentieth century, there have been many hopes that various new communication technologies would democratize the media (e.g., Brecht 1978/1932). Such hopes are only part of a larger history of aspirations for the transformative capabilities of machines and systems, including railways and electricity. But when applied to the communication media, such hopes have a particular significance, because the very idea of communication itself concerns the limits and possibilities of connection between humans (see Peters 1999).

Even the use of supposedly transformative communication systems such as radio by Nazis and other authoritarians failed to dent the idea that new technologies might transform information, knowledge and communication for the better. In the period following the Second World War, computers became a new basis for such utopian hopes, because of the possibility that their potentially vast storage and processing capacities would make it much easier for large numbers of people to access massive bodies of information, cheaply and conveniently, thereby democratizing knowledge – in the sense of broadening access to it (Turner 2004). The rapid development of computers in the post-war era was fuelled by government expenditure on research in an era where the USA-led world of ‘liberal democracies’ and the Soviet Union-led bloc of Communist countries competed for supremacy. As early as the 1950s and 1960s, it seemed clear that computers would transform societies and economies, and this generated a flurry of theories and predictions concerning transitions towards ‘the information society’ or ‘the knowledge economy’ (Garnham 2005).

The idea that technologies in themselves can have effects on *anything*, whether media production or human happiness, needs to be qualified. Technologies, as Thomas Streeter (2011: 8) puts it, ‘are deeply embedded in and shaped by social processes and choices and so should not be thought of as something outside of or autonomous of society’. While technological objects and systems have ‘affordances’ – qualities that define how they might be used – discussion of the affordances of technologies always needs to involve consideration of other factors shaping their use: economic, political, cultural, psychological.

Such important qualifications to simplistic ‘technological determinism’ should not, however, blind us to the fact that the development of complex technological systems do tend to have pretty major consequences – though always in interaction with other forces. And there can be little doubt that digitalization, the incursion of computing into communication on a massive

scale, has had considerable effects on media, and on media industries. For example, we can point to ways in which our access to communication is now far more ubiquitous, mobile and pervasive than in the past, with various consequences for how we act and behave. These are important in their own right, but my focus here is specifically on the extent to which digitalization has led to democratization, in the sense of a meaningful opening-up of the means of media production to greater democratic control.

Media industries in the twentieth century: four major characteristics

To explore this question, I want to begin by identifying *four main sets of characteristics of the media industries in the late twentieth century*. The industrialization of culture and communication brought a new degree of cultural abundance and choice to many sections of modern societies and forged new forms of community and solidarity. But the media industries were hardly democratic, in the sense I mooted above, where collective decision making over how the media operate is exercised in some relatively equal way by those affected by them. In outlining some of these characteristics, I'll also explain briefly how some commentators, whom I'll label 'digital optimists' (a term I take from Turner 2010, though many others have used it), felt that these features could be democratized by the development of digital networks.¹ The rest of the chapter will then explore the degree to which those hopes were realized.

My approach here is underpinned by the idea that, when considering the effects of digitalization, we need to place the changes associated with digital networks in long-term historical context. Seeing digitalization through cultural and historical lenses can help us to avoid widespread errors in discussions of the effects of new technologies: a tendency to overstate the importance and depth of recent changes, and a failure to spot underlying dynamics that remain in place, even in periods of seemingly chaotic transformation.

1. Mix of state and private ownership – and the rise of corporations

By the middle of the twentieth century, in most countries where significant industrialization had occurred, the media industries were dominated by three main types of organization: large state-owned and state-funded organizations, such as the British Broadcasting Corporation, China Central Television and India's Doordarshan; private companies, often controlled by families or wealthy individuals; and 'public' corporations – businesses whose ownership shares were listed on stock exchanges, and therefore in principle open for anyone to buy, but in fact almost entirely owned by wealthy institutions such as banks. In some countries, notably the United States, these public corporations had a legal obligation to make profits and accrue assets on behalf of shareholders. Large firms, especially in industries such as recorded music and book publishing, co-existed with many smaller 'independent' companies supplying particular niches, from horror fiction to rhythm and blues. While at times some of these companies could serve audiences and even workers well, such small

¹ For reasons of space, I can't discuss digital optimism in detail here but I do so in Hesmondhalgh 2019: 261–322. My thanks to Jeremy Morris and Kaarina Nikunen for their very helpful comments on this chapter.

businesses could be as crudely commercial and exploitative as the bigger companies.

Driving the process whereby larger and larger companies gained greater control over the media industries were certain systemic features of media markets under capitalism. The media industries were relatively high-risk ventures for businesses and investors, but ones where the rewards for market dominance could be considerable – including fame and glamour, as well as profits. The high levels of risk derived in part from the fact that it is hard for anyone to know which media products will succeed, because it is hard to predict what pleasures and rewards media audiences might have, as tastes and fashions change. Even audiences themselves do not know for sure what pleasures and rewards a media product will offer because each product tends to be somewhat different from others. All this favoured companies who could produce large catalogues, to spread the risk.

Systems that mixed state, private and public ownership and control sometimes created many media products that were entertaining, informative, and enriching, and many where such qualities seemed subsumed by commercial intent. Some owners used profits to subsidize high-quality investigative journalism, for example. The global recording industry from time to time enabled (and at the same time appropriated) the sharing of wondrous music across national borders (Denning 2015). Sometimes such content was available to working-class and marginalized groups as well as the bourgeoisie. But this system was not in any meaningful sense democratic. In the large companies that came to dominate media in most countries (for reasons outlined below), power was mainly exercised by managers acting on behalf of wealthy owners and senior executives. Justifications of this market system of media production rested on the idea that profits could be achieved only by ‘giving people what they wanted’, and therefore a profit-based system encouraged the satisfaction of people’s desires. But there were some major problem with this claim. For one thing, what people wanted was to some extent shaped by the communication media themselves. For another, people’s desires exist in complex relations to their needs and their well-being.

Organizations representing the interests of citizens, workers and marginalized groups made massive efforts to create alternative systems, resulting in significant networks of media variously termed ‘independent’, ‘alternative’, ‘radical’ and ‘underground’ (see Downing 2000) but such networks frequently lacked the resources to compete with the for-profit companies and state institutions. Where the latter were run by fascist and Stalinist governments, there could be little hope of the media being operated on democratic grounds. In some so-called ‘liberal democracies’, pressure from groups representing the interests of workers led to some state organizations making efforts to serve publics in a relatively egalitarian way, but they were paternalist – authoritarians with a conscience (Williams 1968: 131). Control over, and access to these organizations, was mostly limited to an elite of white, privileged, highly educated men – the British Broadcasting Corporation (BBC) is the paradigmatic example. But the same was even more true of many of the for-profit businesses.

By the 1980s and 1990s, as advertising budgets grew, and as global markets became more interconnected in an era of media regulation, media markets became bigger and more

international. Many of the state-owned companies were privatized. The rest had to compete with commercial firms that had access to greater financing from other firms. A series of mergers led to the creation of vast multinational media corporations.

Critique of such arrangements was widespread from the earliest days of the media industries, often as part of concerns about the quality of 'mass culture' in an era where an abundance of commercially-oriented media products seemed to be swamping older cultures associated with religion and art. It was in this context that leftist commentators in particular began to hope that new technologies (such as radio) might allow communities and political parties to forge their own media, separately from the media industries system just outlined. By the 1980s and 1990s, a distrust of 'mainstream media' had crossed political lines in many countries, and there was a hope that digitalization would be the ultimate democratizing tool for fighting the domination of media-industry corporation and of media control by authoritarian governments (Pool 1983).

2. The importance of copyright; poor compensation and inequalities for media workers

Underpinning modern systems of wealth accumulation is *property*, and the growing media industries of the twentieth century were dependent on systems of intellectual property, especially copyright, that had developed significantly from their origins in the eighteenth century. One way of understanding the importance of copyright is to see that media industries deal in what economists call 'public goods' – goods that are not used up in consumption. If I watch a film, that does not stop anyone else being able to watch it, whereas if I drink a beer or a medicine, no-one else can. This meant that as the media developed, there was a need to create 'artificial scarcity' in order for businesses to accrue revenues, either by direct sales, advertising or subscriptions. Such artificial scarcity was achieved by copyright law and practice, which penalized organizations and individuals who reproduced or otherwise used protected words, images and sounds without the permission of the copyright owner. While originally formulated as a way of protecting creators (such as authors), most rights came to be owned by large businesses, and as copyright grew in importance, those businesses became highly effective at lobbying governments to increase the scope and duration of copyright, and to monitor infringements more rigorously.

This system of copyright law and practice enabled the growth of the media industries, but it was hardly democratic: it protected corporate owners more than creators or users. Nor were the media labour systems of which copyright formed a central part. The revenues from sales or use of copyrighted products went to 'rights owners'. Who owned the rights in particular works was determined by contracts between the various parties involved, in which bigger companies generally had the upper hand. Creative workers, operating as freelancers, would often be paid on the basis of royalties, calculated as a percentage of revenues. The media industries became notorious for poor contract practices, and often it was people from communities with little access to formal legal knowledge or advice that suffered, such as African-American musicians. Other workers were salaried, but had little or no stake in ownership, or access to royalties. What's more, as the media industries became associated with glamour and celebrity, this helped to feed an oversupply of willing workers,

suppressing wages and working conditions for most workers, and feeding inequalities of class, sex and ethnicity, because it tended to be better-off and better-educated people who were able to find means to cope with the long periods of insecure employment necessary to gain access to worthwhile media work. These features were challenged only by a small, idealistic cooperative and 'alternative' sector (Downing 2000) and even this sector sometimes reproduced the dynamics of class inequality, racism and sexism apparent in the 'mainstream'.

By the 1990s, digital optimists were hopeful that the increasing ability of networked computers to share information, knowledge and entertainment would lead to an erosion of the problematic copyright system outlined above, permitting greater degrees of collective or public ownership and access to media products (Lessig 2001 was one major participant in such debates). Many digital optimists, however, paid little attention to questions of working conditions and inequalities in working life, or to how media industries might be owned and managed in the new environment, and this limited their capacity for understanding democratization.

3. Media production by the few, distributed to the many

Across the media industries, there developed massive *asymmetry* between, on the one hand, audiences, by the early twentieth century existing on a scale unimaginable before industrialization, and on the other, a relatively small (though steadily growing) group of professional producers (Williams 1981). In the highly centralized media systems of the late twentieth century, it was possible for relatively small numbers of media producers and celebrities to command enormous degrees of attention – and wealth. Of course nearly everyone has the ability to be a cultural producer, to sing a song, tell a story, or draw a picture. The spread of technologies such as photography and cheap musical instruments amplified this human capacity, and developed a mass of 'amateurs'. But very few of those amateurs were ever able to reach a substantial audience.

Digital optimists hoped that digital networks would allow this mass of empowered amateurs to communicate with each other, bypassing professional systems and gatekeepers (Leadbeater 2004; Shirky 2008). But as we shall see, they failed to appreciate the resilient nature of certain features of the media industries. The problems for audiences of knowing what pleasures and rewards might be available from media products (see Characteristic 1 above) means that there is huge incentive for companies to control the marketing and publicity of media products, so that audiences can be persuaded to spend their money or time on a particular product. This consistently leads to vertical integration, whereby large firms gain control over distribution or circulation, as well as production. While digitalization enabled more

and more people – including 'amateurs' – to create cultural products independently of the mainstream system outlined in characteristic 1, the problem remained of how to allow sufficient people to be aware of such products that they might experience them.

4. Overproduction and blockbusters

In a situation where it was so hard to predict which products will succeed, there was an incentive for companies to create lots of product, and try them out by releasing them to the public, publicizing some more than others, but hoping that even the less publicized might find an audience. This helped fuel the growth of larger media companies through the twentieth century, as the most successful companies grew quickly and swallowed up smaller ones. It also brought about an overproduction of media goods. To make products stand out from this abundance, larger firms devote resources to creating 'blockbuster' products, often with high budgets for recognizable star talent, and for promotion and marketing. Because of the risky nature of predicting audience demand, even blockbusters often fail, but the ones that succeed can be hugely profitable, because of another fundamental feature of media industries: it is quite expensive to develop a media product, but relatively cheap, and sometimes extremely cheap, to *reproduce* it (e.g., making extra copies of a book or newspaper or recording). This meant that profits grew exponentially if a product was a hit: once the initial costs were covered, each extra sale of products or audiences could be very lucrative. Both strategies (big catalogues and blockbusters) favour the large companies, but the blockbuster tendency or syndrome tends to be the main way in which the big corporations exercise and maintain their power (Grant and Wood, 2004). They are sometimes brilliantly entertaining and imaginative and sometimes even politically progressive (such as Disney/Marvel's *Black Panther*, 2018). In order to achieve a wide audience, they often strive to appeal across different communities (classes, ethnicities, nations). Yet blockbusters are in many respects deeply undemocratic. They are only producible by large corporations with huge financial backing. They tend to take up a disproportionate amount of cultural attention, often on an international scale, thereby 'crowding out' more localized, quirky, lower-budget offerings.

Digital optimists were, as we shall see, hopeful that digitalization would see the end of the twentieth century's 'blockbuster syndrome', leading to an implicitly more egalitarian and therefore possibly more democratic system based on serving media niches (Anderson 2006). Unfortunately, like so many other optimistic predictions about the effects of digitalization, this didn't happen.

The development of digital networks in the context of marketization: four consequences

In the last quarter of the twentieth century, two notable developments occurred, which in many respects intensified the features outlined above, but which also seemed to offer the possibility of significantly disrupting them. One development was that governments began to open up media markets to much greater levels of national and international competition. Some have referred to this tendency in media and communication policy as 'deregulation', but perhaps a more accurate term is 'marketization' (Hesmondhalgh 2019: 135-74): an increasing tendency to see the media as best organized via the buying and selling of products and services (i.e., via 'markets'). While this allowed incumbents to be challenged by new

entrants, it hardly altered the nature of the system, it simply made it more profit-oriented. State-run companies in telecommunications, broadcasting and other sectors were sold off, creating new business opportunities for investors and companies, who began to see the media industries as a promising source of returns. Because of the centrality of television to contemporary culture and to cultural business, the development of multi-channel television and radio, via cable, satellite and eventually digital television, was a particularly important fulcrum of change.

The second development was the rise of the digital networks that are the main way in which digitalization has manifested itself in media. While audio-visual technologies such as cable and satellite dominated many predictions of the media future in the 1970s and 1980s, at the same time, developments in computing and digital networks were beginning to appeal to policy-makers. In North America and Europe, businesses and policy-makers were increasingly attracted to ICTs because they offered the potential to gain advantage over 'newly industrializing' non-western nations and businesses (notably Japan, Korea, Singapore, Malaysia) that had increasingly come to dominate manufacturing industries. From the 1970s, as computers rapidly became smaller, cheaper, faster and more accessible, replacing the giant mainframe computers of an earlier period, they began to be connectable in *networks* (Campbell-Kelly and Aspray, 2004). There was a growing prospect that computers would enable faster and more reliable communication, and this added greatly to the excitement – and anxiety – about ideas of 'the information society' and 'the knowledge economy'. Initially, access to networked computers by those outside the military-industrial complex, including the early internet, and much of the excitement surrounding them, was confined to academic communities and amateur enthusiasts. Both these groups saw computers as contributing to the emancipation and democratization of information and knowledge (Turner 2004; Streeter 2011). A vital development was the rapid growth of the World Wide Web, which built on and embodied the principles of open-ness crucial to the development of the internet. As policy decisions paved the way for the opening up of digital networks beyond academic communities in the 1990s, the Web's open-ness inadvertently provided the basis for an increasing use of the internet for commercial ends (Keen 2015: 34–74). Not much later, mobile telephony systems reached a point where they began to operate in effect as networks of connected micro-computers.

At the turn of the century, digital networks had only just begun to have effects on the main communication media of the twentieth century, upon which the above account is based: television, radio, film/cinema, newspapers, magazines and musical recordings. Between 1990 and 2010, there was a frenzy of prophecies as commentators and analysts extrapolated futures, on the basis of what was at that time only just emerging. Many of the predictions were about how digital technologies would enable businesses to make profits more effectively – a strand of writing that continues to this day. But the legacy of understandings of computers as a basis for democratization of knowledge and information, meant that there was also considerable optimism about the impact of digital technologies on media and

cultural production.² The optimistic predictions had a 'performative' role, regardless of their accuracy or otherwise: they played a vital part in legitimating government, business and consumer decisions, by making the onset of digital networks in a particular form seem not only desirable, but inevitable. It is only now, nearly twenty years on, with digital networks as an embedded aspect of everyday life, that we can discuss what has actually happened, rather than what people thought might amidst the confusion of constant innovation. I want to do so here by asking to what extent the major characteristics outlined in the previous section have really changed, and whether there has been any change that we might call 'democratization' in the sense outlined at the start, to refer to meaningful democratic control. I do so by analyzing four *outcomes* (or sets of outcomes) of digitalization: 1) challenges to the copyright system, and to the main ways in which media industries gain revenues; 2) the phenomenon of user-generated content and the degree to which it overturned the 'few-to-many' system outlined above; 3) the continuing power of corporations, and the rise of a new set of titans based on information technology; 4) a continuation of the few-to-many and blockbuster systems outlined above.

Outcome one: initial erosion of media industry revenues but limited challenge to copyright and labour systems

The costs of producing relatively high-quality images and sounds, at least in some media and genres, had already declined rapidly with the digitalization of production in the 1980s and 1990s. Key technologies included desk-top publishing, high-quality digital video and editing software, and computer-based music recording software that allowed musicians in certain genres to create 'bedroom studios'. From the early 2000s onwards, digital networks, now enhanced by third-generation mobile telephony, enabled not only cheaper production, but also relatively easy and inexpensive distribution, potentially on an international scale. In these circumstances, it seemed possible, even probable, that digitalization was threatening the domination of media corporations that had marked the late twentieth century (see Characteristic 1 above). On the news and journalism side, it was frequently claimed that large news organizations would diminish in power, and that digital networks would bring about the rise of a wider and more diverse range of sources, including 'citizen media' (Rosen 2006; see also Anderson in this volume, on the early interest in blogging and in ventures such as Indymedia). The great English rock star David Bowie was by no means alone in predicting that 'the absolute transformation of everything we thought about music will take place in the next ten years', including the elimination of copyright and the rapid decline of record labels (Pareles 2002).

The first major developments took place in music, partly because music requires less digital

² Among examples of those who, criticized such optimism from a more realistic position, see Mosco 2004. Until around 2010, the voices of pessimists were much less widely heard, and this in itself is revealing of the way that the digital was embraced and even fetishized in the early twenty-first century. See Curran, Fenton and Freedman (2016) for an excellent critical overview of many claims about the internet.

capacity than many other cultural forms. Peer-to-peer file-sharing sites such as the first incarnation of Napster (1999–2001) were used primarily to share content that had been created professionally within the music industries system, rather than to share the work of amateurs and emerging professionals. Their main impact was to damage the artificial scarcity that sustained the sale of recordings to consumers (see Characteristic 2). Unsurprisingly, they met with a furious response from rights owners, especially the major music recording and publishing companies, whose clumsy efforts to control file-sharing through legal action against ‘ordinary’ downloaders and to develop systems that would limit copying led to them being treated even in mainstream media accounts either as doomed dinosaurs, or as vindictive defenders of their privilege and power, or both (Gillespie 2007; Morris 2015).

Many people felt that what happened in recorded music augured changes in other industries primarily dependent on sales of goods made artificially scarce through copyright controls, such as book publishing, games and feature films; and even television was worried, as the valuable secondary market of DVD sales began to be eroded. The amounts that could be charged for ‘legal’ (i.e., non-pirate) physical sales of artefacts plummeted from the artificially high levels that had sustained excessive profits for many years.

The most immediate impact of online distribution on media industries was on ‘bricks and mortar’ retailing, i.e., bookshops, record shops and so on, and the key player here was Amazon, which between 1995 and 2005 became the dominant international force (alongside eBay) in online shopping. Retailers selling records and books, or selling and renting games and videos, closed down across the world (Herbert 2014). Many of the people running these enterprises were completely uninterested in questions of cultural democratization, and record and book stores could be intimidating spaces for the uninitiated. But such shops, perhaps especially independents, operated as ‘gathering places that allow people oriented to culture to meet and connect’ (Timberg 2015: 64), providing an informal cultural education for generations of producers and audiences. What’s more, this was a sector in which cooperative and independent ownership had sometimes thrived (see Fraser 1992: 67 on feminist bookstores as meeting places for ‘subaltern counterpublics’). While many such shops struggle on, and some even manage to flourish, they have often disappeared from places where they might be needed most – towns beyond the metropolitan cores (*The Economist* 2011).

From the early 2000s onwards, digitalization also began to have significant impacts on advertising revenues, and this had especially strong effects on newspapers and magazines. Many publications set up online sites, keen not to be left behind in the transition to digital, but often making their products freely available, and thereby damaging sales of their core product. What’s more, these online versions of newspapers and magazines had to compete with new ‘born digital’ news sites and new cultural activities such as social media, for audiences’ attention to information and entertainment. This also meant even more competition for declining advertising expenditure, especially as many of the new digital companies (especially Google in search, and Facebook in social media) claimed to be able to target audiences much more effectively as a result of their ability to collect huge amounts of data and to join up different datasets. Advertising expenditure on newspapers and periodicals fell from around 2006–07 onwards, as internet expenditure soared

(Hesmondhalgh 2019: 303) and employment in newspapers fell rapidly in many countries, leading to discussion of a crisis in journalism and even 'the death of news' (Kamiya 2009; McChesney and Nichols 2010; see also C.W. Anderson and Michael Schudson's essays in this volume).

There is no doubt that digitalization had damaging effects on media-industry revenues and on the retail sector. But these effects hardly represented democratization. Although there was a certain freeing-up of the way in which people used copyrighted material, for example in phenomena such as mash-ups and memes, systems of copyright law and practice remained intact. The rise of digital streaming services (see also Outcome Four below) represents the main way in which the challenge of digitalization to such notions of intellectual property has been contained. In music, online music streaming services such as Spotify, Apple Music and those operated by China's Tencent represent the new core of global music business revenues, offering consumers instant availability of vast catalogues of music (tens of millions of tracks on the largest services), either for free, i.e., paid for on the basis of advertising, or for a monthly subscription fee. Similarly, in television, subscription video-on-demand (SVOD) streaming services, sometimes called 'over the top' services because they bypass the cable systems that dominate US television, have challenged the linear, scheduled viewing that dominated television even in the era of the digital video recorder (Holt and Sanson 2013). The content on such streaming services is abundant and convenient, available 'anytime, anywhere', at least where there is a wi-fi connection for those who can afford the relevant equipment and subscriptions. But in the era of streaming, the system of rights and ownership underpinning the media industries system are if anything more deeply embedded in technological systems (Gillespie 2007) and more removed from democratic debate than ever. This also applies to the unjust and undemocratic systems of labour and compensation which are, as we saw in Characteristic 2 above, underpinned by copyright law and practice (as well as by general labour law and regulation, and by political and socio-cultural values regarding work). It is hard to see that digitalization has had positive effects here; in fact digital labour in general is strongly associated with exploitation and poor working conditions. Undoubtedly a major factor here was the backlash against labour that gained ground with the electoral successes of the right-wing political parties (crucially supported by conservative media) in the 1980s and 1990s, and of a centre-left no longer committed to the democratization of labour or to justice in working lives. This meant that during the period in which the IT industries exploded, from the 1990s onwards, there was an increasing expectation or assumption that young workers should have to suffer very challenging working conditions (long hours on poor pay, with constantly changing demands), including prolonged and often unpaid internships, and multiple temporary jobs. Such working conditions in fact prevailed in *artistic* labour markets for decades before digitalization (Menger 2006) and the influence of the more glamorous and expanding IT sector (Neff 2012).seems only to have made things worse in artistic labour markets and in the media industries with which they are partly intertwined (Hesmondhalgh, 2019: 350-371)

Even hopeful developments such as crowdfunding often lead to misunderstandings between

audiences and producers, and to self-exploitation on the part of the latter (Powers 2015). But the issues concerning the new digital culture in which many of us now live are not just a matter of quality of working life. Digital culture also involves the way that ‘users’, in return for an admittedly convenient abundance of entertainment and information on many subjects, are required to devote enormous amounts of time and energy to learning systems, and to updating apps and profiles, in order to keep up with the social competition of modern societies. But might societies be over-valuing convenience at the expense of other good things?

Outcome two: the rise of ‘user-generated content’

Although ‘pirate’ sites have continued to play a significant role in current media systems, more lastingly significant in terms of claims about democratization was the way in which digital networks seemed to afford the opportunity for non-professionals to have their voice heard beyond small and immediate circles of friends and acquaintances, thus supposedly threatening Characteristic 3 of twentieth-century media industries above (media production by the few, not the many). In this respect, blogging was a particularly notable phenomenon in the early 2000s, helping to fuel digital-optimist claims about the erosion of distinctions between amateur and professionals, producers and consumers (e.g., Bruns 2008 on the concept of ‘produsage’,) but also more thoughtful accounts about how the media presence of amateurs on a huge scale threatened traditional notions of journalism as a profession (e.g., Shirky 2008). Even more significant was the onset of ‘Web 2.0’ sites that allowed uploading, labelling and sharing of content produced by amateurs and non-professionals. For example, three globally important sites that grew rapidly in the first years of the century were Flickr, for sharing photographs, YouTube for sharing video, and Myspace for sharing just about anything. A term widely used at the time for the rising phenomenon of users uploading content that they had created themselves to such platforms was ‘user-generated content’ or UGC. When the phenomenon of ‘crowdfunding’ emerged around 2007-8, along with specialist web-based funding sites such as Kickstarter, it was embraced by small and semi-professional cultural producers (and by digital optimists) as a potential way of bypassing established media businesses, and weakening the grip of media-industry gatekeepers (a key feature of Characteristic 3) (Scott 2015). UGC sites continued to proliferate, even in the midst of financial crisis and austerity policies, including music sites such as SoundCloud, launched in Berlin in 2007, which hosts a vast array of musical and sound content, with special strengths in electronic dance music and hip hop.

There can be little doubt that for those relatively privileged consumers who had access to the new digital networks, the developments just outlined rapidly led to greater choice, abundance and (that word again) convenience, including the availability of many products for ‘free’. Some would interpret this as a kind of democratization, as a spreading and multiplication of voices, but to do so would be to ignore concentrations of power and attention, and fails to get at the crucial question of democratic *control*. Even the seeming ‘freeness’ of such services often reflected a business model based on sustaining huge initial losses via massive financing, in order to later reap the rewards of market dominance, as was the case with YouTube and indeed many of the ‘pirate’ sites. Such abundance for better-off

audiences did not equate to democratization. Nor did it fundamentally change the major characteristics of media industries in the twenty-first century, outlined above. We can see this by scrutinizing a major aspect of Characteristic 1 above – the presence of corporations in the cultural sphere.

Outcome three: Continuing power of corporations – including a new set of IT giants

Rather than unshackle media industries from the control of corporations, digitalization meant that the multinational media corporations that had for some decades (especially since the 1980s) dominated the production and distribution of culture in industrialized countries have now been joined by a new set of corporations from the IT industries. These corporations rapidly grew as vast financing rushed towards digital from the 1990s onwards, especially after they recovered from the bursting of the ‘dot-com’ bubble in 2000–01. The idea that the rising world of IT start-ups would be a major threat to corporate control soon evaporated. A critical moment was 2005–06, when the UGC sites referred to above were all acquired by vast IT or media corporations: Yahoo bought Flickr, Google bought YouTube and News Corporation bought Myspace. Flickr and Myspace declined rapidly as the social media giants Facebook, Twitter and Instagram grew, and absorbed many of the functions of those early social networks, supported by enormous amounts of financing and eventually advertising. This also resulted in the decline of many more local or national rather than global UGC sites that were popular before Facebook. Crucially, these corporations benefited from an extraordinary lack of democratic oversight and regulation – a product of the neo-liberal flavour of the times, and awe on the part of governments at the economic potential of the IT industry.

The best known of the new IT giants are of course Google, Amazon, Facebook and Apple, the famous GAFAM tech oligopoly, sometimes including Microsoft to make up GAFAM. These companies are extremely diverse, to the point where some commentators understandably question whether there is value in the concept of GAFAM at all. It certainly is essential to look beyond these four or five corporations when understanding the new and expanding role of IT businesses in media industries. But the giants of GAFAM do have something important in common: their massive, visible and branded presence in people’s everyday acts of computer-mediated communication, as opposed to IT corporations such as Intel (who make chips) or Palantir (data analytics), whose presence is less immediately evident in everyday life. They are also supplemented by the vast Chinese corporations that operate behind, and increasingly beyond, the digital ‘Great Firewall of China’.

The GAFAM corporations, and the IT sector in general, were crucially involved in the unfolding of digitalization in the second decade of the twenty first century. The further developments they have played a major part in bringing about make it clear that hopes that digitalization would lead to media democratization did not transpire. Again, recorded music was in the vanguard of change. In the wake of the crisis in that industry, Apple, which had established itself as a major player in music with the launch of the iPod in 2001, began to work closely with the major record companies to develop a site for selling ‘legal’ digital files of music and

to some extent video, via its iTunes site. In fact, the iTunes era proved to be rather short-lived, because Apple made a much more lasting intervention in cultural distribution via the launch of its iPhone in 2007 and of the App Store in 2008, the latter of which made third party software easily available to 'early adopter' consumers. Combined with an equivalent venture by Google for its Android platform (eventually known as Google Play) that soon followed, Apple's app store provided a chance for various emerging IT companies to gain access to the new world of digitally-networked devices, including smartphones, tablets and laptops, and eventually smart TVs.

It is in the context of the rise of streaming services (see Outcome one above) that we see most clearly the way in which media digitalization has opened the way for IT corporations to collaborate and/or compete with media corporations. Outside the Chinese market, Apple and Spotify currently dominate music streaming. It is difficult to equate their extraordinary global presence in this new crucial arena of music-industry activity with democratization, in fact their operations are extremely opaque, the subject of endless speculation on the part of musicians, audiences and other music businesses, including controversies over rates of payment (Marshall 2015).

From 2010 onwards, Netflix and Amazon Prime, both of them essentially IT companies, rapidly became dominant forces in video streaming internationally, supplemented by online streaming services established by media companies such as HBO; Disney and Apple are set to join them as I write in 2018. In the television industry in many countries, on-demand streaming represents a threat to previously dominant cable and satellite companies, and to free-to-air 'broadcasters', including the public service media that have generally served the public interest well in many countries (Evens and Donders 2018). Importantly, the IT corporations are now very heavily involved in the commissioning of content - Netflix led the way in this respect, and other, bigger tech companies (notably Amazon and now Apple) have followed. The vast resources being poured into television as IT and media corporations jockey for advantage has led to a vast proliferation of expensive audio-visual 'television-like' programming that some have referred to as 'peak TV' (Press 2018). Once again, though, we should not confuse financial resources and abundance with genuine diversity and a socially just media system. The IT corporations are set to become the major players in the digitalized media-industries system, and this is not a matter of democratization.

Outcome four: Continuation of the blockbuster and few-to-many system

The profusion of music, television and film enabled by digitalization and streaming may be considered a blessing, especially for highly educated audiences, and as the number of corporations involved in music and television has grown to include IT companies as well as media corporations, it has become possible for some economists to understand this as increased competition (see Noam 2016 for a comprehensive examination of such issues). But even if this is the case, does it represent democratization? Admittedly, in relation to Characteristic 3 (media production by the few not the many), more people than ever before can now share cultural products that they have been involved in creating, for example in the form of blogs, vlogs and social media postings. Sometimes such products can be circulated

internationally. Are we now in a many to many media system, rather than the few-to-many system of the twentieth century? Is this threatening the blockbuster syndrome that sustains corporate domination and international inequality (Characteristic 4)?

The concept of 'the long tail' allows us to consider evidence about such questions. This was journalist and author Chris Anderson's idea that media and the media industries (and indeed modern economies in general) were moving away from a situation whereby hits generate most of the attention and profit (cf. Characteristic 3) towards one where millions of niche markets add up to a market that matches or exceeds that of the hits, partly because of the ability of online digital services to provide vast catalogues (Anderson 2006). But studies have shown that on digital retail sites (such as iTunes, nearly defunct as of 2018), most music available digitally was not purchased at all, and that on streaming sites, most music remains more or less unheard; big hits remain the source of the vast majority of income (Page and Garland 2009; Elberse 2014). Digital music streaming platforms contain vast catalogues, but much of the material remains unaccessed, for the simple reason (presumably) that people don't know it's there. For example, Spotify reported in 2013 that 20 per cent of its 20 million track catalogue had never been accessed (Epstein 2017). What's more, the blockbuster syndrome remains alive and well (Elberse, 2014), partly because firms need to spend more money than ever on marketing in order to break through the clutter of abundance to make their products known. Those corporations that can spend that money are set to maintain dominance, though in a context of much greater corporate rivalry than in previous years. For example, just fourteen Disney films accounted for one-fifth of global film revenue in 2016 (Epstein 2017).

Some would claim in response that some aspects of digital networks have led to some democratization in Characteristic 3, because a greater number of creators are now able to bypass media industry gatekeepers, and break through from anonymity to success and fame. For example, it is common to read and hear about musical acts breaking through into the mainstream media industries via YouTube, such as Canadian pop superstar Justin Bieber. It would be a mistake to confuse such mobility with democratization. Bieber's manager, Scooter Braun, discovered him while searching YouTube for another artist. At the time, Bieber 'had only 'six or eight' videos on his account, with a few thousand views each' (Herrera 2010). The ambitious Braun had experience at a fairly high level in music industry marketing and once Bieber and his mother moved to Atlanta to join him, Bieber was soon signed to a major record label, Island-DefJam (part of Universal, the world's biggest record company). In effect, YouTube (and less prominent sites such as SoundCloud) now operate as online versions of the kinds of informal and semi-professional economies from which creators and artists have for a long time emerged. It is true that social media and UGC sites such as YouTube have paved the way for new modes of celebrity such as beauty vloggers and gaming commentators, who establish their reputations on the basis of constructing a sense of authenticity and an ability to form a relationship of trust and intimacy with their viewers. But in order to reach beyond a rather small community, such celebrities are absorbed into institutions that pursue PR, promotion and branding, and when knowledge of this leaks out to fans, this can threaten the sense of authenticity that has been so carefully constructed (Jerslev 2016). Audiences are increasingly savvy about how this works, but such savviness

hardly seems to undermine the existing system.

Reasons for concern, reasons for hope

I have shown that the hopes invested in digitalization as a means of media democratization have generally not been realized. Perhaps this was always a case of optimistic commentators investing too much hope in technology, and failing to engage with all the other economic, political and cultural factors that might be at work. And with the developments outlined above, new problems and new concerns have arisen. One particular area of increasing disquiet is the way in which powerful corporations can make use of data, and related issues of surveillance (Andrejevic 2007; van Dijck 2014; see also Alison Powell's contribution to this volume). Not all uses of data by governments and businesses are equally problematic (see Kennedy 2016). However, entering into the new digital media ecosystem now regularly involves submitting information about oneself to the most powerful data-gathering forces on the planet. The actual and potential power of IT corporations to harness and analyze data is extremely opaque. There has been extraordinarily little democratic regulation of it, though this is beginning to change (for example, with the European Union's 2016 General Data Protection Regulation, implemented in 2018). Yet some digital optimists treat the gathering and analysis of data as if its main function is to allow companies such as Netflix to serve customers better through the refinement of algorithmic systems (Smith and Telang 2016). It is hard to assess this notion of a trade-off of privacy for convenient abundance, partly because there needs to be much greater social debate about what 'serving customers well' might actually mean, and also because the ability of companies such as Netflix to use data as a basis for programming decisions is often celebrated, but rarely specified. Another concern is the degree to which it is even possible to opt out of the new digital systems of communication and culture (Mejias 2013). And I have already discussed above the worrying implications for work, for how we spend our time, and for quality of life.

A couple of cynical friends, when I told them the title of this chapter, commented that the chapter could be kept much shorter by simply typing the word 'no'. Their humorous implication was that intelligent people now recognize that the dream of digital democratization was a sad delusion. But the effects of digital networks should not be understood entirely as a matter of corporate capture and commercialization, undermining any hopes of democratization. Wikipedia is not perfect (see Ford and Wajcman 2017 on its problematic gender politics) but it has been a rare example of a UGC site where the ideals of the computing cultures of academics and enthusiasts held firm: rather than take advertising, it adopted a non-profit model based on donations. What's more, the crisis in journalism has led to a proliferation of new ways in which journalism that serves the public interest and the common good might be funded (Konieczna 2018).

We need also to recognize the cultural complexity of YouTube and other 'corporate' digital platforms, and avoid over-reacting against naïve digital optimism by implying that our

understanding of the digital realm can be reduced to corporate ownership. As a valuable book on YouTube points out (Burgess and Green 2018: vii, 151), participatory culture remains YouTube's core business, founded on 'cultural logics of community, openness, and authenticity'. YouTube is a vast hybrid platform, combining all kinds of amateur and professional content. Arguably it has been the main force in developing a new cultural mode, 'social media entertainment', which some analysts consider to be more varied and diverse than corporate media.

Cunningham and Craig (2019), for example, argue that Asian American and LGBTQ creators have greater visibility and influence in this emergent industry than in mainstream television. It is possible for disempowered groups and communities – some of them with relatively democratic ways of conducting their business – to make use of web television to seek audiences, bypassing the control of 'legacy' television, as Aymar Jean Christian (2018) recounts in a recent book. In this volume, Punathambekar and Mohan show how YouTube has become a space where programming in the 'regional' languages of India has been used to challenge the hegemony of Hindi and English in that country.

Yet even taking into account such examples, there are limitations in how YouTube and other UGC platforms can be understood as a democratization of the production and consumption of media and culture. As Burgess and Green (2018: 151) recognize, cultural logics of community and open-ness on YouTube are in tension with corporate logics. Advertising abounds on the platform, and participatory culture itself now means something very different from what it did in 2005, in a world where the effects of social media on sociality and democracy are widely seen as at best troubling, and at worst dangerous.

There is no doubt that digitalization has offered abundance, convenience and mobility of information and entertainment. An urgent question facing students and researchers of media and culture is whether that should be at the expense of democratic oversight of, and social justice within, culture and communication. As more and more people become aware of the downsides of seductive systems of digital media, the case for greater democratic control of, or oversight of, the media industries and related tech industries grows stronger. What forms such democratization might take has to be the subject of other essays, other books, hopefully building on some of the earlier research on democratization cited above (e.g., Downing, 2000). Marketized media do not per se guarantee media freedoms any more than state-owned media (see Baker 2002). Of course, some would argue that any significant change is impossible, that the nature of the capitalist system is so entrenched that democratization in the sense that I've used it here simply cannot happen. But my view is that we should not give up on the idea that it is possible or desirable for citizens to exercise much greater control over modern economic, political, technological and other systems, in spite of their complexity and the undoubted difficulties of collective decision-making. To give up on such collective deliberation is to abandon something vital about how people might live together. Only by challenging the main ways in which media industries are owned and controlled are we likely to see a significant improvement in how they represent and mediate the world, and we cannot now go back to the

twentieth-century system. We need new democratic media systems for a digital age.

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