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# Not the Apocalypse: Television Futures in the Digital Age

## ABSTRACT

*This article begins by challenging what we describe as a developing analytical orthodoxy around the development of digital television, an orthodoxy which produces a story about the end of television. We argue that the social practice of television is far from over, and that it is changing in ways which reflect continuities with past practices as well as the effects of emerging economic, technological and cultural formations of production and use. The article draws upon our research into some Asian television markets (part of a collaborative international research project on post-broadcast television) in order to highlight the contingency of these changes and thus the importance of a highly nuanced, locally grounded, and culturally informed analysis of what is becoming of television in the digital age. The article also draws attention to the current difficulties confronting such comparative analysis, in that we lack a common, simple and comprehensive means of measuring, benchmarking and mapping the various formations of what we still call 'television' around the globe.*

## KEYWORDS

digital television  
post-broadcast  
television  
convergence  
the end of television

## INTRODUCTION

The history of technological change warns us against attributing agency to emergent technologies; it also provides abundant evidence of the unreliability of the enthusiasm of the early adopters as a guide to mainstream patterns

of take-up. Histories of the mass media, in particular, tell us that while each emerging technology may initially shape up as if to challenge those already in place, it is rare for them to actually displace or render the existing technologies obsolete. Nonetheless, as each new technology emerges, they are inevitably accompanied by an ancillary industry of analysis and prognosis predicting the total collapse of nominated current technologies or markets as the result of the newcomer stealing their audiences. The predictions are rarely borne out; in many cases, both the technologies and their users end up behaving in totally unexpected ways. Video did not 'kill the radio star', after all, but the music industry is looming as an early casualty of the Internet's emergence as an entertainment platform; music downloads and piracy are now threatening the viability of the local music store and the retail market for CDs.

In this article, derived from a continuing study of post-broadcast television, we begin by challenging what we describe as a developing analytical orthodoxy around the development of digital television. We emphasize the need to recognize that the social practice of television is changing in highly contingent ways in specific markets – ways that reflect continuities with past practices as well as the effects of emerging economic and cultural formations of production and use. Our objective, pursued by drawing in particular on Asian examples from our collaboration on an international research project on post-broadcast television, is to highlight the unpredictability of these changes as well as the current difficulty in finding a simple and comprehensive means of measuring and mapping – and therefore of properly understanding – what is becoming of what we still call 'television'.

## **DIGITAL OPTIMISM, BROADCAST PESSIMISM AND THE END OF TELEVISION**

It is not surprising that the rise of digital television should be accompanied by excitable accounts of technological change – from within the academy and the industry – which construct dramatic visions of the likely futures for television. The most common academic account comes from those we might call the 'digital optimists', who see the rise of digital television supplementing what they predict will be a fundamental shift in the focus of television production and consumption: that is, a shift that takes us away from the broadcast network and the television set in the living room and towards 'the people formerly known as the audience' (Rosen 2006) and the home computer. The prognoses of the digital optimists are closely aligned with those of the entrepreneurs and content producers within the media industries. They project a future in which an unprecedented degree of consumer access and content customization is set to dramatically change the nature of television content, as well as the manner in which it is consumed or produced. Worthwhile aspirations towards increased popular participation at the production end, and some form of democratization at the consumption end, are driving these accounts but they are, nonetheless, customarily enlisted into the service of a more commercial objective: that of generating a viable market for those who have invested in these new developments.

The accounts of the digital optimists are, as it were, negatively reinforced by the views expressed by those we might describe as the 'broadcast pessimists': those who see the declining share of (in particular) the US market now watching broadcast television as an incontrovertible sign of the imminent collapse of the broadcast platform altogether. There are certainly some

who argue against both of these positions (Turner and Tay 2009; Miller 2009), but at present it would have to be said that there remains a 'digital orthodoxy' (Turner 2009) which blends the accounts of the digital optimists and the broadcast pessimists into a highly influential diagnosis of what amounts to the declaration of the 'end of television'.

We do not accept that this diagnosis is sufficient and in what follows we outline some of the competing evidence which highlights the complexity and diversity of the international experience of the era of digital television. As a starting point, it is important to recognize how geographically specific the 'end of television' argument is. Once you look beyond North America, Europe, and certain Anglophone countries such as Australia and New Zealand, such an argument loses much of its claim to relevance; in most other locations (and remember, these include the largest television audience in the world, China), broadcast (let alone) television is far from experiencing decline. Athique (2009) argues that India, for instance, is only now *entering* its 'age of television', and its markets are dominated by broadcasting.

We have noted elsewhere (Tay and Turner 2008) that a number of state regulatory and policy regimes – for instance, those in the UK and Australia – have accepted a vision of the future of television that implicitly regards the American experience as an evolutionary model. That is, these regimes operate on the assumption that the stages through which the American market has evolved will be more or less replicated, over time, throughout the globe. We argue that there is every reason to question such an assumption; indeed, it might actually make more sense to regard the American market as significantly anomalous, rather than as standing in an exemplary relation to the rest of the global market. For example, it is important to recognize that there are particular aspects of the regulatory and market conditions in the US at present (as well as a number of other markets regulated towards the US model) which artificially appear to reinforce the end of television thesis: the national transition from analogue to digital broadcasting, for instance, does lend support to this position in various ways that mask its contingency. At the simplest level, the analogue switchover is regarded by many in the US as the final nail in the coffin for an ailing broadcasting industry. While this will not necessarily be the case, in fact (and there are convincing opposing arguments), the convergence of technologies further enabled by the switch to digital has the capacity to blur the specificity of television over time and is doing so, as we write, in a number of markets. More importantly, however, a pattern is emerging in which the traditional broadcasters have approached the switch from analogue to digital with some trepidation – as the point at which the clock starts to tick on their established business models. At the same time, convergent media proprietors have embraced this development as the moment when traditional television surrenders some of its commercial advantages.

It is also important to highlight another consideration which seems to us to be especially relevant to academic debates within television and media studies at this conjuncture. Most of the information we receive about the application of new technologies, about their take-up among audiences and consumers, and about possible developments in the future, comes to us directly from the media industries – often through corporate press releases or other products of a publicity and promotions process, as well as through more putatively grassroots platforms such as industry blogs or online newsletters. While there is certainly academic research in these areas, and while there has also been considerable academic input into the development and application of these new media technologies, at the moment we seem especially dependent upon the

information provided by industry sources because of the pace of technological change and the volatility of the market response. What has resulted from this is an excessive reliance on what can only be called industry 'spin' – the release of material for public consumption that serves commercial rather than necessarily informational objectives.

People working in media studies have always known that the information released by media companies about new applications, audience figures and the like, needs to be taken with a pinch of salt. There will always be concerns about the reliability of such information in terms of its factual accuracy as well as its legitimacy as the expression of an industry view: mostly, we have regarded industry statements as first and foremost the promulgation of a commercial view that supports particular and often temporally contingent configurations of interests. However, it is notable that in relation to digital media, particularly for new and online applications, some of this fundamental scepticism seems to have been set aside – perhaps due to an especially close alignment between the technological aspirations of early-adopting academics and the cutting edge entrepreneurs in the new media fields.

As a result, both media reporting and the academic take-up of industry spin has tended to be largely uncritical, if not entirely complicit with it, and thus risk reinforcing perceptions of major industrial shifts which do not exist or have yet to take place. An example of what we mean would be a 2007 report on IPTV take-up worldwide (Briel 2007), which headlined the figure of 13 per cent growth in total user numbers over the year and provided a list of the top IPTV countries. On the face of it, this is a dramatic result, but closer reading of the figures reveals that in many cases this is achieved off such a tiny base that, even with this level of growth, the proportion of those using IPTV in some of the leading countries is arguably negligible (see Table 1). In China, for instance, the figure after the 13% increase was a total of 720,000 – less than 1% of the total population of China. Hong Kong, the second largest market in the world for IPTV, is much more significant with 13% of the population taking up IPTV, but for all the other top six countries the total figure for IPTV take-up remains small when expressed as a percentage of the total population.

It might be argued, nonetheless, that more recent figures indicate that IPTV has continued to grow at a rate that would justify the hyperbole used in this

<b>Top IPTV Markets</b>	<b>IPTV ('000)</b>	<b>Total population</b>	<b>% of total population</b>
1. France	1,410	61,538,322	2.3%
2. Hong Kong	920	7,000,000 (est.)	13.1%
3. China	720	1,321,851,888	0.1%
4. Spain	427	44,200,000	1.0%
5. Japan	304	127,770,000	0.2%
6. Taiwan	269	22,858,872	1.2%

Source: Adapted from R. Briel (2007) with additional demographic information from Wikipedia.

Table 1: *Uptake of IPTV Telco (2007)*.

	<b>Cable</b>	<b>DTH</b>	<b>IPTV</b>	<b>DTT#</b>	<b>Freesat#</b>	<b>Total TV*</b>
Asia Pacific	147	36	22	26	15	676
Europe – East	15	13	5	10	9	134
Europe – West	35	31	17	59	16	174
Latin America	16	9	2	30	0	124
Middle East@	2	2	0	2	11	22
North America	75	38	8	11	0	133
<b>Total</b>	<b>290</b>	<b>129</b>	<b>54</b>	<b>111</b>	<b>51</b>	<b>1,262</b>

Source: Informa Telecoms and Media (2009).

#*homes not paying to receive cable, DTH or IPTV signals*

\**includes digital and analogue homes*

@*Israel and Turkey only*

Table 2: Digital TV household composition in 2013 (million).

report. Certainly, the recent growth rates are even higher than those reported by Briel, according to the 2009 figures (Broadband Forum 2009); the year's growth in Latin America and Eastern Europe, for instance, clocked in respectively at 109.85% and 109.38%. Again, however, the raw numbers encourage caution; in Latin America, the result of such a percentage increase is still only a total of 23,467 subscribers. An even more sober perspective, however, is gained when we look at Informa's forecasts, which take us up to 2013 and predict that by then IPTV will still only account for 4% of global TV households.

What this table suggests is that while IPTV may still continue to record what can be presented as impressive gains in percentage terms, the realistic expectation is that IPTV is destined to be only a niche delivery platform for TV in the future not, as the booster rhetoric would have it, the future of TV.

It is probably worth emphasizing at this point that there is good reason to doubt even the raw figures provided by the media industries on new media audiences, let alone the implications that might be read from them. An example of this comes from the US Internet industry's confusion over the vast disparity in the size of the audience attributed to online video site Hulu by competing ratings companies: in March 2009, Nielsen reported a total of 8.9 million visitors to the site, while comScore came up with 42 million. These discrepancies have provoked considerable controversy in the news media as well as in the industry but so far no satisfactory explanation has emerged, with both organizations defending their methods in the face of advertisers' demands for more reliable figures (Stelter 2009). This dispute takes on added significance because the Internet industry has always claimed that online usage is more 'measurable' than television audiences and thus represents a more accountable platform for advertisers. They claim (though this can be challenged) that the hit rate provides direct evidence of consumption, for instance. The lesson seems to be that, with discrepancies so large and over such important considerations, and with the industry reports so strongly motivated by the need to boost markets, this is not the time to abandon our scepticism about the validity and motivations of industry-sourced figures.

There is a larger question, of course, which we will return to later on, and which has to do with the difficulty of measuring and mapping the production and consumption of television around the globe. Each country has its own metrics: they are often out of phase with each other, they work with shifting and even conflicting or contradictory terminologies, and it is very difficult (often impossible) to make direct or benchmarked comparisons between the same kind of data, collected over the same period, with the same underlying assumptions. As we will point out throughout this article, even basic industrial terms (such as the version of 'penetration' used in Table 7) mean different things in different contexts and thus change precisely what it is that is being measured.

### RESISTING TELEVISION'S APOCALYPSE

We have to work with what is available, though, and notwithstanding the difficulties registered above, there is plenty of data available which should give pause to any apocalyptic predictions of the end of television. Even in the heartland of the end of television thesis, the US, the figures tell a different story. According to the May 2009 Nielsen 'Three Screens' survey (2009a) (Table 3), television viewing in the home grew by the same percentage (3.6%) over 2007/2008 as the total figure for Internet use (within which, remember, watching video online is a smaller subset.) Total US television viewing continued to grow in the first quarter of 2009 (1.2%), although by a smaller amount than the use of the Internet (3.2%); television viewing figures would be further boosted if time-shifting viewing was added to the total figures for television

<b>Monthly time spent in hours: Minutes per user 2+.</b>					
	<b>4Q08</b>	<b>3Q08</b>	<b>4Q07</b>	<b>% Diff Yr to Yr (4Q08 to 4Q07)</b>	<b>Absolute Diff Yr to Yr (4Q08 to 4Q07)</b>
Watching TV in the home*	151:03	140:48	145:49	3.6%	5:13
Watching time-shifted TV*	7:11	6:27	5:24	33.0%	1:47
Using the Internet**	27:04	27:18	26:08	3.6%	0:56
Watching video on Internet**	2:53	2:31	n/a	n/a	n/a
Mobile subscribers watching video on a mobile phone		3:37	n/a	n/a	n/a

Source: The Nielsen Company.

Table 3: *Three Screens' Survey 2009*.

viewing in the home (time-shifting increased by 37.3% [!] over the first quarter of 2009) (Nielsen 2009b). It is true that the audience share for broadcast networks compared to cable networks is steadily declining; nonetheless, certain broadcast events continue to demonstrate their capacity to draw a massive national television audience: the Obama presidential debates, for instance, drew figures that were comparable with those achieved during the Reagan campaign (Miller 2009) and they, in turn, constitute a historic peak. While the US networks have their difficulties, then, it is simply not the case that people are not watching as much television as before, or that they are demonstrating a clear preference for watching television online via their computers.

Of course, there is no doubt that television is mutating across platforms and the contexts through which it is consumed are multiplying. While this is the case, it would seem that, far from approaching its demise, television is alive and well. If we move away from the US example and look at some other large national markets and examine the mix of platforms, systems of delivery, and audience preferences in play we begin to get a more nuanced sense of the sheer diversity of the ways in which the futures of broadcast, pay, and online video play out in different nation-states and geo-linguistic regional markets. An Australian report from 2008, for instance, found that 42% of its respondents said they watched less TV as a result of being connected to the Internet, while 54% said there was no change in their behaviour (Ewing, Thomas and Schiessl 2008). This report, it should be noted, is based on what the respondents said about their behaviours, rather than the kind of electronic monitoring of actual behaviour that a people meter provides.

## STUDYING THE ASIAN MARKETS

In the research project from which this article derives, we have examined aspects of the broadcast, pay, and online video audience take-up and modes of consumption in China, Taiwan, Hong Kong and Singapore. The television audience has been steadily expanding due to the uptake of cable and IPTV subscribers across at least three of the four markets; namely China, Hong Kong and Singapore, with Taiwan at almost its saturation point for cable television (90 per cent). Broadcast remains a major player, however. In the Chinese geo-linguistic markets of Hong Kong and Singapore, broadcasters have dominated since television began and that has not changed significantly in recent years. The local broadcast television stations, TVB (Hong Kong) and Mediacorp (Singapore), are strong producers of local content. Hong Kong has been the leading television serial producer for both Hong Kong and the Chinese geo-linguistic region generally for decades (Curtin 2007). Many of TVB's serials have attracted popular followings in Taiwan, China, Singapore, Vietnam and Malaysia. Broadcast television in Hong Kong is virtually universally accessible but pay TV subscribers have been increasing; in the period 2007-2008, the proportion of the market subscribing to pay TV increased by 10% from 79.3% to 89%. There are reports of audience migrations from TVB's Jade (though it is still the most popular channel), which suggests a gradual shift in the preferences of the Hong Kong audience (Broadcasting Authority HK 2007a).

In Singapore, Channel 8 (a Mandarin broadcast channel) has enjoyed a popular following since the 1980s through its news and Singaporean-based television series such as *The Awakening*, *Samsui Women* and *Army Daze*. Channel 8's dominance has its roots in the 80 per cent of the population that is of Chinese ethnicity. Notwithstanding this audience advantage, the

evidence points to a gradual shrinking of the broadcast television share in Singapore of about two per cent per year since 2004; there has been a corresponding increase to cable television's market share (MDA 2006). In Hong Kong and Singapore, then, broadcast television is certainly challenged by the competing platforms but it is not in dramatic decline. Indeed, the expansion and uptake of cable and Internet television means that, overall, there are more people watching television now (and for longer) than ever before. This trend may well continue. In their pursuit of a greater market share, cable television in Hong Kong has introduced price segmentation for different urban areas in Hong Kong, in order to attract subscribers from diverse income levels.

In Taiwan, cable television has dominated the market for many years. There are particular historical reasons for this. The introduction of television in Taiwan had significant military and political roots: early broadcast television was associated with partisan news and politically driven content across the top three broadcast channels. Since 1993, with the deregulation of the industry and the entry of new television proprietors mainly through cable TV, Taiwanese viewers have embraced cable. This is partly due to cable's comparatively de-politicized content but mainly for its mix of entertainment and information programming – madcap variety shows, drama serials, and independent news. The penetration level for Taiwan's cable television market is one of the highest in the world and its subscription rates are also among the cheapest (with, for example, 90 channels for US\$15 a month). Ratings for broadcast television, by contrast, are sometimes so low that they do not even register in the ratings data (OnScreenAsia 2008).

These three instances highlight the importance of contextual conditions in understanding shifts in the patterns of television consumption, as well as the highly responsive role now played by local consumers. Consumer studies, such as those conducted by Accenture in its second Global Broadcast Consumer Survey (Accenture 2009), report patterns of behaviour which reflect audiences' readiness to pursue their preferred content across platforms. The Accenture survey found that while 40% of consumers would prefer to watch adverts in exchange for free content, nonetheless up to 49% are willing to pay for digital television. As a result, the survey concluded that subscription television was the most economically resilient section of the television industry globally, recording growth rates of up to 12% even during the economic downturn (Accenture 2009). Such a conclusion feeds into the 'broadcast pessimism' noted earlier, however it is important to acknowledge the role played by factors specific to each market. One clear attribute of the global experience of television in the digital era is that where broadcast television fails to provide content that satisfies audience demand (which seems to have occurred in Taiwan), audiences will readily migrate to subscription television in order to access the programmes they want (especially when the prices are competitive). In the markets of Hong Kong and Singapore, where broadcast television has traditionally provided a richer mix of content which seems to have more effectively satisfied audience demand, the uptake of cable has been much slower than elsewhere.

The content 'drivers' across the Chinese language markets are similar. Live variety shows, urban drama and news consistently feature among the top ten programmes – only toppled at times by event television such as the Beijing Olympics opening ceremony in 2008 (OnScreenAsia 2009). The line up of the top five programmes across a sample of two weeks of the Hong Kong television schedule presented in Table 4 and the Taiwan schedule in Table 5

(3–9 August 2008)				(27 July–2 August 2008)			
Rank	Programme Name (English)	Channel	Rating %	Rank	Programme Name (English)	Channel	Rating %
1.	Olympic Games – opening ceremony (event TV)	TVB Jade	35.6	1.	<i>Moonlight Resonance</i> (drama)	TVB Jade	33.1
2.	<i>Moonlight Resonance</i> (drama)	TVB Jade	35.5	2.	<i>Super Trio Supreme</i> (live variety)	TVB Jade	30.6
3.	<i>When A Dog Loves A Cat</i> (drama)	TVB Jade	31.4	3.	<i>When A Dog Loves A Cat</i> (drama)	TVB Jade	28.9
4.	<i>Super Trio Supreme</i> (live variety)	TVB Jade	29.8	4.	<i>On The Road (III)</i> (documentary)	TVB Jade	27.5
5.	<i>Best Selling Secrets</i> (drama)	TVB Jade	29.4	5	<i>Chua's Choice</i> (drama)	TVB Jade	27

Source: CSM Media Research.

Source: <http://www.marketing-interactive.com/news/8093> (b)

<http://www.marketing-interactive.com/news/8182> (a)

Table 4: Top five TV programmes in Hong Kong.

demonstrate this. The staple choices in both markets are Chinese urban dramas revolving around family and careers, variety shows (such as the *Super Trio Supreme*), and carnivalesque game shows. Although reality television has made an impact in introducing greater diversity to all of these national markets, it rates most highly in China where *Mongolian Cow Yoghurt Super Girl* (modelled on the *Pop Idol* format) and *Journey to Shangri-La* (modelled on *Survivor*) courted controversy and made national and international headlines as well as attracting hundreds of thousands of prospective participants (BBC News 2001).

Similarly, with Singapore television (Table 6), Chinese language melodramas again lead the ratings – just slightly ahead of locally produced lifestyle entertainment. It is important to note however that, within these apparently similar broad patterns of genre preference, at the level of the individual texts there are significant differences which reflect the cultural specificities of each location. In Hong Kong, for instance, the urban soap operas are often 'rags to riches' (and back again) stories which feature characters enjoying enormous wealth, exploiting the narrative spectacle of a wealthy lifestyle setting. In the Singapore dramas, however, extreme wealth is rarely depicted at all, as the texts channel their aspirational message towards a relatively homogeneous middle class-ness instead. A significant difference in terms of the political economy underlying these patterns of consumption is that prime time drama serials in Hong Kong are mainly locally produced by TVB, and the leading drama and light entertainment programmes in Taiwan are also produced locally, whereas, in Singapore, prime time drama is likely to come from Singapore, Hong Kong or South Korea.

<b>(4-10 August 2008)</b>				
<b>Rank</b>	<b>Channel</b>	<b>Programme Name (Pin Yin)</b>	<b>Rating %</b>	
1.	TTV	<i>Ming Zhong Zhu Ding Wo Ai Ni</i> (drama)	9.18	
2.	FTV	<i>Niang Jia</i> (drama)	5.73	
3.	TTV	<i>Zuan Shi Ye Zong Hui</i> (entertainment)	4.14	
4.	SANLI	<i>Zhen Qing Man Tian Xia</i> (drama)	3.96	
5.	FTV	<i>Zong Yi Da Ying Jia</i> (entertainment)	3.97	

Table 5: Top five TV programmes in Taiwan.

<b>(10-16 August 2008)</b>				
<b>Rank</b>	<b>Programme Name (English)</b>	<b>Channel</b>	<b>Rating %</b>	
1.	<i>The Defining Moment</i> (Mandarin drama)	Channel 8	16	
2.	<i>Love Blossoms</i> (Mandarin drama)	Channel 8	15.9	
3.	<i>Food Detective</i> (lifestyle food show)	Channel 8	13.2	
4.	<i>True Files</i> (crime docu-drama)	Channel 8	11.4	
5.	<i>Food Hometown</i> (lifestyle food show)	Channel 8	11.2	

Source: Taylor Nelson Sofres, <http://www.marketing-interactive.com/news/8356>.

Table 6: Top five TV programmes in Singapore.

It is important for us to note that the preparation of the following tables provides a good example of the difficulty of generating strong comparative information for this kind of project. The data used below is largely drawn from secondary marketing websites where the main objective often seems to be a demonstration of the continuities of market share rather than to register change. In general, audience data is not usually available directly from information collection agencies, certainly not without payment, and is not released with the intention of providing a comprehensive report. Furthermore, unlike the more cohesive English language markets, the regional Asian television industries do not benchmark their data; therefore any comparative studies

must pull together what will be (to a greater or lesser extent) incommensurate information from a diverse range of sources. Tables 4, 5 and 6 set out the top five programmes over a week of programming in Singapore and Taiwan. In the case of Hong Kong, two weeks have been included to accommodate the spike around the Olympic Games opening ceremony: this was to indicate its scale as a special event, while the inclusion of the second week was used to reflect a more comparable spread of audience choices.

Notwithstanding the once widespread expectations that the globalization of television would result in increasingly homogeneous content (Moran 1998; Waisbord 2004), as well as more recent but in many ways analogous projections of transnational markets for satellite television in Europe (Chalaby 2005), it is not hard to find significant and longstanding national differences in audience programming preferences at the level of genre, not just of the individual text – and even between closely articulated English language markets such as the US, the UK and Australia. In Australia, the most consistent long-term presences on the top ten rating programmes have been the broadcast networks' evening news, reality and lifestyle formats, and local drama. In the US, however, network news does not even make it into the top twenty programmes; instead they are composed of reality TV, talent shows and Hollywood drama. In the UK, it is primarily soap opera and reality TV, with the ten o'clock news just squeezing in at number ten. Further comparisons of idiosyncratic local preferences might pick up the dominance of prime time telenovelas (and masked wrestling!) in Mexico, and of locally produced carnivalesque game shows in Japan. While there are certainly many common elements in programming and scheduling around the world – the international formats *Pop Idol* and *Big Brother*, for instance, the various versions and adaptations of the Latin American telenovelas, and international sports coverage – there is little that is homogeneous or predictable about how these trends play out in the choices which make up the top ten rating programmes of the week in particular markets or territories.

Such comparisons reinforce our view that, globalizing media markets notwithstanding, the influence of local conditions has been underplayed in recent accounts of the rise of digital and global television – perhaps because the focus of most accounts has largely been on Anglophone transnational media companies. This is particularly true of accounts of television futures coming from the US, where television scholars (with significant exceptions, such as Marwan Kraidy 2009) tend to see their local experience as normative. Even a rich and valuable study such as Amanda Lotz's *The Television will be Revolutionized* (2007) is largely unreflective about the particularity of the American experience and the possibility that 'the television' might turn out quite differently elsewhere. This habit of mind is one of the reasons why, for instance, western media scholars have often misunderstood the cultural politics of the rise of convergent media markets in China (see Tay 2009; Sun and Zhao 2009).

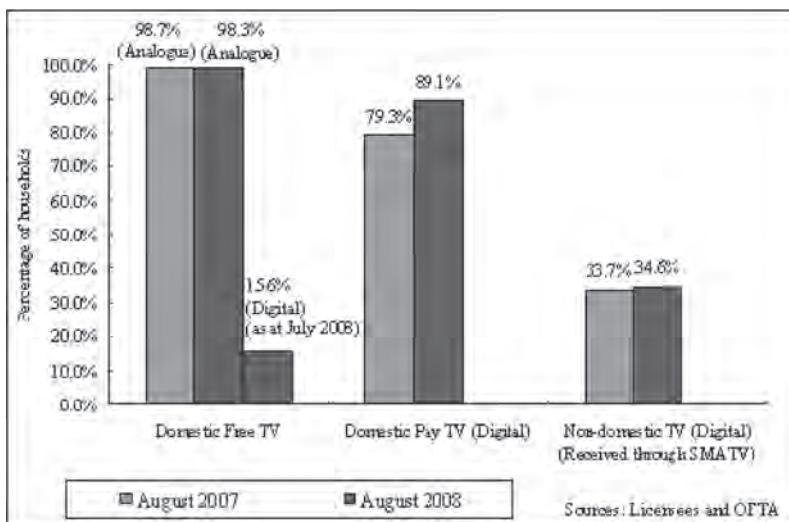
Notwithstanding the anglophone world's comfortable sense of the development of an increasingly integrated global media culture, there are plenty of examples of relatively autonomous and highly distinctive media cultures, which, in some cases, are massive in their scale and density. China is always mentioned in this connection, of course, but another, less noticed, example is Mexican television, which dominates its national market in much the same naturalized manner that American television dominates the American market (and indeed operates hegemonically within its geo-linguistic region in much the way that

American television does). In comparison to its influence on many other markets much less geographically proximate, Hollywood is a surprisingly minor presence in Mexican media culture (its influence is actually far more pronounced in Australian television!), and the ancillary industries – those associated with media celebrity and publicity and so on – seem to be thoroughly focused on Mexican product. (You could look through Mexican celebrity magazines for some time before you would come across a major Hollywood star; when one of us conducted an informal search through a colleague's pile of Mexican TV magazines, the only Hollywood celebrity found was Jennifer Lopez!). The wide variations in the geopolitical logics of international television are underlined when you compare this situation with that of the US's other neighbour, Canada, where a Canadian television culture continues to struggle against the threat of total submersion beneath programming from the US.

## THE CASE OF HONG KONG

An interesting case study would be that of Hong Kong, as an example of Michael Curtin's comment that 'audiences in different [Chinese] locales express distinctively different attitudes towards fashion, music, and imagery' (Curtin 2007:23). It is worth briefly sketching some of the features of the Hong Kong market in order to highlight the complex patterns of similarity and difference in play. This is a market in which there are strong preferences for local material – largely Cantonese Hong Kong-made drama serials and variety programming. There is a history of highly successful broadcasting programming, but recent indications suggest that the attractions of pay TV are making inroads into the exclusive dominance of broadcasting. The Broadcasting Services Survey in Hong Kong (2007b) reports that the market leader, TVB Jade (Cantonese, local programmes, the top rating channel by a significant margin) lost 6 per cent of its market share to TVB Pearl (English language) and ATV Home (Cantonese) over 2007 (Broadcasting Authority Hong Kong 2007b: 5). The survey also picked up what it regarded as high levels of 'dissatisfaction' with TVB, with outright dissatisfaction registered at 6.6 per cent (Broadcasting Authority Hong Kong 2007b: 8). While Table 7 demonstrates a marked increase in the take-up of subscription television in Hong Kong, particularly in comparison to other forms of non-domestic television, this has not come at the expense of broadcast television. Nor does it constitute a growing embrace of globalized content. English (mainly American) content does occupy a small segment of the market in Hong Kong, as do regional drama and variety shows from Taiwan, South Korea, China and Singapore. However, few of these rate as highly as their Hong Kong-made counterparts, due to the specificity of the cultural taste and the continuing demand for local references on screen.

Enquiring into the dissatisfaction expressed about TVB Jade's programming, the survey suggests that consumers are now demanding more variety – and are perhaps locating the potential for more variety in their awareness of the offerings available through pay-TV. A significant number of the viewers surveyed wanted more non-fictional or documentary programming; over one fifth wanted more programming which dealt with health, education, arts and culture, films, and sports. Significantly, most of these dissatisfied viewers also subscribed to pay television where, perhaps, they found such programming available (although the survey results do not necessarily support such a view:



(The term 'penetration' is used as in the original diagram, but it is applied in a slightly misleading manner. We acknowledge that it is customary to use 'penetration' to refer to the numbers subscribing to pay TV or choosing particular technologies –VCRs, for instance – rather than those accessing broadcast TV, which is usually assumed to be universally available. The diagram nonetheless helps to map shifts in the market shares accessed through the various platforms, to demonstrate that the only really significant movement is in the take-up of domestic pay TV).

Table 7: Penetration of licensed television services in Hong Kong.

the top rating pay channels were News channel at 18.1%, the Movie Channel at 7.1% and the Entertainment Channel at 6.4%).

Media consumption in Hong Kong has always been relatively high. In his recent study of the consumption of news in Hong Kong, Li Xigen refers to about a dozen local daily newspapers, and reports that 89% of the population consume newspapers daily, spending about an hour a day on this activity (Li 2006). This interest in news and global information is also reflected in the use of the Internet in Hong Kong. According to the World Internet Project, 66.8% of the population are Internet users and news is one of the leading applications, with Internet users of news standing at 11% – more than multimedia (movies and music), for instance, which comes in at 9% (Hong Kong Internet Survey Project 2007). The take-up of new technologies highlights what becomes an important issue in discussing the specifics of what happens to digital television in particular markets. Local and regional differences in the uses and emphasis of the Internet and other communications applications (such as the mobile phone) alert us to the importance of divergent cultural consumption practices that ultimately determine which (and how) new technologies and platforms will be used. If we were to compare how the Internet is used for social communication and networking in Hong Kong, for instance, we would find that e-mails are marginally more popular among Internet users in Hong Kong than instant messaging sites such as QQ (Chinese language) or MSN (English language). In China, however, it is dramatically the reverse, with instant messaging recording participation rates of 81.4% to e-mail use of 56.5% (December 2007) (CNNIC

2008). This, to extend the comparison further, is relatively low in international terms when compared to the e-mail participation rates in the US at 91% and South Korea at 82.1%. A simple point to make is that the reasons for these significant variations across national, geographical and cultural locations are not only technological or infrastructural, but also social and cultural.

The specificities of the Hong Kong market for television demonstrate how the competing formats and platforms of delivery vary in relation to, and in ways that categorically respond to, local conditions. These conditions may be cultural, regulatory, infrastructural, or political, but they will exercise a determining influence over how television is produced, distributed, and consumed within national markets as well as how it is traded across markets.

## MEASURING 'TELEVISION'

The question for us now, then, is not so much a matter of whether we are seeing the end of television as a form of content, but rather a matter of mapping the varying formations and configurations of the presentation and distribution of television – and asking of each, as does Joshua Green (2008), 'how is this still television?' This reiterates the question Raymond Williams asked more than thirty years ago in *Television: Technology and Cultural Form* (1974): what are the alternative uses and social functions of these new forms? There is still almost as much to be done now as when Williams first asked that question to establish just what it is that remains fundamental to television. The specific question for television studies in the digital era is whether the advent of digital technology has categorically changed the social practice of watching television.

It would have to be acknowledged that the evidence so far points in several different directions. For instance, when we think about the aesthetic and spectacular dimension of television as a regime of visual culture, there are two contradictory movements observable in most developed markets. On the one hand, there is the move to the home theatre with high definition digital television on large flat screens and surround sound, in which the quality of the audience's audio-visual experience is of paramount importance. The shift to this model of home entertainment is a recent development made possible by technological advancements in the integration of television and hi-fi systems as well as in digital and high definition television; the idea of the home theatre explicitly aims at replicating the aesthetically 'superior' cinematic experience. On the other hand, and apparently working in entirely the opposite direction, there are the increasing numbers who choose to access video through the Internet. In this case, they are consuming material where the technical and aesthetic quality of the experience – the image has poor resolution, it is interrupted by delays in downloading, and uses low-fi sound – is often at quite primitive levels. The compensation for this seems to lie in the consumer's commitment to the benefits of customization; the accessing of large menus of otherwise inaccessible material takes precedence over the audio-visual quality of the texts themselves. Arching over all of this, of course, is a regime of visual culture that remains, on balance, anchored within the larger context of the home and thus infers many of the issues of domesticity that have always framed the practices of television consumption.

Similarly, among the key attributes of broadcast television has been the sense of 'co-presence' (Ellis 2002) – the perception that we are watching as part of a larger, customarily national, audience and that this

constitutes a significant component in the character of our engagement with what we watch on television. Clearly, this is important when we are watching a national celebration, a high profile sporting event, or a news event of national significance; sharing our response to such moments becomes part of our sociality at the workplace, in the neighbourhood, within our communities. It might seem that the teenager constructing their menu of television clips from YouTube is not consuming television in this way; it may seem, indeed, that this is a highly individualized, expressly customized mode of consumption and thus does not carry with it the sense of co-presence for so long attributed to the consumption of television. We are not sure that this is necessarily true; rather, it might be the case that the nature of this co-presence has in many ways changed and expanded. Rather than just the co-present nation, for instance, what we might have is a co-present globalized taste culture or subculture to which the individual confirms their membership through their consumption of particular clips, or participation through engagement of one kind or another (comments, subscription, and so on) with particular YouTube 'stars' such as Numa Numa Guy (Gary Brosma).

Importantly, it seems as if it might be the international character of this taste culture which is among its attractions – picking up on the preferences of a more or less globalized (or at least transnational western) audience all watching Jon Stewart or Tina Fey or the latest video from the international music industry. Not all of these clips are entertainment driven, however. For example, Barack Obama's presidential inauguration speech attracted four million downloads between January and May 2009, thus demonstrating the diverse consumption and almost universal archival potential on YouTube. However, what is significant is that this display of national politics shares the same public archival space as other very different clips such as the infamous *Bus Uncle* from Hong Kong (random surveillance on public transport), and *I am Maru cat* from Japan (domesticity and private life).

There certainly seems to be a *prima facie* case to argue that the consumption of these clips on YouTube, and elsewhere, is among the activities that provide the basic material from which the taste culture's sociality might be constructed. The imbrication of this culture within the growth of social networking technologies (and of course much of what is shared through these networks is video) would support such a view. However, we still do not understand very much about the specifics of these formations of co-presence; such as what forms of sociality are being promoted, and how can we classify these as subcultures (if indeed we can call them that at all given the constrained character of the cultural connections the members can actually share). If we are to extend the frame of television to these new media technologies, much more work still has to be carried out. That said, and not to seem to exaggerate the novelty of the situation we are describing, it is also notable that so much of what is consumed through the video aggregator sites, and certainly so much of what makes up the list of its most viewed selections, actually comes from mainstream broadcast and subscription television. According to Burgess and Green (2009: 46), material from broadcast and mass media sources make up 66% of the 'most viewed category' and 47% of the videos which users have added to their personal profiles.

While the implications of this argument, then, would indicate that there are strong commonalities in the experiences of television just described,

it is also worth addressing what seems to be an almost taken-for-granted assumption in much of television studies that, for instance, watching a football match on broadcast television and downloading a *Saturday Night Live* sketch from YouTube are mutually exclusive activities. That is, much of the argument about the end of television seems to assume that the one individual is unlikely to engage in both of these activities – hence the narrative which sees the rise of one form of consumption as necessarily predicated the demise of the other. Clearly, as the evidence of a steadily increasing, albeit mutating, consumption of television might suggest, this is not necessarily true. What seems worth emphasizing is that these are quite different, but in some ways, analogous or even complementary activities, which link the consumption of television into a wider range of social and cultural relations than was previously the case. That the digital capacities for copying, sharing, and so on have been added to the traditional elements of the television experience might be regarded as having extended the purchase of television into the personal and the private in ways that were hitherto difficult to achieve via the television set in the living room.

Further, the diversity of content, television channels and platforms now available to us do not so easily allow viewers to take a passive role in their television watching; viewers are in a sense forced to become more 'proactive' in their televisual choices and tastes. If you have 200 channels and nothing catches your fancy, there is still the DVD box set, the Internet, the pay-per-view – a variety of choices of entertainment. As the digital optimists like to remind us, the choice of how you wish to be entertained and informed is, increasingly in many markets, yours to make. Thus, coupled with the expansion of choice is the greater sense of decision-making and responsibility that now goes with watching television with your family, spouse, friends or just alone. As a number of commentators have argued, this can be hard work. Jostein Gripsrud has noted that the European broadcasters initially feared broadcast television would be made obsolete by the introduction of 'MeTV' where viewers can personally programme their schedules from a large number of suppliers (Gripsrud 2004: 214). However, this assumes that increasingly time-poor urban viewers would always choose the labour of negotiating the ever-increasing number of suppliers, time schedules and new content in order simply to select a programme to watch. Choice fatigue, as Ellis calls it, turns choice into 'an imposition rather than a freedom', and 'broadcast television answers to this feeling' (Ellis 2002: 171). It is possible that choice fatigue may come to play an increasing role in a context where we know already that consumers only use between eight and fifteen television channels on a regular basis – no matter how many they might actually possess the technology to access (Buonanno 2008: 69).

That said, as the consumers of digital television increasingly embrace the opportunities for customization and individualization and so on, it would seem reasonable to assume that some of the preceding versions of co-presence – the national, the local, the broader and less personal social framings – are likely to become less important to the experience of television than they have been in the past. This will vary, though, according to the social, political and regulatory context – and not just merely in relation to the actions of consumers or the enabling capacities of the technology. There are plenty of locations where broadcasting has declined in importance but where the embedding of the national has remained a major discursive component of the television programming produced (see, for instance, Volcic 2009).

This article sets out to make a contribution to developing the comparative dimensions of television studies' accounts of the global rise and take-up of digital television. It is undoubtedly the case that the particular capacities of digital television and the character of the platforms upon which it has been mounted so far will change the social practice of television in many locations and contexts. The rejection of 'appointment TV' organized through a fixed programming schedule, the increasingly varied possibilities for the way television might now take its place in our routines of everyday life, and the potential for user-generated content to reconfigure aspects of the familiar relations between media production and consumption, are just a few among many. However, we should not lose sight of the continuities with aspects of the broadcast regime nor assume that we are awaiting the same process of evolutionary change in every market as result of a shift in technological capabilities. Nor, and most importantly, should we overlook the notable and highly contingent national, regional, political and cultural differences which need to be factored into any genuinely international and comparative account of the possible futures of digital television.

There are significant practical difficulties, however, which limit our capacities to find appropriate ways of developing these comparisons – even if we can quickly agree on what we might include as 'television' in the current context. As things stand, television, broadly defined, is measured in many different ways in its various locations: sometimes by ratings agencies, sometimes by state regulators, sometimes by marketing arms of television companies themselves and so on. The actual form that such information takes is subject to political as well as commercial and cultural influence, and the purpose for which it is designed and collected is almost always to do with reasons that are internal to the nation-state or the local market. As a result, comparative work on digital television will have to become more collaborative, involving culturally grounded local knowledge and expertise rather than merely access to data, especially if we are to make the important distinctions and develop the nuances which make this work useful.

## END NOTE

The research project from which this article derives is a funded study of post-broadcast television which examines trends and experiences in the usual anglophone countries (UK, US, Australia, Canada) as well as in the geolinguistic markets of Asia and Latin America. The project is led by Graeme Turner and has two research fellows, Jinna Tay and Anna Pertierra, working in the foreign language markets. It has been running since 2007 and is funded until the end of 2011. So far, it has produced one edited volume that attempts to give some sense of the issues and the diversity of experiences upon which it has focused (Turner and Tay 2009).

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