Trust in the diverging, convergent multi-platform media environment[1]

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Summary: *Issues around trust and the media are becoming ever more acute as audiences in the developed world are faced with increasingly diverse sources of news and comment, which form part of a rapidly changing mediatised environment. Convergence promotes the consolidation and extension of strong and trusted brands across different platforms, yet those brands operate within increasingly competitive markets. In broadcasting, the old state monopolies and public/private duopolies were previously more easily operated and regulated than today, whereas now the internationalisation of content delivery means certain voices and platforms can be trusted more than others which have also become easily accessible. Print media benefited from self-regulation and economic gate keeping, in which only the most credible titles could be sustained by the market, whereas now almost anyone can self-publish online at little expense. However, the truthfulness and trustworthiness of even heritage media brands was rarely incontrovertible. For audiences, this period of rapid change can either be empowering or bewildering as they must develop skills in media literacy in order to become their own content editors, filtering out if they can from a cacophony of voices, those which can and cannot be trusted. This they often do, but frequently in a way that is brand led, rather than based on increased media literacy.*

The implications of what is often termed 'progress' for representation and for democracy are considerable. This paper uses evidence from the context of the United Kingdom to suggest ways in which audiences might be adapting to increased diversity of news sources. It also adds an important caveat to the notion of increasing plurality in the mainstream media: that institutional and economic forces have between them significantly eroded plurality through mergers and acquisitions in the traditional media industries whose main platforms remain print, television and radio.

Keywords: *trust, media, convergence, divergence, radio, television, newspapers, online, brand, audiences*

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1 The first draft of the paper was presented to the COST Action conference 'New challenges and methodological innovations in European media audience research', held at the University of Zagreb in April 2011. It draws upon and re-contextualises earlier research for the book Balance and Bias in Journalism: Representation, Regulation and Democracy (Starkey, 2007) and Local Radio, Going Global (Starkey, 2011).

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Introduction

This paper considers the implications for trust of the increasingly challenging media environment facing today's audiences. If they are aware at all of the challenges they face, individuals within these audiences find themselves needing ever greater levels of media literacy when seeking to access information and experience 'realities' which they cannot witness at first hand without some element of mediatisation by a 'proxy'. In making sense of controvertible issues and mediatised 'realities', they are already implicated in the "double hermeneutic" previously identified as problematic by Giddens (1984: 284), but some old certainties around the trustworthiness of those who mediate as proxies have gone, as the range and the nature of would-be mediators have changed dramatically. Just whose representations can be trusted as being accurate, 'unbiased' and at best not misleading, in an age in which we are aware more than ever of what Porlezza and Russ-Mohl labelled "the toll of inaccuracy" (2013: 57–8)? The nature of competing 'realities', the nature of 'bias' and the role of media producers as proxies was explored in detail in Starkey (2007: xvii), but in the years which have intervened since that text was written, much about the media landscape has changed – and some of it would be unrecognisable to individuals within even the audiences of 2007, were they not to have witnessed its evolution over the period of time which has elapsed since then. Since Giddens wrote of the double hermeneutic in 1984 almost two decades have passed, and trust is open to abuse as never before. Some studies correctly suggest that the correlation between trust and believing that the regular selection and retelling of what we term 'the news' is a complex one, with clear implications for the social actors being represented – and, in the case of the way politics is reported, for democracy itself (Coleman, 2012). In the way that Barber sought to rationalise the ways in which trust may be deserved or undeserved (1983), some representations and some proxies are untrust*worthy* in either systematic or random ways: they may be undeserving of their audiences' trust because their intentions are malign or the processes behind their creation of content are insufficiently robust to resolve the considerable tensions between ontology and epistemology (Scott & Usher, 1993: 63).

There are other issues here: as Campus suggests, the impact of 'opinion leaders' can be subject not only to the influence of mass media, but also to political discussion in personal networks and small groups (2012), the growth of which in electronic contexts has been exponential in the past seven years. Furthermore, where mass audiences once had little choice but to gather round large-scale providers of mediatised content, today social networking often takes on some of the characteristics of traditional publishing and broadcasting because of the long reach and growing share of attention of some of the most popular platforms, such as Facebook, YouTube and Twitter. The way a single electronic post on a public or semi-public platform can be forwarded so extensively that, in the popular term, it 'goes viral', has much in common with a broadcast, if not actually the simultaneity that first gave the act of broadcasting its name. This means that now it is not only broadcasters and publishers who may disseminate content with the impact that until relatively recently only broadcasting and publishing could achieve, with all the implications this has for trust in a "network society" (Quandt, 2012), or perhaps a 'network*ed* society'. So, the question posed by Tsafati and Cappella (2003), "Do people watch what they do not trust?" is further complicated by the notion, compelling as it is, that many individuals within audiences are not in a position to know whether they should trust a particular source or not – or at least, whether or not they realise it, they are unlikely to be in possession of sufficient information to know which sources they should trust and which they should distrust. Trustfulness and trustworthiness in democratic societies are both interdependent and subject to cultural influences in the manner suggested by Sztompka (1998), and in the case of the growing numbers of providers of mediatised content, often such cultural influences can be dependent on branding, as we shall see. Unfortunately, where present and where it might act as bulwark against cultural influence, a blanket cynicism among individuals who might be characterised as 'educated' does little to resolve the essential epistemological issue raised above around establishing 'realities', when what van Zoonen terms "*I*-Pistemology" (2012) intervenes and an often random mix of virtual experiences online convinces some of those individuals within audiences that they can know distant realities from the comfort of their own keyboard. Ironically, when asked whom they trust, few people are able or inclined to admit their ill-preparedness to make such a judgement: an extensive 2006 opinion poll by GlobeScan revealed differing levels of trust in media and in government among the populations of ten different countries, but very little equivocation – especially in the case of traditional media, with less certainty over news websites and internet blogs (GlobeScan 2006). This phenomenon is of course both predictable and quite reasonable because behind trust lies a personal assessment of someone else's trust*worthiness*. However, we need to be clear about its implications.

Trust in a shrinking world, and a changing environment

Trust was once placed hegemonically in some, who were subsequently accorded trust by the audiences they attracted. More precisely, in broadcasting, the old state monopolies and public/private duopolies which developed over the middle of the last century were given to those whom governments trusted, and because of the trusted positions they occupied (as the state broadcaster or the holder of a commercial franchise), they in turn became trusted by their audiences, who began to associate the brand they recognised with trustfulness. These broadcasters may have seemed fairly benign, as they emerged to increase public access to 'realities' they were unable to experience for themselves at first hand. However, in the majority of countries which considered some measure of 'fairness' in their broadcasting systems to be desirable so as not to impede the proper working of democracy, various systems were established by which they could be regulated over ownership and/or content.

Regulation of multiple broadcasters, or the operation of a state monopoly broadcaster – whether for democratic purposes or simply to preserve a political status quo – was much easier than it is today, simply because the old monopolies and even the regulated duopolies have long since been overtaken by the varied, even crowded media landscape of the plethora of sources which are now accessible to audiences in most of the developed world; the extent of which is typically *suggested* by Fenton's discussion of news sources and the parallel phenomenon of mass self-communication, mainly through social media (2012: 133–6). While noting that larger audiences tend to be concentrated around relatively very few sites, Fenton cites data from the alexa.com 'top 1,000,000,000 sites' rankings, suggesting that even in under-developed regions and the few remaining authoritarian states, audiences are able to access a greater variety than ever before of sources of *ad hoc* and formally streamed content offered to them at least in the *manner* of broadcasting, which does not necessarily have to be broadcast but may indeed emanate from within or outside international borders. Of course, it would be interesting to consider to what extent variety of provenance represents true diversity, especially when the top two 'alternative' news sites are ranked 36,694th and 61,148th respectively out of all websites on the internet. Plurality, though – somewhat paradoxically – derives from the mere *existence* of alternative voices in the media landscape, as opposed to the extent to which they are listened to, but in this current discussion of how comparatively effective previous state regulation or provision of broadcast media were in democracies and for despots alike, in restricting the number of voices audiences could access, it seems clear that the present is very different from the past.

Certainly, technological advance has played a significant role in this, but changing societies and both established and emerging trends in the development of popular culture are also of some considerable significance. The migration of media production and distribution technologies into the digital domain has continued apace since 2007, bringing new challenges and opportunities to a range of mass media (Franklin, 2011: 1–9). Where once only a privileged minority had access to the means to broadcast or publish content to more or less receptive audiences, today only the most resistive or technologically disadvantaged of individuals remain isolated from the burgeoning plethora of content providers who choose to situate themselves within the broadly convergent paradigms evolving from the old, mainly discrete traditions of broadcast and print media. That is, 'new' media, despite their remaining 'new' in few meaningful ways, continue to expand the potential for audiences to interactively benefit to a greater or lesser extent from the communication and distribution of compressed and customisable mediatised content, some of it having previously been archived and some of it exhibiting at least an element of 'liveness' (Crisell, 2012). Since 2007, the development of Web 2.0 has noticeably hastened the realisation of Canadian scholar Marshall McLuhan's prediction, made as long ago as 1964, of an increasingly mediatised world resembling an ever-shrinking 'global village', an evolution with both positive and negative results despite McLuhan's clearly controvertible reassurance that it would not be a homogenising influence on societies (2001: 334). While McLuhan's vision of the 'global village' was understandably limited to his contemporary experiences of the power of electronic communication media to enable rapid flows of information and opinion over far greater distances than could previously be imagined, digital technology – and particularly social media with their foregrounding of individual citizens' opinions – has significantly weakened the geographical barriers to communication between peoples that once seemed almost insurmountable without great expense on travel and accommodation.

We shall shortly examine in greater detail the phenomena described above, embellishing that detail with relevant quantitative audience research data derived from industry sources and public opinion polling in the UK, using robust sample sizes and methodologies that are rarely problematised as being controversial. In essence, this analysis represents a limited national case study – albeit one with considerable potential for generalisability to other national contexts.

Firstly, though, and as this is the main focus of this thematic edition, let us consider briefly what might be the implications of such rapid change – having in all likelihood now progressed way beyond the initial imaginings in the 1960s of McLuhan – for the issue of trust. Certainly some governments and their associated state apparatus for the operation of civil society have demonstrated themselves to be more trustworthy than others, although of course we are now entering into a highly subjective arena in which personal perceptions of motives and perspectives, and even what constitutes democracy, let alone reality, may differ quite significantly among individuals within audiences.

For example, before and until shortly after the lifting of the metaphorical 'iron curtain' that left Europe politically divided in two between the end of the Second World War and the early 1990s, the more authoritarian governments of the Soviet bloc used state broadcasting to reinforce rigid adherence to the single-party dominance of communist ideology. To many individuals among their populations, this was an appropriate response to their recent history and the more damaging influences of earlier, monarchist or tsarist regimes, as well as what they perceived to be the pervasive capitalist imperialism of the West. Even today, there are reports from the former eastern bloc of widespread nostalgia for the communist era (for example Todorova & Gille, 2012). Others, though, resented the state control of informational and editorial broadcast content, especially but not only where it impacted upon the ability of the state to control whole populations or of others to exert counter-influences. Yet, beyond those individuals within audiences who would prefer to be subject to state control, and of course those who are simply uninterested or incapable of interest in playing some role in determining their own futures, there are those who value democratic principles highly and wish to a greater or lesser extent for them to be supported and sustained by the media of mass communication rather than limited or damaged by them. In the communist East, the early resistance of many people to the imposition of their own state broadcaster by tuning in to foreign radio stations, many of them propagandist by nature, is well documented (for example Nelson, M. (1997)). In such cases, the incursive broadcaster, such as Radio Free Europe, was clearly trusted more than the indigenous state broadcaster (Starkey, 2007: 115-21). Some state broadcasting regulation has been more effective than that in other countries at bolstering, even if not actually securing, democratic principles in the way, until recently, the privileged few have been able to use their disproportionately large share of voice in the arena characterised by Habermas (1989) as the "public sphere". Whereas now, the increasing internationalisation of content delivery means audiences face a far wider choice of sources, among which certain voices and platforms can be trusted more than others. The end of the old state broadcasting monopolies and duopolies was decisively heralded by the development of satellite broadcasting technology, which enabled television as well as radio to be broadcast across wider areas than those permitted by the physics of terrestrial transmission, in defiance of the need for virtual line of sight proximity between television transmitter and receiver: by effectively positioning the transmitter on a geostationary satellite situated in the Clarke Belt nearly 36 kilometres above the equator, the transmissions can be received by anyone equipped with a suitable receiving dish over a much larger line-of-sight 'footprint' that ignores regional and national boundaries, geographic topography and – crucially – any state regulation in place in any of the countries situated within the footprint. The second major step in the internationalisation of television has been broadband connectedness, in that the internet has now provided us with an almost worldwide virtual 'footprint' that is dependent not on line-of-sight transmissions, but on cabling – with, of course, the added enhancement of mobile phone technology that now offers some portability of the content disseminated in this way. Only such draconian state intervention as the banning of satellite dishes or the censoring of certain sites or genres now stands between producer (or content aggregator) and audience, so regulation of ownership, share of voice or content is in most territories at least unthinkable if not actually impossible.

In print, the challenging economics of the production and distribution of newspapers and magazines have constituted (and still do) an effective gatekeeper for entry into the industry because only those investors with deep enough pockets to launch printed paper titles and sustain them through almost inevitable and probably lengthy bedding-in periods of heavy financial losses have succeeded in making an impact on some already crowded national markets. This 'market model of accountability' was rationalised by John Stuart Mill in 1859 as a bulwark against toxic government control of the press, and hence a guarantor of freedom of expression, because only newspapers of good repute and broad appeal would survive (Brants, 2013: 21). In the UK, for example, only the October 2010 launch of the 'compact' national paid-for daily newspaper *i* has so far bucked the trend of arguably promising new launches resulting in huge losses and then closure, established since the 1980s exploitation of 'new' print technology by *Today*, *The News On Sunday* and *The Sunday Correspondent*, which lasted nine years, seven months and ten months respectively. As Brants goes on to observe in more general terms, Mill might be less confident in the principle today (Brants, 2013). While many observers might have felt that this implicit economic gatekeeping, as opposed to the relatively heavy-handed regulation of content and ownership in broadcasting, has sufficed to restrict activity in the print industry – particularly in the case of newspapers – to only responsible proprietors and so, editors, the recent revelations in the UK during the course of the 2012 Leveson Inquiry, *Culture, Practice And Ethics Of The Press* (Leveson, 2012), and parallel police investigations suggest otherwise, with phone hacking and corruption among their worst excesses and a lack of clarity over processes and ethics among the more benign.

When Leveson reported his findings, a key recommendation was that self-regulation by the UK press should be overseen in terms of its effectiveness by an arms-length body, itself underpinned by statute, in an attempt to restore trustworthiness to the industry through 'backstop' legislation. One guest speaker in the BBC Reith Lecture series, Onora O'Neill, had already called for greater accountability of the press than was afforded by self-regulation, in order to restore public confidence in the newspaper sector. She had argued that "press freedom should not be a licence to deceive" (2002: 81–100) and she reprised this theme a decade later as Leveson was about to report, adding that: "It is reasonable to require the media to be open about their processes – as they often demand of others" (2012). Consider, though, the implications for trust of the differences between self-regulation and no-regulation: outside the print domain, if it is only online, almost anyone has at least the potential to become a newspaper publisher, editor or journalist, as we shall consider shortly, and the only 'backstop' to what they might say lies in certain narrow aspects of the criminal and civil law which hardly touch on issues of representation and misrepresentation. For now, however, let us merely note that at the heart of the recent UK controversies over the working of the press, lies the paradox of broadcasters being regulated over content while the print industry has traditionally been allowed, as in many other markets, to regulate itself. This has not been without success from the perspective of developing trust in the print industry, though: evidence from the ten-nation poll suggested that in nine of the ten countries, with the exception of Brazil, newspapers were the second-most trusted after national television, with public radio coming third (GlobeScan, 2006). The same survey found that news websites and internet blogs were the least trusted overall in 2006 – although it is likely, if unproven, that since then audiences have become more familiar with these new sources of news and information, and become more inclined to trust them.

So, if the relatively newly liberalised landscape of multiple proxies for individuals within audiences, with the plethora of more or less mediatised versions of experiences of realities which they offer to represent on behalf of those individuals, no longer benefits entirely from whatever regulation or gatekeeping might previously have provided at least some element of responsibility (or what is commonly termed 'professionalism') in mass mediatisation, what does this mean for trust and the media? What are the democratic implications for audiences in the diverging, convergent multi-platform media environment of today and tomorrow as the effect of economic gatekeeping and regulation on representation is weakened and the nature and motivation of producers – many of them relatively anonymous – becomes ever more difficult to remotely discern?

Trusted brands and the problematic dichotomy of media convergence and divergence

While much is being written and postulated around the phenomenon of media convergence, there is less recognition in current literature of the effects of a parallel divergence in provision in the increasingly crowded media landscape. Where once new digital technologies – and public access to them – were almost universally applauded, they are belatedly becoming recognised as problematic (for example, in Curran, Fenton & Freedman, 2012). To abandon, at least temporarily, the metaphor of a landscape, the advances in technology and the disruption of previous boundaries and impediments to *producer* access to non co-located audiences that we have already begun to consider here, mean that those audiences are in essence being confronted by increasingly diverse *choices* between content sources. Where once a form of news reporting of events that could not be witnessed personally, but which a proxy was prepared to represent on an audience's behalf, was available relatively quickly from a small number of radio and television broadcasters and then perhaps in more depth and accompanied by more considered reflection in a small number of competing newspapers, now audiences are faced with many more representations of those events *and others* which might previously have gone unreported or been given significantly less prominence. This, and the trend for audiences to increasingly become distracted from traditional news media, is regularly documented in the United States by the Pew Research Center for the People and the Press, whose September 2012 survey found 'online/mobile platforms' had overtaken radio and newspapers when respondents were asked “Where did you get news yesterday?”. While television still led online/mobile platforms by 55% to 39% (because measuring reach allows individuals to be double, triple and in this case quadruple-counted), the prevailing trend meant television looked increasingly vulnerable as a medium (Pew, 2012). Some necessary caution over these findings requires us to note that among the sources of online/mobile news will be traditional media brands which audiences are accessing via less rigid and perhaps more portable platforms, allowing timeshifting and mobile phone browsing of content. Such a notion is certainly suggested by the alexa.com web traffic data considered by Fenton (2012: 135) and almost continuously available online, which showed a BBC site to be ranked 44th in the world, but the essential point here is that the newer platforms are allowing new sources to enter the market, with at least considerable potential for discovery by audiences looking for proxies to re-present otherwise unreachable ‘realities’ for them.

Furthermore, relatively well-established media brands are even being challenged on older platforms, and it is to these traditional media platforms and the effects on them of changes in the media market that we now turn our attention. For example, one, two or three national broadcasters, either publicly owned or commercial, or both, might previously have been the only sources of television news reporting in a given national market, with the possibility of some additional, licensed and perhaps regulated, regional or local television stations. Now (to continue to maladroitly confine ourselves solely for reasons of space to English-language provision), the choice of available broadcast sources might have been extended to include such international broadcasters as CNN, Euronews, RT, Fox, France24, Al Jazeera, CCTV News, DW-TV, NHK World and many others, including in the case of financial news, Bloomberg and CNBC. Variations of such competing sources are of course now also available via internet and mobile platforms, although the content is likely to have been re-versioned to accommodate the constraints of data transmission and screen display size by which these newer platforms remain mostly hidebound – at least at present. To complicate matters, the originators – or producers – of these content sources themselves appear to be increasingly diverse in nature and in most cases increasingly difficult to identify. Some of these content sources benefit from being recognisable, and potentially relatively trusted, brands about the platform convergence of which much has been written, because that convergence enables such well-established examples as the BBC to reach audiences through increasingly large numbers of routes – bringing, for example, pictures to audiences on the move or overseas who would have previously had to rely on the audio-only commentary of radio. That the BBC should now be in competition as a news provider to UK and international audiences with not only its established domestic rivals, ITV and Sky, but also with state broadcasters in France, Germany, China and Oman among others, is an example of the parallel divergence of sources in which lies our essential dichotomy. Some individuals within audiences will attempt, with greater or lesser levels of success, to divine the identity and the nature of those new, alternative content sources – and an interesting obstacle to this has been the recent re-branding of Russia Today as 'RT', but it seems reasonable to suggest that many others will not – levels of media literacy differing greatly between individuals. Viewers using the Sky platform, for example, can access both Sky News and Fox News, both being under the influence to a greater or lesser extent of Rupert Murdoch, but the latter being a relay of a very lightly regulated American news channel with a heavily biased right-wing agenda and a tendency to bias that would be unacceptable to the UK regulator, Ofcom, for any nationally targeted service. Paradoxically, any or all of these sources could be subjected to some form of formal audience trust assessment, perhaps in the manner suggested by Kohring and Matthes (2007), by which we might establish a rank order of how much they are trusted, but in practice that would not necessarily reveal to what extent they are *worthy* of that trust.

Certainly, the BBC, among other 'heritage' broadcasters could be forgiven for adopting a relaxed attitude to the existence of this new competition. The long-standing tendency of UK audiences to choose the BBC over its domestic commercial rival, ITV, when a major news event occurs is well documented. For example, recent BARB data suggested the live 2011 royal wedding coverage peaked at 19.3 million on BBC1 and at 6 million on ITV. The relatively recent entry into the market of new *news* providers appears to have done little to dent the BBC's market share of television news, although the existence of a wider range of programming, including entertainment, sport, premium movies and so on has provided more and often more attractive alternative choices to news coverage, so that the 28.4 million audience for the 1981 royal wedding of Charles and Diana probably set a high watermark that will be difficult for a single UK broadcaster to reach in future. Not surprisingly, the ten-nation survey of trust in the media confirmed the BBC to be the most trusted media brand in the UK (32%), followed by ITV (8%) and Sky News (7%) (GlobeScan, 2006). This research preceded of course the extraordinary crisis in public confidence in the BBC in the autumn of 2012, when revelations of historic, systematic paedophilia by a BBC presenter, often on BBC premises, caused dramatic declines in levels of trust in the corporation among UK citizens. In November 2012 the opinion polling organisation YouGov found that for the first time since it began researching this issue more people distrusted BBC journalists (47%) than trusted them (44%) (Kellner, 2012) because by then the scandal had impacted upon the BBC's own reporting of it and the organisation's systems of governance, culminating in the resignation of the then Director-General, George Entwhistle, and further controversy around his financial compensation.

That may well, however, prove to be a temporary phenomenon and the 2006 GlobeScan survey is far more representative of long-term trends in the UK, with the BBC consistently enjoying far greater levels of trust than its commercial competition. Many of today's UK television viewers will remember the time before the launch of Sky News, but in 2006 ITV had had fifty years since 1955 during which to establish itself as a trusted, heritage brand. This might be explained by evidence in the same survey of a wider preference for public service broadcasting over commercial broadcasting when asked about trust. Table 1 shows official BARB audience data in a relatively typical week in 2012 for the main television channels accessible by substantial numbers of individuals among UK audiences and which provide news bulletins (although in most cases, news is not the only content broadcast by the channel but it may be the only context within which some viewers encounter television news). For the avoidance of confusion: it is arguable whether time-shifted or HD variants of main channels should be considered in making comparisons between individual broadcasters, especially as the definition of reach means viewers are double-counted (or rather, multiple-counted) because individuals rarely view a single channel to the exclusion of all others. ITV1 benefits in the audience data from the timeshifting of content allowing later access to its news bulletins through ITV1+1, whereas BBC1 does not. Statistically, in considering these data and the relative strength of different brands, it would be misleading to aggregate the reach for the base channel and its '+1' variant because of the inevitable overlap between the paired channels' audiences. Demonstrably, though, the newcomers into the UK news market barely register in the audience data, and despite the considerable ongoing brand marketing of Sky, Sky News achieved just over half the reach of the BBC News channel. Sky's reach was, though, the clear leader among dedicated, non-BBC, rolling news channels.

Table 1: Weekly reach of the main UK television channels providing regular news bulletins, week commencing 27 August 2012 (source BARB).

Channel	Weekly Reach 000's	Weekly Reach %
BBC 1	46,718	81.4
ITV 1	37,556	65.4
ITV 1 +1	9,536	16.6
ITV 1 HD	4,186	7.3
Channel 4	39,085	68.1
Channel 4+1	11,383	19.8
Channel 5	28,861	50.3
Channel 5+1	4,606	8.0
Al Jazeera English	596	1.0
ARY News	437	0.8
BBC 3	18,144	31.6
BBC 4	10,406	18.1
BBC News	9,739	17.0
Euronews	293	0.5
Fox News	276	0.5
RT	452	0.8
S4C (Welsh)	570	1.0
Sky News	5,359	9.3
Other non-BARB reported channels	14,588	25.4
Other viewing	51,789	90.2

Part of this predominance of the formerly analogue terrestrial channels which now find themselves situated on digital platforms with a range of others may be attributed to the means of access to live television broadcasts through digital platforms, because the positioning in the numerical order of the many channels on the on-screen Electronic Programme Guide (EPG) relegates many of the newer entrants to the market to relative obscurity. In the UK, BBC1 appears variously as channel number 1 or 101, depending on the platform (for example, Freeview, Sky, Virgin or Freesat), while ITV, Channel 4 and Channel 5 are also located among the first few choices with which audiences are normally faced when switching on receivers. By contrast, the lesser known – and therefore relatively obscure – channels can take some finding and are much less likely to be happened upon by viewers by chance. In the UK, the importance of the EPG in raising awareness of a channel is recognised to the extent that some EPG positions are subject to regulation by Ofcom. Similarly, the official government backing being afforded to a new tier of local television channels for which competitive franchise bids were being considered at the time of writing has led to their being pre-allocated channel six (or 106) on the official EPGs, in order to mitigate the possibility of their disappearing into relative obscurity soon after their initial launch publicity fades from memory. It is interesting to speculate on the importance of EPG positioning to the established television brands, and whether the BBC, as the most conspicuous of them, would maintain its reach and market share if its main channels were instead relegated to obscure channel numbers. Parallels exist with this privileging of established, heritage channels in other markets. Another example is that of France, where the official TNT platform accords the first seven positions to, in order, TF1, France 2, France 3, Canal Plus, France 5, M6 and Arte, almost exactly mirroring the channels' original numbering on tuneable analogue televisions and their usual positioning in printed television listings in newspapers and magazines. Paradoxically, no such official intervention is involved in determining the relative prominence of different print titles at the traditional consumer interface, which is entirely the result of their being physically placed within or out of easy reach – often randomly – on shelves by newsagents or in-kiosk newspaper vendors, although some titles do benefit from point-of-sale display material which can even apply the publication's branding to part or all of the retail outlet. Yet, even in the absence of an 'official' or state ranking of websites, the common online search engines do implicate different parameters in the way sites appear in lists of search results. Often, as is the case with Google, for example, sponsored links will appear at the top of the selection, subverting any other criteria used in the placing on the page of non-sponsored links, which may appear according to their popularity in past search referrals or the nearness of the search terms to key words in the documents.

We are, therefore, unable to determine at present the overall balance of influence on individuals in audiences of recognisable – and, for example in the case of the BBC which normally scores highly in this regard, trustworthy – branding against visibility and the mere possibility of being happened upon among an ever-broadening range of choices. However, at least one effect of the proliferation of content providers we have already identified in the television market can be measured. Table 2 shows how BARB data suggest that the market share of key heritage brands has fallen significantly over the period in which the multi-channel television environment has developed, in a similar way to that in which the BBC's ability to draw audiences to the weddings of youthful royals has also fallen in response to the pull of growing numbers of alternative sources of distraction, be they offering coverage of the same events or something entirely different, such as web content, electronic games or even such non-mediatised activities as extended shopping and pub opening hours. Interestingly, it is the BBC's former main commercial rival, ITV, that has suffered the greatest decline in market share over the twenty years between 1992 and 2012, while it is the original minority analogue terrestrial channels, BBC2, Channel 4 and Channel 5 which have experienced the smallest declines in market share. The mainly subscription-funded commercial broadcaster BSkyB is represented in the BARB data as one of the 'others' whose combined growth over the period has been spectacular.

Table 2: Viewing share of UK television channels in the January of selected years, 1992-2012 (source BARB).

	BBC1	BBC2	ITV	Channel 4/S4C	Channel 5	Others
1992	35.1	9.3	43.1	9.3	-	3.2
1998	31.0	10.8	31.7	11.2	3.1	12.2
2004	24.2	9.4	24.2	9.5	8.3	24.4
2008	22.6	8.1	19.2	8.2	4.5	37.4
2012	21.8	6.7	15.4	6.7	4.0	45.4

Many of the brands which *cumulatively* have so successfully challenged the established 'heritage' television channels have themselves become established relatively quickly. Examples do include Sky, who now dominate the UK television market not because of Sky News, but because of near-monopolies of premium sport coverage and first-run movies, as well as vast budgets for marketing the wider Sky brand. But of greater interest here in the wider media landscape would be Google, MSN, YouTube, Facebook, Twitter, Amazon and others who all offer mediatised content that is mainly very different to broadcast television, but who have all built their audiences by way of distraction from traditional televisual, radiophonic and printed forms of information and entertainment. Most importantly, those new media brands which have come to dominate their own online market, and so impact substantially on the worldwide attention market place, are all very new and so lack any real 'heritage' impact. Yet in spite of that, they have, in relative terms, eclipsed the myriad alternative online brands that are available on the internet, among them thousands of comparatively amateurish websites that are seldom visited in large numbers.

In print, the rise of the internet has contributed to falling circulations, reduced page counts and the closure of newspaper titles where the income from advertising could not support the costs of production. What Bogaerts and Carpentier label the "high-modernist" phase of journalism has now passed (2013: 62–3). The response from much of the print industry to advances in digital communication technology has been to make content available online, and to present content in forms other than text, graphics and still images. The best-resourced now routinely offer audio and video content online, usually presented within genres developed in radio or television broadcasting, such as location reporting to a single camera and edited news packages, as opposed to developing their own bespoke genres. The element of interactivity afforded by the internet is reflected in their exhortations to their audiences to comment on stories or to offer material for publication through the website, be it photographs, copy or merely story leads for professional journalists to pursue if they wish. Although such titles do attract additional advertising through their web presence, most have struggled to monetise this additional use of existing content, and the cost-benefit of the web presence is difficult to reconcile with any impact it might have on the circulation figures or the paid-for advertising revenues of the primary printed product. It is impossible to be certain whether the newspaper's website draws more readers to the print version or is damaging to the print circulation figures because individuals choose to access the content online free of charge rather than buy it on inky paper. In the now widely accepted sense of media convergence, radio stations and television channels also make content available online, even in such under-developed regions as Africa (as evidenced in such studies as Damome, 2011).

Paradoxically, the traditional media all have their imitators online – even though these imitators normally lack their own print and broadcast versions – because online the traditional economic barriers to entry have almost completely disappeared. The public relations departments of different businesses, large and small, also make their own subjective representations of their products and services through the internet, presenting realities which are convenient to their commercial interests, whereas they could not otherwise transmit broadcasts or print and distribute their own newspapers or magazines because of the great costs and institutional barriers involved in entering into such traditional communication markets. Now there are also a plethora of interest groups and pressure groups which represent their own private opinions and versions of realities online. Of specific concern to this current discussion are the web news services – often self-styled as 'hyperlocal' by nature – and the many 'citizen journalists' who present their own news, often without the benefit of any journalism 'training' that might enhance the possibility of some objectivity pervading their reporting and their editorial comment. Some content aggregators, and even news aggregators, are merely automated web pages which use metadata to draw in and display content provided by others, without any editorial intervention between the original source which first posted the content and the aggregator's page which relays it to new audiences under its own bespoke branding. For individuals accessing this content, its provenance – and its reliability – is often very difficult to discern.

To avoid any misrepresentation of the reality being described in this paper, though, it is important to enter a caveat by noting that one important feature of the burgeoning professional and 'cottage' media industries offering mediatised content online, in print and distributed to audiences via broadcast means is a concomitant consolidation of many of the very existing providers we have just identified. The example of the UK, the surface of which we have only begun to explore here, is one that is generalisable in many ways to a large number of other countries, and in the book *Local Radio, Going Global* (Starkey, 2011) media *di*vergence was reconciled to some extent with the very *con*vergent, globalising or homogenising trend that, as we noted above, according to McLuhan, would not impact negatively on the shrinking "global village" (2001: 334). In television, in parallel with the creation of additional channels and the consequent development of the multi-channel environment, the most popular channel in terms of its audience share in 1992, ITV, has, through a series of mergers and acquisitions ending in 2003, been reduced from a regionally organised federation of up to fifteen separately owned companies to a single major conglomerate, ITV plc, which now serves the whole of England and three smaller associated companies which operate on the national peripheries of Scotland, Northern Ireland and the Channel Islands. This institutional consolidation has to some extent damaged pluralism in UK commercial television in a way which runs counter to the divergence of media ownership and access we have already identified elsewhere.

The ownership of the UK's local and regional press has likewise been subject to significant consolidation, as illustrated in table 3, which presents Newspaper

Society data from July 2011 to demonstrate a *con*vergence of ownership which may be directly attributed – since it often stems from falling print circulations – to the *di*vergence of available, but alternative, sources of news, information and entertainment. In many cases, what were once wholly independent, locally owned newspaper titles which developed in local communities that were reflected in their printed content, had been subsumed by the four largest owners: Trinity Mirror, Johnston Press, Newsquest Media Group and Northcliffe Media, who between them owned 719 out of the 1,167 titles published in 2011, with a combined weekly circulation of 29,660,908. Only 153 titles were owned by a small number of relatively small 'independents'. Declining local ownership of newspaper titles has led to increasingly homogenised approaches to producing content within each publisher's portfolio of titles, with the imposition of standard practices and an obvious loss of distinctiveness in style and content in many of them. Some feature material is syndicated across titles, with little regard for geographical and cultural difference, which might previously have been better reflected on the pages of the different newspapers now owned by a large group.

A similar trend has been evident in privately owned commercial radio, where a small number of major groups now own large numbers of stations which were once locally owned and locally programmed, with much production having been concentrated in news and programming 'hubs' (Crisell & Starkey, 2006), and in the case of Global Radio, content that is made to *sound* local in different geographical markets but which largely originates from London in a way that we might reasonably refer to as a form of reverse glocalisation. The clones of a single quasi-national brand such as Heart or Capital were once individual entities, commercial radio companies spawned and developed in local markets but now largely bereft of the distinguishing features which previously made them more reflective of local taste and cultural and political difference (Starkey, 2011). This consolidation of UK commercial radio broadcasting is described in detail in Stoller (2010), following successive relaxations of regulation exemplified by the rationale for change argued in Ofcom (2004), and illustrated by the large numbers of local and regional licences held by the largest groups, as shown in Table 4.

Table 3: UK local and regional press ownership, July 2011 (source: Newspaper Society).

Rank by weekly circulation		Number of titles	Weekly circulation
1	Trinity Mirror plc	168	10,889,071
2	Johnston Press	253	7,046,685
3	Newsquest Media Group	183	6,399,077
4	Northcliffe Media Ltd	115	5,326,075
5	Associated Newspapers Ltd	1	3,628,870
6	Evening Standard Ltd	1	3,009,800
7	Archant	69	1,812,760
8	D.C. Thomson & Co Ltd	6	1,612,089
9	The Midland News Association Ltd	17	1,608,258
10	Tindle Newspapers Ltd	74	1,133,678
11	Iliffe News & Media	40	1,018,954
12	Independent News & Media	6	507,559
13	NWN Media Ltd	14	446,843
14	CN Group Ltd	10	371,229
15	Bullivant Media Ltd	9	369,717
16	Kent Messenger Ltd	18	355,937
17	Irish News Ltd	1	265,332
18	Dunfermline Press Group	14	224,214
19	Clyde & Forth Press Ltd	14	214,671
20	Topper Newspapers Ltd	1	212,793
	Total Top 20 publishers	**1,014**	**46,453,612**
	Total other publishers	**153**	**1,529,774**
	Total all publishers (87)	**1,167**	**47,983,386**

Table 4: Station ownership and control by the principal UK commercial radio groups in January 2011, shown by analogue licences held and national broadcast brands operated, whether available through analogue or digital-only means (source: Starkey, 2011). * Excludes digital-only groups/stations, such as Planet Rock and UCB.*

Group	Number of commercial analogue radio licences held	National broadcast radio brands operated, analogue and digital
Global	47 FM (including Classic FM), 23 AM	The Arrow, Choice, Classic FM, Galaxy, Gold, Heart, LBC, XFM
Bauer	24 FM, 13 AM	Heat, The Hits, Kerrang, Kiss, Magic, Q Radio, Smash Hits
GMG	13 FM	Real, Smooth
UTV	11 FM, 4 AM (including TalkSport)	TalkSport
Absolute Radio	1 AM (Absolute Radio)	Absolute Radio, Absolute 80s, Absolute Radio 90s, Absolute Radio Classic Rock, Absolute Radio Extra
The Local Radio Company Group (UKRD controlled)	13 FM	
Lincs FM	9 FM	
UKRD	4 FM, 1 AM	
Sunrise Group	4 FM, 3 AM	Sunrise Radio, Kismat Radio, Punjabi Radio
Tindle Radio	9 FM	
Town & Country Broadcasting	7 FM	
Quidem	6 FM	
KMFM	7 FM	
Orion	5 FM, 3AM	
CN Group	3 FM	

Conclusion: Trust among audiences facing a potentially bewildering range of content providers

Notwithstanding the important caveat above, if, however, we accept that the general trend over the last two decades of advances in the application of digital technology to the mediation by proxies of realities audiences cannot witness personally, has been one of exponential growth in the number and *diversity* of content sources, what are individuals within those audiences to make of the increasingly diverse range of providers of news and information? In turn, what effect might this often bewildering range of choice have on the proper working of democracies around the world? One of the main issues in which Leveson showed the greatest interest during his protracted inquiry in 2011/12 was that of editorial decision making in the mainstream UK press being influenced by proprietorial control and, in turn, by the often very close relationships between editors, proprietors and politicians (Leveson, 2012). Arguably, these are some of the key players in any democracy, because the realities of party politics, democratic governance and decision making exist – even at municipal level – beyond the immediate reach and the first-hand experience of most individuals within media audiences. Politicians naturally crave influence over the electorate and consider the media to be a conduit to that electorate, while the act of mediatisation is to represent – or misrepresent – a set of knowable truths based upon which individuals might change or persist with their voting intention in elections (Kuhn, 2007). Even 'news' and 'current affairs' produced by relatively known and trusted – or even regulated – providers is often wrongly considered by those whose media literacy is underdeveloped to be an incontrovertible set of facts, while it is clear what really 'makes' the news is normally determined by a myriad of macro- and micro-processes operating outside the daily consciousness of its audiences and documented and discussed at length elsewhere (for example in Franklin, 2006).

This is a major issue for trust and the media, and one of increasing importance for democracy. As Luhmann suggests with respect to a number of different contexts, there could be serious consequences for democratic societies in the widespread breaking down of trust. In relating the challenges inherent in diminishing trust to societal change in ways which clearly resonate with the changes to the mediatised environment we have discussed above, Luhmann states:

> "… it may be more important to accept two interdependent structural changes: firstly, the increasing diversification and particularization of familiarities and unfamiliarities; and secondly, the increasing replacement of danger by risk, that is by the possibility of future damages which we will have to consider a consequence of our own action or omission" (1988: 105).

Trust, trustfulness and trustworthiness among and between media producers and their audiences are inextricably bound together in a complex relationship subject to often systematic, often random forces that are becoming increasingly intricate in nature. As even limited safeguards in regulation and economic gatekeeping have been reduced in their effectiveness as bulwarks against misinformation and systematic bias by the emergence through divergence of media provision of many unconstrained providers of news and information, where are individuals within audiences to turn for help in discerning between competing realities being *re*-presented to them? In short, how are they to know whom to trust? Without sufficient levels of media literacy to begin to make informed judgments about the trustworthiness of different mediators by proxy, their editorial processes, motives and capabilities, it is unlikely that many citizens will be properly prepared to safeguard themselves against misleading representations; representations upon which they may base judgements in exercising – or choosing not to exercise – their right to democratic participation.

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