

6th World Media Economics Conference

Centre d'études sur les médias and Journal of Media Economics

HEC Montréal, Montréal, Canada

May 12-15, 2004

Cultural Industries Economics

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The concept of Cultural Industries competes with that of Media. A look back at the history of the concept makes it possible to more clearly define the specificity of cultural industries and cultural products. Cultural products are symbolic goods or services incorporating cultural labor by the mean of an industrial process. Culture and industry must also be clearly defined to avoid confusion. A paradigm can then be proposed which combines Economics and Communication Studies: the conditions of production, the content and the reception of cultural products. A version of the classical industrial organization model can be worked out of this paradigm.

Introduction

This paper will argue that it is both possible and desirable to extend the scope of media economics. This can be summarized by the possible use of *cultural industries* as the defining concept of the discipline. By doing this, I do not intend to exclude past or current media economics as irrelevant but to open the doors to a wider set of methods and questions and to show that this lies well within the work of economics.

My main intent is to more precisely define what should be included in cultural industries. This is a concern linked to my work in the field of cultural statistics (Martin, 2003) where one can often see very loose definitions of domains such as media, communication, or culture. Defining cultural industries implies the identification of their main economic characteristics. This being made clear, I will expose a methodological framework for the analysis of cultural industries, including what I consider as essential variables that should be part of the agenda of research institutions in the field.

Media vs. Cultural Industries

It may seem like splitting hairs to insist on the difference between media and cultural industries since these concepts strongly overlap. Most works on media completely ignore the concept of cultural industries. The expression *cultural industries* is more often seen in European and Canadian than in American texts. Part of the explanation for this lies probably in the critical or Marxist origin of the expression and in its later spread through the UNESCO channel, often in association with debates on cultural imperialism. I may add that the expression may appear to pertain to the disciplines of cultural studies, a strange world for economists. As both an economist and a communication scholar, I would say that it is possible co-exist.

Robert G. Picard deals with the same issue paddles in the preface to *The Economics and Financing of Media Companies* (2002), but he does so looking at communication studies and comes to

the opposite of what I conclude. “Since the beginning of the study of communications, attention has primarily been focussed on the roles, functions, and effects of communication.” (p. xii). But, happily it seems, “a coherent and growing body of knowledge about economic issues (...) has developed.” If my reading is accurate then, it seems acceptable to stop asking questions about the functions of media. Certainly, one cannot argue against specialization as a mean for deeper knowledge, but is there a meeting ground for economics and communication?

In *The Cultural Industries* (2002), David Hesmondhalgh asks the question “Why do the cultural industries matter?” (p. 3) and gives as an answer “the cultural industries are involved in the making and circulating of products – that is, texts – that have an influence on our understanding of the world.” I would say that these are important matters and that, without invading the disciplinary territories of others, economist can work on the texts and the functions of media or cultural industries.

Defining Cultural Industries

It is impossible to define cultural industries without singling out of the works of Walter Benjamin (1935) and Theodor W. Adorno (1947). Both were members of what is now known as the Critical or Frankfurt School, a branch of Marxism clearly outside of the main venue of the Communist parties. Benjamin analyses the *technical* (or mechanical in some translations) reproduction of works of art, such as photography or cinema, showing that this constitutes a completely different type of interaction between the public and art. Adorno goes a step further in theorizing the homogenization of products of this process, naming it the *culture industry* (singular). In the end, Adorno sees the culture industry as a means of social control. I do not have the space here to go into a more detailed or critical analysis of these works, but want to underline the founding of a new conceptualization of the media.

The Frankfurt School approach was not however, an economic analysis, even though it includes a well-defined view of economy and society. To be brief, I will jump directly into the re-definition of cultural industries (plural) at the end of the 1970s. This work was done simultaneously in two fields: in the definition of national and international cultural policy, and through the works of French scholars, especially that of Bernard Miège and his colleagues (1978). Both, in their own ways, got rid of some aspects of Adorno’s work. Governments scrapped any idea of cultural industries as a means of social control, but kept the idea of industries that are strategic operators in nation-building and added that these are real industries with real jobs, part of the information sector of the economy. In Canada, this was rooted in an already working model of state intervention in communications (since the founding of the Canadian Broadcasting Corporation in the 1930s). Miège *et al.* were influenced by the School of Regulation, a neo-Marxist movement of economists in search of a general model of the development of capitalism. They Adorno's insistence on the ill effects of industry on the arts and went on to analyze the financial control of the cultural industries and the organization of production within them. On the topic of financial control, they were not far from work done in the United States or in Canada using the industrial organization model. But their views on social relations in cultural production are different.

For Miège *et al.*, what singles out the cultural industries is their use of the cultural laborer (*travailleur culturel*) which leads to a specific use value (*valeur d’usage*). This gives us a quite precise definition of cultural industries which I have tried to capture in Table 1.

Table 1
Defining cultural industries

Two dimensions:		Cultural labor at the root	
		Yes	No
Mainly or strongly symbolic goods or services	Yes	Cultural industries (mainly symbolic)	Other leisure industries E.g.: sport, tourism
	No	Other creative industries E.g.: design, fashion	Other industries

(See acknowledgements.)

Cultural labor at the root means that the conception of cultural products is the result of a creative work, which means that a personal mark (including the names of the authors or performers) is normally part of the product. This is also a base for copyright. The creative work is transformed into a cultural product by the production process. This process also uses cultural labor. *Mainly symbolic goods or services* means that the main use or value of the product is a form of communication or message. *Mainly symbolic* keeps a cultural product apart from other goods, as almost all goods or services include a symbolic dimension (often through design, a cultural labor).

To clearly define cultural industries, one must also ask questions about what is meant by the very polysemic terms, *culture* and *industry*. We must first accept however, that these two concepts are somehow contradictory. Each cultural work needs space to distinguish itself from other cultural works while industry needs control over the production process. Cultural industry means bureaucratic control over creation (Morin, 1962). Media conglomerates live with this dilemma. Innovation and standardization are both at work in the cultural industries and they do so in different ways depending on the industry considered.

As for *culture*, we must distinguish between two strands. The oldest definition of *culture* defines it as the development of the mind (quality of a person) and the result of the work of the human mind (knowledge and practice of fine arts). The more recent anthropological definition of *culture* refers to the defining bond of a human group or society. Cultural industries brings cultural work (definition #1) to society which in turn is part of the definition of social culture(s) (definition #2). Moreover, cultural products (#1) are conceived from existing culture (#2). Traces of social culture can be found in every industrial product, but this does not mean that all products are cultural products.

Industry is also a complex notion. Here, we will not use industry to mean any group of economic activities, as long as there is a common denominator. We want to distinguish between fine arts, crafts, and industries, keeping in mind that a domain, say performing arts, can include both industrial (Broadway shows) and non-industrial organizations (a local children's theatre). This can be done using the dimensions of the *process* of industrialization, according to Boudon & Bourricaud (1986):

- Uses of science and technology
- Division of labor
- Increases in production and consumption
- Existence of markets for the exchange of commodities.

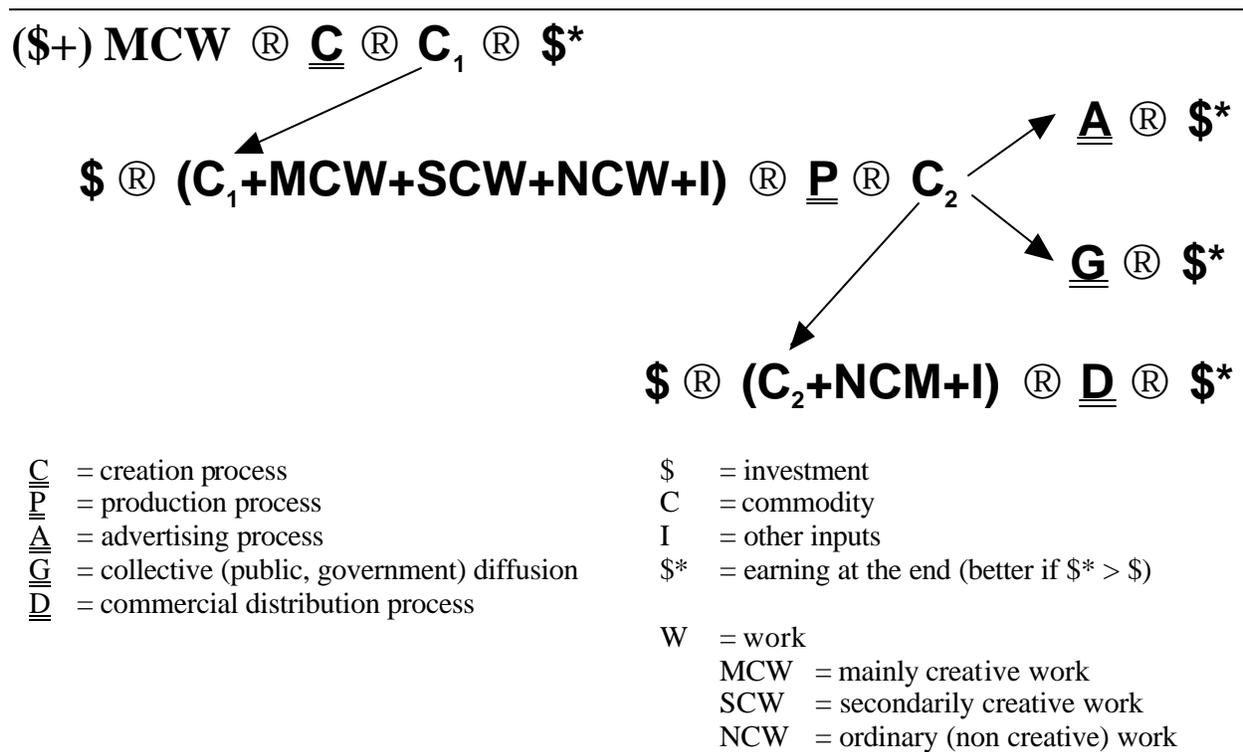
On the use of technology and the increase in consumption, it can be repeated that most of the cultural industries owe their existence to a technique capable of communicating to a wide audience. These technologies can take the form of manufacturing (e.g., of records), but not necessarily (e.g., a television station). The wide audience is financially attractive because technology generally allows for decreasing marginal costs (but with severe limits in some industries, especially in the performing arts). In turn, this leads to the concentration of ownership while, at the same time, new technologies open doors for smaller firms.

The division of labor takes place between workers and also between organizations. Typically, the first level of division of labor is the separation of the creation, production, and distribution or diffusion processes (Diagram 1). Different types of cultural labor are employed in the two first stages. Typically,

the creation and the direction of the production process are to be done by creative labor with the help of more technically oriented (secondary) creative labor. It is important to note that cultural (creative) labor is also widely employed outside of cultural industries while “ordinary” labor is employed in cultural industries alongside cultural labor (Table 2). The use of creative labor endowed with personal marks gives market powers to “stars” at the same time that it offers a guarantee of success in the production process. But stars also get a bigger share of the earnings. The case of actors is well known. This rule also applies to authors or creators. The heart of cultural industries is communication between a creator (author) and audiences (also users, citizens) mediated by an industrial process. Audiences know about creators (and stars) and most creators work to be read, heard, or seen.

Cultural industries do not always operate in classic markets where goods or services are sold to consumers. In many societies, collective organizations and especially the State take charge and give the products or services for free. In commercial environments, the selling of audience attention to advertisers is as important as the selling of cultural products to audiences. The common unit between these modes of production is audience time (which can be seen as a kind of work).

Diagram 1
General structure of the cultural industries



To summarize: cultural industries are the domains of human activity where the work of cultural creators is transformed into cultural products in an industrial environment. Following Paul Audley (1983) but altering his definition slightly, cultural products can be defined as goods or services that express attitudes, opinions, ideas, values or artistic creativity and offer information, entertainment and aesthetic emotions.

Table 2
Index of cultural to non-cultural jobs (in Canada)

Types of jobs	Domains	
	Cultural industries	Other industries
Cultural jobs	100	200
Non-cultural jobs	300	

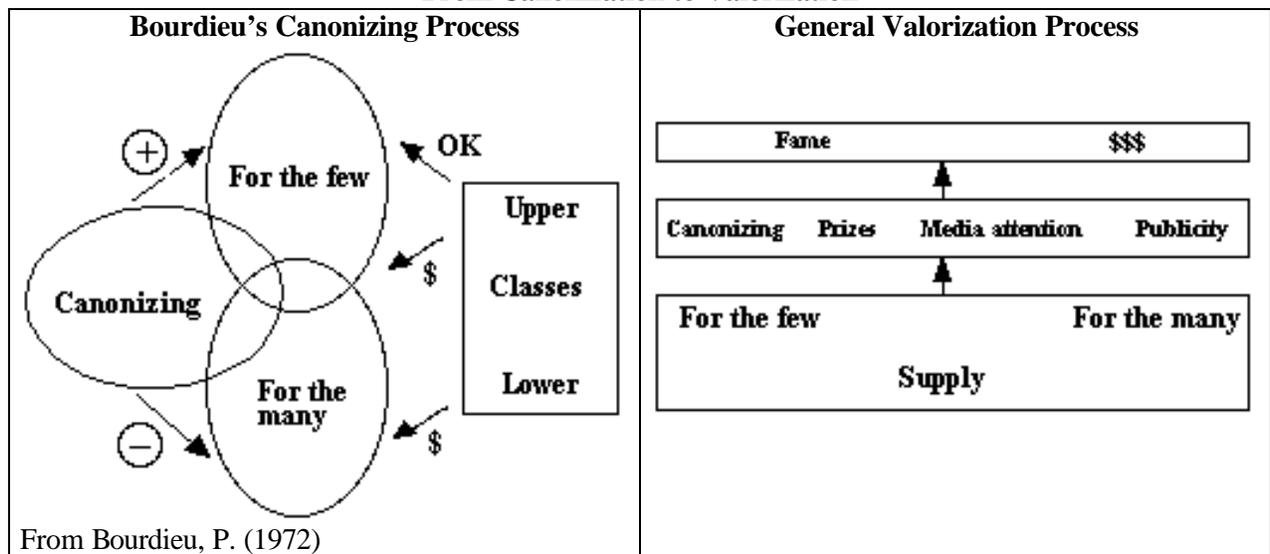
Rounded numbers calculated from data by Statistics Canada, #11-402-XPF/1997, Table 8.1.

The problem of cultural value

It should be noted here that we do not divide this universe between Arts and Entertainment. A cultural product is art, but art that went through an industrial process. The problem of cultural value (or “cultural” for Benjamin, 1935) lies elsewhere. For Pierre Bourdieu (1992), there is no intrinsic cultural value. Cultural value is created by society, or, more precisely, by the agents in the “field” where the artist operates (Diagram 2). In the production of symbolic goods, artists and organizations can be oriented toward short term (market oriented) or long term (fame oriented, fame being possibly turned into market value at some point in time). Thus, there are differences between products, but this does not lead to barring market-oriented products from the status of symbolic or cultural good.

The production of cultural value is of consequence for an economic analysis because of its links to quantity sold and profitability. In Bourdieu’s canonizing process, cultural value is the product of a social apparatus (academies and academic publications, museums, etc.) having the power to distinguish between the better and the lesser, ending in the school system as the list of works that are in the textbooks. This is fame at its best, lasting for centuries. In this view, production for the lower classes of society is rejected as lesser good. Nevertheless, these lesser goods are sold in quantities. Upper classes do buy cultural artifacts, but more of the in-between type (not so popular, not so *avant-garde*). They are also asked to approve the whole system of canonizing and to recognize the chosen few, in a museum, after many years.

Diagram 2
From Canonization to Valorization



In Bourdieu’s 1972 system, popular cultural products are seen as dependent on the innovation at work in the “restricted” circuit of cultural production. Simple observation can reveal the contrary. More importantly, the cultural industries have produced their own system for selecting their own champions. I

would call this the valorization system, part of which is occupied by the canonization system, which is still at work and stronger than ever. The popular valorization system apparatus is in part similar to the restricted one. Industrial prizes (like the Oscars given by an “Academy”) and a critical system, Arts & Entertainment journalism, take on the job of signaling the champions. Advertising and Public Relations are called upon to support the products (but not all of them). In the end, some get lots of money, some get lasting fame, some both. Many cultural products stand at the frontier of legitimate canonizing and some get into the ranks of the canons. From another point of view, resources spent in the popular valorization system far outweigh those of the canonizing system.

Instances of the valorization system do not follow the same rules. Journalists decide on the books they will talk about by themselves, but they are subject to public relations and advertising from the publishers. They may also be part of a similar value system. In a study of book coverage in Montréal newspapers, I found that the journalists did not necessarily review books which were heavily advertised. That was also the case for books already on the best-seller lists. Elsewhere, there was no correlation between the sales of records and the prizes won at the Québécois popular music awards. Thus, there is divergence. But all of these data come from books and records already in the forefront of public attention. On the whole then, the contradictions between the different instances of the valorization system are real but minor. What is more important, as Bourdieu wrote, is that the rules of the game remain hidden: cultural value is a social product, not an intrinsic property. However, we need to add here that cultural value is not the sole production of the social apparatus of valorization. It needs an audience on the other side of the communication.

A List of the Cultural Industries

Another contribution of Miège *et al.* (1986) was the attribution of the plural to the expression *cultural industry*. More than one *model* (or *logique*) are necessary to account for the cultural industries (plural) since their products and their modes of accumulation (or financing, using another language) are very different from one another. Many aspects can differentiate industries:

- The technologies used for audience formation (theatre, radio...),
- The rhythm of production (single products, daily, electronic flow...),
- Sources of revenues (consumers, advertising...),
- Types of labor (artists, journalists, technicians...),
- Central function (editor, programmer...),
- Etc.

This gives way to different models:

- The performing arts model,
- The editorial model (books, records, films),
- The newspaper model (regular issues),
- The flow model (radio, tv),
- Etc.

Table 3 shows a list of the cultural industries that I hope is consistent with my defining principles. This list is always changing with technology or divisions of labor. Looking at the media studied in the *Journal of Media Economics*, one can see that this list includes more domains, but excludes “pure” telecommunications (telephone). Performing arts, festivals, and museums are not frequent themes in *Media Economics*, although one can find sources that put them under this umbrella

One interesting point in any list of this type is the exclusions. Hesmondhalgh (2002) has a list of “core cultural industries” similar to mine, but adds video & computer games. I would rather put this industry in his “borderline cases” because the principal aim of games is play, not communication, making it an industry which employs cultural labor, but not a cultural industry. Hesmondhalgh and I agree on excluding (or putting on the borderline) sport, consumer electronics, software, and fashion. We further agree that a rather strict definition is necessary.

A similar problem arises when devising a conceptual framework for cultural statistics (Martin, 2003). Culture is a wider domain than cultural industries. Visual arts are part of culture, but are not an

industry, even if paintings are sold. One problem arises with architecture, which is part of design. Most of the buildings we see are poor communication media, but architecture is one of the fine arts, so it is often included in the cultural sectors. This problem extends to design as a whole. Adding design to other cultural sectors (film, book, etc.) boosts the total value added of the culture domain by almost 50%! One must therefore ask questions. The first question would be the principle for inclusion in the cultural sector. For me, the use of cultural labor (architect) is not a sufficient condition. Products themselves must have their main use as a form of message. That not the case with most buildings. Moreover, buildings are not distributed like books, although they can be visited like an exposition.

Table 3 is organized by types of media, i.e., means by which the communication takes place. This is because a class of media implies a production function (inputs, process...). A classical orchestra is special because of its specialized labor, its size, etc. Printing and radio differ by their technologies and have different cost structures: paper must be paid for every copy sold while radio cost does not increase if a new listener turns on their receiver. This does not differ from the media economics perspective.

Table 3
One list of the cultural industries

<ul style="list-style-type: none">• Performing arts<ul style="list-style-type: none">• Theatre• Dance• Opera & musical• Classical orchestras• Popular music• Humor• Festivals• Printing<ul style="list-style-type: none">• Art reproductions• Books<ul style="list-style-type: none">• For the general public• For schools• Newspapers<ul style="list-style-type: none">• Dailies• Weeklies• Magazines<ul style="list-style-type: none">• General public• Trade• Museums<ul style="list-style-type: none">• Of fine arts• Of anthropology• Of sciences• Audiovisual production<ul style="list-style-type: none">• Sound recording• Feature films and television programs• Electronic stations & networks<ul style="list-style-type: none">• Radio• Television<ul style="list-style-type: none">• Terrestrial station over the air• By satellite• Cable & other terrestrial networks• Satellites• Over the Internet• Digital edition<ul style="list-style-type: none">• On material supports (e.g., disks)• WWW sites
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Methodological Consequences

If the production of symbolic goods is defines cultural industries, it should follow that we take note when analyzing them. This is not to say that economists should convert to cultural studies. We will try to stay in our domain of expertise. Table 4 presents what could be a research paradigm combining economic and communication methods. It suggests that explaining the cultural industries calls for analysis of the production process, the content of the products and their reception. This is not a radical departure from media economics. Looking back at the *Journal of Media Economics*, one can find many contributions along these lines, but the production side is much more strongly represented. Using the term *cultural industries* rather than *media* implies paying more attention to content and reception. In the field of communication studies, this does not come as a new development. Communication Studies started with the analysis of texts or messages and, later, accepted the ideas that the organizations and the audiences were parts in the production of meaning in the communication process.

Another consequence of this theory of the cultural industries is that cultural products that meet with success give important clues on the working of the system. Success can be defined in purely financial or audience terms or can be defined using other dimensions of the valorization process, especially industrial prizes. The latter are interesting because they reveal parts of the formula for success as seen by professionals in the industries. Products meeting with success (e.g.: books on a best-seller list) can be analyzed and coded to give an image of the structures and the conducts in an industry.

Table 4
Combining Economics and Communication Studies

Domains of study	Objects of analysis		
Market economics	Supply	Product Price	Demand
Communication studies	Sender Encoding	Message Noise	Receiver Decoding
Analysis of cultural industries	<u>Production</u> Creation Organizations	<u>Content</u> Genres Themes Aesthetics Stars	<u>Receiving</u> Audiences Critics

I can give an application from my own work on best-selling books (Martin, 1996), without the pretension here that this is the only path to follow or that one should always search for the “totality”. The starting point of this research was the interest of my colleagues in the literature department of Université Laval for popular forms of novel. At one time, they realized that those appearing on the best-seller lists needed more analysis. From an economist's point of view, I had two main interests: finding the share of the market which went to Quebecois products (unknown at that time) and analyzing the characteristics of the best-sellers in the Quebecois market according to their origin. There was no data on the subject. We decided to input the weekly best-seller lists in a computer in order to get annual winners. We then took the top 25 for each year and coded each title for genre, origin, themes, etc. This yielded the first estimation of Quebecois authors' share (around 40%), the composition of this share (e.g., stronger in “practical” books rather fiction), the themes by origin (“love” from France, social success from the U.S.A.). Later thematic analysis on a longer period showed that social success as a theme was losing ground to what we called “internal” success, i.e., “self-help” and spiritual development (in short, replacing Gold with God?). We also got a good idea of the market structures, as the titles came with their publisher (about the same share as that of authors) and distributors. We also interviewed many people in the book trade and came out with a working formula for the production of best sellers (no guarantee given!). Finally, we went for the readers. We first used data from a scientific survey on cultural practices

in Québec to get a very good idea of the audience for best sellers (first, women with jobs). For this research, I was working with two colleagues from the literature department and a sociologist working with me in the communication department. They had plenty of work besides the data crunching and the interviews I was doing. As examples, they determined the typical narrative structure of the fiction and biographical best sellers (seven steps) and the definition of a “good” book by the readers (psychological realism). All this ended up being a quite complete inquiry into the best sellers sold in French in Québec.

After many years of looking into the cultural industries, I came up with my version of the classical paradigm of industrial organization applied to cultural industries (Table 5). In doing this, I try to fit the model of Table 4 in the classical industrial model. The first difference is the explicit inclusion of History as input for the structural component. This is necessary because of the continuing process of innovation of the cultural product (Bourdieu, 1992). It does also help to know the history of the main players in the field. State regulation, or the relative lack of it, cannot be underestimated. History shows that it all began when the State left a little room for printing without license. As to the basic conditions on the demand side, forms of commodity refers to the various way of getting resources in exchange for cultural products, not all of them being available in every society (e.g., advertising to children forbidden in Québec). In the strategies box, the main item is content (message), this being very specific to cultural industries.

In the results box, the market shares of domestic (local, national, continental) products is the one most important variable in the model. “Domestic and imported cultural products are not perfectly interchangeable” (Dayton-Johnson, 2001). I have always tried to calculate Québec’s share of cultural markets. This is not always easy due to the lack of data in some domains. But it is also theoretically difficult to define “domestic” products. From that perspective, I will be soon working with the Soundscan (Nielsen) data on record sales and hope to provide the first precise figure for market shares in Québec (around 25% for domestic products, by indirect estimations). After more than 100 years of record sales, it is about time! I should add that these figures are available quite precisely in some industries (feature films and advertising supported industries). Calculating domestic shares does not mean that I think that borders should be closed to foreign products, but that we must know if domestic production is strong enough to give society “food for identity.” Table 6 shows that cultural industries can develop in a small society.

Table 5
Main Aspects of Industrial Organization Pertaining to Cultural Industries

<u>History</u> Accessibility of technologies and products Organizations Notable cultural products and trends	
▽	
<u>Of supply</u> Technology Labor laws & organizations State and professional regulation	<u>Basic conditions</u> <u>Of demand</u> Forms of commodity Disposable income Education & demographics
▽	
<u>Structures</u> Barriers to entry Cost structure Number & size of sellers & buyers Concentration of ownership Ownership of distribution channels	
▽	
<u>Strategies</u> Price Content Publicity & advertising	
▽	
<u>Industrial results</u> Audiences Growth & profits or financial equilibrium Jobs Market shares <hr style="width: 50%; margin: 10px auto;"/> <u>Social impacts on</u> Identities or lack thereof Social cohesion / disruption Cultural diversity / homogeneity	

Finally, very complex links lead to the “bottom line” of cultural industries, its contribution to society’s well being. Québec is a small society where French is the dominant language over English, while the reverse is true elsewhere in North America. Cultural industries in Québec do show interesting results in terms of market shares. This came to be through a mixture of social movements, State intervention, commercial dynamism and artistic creativity in the context of an open economy and free circulation of ideas. This is a very nice “laboratory” to observe the social impact of cultural industries. The information parts of the cultural industries (the news organizations) are very important, but the fictions, the music and many other products are also essential parts to the definition of society.

Table 6
Origins of Cultural Products in Québec

Products	Main Sources	Québec's Share of Market (approximate %)
Best-sellers (books)	Québec, France, U.S.	40
Daily newspapers	Québec	95
Consumers magazines	Québec, U.S., France, Canada	75
Records	U.S., Québec, France, U.K.	25
Feature films	U.S., France	10
Music on radio	Québec, U.S., France	50
Television	Québec, Canada, U.S.	60
Internet sites*	U.S., Canada & Québec, France	15

* % for Canadians visiting sites with Canadian content.

Conclusion

Since the 1980s, most of those interested in the cultural industries have underlined the problems of this concept, the principal being the extent of its application. It is easy to find colleagues that think of cultural industries as a much narrower domain than the one I have tried to encompass. Many restrict the term to the “editorial” industries (book, record and film) or exclude journalism from cultural industries. Instances of a definition wider than mine can also be found. My definition follows the Canadian school (Audley, 1983) on that point, although I open the door a little wider.

In the context of cultural statistics, it has been argued that we do not need a theoretical definition of a domain before starting to work on it, since we end up with a list anyway. I think we should at least try to lay down the reasons why we treat a set of industries as different from others, if we do so.

Acknowledgements

Many thanks to Maria Dominguez, from the doctoral program in Communication at Université de Montréal for her help in contrasting Media Economics and Cultural Industries Economics. Also to Val Morrison for her kind help with English language. Finally, thanks to Jeff Dayton-Johnson from the Economics Department of Dalhousie University for fun discussing Cultural Economics and for leading me to Table 1.

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