"THINKING GLOBAL" IN THE CULTURAL INDUSTRY: HOW FAR IS THE BUSINESS MODEL OF THE US FILM INDUSTRY APPLICABLE IN THE FRENCH BOOK INDUSTRY?

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ABSTRACT

This research focuses on globalization strategies in the cultural industry, i.e. cultural production based on replicable goods: books, films, music. Traditionally, this process has been criticized due to loss of uniqueness (Benjamin, 1935) and the risk of standardization, particularly within the Hollywood film industry (Adorno and Horkheimer, 1944). Our study explores the appropriatness of adopting the US film industry's business model within the French book industry. French publishers have been inspired by this business model, particularly regarding production, development and promotion. However, limited academic research has been conducted to date. Therefore, this research aims to identify the links between the business model of the French book industry and that of the US film industry, and also how the business model implemented in the French book industry is perceived by consumers using qualitative interviews with French book experts and consumers. A number of implications for the French book industry is presented.

Keywords: business model, film industry, publishing industry, books, cultural goods.

INTRODUCTION

This research focuses on globalization strategies in the cultural industry, i.e. cultural production using techniques such as replicable goods: books, films, music. Traditionally, this process has been criticized due to loss of uniqueness (Benjamin, 1935) and the risk of standardization, particularly within the Hollywood film industry (Adorno and Horkheimer, 1944). Our study explores the appropriatness of adopting the US film industry's business model within the French book industry. In France, publishers have been inspired by this business model, particularly regarding production, development and promotion. This can be explained through the following factors:

- Historically, the film industry is the first cultural industry;
- Common features of books and films as cultural goods:
  1. Unique goods as they represent an artistic creation (Benhamou, 2011);
  2. Symbolic goods perceived by consumers (Eco, 1985; Colbert, 2006);
  3. Replicable goods allowing for larger scale sales of prototypes (Creton, 2001; Karpik, 2007);
  4. Experiential goods (Nelson, 1970) where there remains uncertainty on quality pre- purchase for consumers (Evrard, 1987; Anthorsson, Berry and Urbany, 1991);
- Hyperchoice in these markets (Evrard, 1987): for example, nearly 600 films per year in movie theaters and more than 600 novels published each September in France. This phenomenon has been increased with the development of Internet and e-commerce: a huge number of films and books is now available for free or for sale on websites as well as via mobile and digital tablet applications.

However, limited academic research has been conducted to date on the comparsison between the different business models of cultural industries in a global context. Therefore, the main research question in this study is the following: How far is the business model of the US film industry applicable to the French book industry? The paper is structured as follows. Firstly, we present the theoretical framework of the business models related to the US film industry and the French book industry from a review of the literature including a number of theoretical domains (i.e. Economics of Culture, Economics of Leisure, Arts and Cultural Management, Marketing in Arts and Culture, Sociology, Sociology of Culture). We follow with a presentation of our methodological approach used in the study. Next, we present our findings as well as a number of implications for book publishers. Finally, we conclude with the main contributions and limitations of our research along with proposals for future research.

THEORETICAL FRAMEWORK

Following a review of the literature from a number of specific management domains (i.e. Economics of Culture, Economics of Leisure, Arts and Cultural Management, Marketing in Arts and Culture, Sociology, Sociology of Culture), there appears limited academic research conducted on the business models of the US film industry and that of the French book industry. The literature review outlines the main characteristics of books and films as cultural goods. Then, common marketing-mix practices in these industries are presented.

Characteristics of cultural goods industries

Historically, the film industry is considered as the first cultural industry given that "the cinema is the first art to be born during the era of industrial growth and from this industrial growth" (Farchy, 1992, p. 9). However, the other cultural industries have become industries with the development of technology in their sectors. Academic research make the distinction between cultural goods (i.e. books, films, music), which are usually replicable goods allowing for larger scale sales of prototypes (Creton, 2001; Kaprik, 2007) and cultural activities like performing arts (e.g. ballets, concerts, opera, theater) as these activities combine simultaneously production and consumption (Bourgeon-Renault, Filser and Pulh, 2003, p. 113). This research being focused on the book industry and the film industry, the main characteristics of cultural goods industries are detailed below.

Cultural goods represent an artistic creation (Benhamou, 2011). These goods are therefore defined as unique goods on the basis of their artistic dimension even if books, films as well as music are replicable goods like most consumer goods. Benjamin (1935) points out that the production process of replicability is damaging for cultural goods due to loss of uniqueness, i.e. loss of the "aura" of the artistic work. The main objective of his research is to understand this phenomenon with a focus on photography. Nonetheless, loss of uniqueness does not mean the decline of cultural goods. Adorno and Horkheimer's analysis (1944) is in line with Benjamin's study (1935) as they emphasize on the threats for cultural industries because of the development of culture towards entertainment and standardization, particularly regarding the Hollywood film industry. More recent academic research (Caves, 2002; Vogel, 2007) define cultural goods like films and even books as leisure products, which are assimilated to consumer goods instead of cultural goods.

Regarding books, a dichotomy appears between studies that focus on uniqueness (e.g. Archambault and Lallement, 1979; Rouet, 2007) and those where a book is associated to a consumer product, i.e. "a consumer product for everyone and subject to profitability" (Tamisier in Lardellier and Melot, 2007, p. 36). Moreover, Mollier (1999) highlights that books have been considered as consumer goods for a long time in France, since the distribution of books for only 1 franc in the railway network by Louis Hachette. However, Mollier (2001, in Eveno and Marseille, 2001) suggests to go beyond the analysis of the book as a tangible product in order to take into account non tangible aspects like the mental dimension. Additionally, digital innovations in cultural industries have lead to rethink the business model of these industries (Curien, 2004; Le Diberder and Chantepie, 2004; Bomsel, 2006).

For consumers, uniqueness related to cultural goods may be difficult to deal with in their decision- making process. Uniqueness involves uncertainty in the consumer's choice: there remains uncertainty on quality pre-purchase (Evrard, 1987), much more than for consumer goods given that cultural goods are experiential goods (Nelson, 1970; Anthorsson, Berry and Urbany, 1991; Cooper-Martin, 1991; Reddy, Swaminthan and Motley, 1998) versus utilitarian goods. Access to information appears to be usually incomplete (Cyert and March, 1983). Consequently, uniqueness involves a higher risk to make the wrong choice (Benhamou, 2011) and to be unsatisfied with the product (Karpik, 2007). However, cultural goods are perceived as symbolic goods for consumers (Eco, 1985; Colbert, 2006).

Despite these common features of books and films as cultural goods, some studies show a major difference regarding consumption: a book is "typically an individual product" (Bonnell, 2001, p. 34) whereas watching a film can be a collective activity. But both industries have experienced the phenomenon of hyperchoice (Evrard, 1987). This phenomenon has been increased with the development of Internet and e-commerce: a huge number of films and books is now available for free or for sale on websites as well as via mobile and digital tablet applications. Consequently, marketing- mix practices have been developped in the French book industry to remain competitive and also to access new customers. Most of these practices are inspired by the US film industry.

Marketing-mix practices in cultural industries

Previous research have revealed that many marketing tools implemented in the French book industry are inspired by the US film industry, particularly regarding the product strategy as well as the promotion strategy. "Sneak preview" is a common practice in the US film industry (Mandelbaum, 1998), where a panel of consumers is asked to watch a film in order to get feedback from them before launching the film in movie theaters. A similar practice is implemented by authors via their blog: Internet users can vote for the best end of the story between different choices suggested by the author. In some cases, authors invite Internet users to write a part of the story on websites dedicated to collaborative writing (Lipsyc,
2009) such as www3espaces.net created in 2007.

Moreover, French authors have already used tools employed to promote films like trailers and product / brand placement. No research has studied the impact of book trailers on the consumer behaviour to date. But a recent study has been conducted on the effectiveness of movie trailers boosting customer's appreciation desire based on a customer science approach using statistics and GSR (Galvanic Skin Response) (Iida, Goto, Fukuchi and Amasaka, 2012). The authors suggest new models to create movie trailers in order to motivate viewers to see the film. Three main factors have been identified to create more appealing trailers: the picture, the content and the role (title, release date display). Furthermore, Iida, Goto, Fukuchi and Amasaka (2012) propose a time flow model based on the relationship between the level of stimulation and the running time of the movie trailer. As for product / brand placement, the quotation of the brand in a novel can be informal or based on an agreement (Lehu, 2006). This strategy represents an opportunity for the author to offer a better social positioning of a character (Lehu, 2006) in a novel, for example.

More and more French authors have also established a partnership with a publishing agent to promote their work and get their books published. The role of the publishing agent is similar to that of the artistic agent for musicians and actors. However, this partnership mainly concerns authors of best-sellers (e.g. Marc Lévy, Amélie Nothomb), i.e. called "big books" (Schiffrin, 2007) and leads to criticism: a trend towards "best-sellerisation" in the French book market. Chiapello (1998) demonstrates that marketing management within French publishing houses is focused on consumers instead of creation although there are differences between publishers. Therefore, publishers would be more likely to publish books with high potential of profitability and to favour best-seller authors rather than unknown authors. According to the sociologist Pierre Bourdieu (1992, p. 165), "books" and "marketing" have been historically opposed as *"the hierarchy between book categories (and authors) based on the peer judgement was more or less the opposite of the hierarchy based on best- sellers"*. However, Larceneux (2007)'s study demontrates that film recommendations by critics and by internet users on the Allociné website are significantly correlated to the box-office after the first week of release in movie theaters. More globally, there is still a debate on the "Long Tail versus a Superstar effect" (Peltier and Moreau, 2012). In the digital era, Anderson (2004, 2006) argues that sales of a few copies of cultural goods – books, for example – can be collectively as profitable as best- sellers and even more profitable than best-sellers. This process is called the Long Tail (Anderson,

2004, 2006). Peltier and Moreau's findings from a database analysis between 2003 and 2007 indicate that best-sellers get less market shares online than offline. The replication of this research would be interesting to take into account the recent evolution of digital in cultural industries. Other research assess that Internet might increase the demand for best-sellers for books that are already popular offline: this is the "Superstar effect" (Rosen, 1981) or the "winner-take-all" phenomenon (Frank and Cook, 1995). Promotion strategies may contribute to build the status of "superstars" (Rosen, 1981) or "stars" for authors or actors as "myths in peoples' mind" (Morin, 1957, p. 4) and who represent "a universal symbolic authority capable of influencing consumers' choices" (Karpik, 2007, 297). However, reputation is a social "capital" (Benhamou, 2002, p. 85) determined by talent in the long- term (Posner, 1990, in Benhamou, 2002).

However, there is limited academic research comparing the different business models of cultural industries in a global context. To fill the gap in the literature review, this work was based on an exploratory study with the view to highlight how far is the business model of the US film industry applicable in the French book industry.

METHODOLOGY

This study employed a qualitative research design to identify the links between the business model of the French book industry and that of the US film industry, and also how the business model implemented in the French book industry is perceived by consumers. Two sets of interviews were conducted to generate data on these topics while being respectful of the anonymity of respondents. This methodological approach mainly based on face-to-face interviews was selected because it usually promotes greater involvement of respondents, greater reliability of data collected and the analysis of verbal and nonverbal discourse for (Giannelloni and Vernette, 1995).
The first set of interviews was conducted with 38 experts from the French publishing industry, defined as "experienced persons whose expertise will help better understand the problem, its different aspects and critical points to take into account" (Evrard, Pras, Roux et al., 1997, p. 90). This sample represents all categories of professionals who are directly or indirectly linked to the book market, i.e. book purchases: publishers, press agents, book critics, booksellers. The profiles of these experts interviewed are presented in the table below:

PUBLISHERS	PRESS AGENTS	BOOK CRITICS	BOOKSELLERS
- Small-sized publishers (0 to 49 employees) - Medium-sized publishers	- From small-sized publishers - From medium- sized publishers	- For newspapers: Daily, weekly and monthly newspapers Cultural newspapers Literary supplements	- Independent booksellers - Retailers specialized in cultural goods
(50 to 249 employees) - Publishing groups (> 250 employees)	- From publishing groups	News magazines Magazines for women - In TV programs: Cultural programs Book programs - On the radio: Cultural programs Book programs	- Book retailers in department stores - Book retailers in hypermarkets

The objective of this first set of interviews was to define strategies implemented by these experts to launch and promote books, and to identify if there are common strategies with those of the US film industry. Most of the professionals were interviewed via face-to-face semi-structured interviews (i.e. most publishers and booksellers) but some of them were interviewed by phone (i.e. press agents, book critics), depending on their availability. In both cases, in-depth interviews were conducted so as to collect detailed information.
The second set of interviews involved face-to-face interviews with 20 consumers of cultural goods (books, films, music). A stratified sample of adult respondents aged between 23 and 69, male and female from a cross section of social class was chosen. The social class is based upon the social status determined by the classification of INSEE (PCS-2003), which is the national institute of statistics and economic studies in France:

N° of the respondent	Gender	Age	Social Class
1	W	24	Employee
2	W	30	Executive
3	M	23	Student
4	W	27	Executive
5	W	25	Intermediate
6	W	23	Student
7	M	33	Executive
8	M	46	Executive
9	W	69	Retired
10	W	65	Retired
11	M	23	Student
12	M	54	Entrepreneur
13	W	62	Retired
14	W	58	Retired
15	M	24	Student
16	W	48	Employee
17	W	54	Shopkeeper
18	M	52	Shopkeeper
19	M	28	Intermediate
20	W	65	Executive

These interviews aimed at understanding how consumers perceive strategies devoted to the launch and promotion of books, and if this perception is similar to that of the promotion of films.

All interviews took place in the same geographical area (Paris, France) to reduce bias related to the heterogeneous geographical environment. For each study, interviews were conducted on the basis of the empirical criterion of the level of "saturation" (Blanchet and Gotman, 2006, p. 54; Caumont, 2002, p. 70) where additional interviews would not have brought more information about the main research question.

Content analysis of data collected was conducted on the fully transcribed interviews as required for qualitative research (Bardin, 1998). The coding of interviews was validated by a French expert in content analysis at 93%. This level exceeds the acceptable threshold of 90% required in such studies (Kassarjian, 1997).

RESULTS

Our interviews conducted with experts from the French book industry reveal common strategies between book and film industries in three major domains: production, development, promotion. We compare these results with information from consumers.

First, our findings indicate that production in both markets is greater than the demand. The offer combines:

- "Bookbusters" (Caves, 2002) in the French book industry, i.e. best-sellers usually written by famous writers with a large fan base such as Marc Lévy. This can be compared with "blockbuster" films and "superstars" (Rosen, 1981; Benhamou, 2002) or "bankable" actors because they attract a large audience. Moreover, book consumers who have quoted their favorite authors consider them as "brands" and are loyal to these "brands" as they purchase each publication. Their consumer behaviour is defined as serial purchases:
  "I bought the last François Vallejo's novel (...), the last Peter Robinon (...) and also the last Van Cauwelaert" (respondent n°7). "I bought all novels by Patricia Cornwell" (respondent n°10). "When we like an author, we purchase all his novels, like for Gaudé. We follow him" (respondent n°17). "My favourite authors are Pierre Boulle, Alison Lurie, David Lodge. I bought all their books. I would say I have favourite authors and I'm loyal to these authors" (respondent n°20). Globally, most of the favourite authors quoted by repondents appear to be famous and best-seller writers as mentionned in the table below:

Favourite authors
Paul Auster (n°17/18)
Patrick Besson (n°3)
Pierre Boulle (n°20)
Patricia Cornwell (n°10)
Françoise Giroud (n°3)
Philippe Labro (n°14)

David Lodge (n°20)
Patrick Modiano (n°15)
Amélie Nothomb (n°8)

- "Confidential books", mainly written by unknown authors and purchased by a smaller audience:
  "I have just purchased Sudden Love written by an Israeli author. I would like to know more about what happens there" (respondent n°2).
  The equivalent in the film industry would be arthouse films, which place artistic aims above commercial interests.

There appears to be a spontaneous association between books and films among consumers, especially for best-sellers. The "autonomous" consumer profile (i.e. who makes his own purchase decision without being influenced by others) considers that there is no link between sales and value of cultural goods: "Even if some best-sellers are good books, I'm still skeptical about all that stuff... best-seller books and blockbusters" (respondent n°3). "If there is a need for such media hype for a book or for a movie, it means that this is not a good book or movie" (respondent n°3).

Consequently, best-seller lists are mainly used by consumers defined as "followers" in their decision- making process because they perceive that if a book or a film is at the top of the list, it is likely to be a valuable product. Indeed, they consider that if lots of people have already bought the book, it cannot be a "bad" book: "When a book is a best-seller, I guess it can't be a wrong choice to buy it" (respondent n°1). "The Da Vinci Code was the book to read, a must have. I pay attention to commercial success" (respondent n°5).

Additionally, book publishers implement extension strategies by publishing books in paperback or adapting them to films, for example. The same extension strategies are deployed in the film industry with DVDs and novelisation (i.e. adapting a film to a book).

According to interviews with consumers, young adults (i.e. 18-25) usually prefer waiting for the paperback book or the DVD (or even VoD) because most of them lack of money as they are students: "Hardcover books cost between

15 and 20 euros and I'm student so it isn't affordable" (respondent n°3). "A hardcover is around 15 or 20 euros. If I buy one in the month, I'm going to lack of money. So I prefer waiting for the paperback" (respondent n°11).

Here are their common strategies for novel purchase depending on the profile of consumers and/or the situation (e.g. purchase power, time):

	Novels	Films
Instant purchase	Hardcover	Movie theaters
Deferred purchase	Paperback	DVD or VoD purchase
Borrowing (subscription or fee per unit)	Library	Rental shop or library
Borrowing for free	Network (friends, relatives, professional relationships)	TV or streaming

Nonetheless, they estimate that adaptation and novelisation strategies can represent a motivation to purchase a book or go to the cinema.

Many marketing/communication tools employed in the US film industry are also used by French publishing professionals to promote books. Consumers have noticed media hype for "bankable" writers and big publishing groups (e.g. Hachette). They assess that this technique is lowering the perceived quality of books, which is not always the case for films: "I saw posters with Marc Lévy and so on. This is not appealing" (respondent n°5). "It's different for films because it's helpful to be aware of films to release" (respondent n°11).

Writers or publishers sometimes show trailers for books on the web. Moreover, some writers with a web presence or a social media profile (e.g. Facebook, Twitter) collaborate with Internet users by providing them the opportunity to read a book chapter and give feedback. This technique is similar to the "sneak preview": a film shown to the audience before launch so as to gather opinions and meet the demand.

Globally, results from interviews with experts and consumers demonstrate the importance of web presence with the development of ICT (i.e. Information and Communication Technology), especially to access the young adult target. Most publishers implement a global communication strategy as they use not only historical media (newspapers, TV, radio), but also the web and particularly social media. Nevertheless, there is a gap between small publishers like Le Rouergue and Sarbacane who must deal with a low budget and big publishing groups like Editis and Hachette Jeunesse who benefit from a high budget and a communication department, which is not the case for the small ones. However, all publishers promote their books dedicated to young adults on the Internet. All of them have their own website and a fan page on Facebook for their collection and/or some new publications they want to highlight. And some of the big publishers have a blog, such as Gallimard Jeunesse (http://onlitplusfort.com/). But it is interesting to notice that the most innovative promotion strategy has been implemented by a small publishing house, Sarbacane, for its young adult collection named eXprim'. Fans of the collection have been proposed to get novels published by eXprim' for free. In return, they have been asked to communicate about these books on their Facebook profile or on their blog but the content remains free. This new way of recommending books is very efficient to access young adults as well as trailers for books shown on video sharing websites (Dailymotion, Youtube). The table below represents an overview of the web presence of French publishers who have at least one collection dedicated to young adults:

Name of the collection and Name of the publisher	Web presence
“doAdo ”, Éditions du Rouergue	- Website of the publisher - No Facebook profile
“Scripto“ and Hors Séries, Gallimard Jeunesse	- Website of the publisher - Blog dedicated to youth - Facebook profile for the publisher and another profile for the blog
“Wiz ”, Albin Michel Jeunesse	- Website of the publisher - Website dedicated to the collection - Blog dedicated to the collection - Facebook profile for the publisher Albin Michel (but no profile for Albin Michel Jeunesse) and another profile for the collection
“Pocket jeunes adultes”, Pocket Jeunesse	- Website of the publisher - Facebook profile for the publisher
“Macadam“, Milan Jeunesse	- Website of the publisher - Facebook profile for the publisher Milan but no profile for Milan Jeunesse
“eXprim’”, Éditions Sarbacane	- Website of the publisher - Facebook profile for the publisher and another profile for the collection - Book trailers on Dailymotion and Youtube
“doAdo Noir”, Éditions du Rouergue	- Website of the publisher - No Facebook profile
“Babel J“, Actes Sud Junior	- Website of the publisher - Facebook profile for the publisher
“doAdo Monde“, Éditions du Rouergue	- Website of the publisher - No Facebook profile
“Black Moon”, Hachette Jeunesse	- Website of the publisher - Website dedicated to youth - Facebook profile for the publisher Hachette (but no profile for Hachette Jeunesse) and another profile for the collection
“Bliss ”, Albin Michel Jeunesse	- Website of the publisher - Website dedicated to the collection - Facebook profile for the publisher Albin Michel but no profile for Albin Michel Jeunesse
“eXprim’ Noir“, Éditions Sarbacane	- Website of the publisher - Facebook profile for the publisher
“La Martinière J. Fiction”, Éditions La Matinière Jeunesse	- Website of the publisher - Facebook profile for the publisher
“Darkiss”, Éditions Harlequin	- Website of the publisher - Facebook profile for the publisher and another profile for the collection
“Castelmore”, Bragelonne	- Website of the publisher - Website dedicated to the collection - Blog dedicated to the collection - Facebook profile for the publisher
“Pôle Fiction”, Gallimard Jeunesse	- Website of the publisher - Blog dedicated to youth - Facebook profile for the publisher and another profile for the blog
“Territoires”, Fleuve Noir	- Website of the publisher - Facebook profile for the publisher and another profile for the collection

Our study`s uniqueness resides in its comparison of different cultural industries in a global context through the triangulation of qualitative data from experts and consumers. There are industry implications as we suggest recommendations to adapt the US film industry's business model to the specificities of the French book industry:

- Focus more on the artistic value than on the commercial value to promote books because French consumers do not perceive them as mass products, even "followers": for example, posters to promote books should not be a priority for publishers;
- Build a brand strategy for loyal consumers to an author, a collection and/or a publishing house as this profile of consumers is based on serial purchases. They could even been asked to become endorsers and promote the "brand" to their network like Sarbacane did for the eXprim' collection;
- More collaboration via Internet between publishing professionals and consumers would improve the development strategy as books are involving goods;
- Promotion strategies via ICT (i.e. Information and Communication Technologies like social media, mobile apps...) would be more efficient than traditional media promotion if book recommendations were personalized and more interactive.

These strategies could be implemented by big as well as smaller publishers because a lower budget is required.

CONCLUSION

To conclude, the main contributions and limitations of this research as well as future steps are outlined below.

Employing a qualitative methodology, the reliability and validity of the results have been achieved via triangulation of data collected, as experts and consumers were interviewed via the two qualitative studies. Industry implications are also identified and presented. Consequently, the study provides practical suggestions for French book publishers.

However, the limitations of the current study need to be highlighted. Most limitations are due to the methodological approach and concern:

- The risk of biased responses, which are typical for qualitative studies. However, an attempt to limit this risk was employed through respecting the anonymity of respondents and face-to-face interviews in most cases;
- The scope of the study is limited due to the sample design. Whilst the intention was to obtain an homogenous sample with consumers interviewed coming from Paris or the suburbs, the lack of generalizability of the results is acknowledged.

Additionally, this research is still a working paper. Therefore, further readings for the literature review as well as a more in-depth analysis of our data are required to propose a complete comparison between the French book industry and the US film industry.

Future research is also suggested to extend the contributions and take account of the limitations of the current study:

- The pursuit of the qualitative research with additional interviews with French consumers living in other places than Paris or the suburbs would be a major input;
- Conduct Interviews with experts in the US film industry as well as in the French film industry in order to propose a more in-depth analysis of the business models of both cultural industries.

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