

Cultural Consumption and Participation

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Abstract: As technology-push and supply-side creativity help determine the shape of enhanced and more diverse cultural supply, new characteristics such as the potential of interactivity and multidirectional connections become questions of public policy and raise issues of consumer choice, accountability, and control. How equipped are we to monitor and understand the nature of these issues on a macro scale? This paper explores cultural consumption and participation patterns in Canada by reviewing recent quantitative analyses, identifying key data gaps, and proposing solutions. These include: (1) considering longer-range forecasts of consumer change; (2) conducting more international comparisons of consumer/participant-related research indicators; and (3) calling for more extensive theoretical and practical research focussed on the cultural consumer and participant.

Résumé: Les développements technologiques et la demande du marché inspirent une création culturelle de plus en plus riche et diverse. Cependant, certaines manifestations de cette création, ayant par exemple le potentiel d'interactivité et de connexions multiples, peuvent requérir l'intervention du gouvernement en ce qui a trait aux choix offerts aux consommateurs, à leur autonomie et aux responsabilités des commerçants à leur égard. Dans quelle mesure sommes-nous équipés pour surveiller et comprendre sur une grande échelle les politiques concernant les consommateurs de la culture? Cet article explore la consommation et la participation culturelles au Canada, en examinant des analyses quantitatives récentes, en identifiant des lacunes clés dans les données, et en proposant des solutions. Ces solutions comportent: (1) envisager de prévoir à plus long terme des changements dans la consommation; (2) mener plus de comparaisons internationales de résultats de recherche sur les consommateurs/participants; (3) recommander des recherches théoriques et pratiques plus approfondies sur les consommateurs et les participants culturels.

Introduction

The dawn of E-culture is upon us. As readers, viewers, buyers, renters, and audiences, we find ourselves at the edge of a new world of unlimited supply and delivery potential. As a society and as individuals, we face an unprecedented expansion of access to vast supplies of electronic (and non-electronic) cultural content. Amongst the most successful content will be that which directly appeals

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to our tastes and preferences, meets our needs and expectations at an affordable price, and ultimately captures our attention and time use.

With the growing market penetration of interactive digital hardware and software, consumers now have the potential, through their exercise of active choice, to help determine the quality and quantity of the content (or bundles of content) available to them. Through the proliferation of targeted services and channels delivered in this manner, suppliers' and advertisers' access to real and virtual audiences is also broadening and quickening. However, even with enhanced technological capacity, audiences may have already found their satiety point for total cultural time use. It is unlikely that most Canadian participants in cultural activities can or necessarily wish to spend much more than four or five hours per day on these activities on average, owing to other pursuits. Thus, one must ask, what is the real choice of audiences faced with a huge increase in the total supply of content available to them? Perhaps the answer lies in the ability of audiences to plan viewing patterns and decisions and interact more intelligently and frequently with networks that can provide customized delivery of choice. Of course, there is always a price to pay for the still somewhat privileged sphere of digital access from home.

Of all the components making up the chain of cultural supply and demand, audiences and consumers of cultural goods and services are most likely to be influenced by the vast changes taking place in the cultural environment, which include rapid and system-wide transitions in technology delivery, growing trends towards globalization and economic restructuring, and steady increases in demographic diversity. While creators, producers, and distributors are integral to the process of change in the cultural and information sectors, audiences and consumers traditionally hold an "outside" role in this decision-making process.

The evolving dynamics of cultural production, dissemination, viewing, and consumption will largely determine the shape of cultural participation to come. From a public policy perspective, it is imperative that we have an informed understanding of the risks, tendencies, and trends of cultural participation and consumption in order to act strategically in the public interest of Canadians. From a research perspective, we need to keep the audience or participating population at the centre of theoretical cultural analysis, in order to enhance our understanding of the motivations and patterns underlying the scope and duration of such cultural participation and consumption.

Understanding cultural audiences and consumers

Although they stand at the receiving end of the cultural chain of creation, production, distribution, and conservation, audiences have always been central to cultural development and growth. Consumers and would-be consumers alike exert the same power, whether they choose to spend (or not to spend) time or money on the efforts or exhibitions of creative artists. Audiences are also linked to the producer and retailer or information provider through corporate branding processes, which compete against one another for the consumer's attention or allegiance. Thus, through their demonstrations of changing tastes and preferences, audiences and

consumers provide feedback on the several uses and gratifications to be found in viewing, listening, and/or buying various cultural productions.

Consumer demand has long been studied by economists, usually in response to changing levels and varieties of supply. Consumers have also been surveyed and polled relentlessly for their views, attitudes, and preferences, as well as records of their actual consumer behaviour. In the same way that suppliers are regularly profiled, audiences are carefully dissected to reveal contributing factors or characteristics that help determine, stimulate, or otherwise influence their decision to participate or consume. The strong involvement of broadcasters in identifying and reaching viewers based on ratings has been practised for many years. However, extensive audience research is not a tradition in the fields of feature films, sound recording, or book publishing because the imperative to measure audiences for advertisers is absent in these areas (McFadyen, Finn, & Hoskins, 1994).

The rapidly changing communications environment, together with the fragmentation of audiences that such changes entail, must find their reflection in research adapted to analyze and interpret new consumer needs. Broadcasters and other audiovisual producers, faced with extensive market segmentation and enhanced competition, must learn to identify new, often smaller audiences and plan their programming and marketing campaigns accordingly. Producers of content for the print industry, especially newspapers, consumer trade books, and magazines, are in the midst of the same metamorphosis.

There is much that we still do not know about audience behaviour. For instance, do viewing habits persist over a lifetime, or do they change with age? With the huge enlargement of audience choice, is the sum total of cultural participation or consumption per person going up or down? Will audience tastes and preferences change in response to the inevitable onslaught of electronic content? How does digitization help us track the uses which audiences put to cultural consumption and participation? How can we understand the motivations behind audiences' participation in a given cultural experience, be it live or mediated?

A review of the literature suggests that the audience or consumer has traditionally been considered from either an economic/commercial or a social/public perspective (Jeffrey, 1994). The economic approach places the greatest emphasis on commercial ratings and audience reach, which are crucially tied to advertising revenues. The social approach, on the other hand, emphasizes the values and behavioural trends of the consumer or viewer: these form the basis for production and marketing decisions, rather than trying to mould public tastes and preferences according to private interests.

While Jeffrey questions the validity of commercial audience measurement systems and alternatives, she does acknowledge that, for commercial broadcasters, audience ratings and other quantitative measurements of audience size remain "the global lingua franca" (p. 252). This measure is proving less and less relevant, however, as content diversification and specialty programs and products proliferate. While efforts are being made to enhance the reliability, ease of use,

and accuracy of audience testing in broadcasting, one must ask: Is a better “people meter” really the answer to better data on audiences? Or must we couple the people meter with attitudinal and viewing trend profiles to truly understand audience motivations and behaviour?

In *Accounting For Tastes: Australian Everyday Culture* (1999), Tony Bennett, Michael Emmison, & John Frow describe audience development strategies which “more often than not . . . prove to be dominated by marketing imperatives in which it is ‘bums on seats’ that count, no matter whose bums they are and how many times they may be the same bums” (p. 241). The authors note that “the tendency for cultural institutions to focus on increasing the rates of participation of existing users rather than attracting new ones is a strong one as it usually represents a better short-term return on the marketing dollar. Where this is so, audience development is likely to reduce rather than increase the social reach of both public and subsidized culture” (p. 241).

For public sector broadcasters, to counter the “threat” of diminished public broadcasting support by governments, there is an added need to develop indicators of audience appreciation, determine measures of program quality, and justify legislated mandates. Within a context marked by “the increased autonomy of viewers in multi-channel conditions” (Blumler, 1992, p. 205), Jeffrey argues that more audience research is needed on the mixed public and private system:

Evolving technologies, especially the growth of computer use, will affect the nature and understanding of audiences with profound economic and cultural consequences. Policy changes, particularly the opening of broadcast markets to telecommunication corporations, will accelerate these shifts. As the environment of options for audiences becomes more complex, further research is required to make sense of the emerging patterns. (p. 264)

“Audience research” here should be understood as part of a broader context of multimedia/multi-experiential cultural participation and consumption, which includes both electronic and non-electronic products and experiences.

From a societal perspective, an underlying consideration in Canadian audience research is the question of delivery and consumption of massive quantities of foreign (particularly American) content, and the implications of this for Canadian society and values. As Catherine Murray (1999) notes: “Despite rising education levels among the citizenry and local preference for news, current affairs or sports content, no other country controls less of its patterns of popular cultural participation . . . or understands less why its citizens as consumers do not voluntarily choose local or indigenous fictional product” (p. 7).

Improved research on the audience and cultural consumer is useful for cultural producers as well as policymakers. As McFadyen, Finn, & Hoskins (1994) have shown, innovative marketing requires an audience-first approach towards the collection of information on consumer trends, in order to parcel out the various cultural product markets according to demographic, socioeconomic, geographic, social class, lifestyle, product usage, and usage differences among consumers, among other possibilities. Developing a greater understanding of audience and

cultural consumption patterns and trends not only helps enable individual producers to make informed decisions in an often turbulent operating environment, but also assists in making strategic policy decisions for the public good.

Selected audience trends and measures

Data on cultural consumption and participation in Canada is uneven and scattered. Major sources of data on overall cultural consumption and participation at Statistics Canada are the 1992 and 1998 General Social Survey, the Survey of Household Spending, and the Household Facilities and Equipment Survey. Other surveys by Statistics Canada that bear on consumption and participation include retail and wholesale sales surveys; cultural surveys (book publishing, periodicals, film production, distribution, post-production and theaters, sound recording and music publishing, heritage institutions, performing arts, broadcasting, and government expenditures in culture); economic impact studies (1989-90 through 1996-97); the National Survey of Giving, Volunteering and Participating; and the Canadian and International Travel Surveys.

Sources of consumption and participation data outside Statistics Canada include federal, provincial, and municipal cultural support programs (expenditures and evaluations), public opinion surveys (behaviour, knowledge, and attitudes), industry surveys and reports, marketing and investment reports, and other economic impact and social benefits studies. For example, television viewing studies have been conducted by the CRTC, the Bureau of Broadcast Measurement, Nielsen, and the Department of Canadian Heritage, sometimes in conjunction with Statistics Canada. Cultural consumption behaviour and attitudes are also measured frequently in leading syndicated public opinion surveys. For example, major Internet use studies are conducted regularly by firms such as Ekos Research (annual surveys on “Rethinking the Information Highway” since 1996), AC Nielsen Research (beginning in 1999), Ipsos-Reid, and Media Metrix. Through such sources, time use profiles of cultural consumers and participants in Canada and typologies of cultural events attended and goods/services consumed can be compiled.

Cultural participation

Statistics Canada’s General Social Surveys (GSS) of 1992 and 1998 comprise the single largest source of data on cultural participation of Canadians 15 years of age and older, based on frame sizes of approximately 10,000 individuals. The strength of the survey lies in its large sample size and its broad coverage of the incidence of participation over a wide range of cultural activities. Although GSS cultural participation data go back to the 1980s, changing questions and frames prevent full comparability with more recent data. A full analysis of findings from the 1992 and 1998 GSS Surveys can be found in a Statistics Canada Report commissioned by the Department of Canadian Heritage entitled *Patterns in Culture Consumption and Participation* (December 2000b).

The GSS tracks the percentage of the population participating in various cultural activities at least once in the twelve months prior to the 1992 and 1998 sur-

veys, and thus indicates, on a macro level, the most popular types of activities: which ones are growing in popularity, which ones are declining, and which ones are changing in relation to the popularity of other activities. For instance, the five most popular cultural activities in 1998 (after watching television and listening to the radio) were: newspaper reading (81.8%); listening to music on cassettes, compact disks, and records (76.8%); viewing a movie, bought or rented, on VCRs (72.9%); reading magazines (71.2%); and reading books (61.3%). Each of these scores was substantially lower in 1998 than that recorded in 1992. Other cultural activities ranked lower in overall participation rates but nevertheless increased from 1992 to 1998. They include: going to the movies (48.6% in 1992 and 59.1% in 1998); attending a professional concert/performance (23.7% in 1992 and 34.6% in 1998); and visiting a public art gallery (19.3% in 1992 and 22.1% in 1998).

The GSS also records the average time spent on cultural activities over a seven-day period. While the results may vary significantly according to season and region, as well as demographic variables, they do provide a picture of the limited scope of unused time available to the average Canadian consumer. Leaving out paid work (3.6 hours), unpaid work including housework and child-care (3.2 hours), education (0.6 hours), and sleep-meals-personal care (10.5 hours), the amount of free time totals just over 6 hours daily. Respondents participating in cultural activities in 1998 spent an average of:

- 135.02 minutes per day watching regular television,
- 13.54 minutes reading books,
- 9.84 minutes reading newspapers,
- 3.22 minutes surfing the Internet,
- 2.34 minutes going to a movie, and
- 2.22 minutes reading magazines.

The survey also captured information on demographic variables including age, gender, education, language, marital status, living arrangements, household income, and regional distribution. Correlations between participation rates and various demographic variables permit a greater understanding of cultural participation practices among subgroups of Canadian society. For example, gender shows major variations in cultural activity participation rates and time use.

Men enjoyed half an hour more free time each day than did women. Men spent almost 40% of their time watching television and rented movies. On average, men spent 2.4 hours per day watching television compared to women who spent 2 hours per day. As for reading, women spent on average 30 minutes per day . . . while men spent 18 minutes per day. Women volunteered more of their time than did men, spending 24 minutes per day volunteering compared to 18 minutes per day spent by men. (Statistics Canada, 2000b, p. 11)

In general, private sector sources of participation trends show roughly similar results as those found by the GSS, although a perfect fit among questionnaires is rarely possible, and often the different timing of alternative sources limits comparability. For instance, while the GSS reports on who is watching television and the

time spent watching television, the Bureau of Broadcasting Measurement (BBM) further segments the Canadian television audience according to what is being watched (such as French- or English-language stations, Canadian or U.S. conventional stations, or Canadian or U.S. specialty channels) and types of programs watched (such as news and public affairs programs, sports, or drama). The BBM surveys also gather extra data on the availability of various cultural services and equipment in the home (such as cable, satellite dishes, VCRs, and multiple television sets).

Tracking Internet use is already a flourishing new sub-set of audience-based research. Ekos Research reports that in October-November of 2001, 65% of respondents used the Internet daily at home or elsewhere for personal and work related activities. This represents a 9% increase in less than four months. Users spent an average 9.2 hours on the Internet in the week preceding the survey, and 74% of respondents indicated that they had been using the Internet for more than two years. Based on what may become a continuing decline in both television and reading activities, one interesting hypothesis is that there is a displacement process taking place that is brought about through increasing Internet usage, although for how long remains to be determined as Internet use nears saturation levels. While it remains to be proven that increased use of the Internet fully accounts for changes in cultural consumption patterns observed over the last five years or so, the limited number of "leisure time" hours open for cultural consumption and participation makes the overall displacement effect of the Internet a logical possibility.

Cultural consumption

Consumption is defined as the value of financial transactions in purchasing, subscribing to, or renting cultural equipment and content. It is the economic counterpart to social participation data. The main sources of cultural consumption data are the Household Spending Survey (now subsumed by the Household Facilities and Equipment Survey) and the Merchandise Trade Survey, both administered by Statistics Canada.

Family expenditures on cultural goods, events, and equipment have been tracked by Statistics Canada in its Survey of Household Facilities and Income and the Family Expenditures Survey for 1992, 1997, and 1998. The two surveys are now integrated into the annual Survey of Household Spending (SHS) with a national sample of 20,000 households. The limitations on spending data are several: many types of cultural activities and events can be enjoyed free of charge, and are therefore not covered. Moreover, the SHS data exclude non-private households (e.g., schools, companies, institutions). Caution is required when comparing total current consumption to total consumption from 1996 and before.

The SHS provides data on the total dollars spent and the proportion of total personal expenditures on consumer goods and services represented by consumer spending on cultural events, activities, and selected equipment, which in 1998 amounted to just 3.9%. It lists family expenditures under categories which include the visual arts, performing arts, print, film and video, photography, music, heri-

tage, and libraries. In addition, it captures expenditures on equipment and “infrastructure,” such as broadcasting distribution (cable television, satellite) and home entertainment equipment. For example, in 1998, the top six household expenditures on cultural activities (not equipment) were: subscriptions to cable television and satellite broadcasting services (\$307); purchase of books (\$163); purchase of CDs, tapes, videos, and video discs (\$125); expenditures on newspapers (\$108); rental of videotapes and video discs (\$102); and movie admissions (\$77).

A second data source, the Merchandise Trade Survey (MTS), is a quarterly questionnaire which was introduced in 1998. It therefore cannot yield any long-term trend numbers at this present point in time, although it may be useful to cross-check SHS findings with those from other Statistics Canada cultural spending surveys. The MTS data require some judicious “mining” in order to provide more than a general picture of the type of retail outlets through which cultural products are sold. The two categories of cultural products defined in this survey are: (1) pre-recorded audio and video tape and disc (and record) sales (excluding rental), and (2) books, newspapers, and periodicals. The types of retail outlets included in the MTS are: supermarkets and other grocery stores, pharmacies, apparel stores, furniture stores, general purpose retail stores, and hardware/automotive and general stores. While these broad categories evidently limit the level of analysis that is possible, the total level of sales and the shifting type of retail outlets through which these cultural items are sold may provide a useful indicator of changing consumer practices and retail fortunes.

Thus, sales data on cultural goods and services are somewhat weaker than data on time use, production, and distribution. One limitation is that individual consumers’ consumption patterns are only broken down to the level of the family, rather than to the level of the individual where cultural consumption patterns might be correlated with demographic characteristics (as in the GSS data). Further work is required to improve industry- and product/service-differentiated measures of cultural consumption especially (but not exclusively) at the retail level. The pressures of constant change in the cultural environment make it equally evident that much more needs to be understood about the changing cultural audience and consumer.

Towards an improved understanding of cultural consumption and participation in an evolving environment

Many consumption and participation issues are directly related to the often uncertain effects of environmental pressures on audiences and consumers, such as globalization and diversity. Let us now examine each one of these in greater depth, in turn.

Globalization

Globalization is nothing really new to Canada, which has long enjoyed one of the world’s most open cultural marketplaces. Canada’s domestic visual media (television, motion picture theaters, VCR tape rentals) carry significant amounts of foreign content. In some important respects, foreign content subsidizes the car-

riage and availability of domestic content. Globalization also provides major opportunities to Canadian creators and producers to reach international audiences. Cultural exports are already beginning to generate impressive revenues, although they are still three times less than cultural imports.

Globalization has tended to increase the already significant advantage of foreign content and services over Canadian content in Canada. As the forces of globalization lead to greater and greater concentrations of media power in the hands of multinational conglomerates, the structures of smaller national marketplaces and communication systems start to suffer from the strain of competition. It thus becomes all the more incumbent on governments to ensure a space for diverse and open expression in the midst of increasing cultural encroachments from without.

Diversity and choice

E-culture is rapidly transforming the landscape of cultural and information systems in developed countries around the world. As the infrastructure required to bring cultural creations to production and distribution becomes increasingly accessible and powerful, the vistas for diversity and choice are ideally enhanced. However, this technical capacity to carry large volumes of programming does not always conform to cultural policy provisions which are supposed to ensure or encourage diversity and choice of Canadian cultural content against the onslaught of amortized foreign (and largely American) content.

The rapidly evolving demographic and ethno-cultural composition of audiences and participants is also contributing to the growing range of content now available on language-specific channels and media. The Canadian Radio-television and Telecommunications Commission has played an important role in this process by licensing multiple specialty channels that appeal to segmented or targeted audiences with common interests. There are, of course, some limits to diversity and choice, such as the economic viability of “narrowcasting” and the cost to the consumer of shifting to digital equipment and specialty or pay-per-view services. Moreover, the definition of “real or relevant choice” can differ quite significantly from what a pure number count of available cultural content might suggest. Greater research into the dynamics of power, access, and choice can only shed more light on the extent to which “real or relevant choice” can grow under these constantly changing conditions.

New approaches to audience/consumer research

Given the complexities of the two environmental pressures just described, two research questions concerning cultural consumption and participation come to the fore:

- Will audience tastes and preferences change in response to the inevitable influx of electronic content?
- How can we track the uses that audiences put to cultural consumption and participation, and make sense of the motivations behind audiences' participation in a given cultural experience?

Linking these changes, uses, practices, and understandings to larger environmental dynamics is part of the necessary work that must be conducted to appreciate more fully the factors influencing cultural participation and consumption in a complex society. Future research should specifically address, *inter alia*, performance measurement and evaluation, international comparisons and networking, and new measurement tools for examining culture in everyday life.

Performance measurement and evaluation: Cultural policies and programs should be studied as part of a continuum of issues and influences stemming from a continually expanding marketplace, with all its attendant demands for the satisfaction of genuine choice, diversity, and equitable public access. The audience is part of the social and economic systems that create, produce, distribute, and preserve our cultural heritage. It is thus the audience who decides what role the government should play in cultural valuation and dissemination, through programs designed and monitored to serve the widest possible public interest.

International comparisons and networking: Proactive cultural policy research should address the diverse interests of cultural consumers and participants, in order to balance the traditional focus on the questions of creativity and production. Policy researchers at home should be encouraged to develop indicators of cause and effect in order to assess changes that can be translated into grounds for greater international comparisons abroad—not only as they pertain to “Culture” per se, but to the related “smaller-c” cultural domains of citizenship, values, and identity as well. UNESCO’s budding network of cultural observatories around the world already constitutes a step forward in this direction. Other research organizations such as the Canadian Cultural Research Network and CIRCLE can also offer advances in international understanding.

Measurement tools: The quality and harmonization of survey questionnaires, indicators, and sampling methodologies should be improved, the better to stay in step with so many rapid changes. For example, digital tracking of audience viewing may well lead to more sophisticated and accurate measurement of cultural consumption and participation patterns, but present more problematic data for interpretation because the range of audience attitudes, values, tastes and preferences, perceived satisfaction, cause and effect, and motivations underlying choice still remains complex. Psycho- and ethnographic research should thus be integrated into the traditional ratings system of audience tastes and preferences, the better to understand how the “why” of audience receptivity to content options is often more important than the “what” of the actual choice.

Conclusions

We stand at a crossroads in cultural development. While we have the technology for transmitting greater and greater volumes of content, we as audiences and participants are paradoxically faced with fewer and fewer genuine options in terms of diversity and complexity.

Cultural audiences and participants must be given due recognition in cultural research initiatives, including the effect of public policies and regulations on consumption and participation. The strategic importance of audiences in the cultural

continuum requires extensive theoretical and behavioural research, in closer tandem with more traditional commercial market-based research. There needs to be a major overhaul in the ways that cultural audiences and participants are measured and surveyed. Different survey instruments should be harmonized to permit better integration and cross-analysis of their respective findings, between both the public and the private sector.

An E-cult consumption and participation profile that highlights linkages with traditional goods and services is another desirable initiative. We need to develop new instruments to chart and describe today's electronic metamorphosis of cultural audiences and participants. New media and new modes of cultural participation demand new tools of measurement (e.g., conducting exit polls for the collection of more nuanced information on film audience expectations, and tracking MP3 music downloading or video on demand with a greater eye and ear towards more comprehensive records of activities). The infrastructure of the media is only part of the new cultural story underway, since the audience is now an active part of the message: E-consumers of cultural transactional services today have an immediate impact on the ways in which the collective cultural landscape grows into tomorrow.

The future of cultural development may be decided by such environmental pressures as globalization and diversity. We must rise to these challenges by creating and refining long-term, reliable, and replicable data series, towards a greater understanding of consumer and participation trends. Large-scale quantitative research along the same lines as the General Social Survey can contribute significantly to this understanding. However, more qualitative instruments (such as psycho- and ethnographic research) should also be employed more widely, to ensure that social factors affecting individual tastes and preferences and motivating active participation are also taken into account, along with the more traditional economic factors affecting cultural consumption—in Canada and elsewhere.

Note

1. The views expressed in this paper are those of the author and not necessarily those of the Department of Canadian Heritage.

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