

# **Transmedia Storytelling Strategy**

*How and why producers use transmedia storytelling for competitive advantage.*

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# Abstract

Storytelling in contemporary media production exists in a landscape of rapid and continuous change. Practitioners and scholars alike have been exploring different methods for success within this landscape, fixating on multiplatform strategies that blend together novel and traditional methods of telling their stories. As a result, transmedia storytelling, the strategy of creating an immersive world through the coordination of multiple, unique narratives, has enjoyed a place of prominence within media production research for the better part of the last decade. However, the concept of transmedia storytelling has become clouded by 'semantic chaos' (Scolari 2009). Investigations from different disciplines and industries have formed separate silos of research that have divided transmedia and left professionals questioning the relevance of transmedia storytelling to their practice.

Using strategic management theory to coordinate research from across different disciplinary silos (media and cultural studies, marketing and advertising), this thesis conducts an original, interdisciplinary study of transmedia storytelling. It develops an audience engagement framework specific to transmedia projects and a lens for assessing the competitive advantage of different transmedia strategies. It then uses the lens to conduct three case studies of leading and successful transmedia projects; *Doctor Who*, *Sofia's Diary* and *The Lizzie Bennet Diaries*. Comparing big-budget, franchises with small, innovative and independent story worlds, this thesis demonstrates how context, company goals and audience engagement objectives significantly influence the development of successful transmedia worlds.

# Statement of Original Authorship

The work contained in this thesis has not been previously submitted to meet requirements for an award at this or any other higher education institution. To the best of my knowledge and belief, the thesis contains no material previously published or written by another person except where due reference is made.

QUT Verified Signature

Signature:

Date:

27/1/17

## Dedications & Acknowledgements

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## List of Abbreviations

TS – Transmedia Storytelling

Entarch – Entertainment architecture, a web specific form of transmedia storytelling

TV - Television

Sony – Sony Corporation

BBC – British Broadcasting Corporation

Who – *Doctor Who*

SD – *Sofia's Diary*

LBD – *The Lizzie Bennet Diaries*

## CHAPTER 1: INTRODUCTION

Today's media production landscape is one defined by rapid and continuous change (Cunningham, Silver, & McDonnell, 2010). Old and new media are interacting with increasing complexity and, as a response, practitioners and scholars alike have been exploring different strategies for narrative production that combine multiple media channels together (Dena, 2014). One strategy in particular, transmedia storytelling, has enjoyed a place of prominence across media and cultural studies, advertising and marketing research (Fast & Örnebring, 2015). Coined by Jenkins(2003), transmedia storytelling refers to multiple delivery platforms (such as films, games or books) providing separate but interlinked narratives within the same narrative world (Jenkins, 2006), and creating "a whole that is greater than the sum of its parts" (Gambarato, 2012a, p. 2).

*"For example, in The Matrix franchise, key bits of information are conveyed through three live action films, a series of animated shorts, two collections of comic book stories, and several video games. There is no one single source or ur-text where one can turn to gain all of the information needed to comprehend the Matrix universe" (Jenkins, 2007).*

This approach has many documented benefits for practitioners; enhanced longevity and commercial success of story worlds (Hardy, 2011), greater word of mouth amongst global audiences (Sinnreich, 2007), higher audience satisfaction (Long, 2007) and servicing a large variety of audience members with catered content (Adam Smith, 2008). However, *"the nature and breadth of transmedia practice has been obscured because investigations have been specific to certain industries, artistic sectors and forms"* (Dena, 2014, p. 4). What may be the greatest irony of transmedia research is that, founded upon a philosophy of holistic and synergistic approaches to storytelling, the field lacks a holistic and synergistic approach to understanding transmedia that is directly relevant to practice.

This thesis investigates why practitioners choose transmedia storytelling as a strategy for narrative production, how that strategy develops and how it is used to engage audiences. This is done with the intention of uncovering lessons that can be learned for industry

practitioners about how transmedia storytelling operates. A literature review of media and cultural research found no existing model or framework that enabled the holistic analysis of transmedia storytelling as a strategy for narrative production (see Chapter Two). This gap in the literature is addressed in Chapter Three, which develops a theoretical framework for the comparative analysis of transmedia storytelling strategies. This framework comprises of three component parts drawn from media culture, marketing and advertising research; 1) analysis of types of strategies that practitioners use, 2) how and why those strategies are formed, and 3) how those strategies facilitate audience engagement. These parts are then combined together through a “strategic lens”. The lens uses strategic management theory to focus existing media culture, marketing and advertising research and facilitate the analysis of three different case studies of transmedia storytelling success (*Doctor Who*, *Sofia’s Diary* and *The Lizzie Bennet Diaries*). The lens, its framework for the analysis of audience engagement methods and the case studies are all original contributions of this thesis.

## 1.1 MOTIVATIONS FOR THIS STUDY

Recent technological and cultural developments, centred around the popularisation of the Internet, have led to significant changes in how audiences are interacting with and experiencing stories (Jenkins, 2006).

*“There is no more central issue in media and communications studies today than the proposition that we are in the middle of a rapid process of change that is seeing established or ‘old’ media being challenged for primacy in audiences’ and users’ attention by new modes and types of production, dissemination and display”* (Cunningham et al., 2010, p. 119).

Transmedia storytelling represents a practice full of potential in today’s shifting landscape. Scholars such as Evans (2011) and Johnson (2012a) noting its ability to connect meaningfully with audiences in an Internet connected world. It has risen to prominence because of its ability to resonate with scholars and practitioners alike (Ibrus & Scolari, 2014). However,

although interdisciplinary study is common within transmedia enquiry<sup>1</sup>, there has not yet been any use of strategic management theory to explain why a producer should choose transmedia storytelling over another approach or how transmedia develops as a media production strategy. Strategic literature focusses on these problems for businesses, especially literature on competitive advantage (De Wit & Meyer, 2005). Despite leading scholars such as Scolari(2009), Jenkins(2013) and Holt and Sanson (2014) referring to transmedia storytelling as a strategy in their work, there is a noticeable lack of competitive and comparative strategic analysis within transmedia research (Dena, 2014).

After reviewing the existing literature on transmedia storytelling, various explanations for narrative structure, fan behaviour and aspects of audience engagement were found (see Appendix 2.3). Discussions of strategic components, such as expansion or compression strategies (Scolari, 2013), adaptation (Bourdaa, 2013) and the construction of spin-off series (Hadas, 2014), are common within transmedia scholarship and different frameworks for thinking about types of transmedia storytelling exist, such as “franchise transmedia” (Phillips, 2013a) and “portmanteau transmedia”(Pratten, 2011). However, this review found no single framework that brought these various elements together. Perhaps this is because the majority of transmedia analysis is driven by the field of media culture and is nested within larger studies into fan behaviour and the consumption of media in the contemporary marketplace (Freeman, 2014a). Regardless, it has become clear that, in order to fully understand transmedia storytelling and how it works, insights from the application of comparative and competitive theory from the strategic management literature could be very valuable to practitioners and scholars alike. In today’s landscape of rapid change, experimenting with new strategies to reach audiences has become of increasing importance to practitioners and scholars alike (Ellingsen, 2014, p. 111).

## 1.2 PURPOSE OF THIS THESIS

The purpose of this thesis is to investigate and unravel what Scolari (2009) encapsulates as the “semantic chaos” surrounding transmedia storytelling. While ongoing changes in the

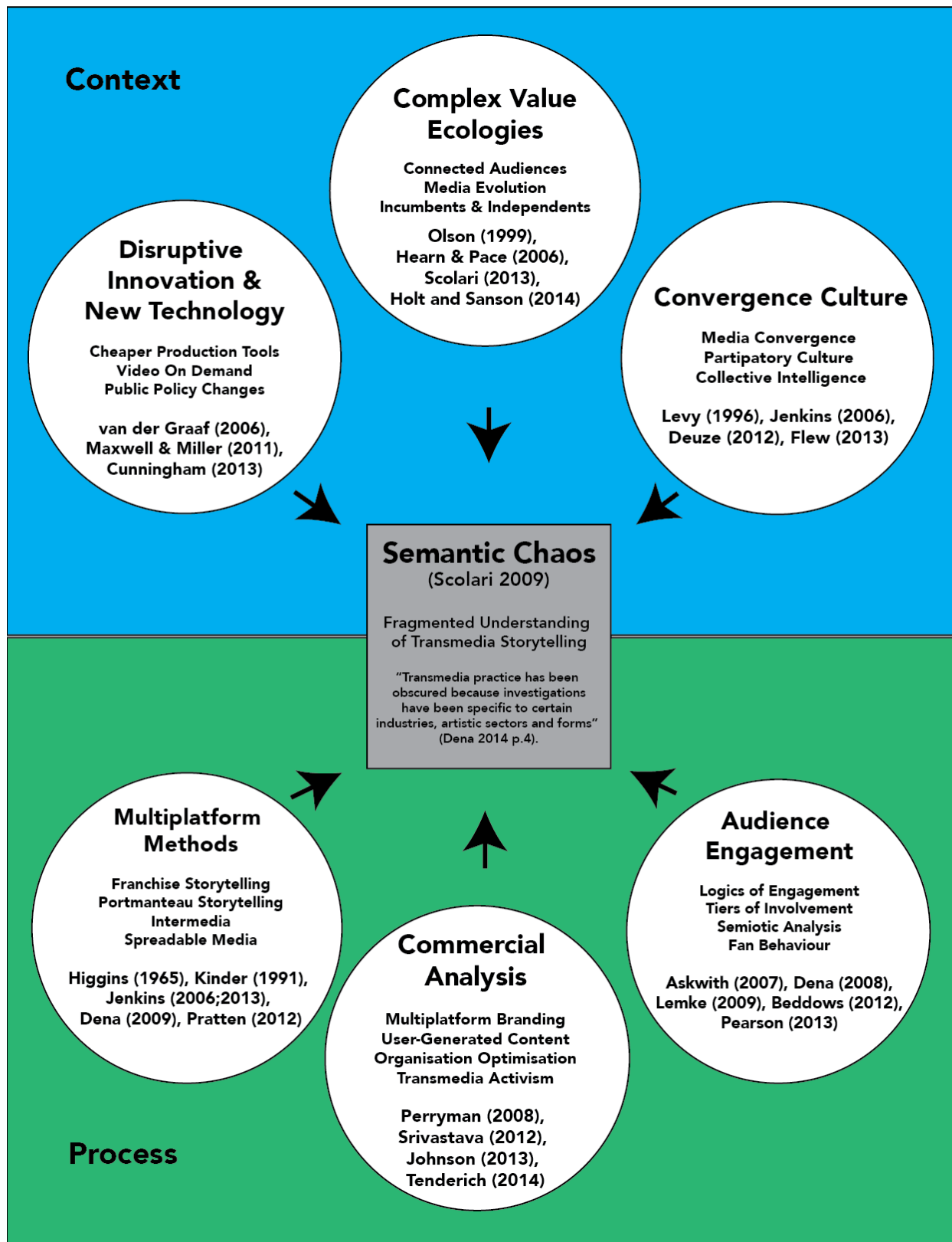
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<sup>1</sup> Marketing, advertising, media and culture and even economics research has been used to investigate the practice (Ryan 2005, Phillips 2012). Concepts such as media synergy (Schultz 2006) (advertising), marketing 3.0 (Kotler 2010) (marketing) and distributed narratives (Walker 2004) (narrative theory) have also all emerged to describe similar processes to transmedia storytelling.

broader media production landscape are well researched (e.g. convergence culture (Jenkins, 2006) and connected viewing (Holt & Sanson, 2014)), the investigation of transmedia practice has become fractured as multiple people from different disciplines have adopted it to suit their own ends (Jenkins, 2012). Figure 1, overleaf, illustrates this semantic chaos, showing the separate silos of research that influence understanding of transmedia storytelling. It shows that, to implement transmedia strategies effectively in practice, greater understanding is needed of the role of transmedia storytelling strategy amongst these thematic clusters.



Figure 1: Semantic Chaos in Transmedia Storytelling



As Figure 1 demonstrates, transmedia theory represents an intersection of thought between the context and process of media production. This thesis analyses transmedia storytelling through a holistic lens to provide a filter for all of these influencing factors. Lessons learned may be of benefit to those working on large, high budget story worlds for major studios, seeking to indefinitely expand the lifespan of successful properties as well as to independent companies, seeking to create meaningful, innovative content to smaller niche audiences. Practitioners and scholars alike need to know what transmedia strategy is and how and why transmedia components might enhance audience engagement.

### 1.3 THE GAP IN THE LITERATURE

The literature review *found no existing theoretical model* in the business, narrative, media culture or marketing literatures that could comprehensively explain the application of transmedia storytelling as a strategic choice for practitioners. Prominent works that might have provided that model include Dena's (2009) thesis codifying transmedia practice and Smith's (2009) thesis, which provides a narrative production model for transmedia in the context of television based storytelling. However, none of these models have been constructed from a cross-disciplinary standpoint and either focus on the effects that a transmedia approach has on the narrative world or on the engagement the audience has with that narrative.

Reviewing the literature did, however, demonstrate a strong link between transmedia inquiry and the pursuit of competitive advantage, a core tenet of strategic management research. Competitive strategy focusses on what companies do differently to their rivals, how they establish a unique position compared to similar companies with similar resources (Porter, 1980; 1996). Transmedia research centres on how storytelling companies are coordinating multiple media to create unique experiences for their audiences (Beddows, 2012b). Case studies such as Perryman 's (2008) analysis of *Doctor Who* and Fast and Örnebring's (2015) analysis of *The Shadow* and *Transformers* demonstrate how media companies in different contexts have sought to differentiate themselves from their rivals with transmedia storytelling strategies.

These kinds of case studies demonstrate the need for further interdisciplinary research into creative and commercial decisions within transmedia practice (Polson et al. 2014 p.vii). Despite this need, the literature review only found one other study that applied strategic management research to transmedia storytelling, Hsu and Shih(2012). It also found no other study that provides a framework for the analysis of transmedia storytelling from this perspective. To address the semantic chaos among different silos of transmedia enquiry, there is clearly a need to research transmedia storytelling from an interdisciplinary perspective, a perspective that draws upon strategic management research.

#### 1.4 ORIGINAL CONTRIBUTIONS OF THIS THESIS

Theoretical lenses provide some of the greatest breakthroughs in filtering and refining qualitative research (Denzin, Lincoln, & Giardina, 2006, p. 778). This thesis constructs its own theoretical lens for the analysis of transmedia storytelling strategy. It builds upon a method developed by Jones(2001) and Silver(2007) for unifying business research with media and cultural studies. This lens uses a strategic management framework to integrate foundational theories from existing research across marketing, advertising and media and cultural studies. It represents an original contribution to how transmedia research is approached as well as providing unique data on transmedia as a strategic practice. It also provides a unique interdisciplinary framework for analysing audience engagement in a transmedia context, blending marketing and media culture research. For practitioners and scholars alike, this provides an expanded way of viewing audience interaction in the contemporary converged marketplace.

The lens manifests itself as a set of guiding questions for case studies of transmedia projects. It divides the transmedia process into questions of strategic form, influences upon the formation of transmedia strategy and how those strategies influence audience engagement. Not only does this provide tools for the analysis of transmedia projects but it also helps practitioners and scholars compare different uses of transmedia storytelling to one another.

## 1.5 THESIS OUTLINE

### **Chapter One: Introduction**

This introductory chapter conducts a brief overview of the context and purpose of this research. It also maps out the approach being taken within this thesis to that research and provides an outline of each of the chapters.

### **Chapter Two: Literature Review**

The literature review is a critical evaluation of the fields of study that are directly relevant to transmedia storytelling; media and cultural studies, screen production, marketing and business strategy. The first section of the literature review (Section 2.1) investigates the definition and parameters of transmedia storytelling. It establishes a need for strategic analysis. Noting a unifying focus upon audience engagement in transmedia research, Section 2.2 then analyses the concept of audience engagement and how transmedia influences the design of experiences for audience interaction. It highlights the absence of a concise definition for audience engagement in transmedia research. Section 2.3 then demonstrates why, after analysing media culture and strategic management literature, strategic management research is of direct relevance to transmedia storytelling. It argues that an analysis of transmedia projects, through the lens of competitive advantage theory, is highly beneficial to research and practice. Section 2.4 then summarises the chapter, outlining the gaps in the literature and research questions that guide this thesis' enquiry.

### **Chapter Three: Method and Construction of the Lens**

This chapter addresses the strategic gap in transmedia literature by drawing together various foundational theories from media culture, strategic management, marketing, advertising and branding literatures. It integrates these theories into a model that accounts for why different producers choose different types of transmedia storytelling strategy and how this then affects their approach to audience engagement with their stories. This chapter also outlines the method for applying the lens; a method patterned after Jones(2001) and Silver(2007), who have both used strategic lenses to apply business theory to narrative industry (film in both cases). It also outlines how data has been gathered within this thesis; a mixture of face-to-face interviews conducted specifically for this thesis, primary source

materials from the projects themselves, academic literature and online articles written by leading practitioners and scholars.

#### **Chapter Four: Pilot Case Study – *Doctor Who***

An established example of transmedia storytelling with over 50 years of history, *Doctor Who* provides the first case study of this thesis. It tests the application of the lens by comparing its findings with those of existing *Doctor Who* scholars. It finds *Doctor Who* to be an example of cost-leadership narrative strategy focussed on attracting a broad audience. It links transmedia storytelling for a large audience base to a focus on engaging audiences by immersing them in a world of content, in providing extensive, if mostly passive, opportunities for the audience to experience stories within the narrative universe. It shows that, without the resources of large Hollywood conglomerates, transmedia strategy can be adapted to reach a broad, global audience and achieve a company's objectives.

#### **Chapter Five: Case Study – *Sofia's Diary***

Following that case study of *Doctor Who*, Chapter Five analyses *Sofia's Diary*, a project that coincides with the dawn of transmedia scholarship. *Sofia's Diary* started as a small independent Portuguese narrative but rapidly turned into a national success. It was then on-sold as a narrative format, providing continual revenue for its producers as the story was adapted and retold in over thirty territories and ten different languages around the world. This case study illustrates how, by understanding how context impacts upon a narrative strategy, a small company can establish itself through strategies that focus on cost-leadership for a niche audience. It links the way in which beActive (the producers of *Sofia's Diary*) understood its audience and mirrored how they were already using media within their daily lives to the success of the project.

#### **Chapter Six: Case Study – *The Lizzie Bennet Diaries***

The final case study in this thesis is an analysis of *The Lizzie Bennet Diaries*, a modern retelling of Jane Austen's classic novel, *Pride and Prejudice*. It shows that, although also targeted at a small niche audience, *The Lizzie Bennet Diaries* focussed on differentiating its narrative and providing a version of *Pride and Prejudice* that its audience had never encountered before. *The Lizzie Bennet Diaries'* use of transmedia storytelling, as shown by the application of the

lens, again demonstrates a focus upon leveraging how its audience members were already using media platforms within their daily lives. In the case of *The Lizzie Bennet Diaries* this meant making the entire narrative experience social and allowing audience members to interact with each other and the characters on every platform that they experienced the story. It demonstrates a link between personalisation and the use of transmedia to reach niche audience groups.

### **Chapter Seven: Analysis**

This chapter provides a cross-analysis of each of the case studies, comparing the findings within to those of other transmedia scholars and their work on Hollywood style transmedia storytelling. It shows that the theoretical lens does indeed provide valuable insight into how transmedia storytelling can advantage different producers in their construction of narrative worlds. It maps the different contributions of each case study against one another and shows that it was the ability to adapt to context and orient towards a specific market that unifies successful transmedia projects. While transmedia storytelling can take on different forms for different projects, it is unified by its customer centricity. The choice to undertake a transmedia project, for each of these successful case studies is informed by an understanding of audience and a subsequent, marketing orientation of each storytelling company.

### **Chapter Eight: Conclusion**

The conclusion draws together key findings from Chapters Four-Seven and argues that transmedia storytelling is a specific narrative strategy. One that, when analysed from a strategic perspective, depends upon an understanding of the market place and the ability of its producers to create a unique, immersive experience.

## **1.7 CHAPTER SUMMARY**

This introductory chapter establishes why we need to analyse transmedia storytelling as a strategy for creating narrative worlds and engaging audiences with those worlds. It has discussed the importance of this research and briefly maps the content of each chapter, highlighting the unique contributions of this thesis to the work of theorists and practitioners alike.

## CHAPTER TWO: LITERATURE REVIEW

This chapter reviews relevant media, cultural studies, transmedia, economics, strategic management, marketing and branding literature, and identifies a key gap in the current research on transmedia: an absence of theory that comprehensively explains the role of strategy in transmedia storytelling. Despite identifying a diverse range of what can be described as 'strategic considerations' advanced by scholars in various studies of transmedia storytelling (see Appendix 2.3), this review shows that more research is still needed to explain why producers turn to transmedia storytelling, and how different contexts and different organisational objectives influence the development of transmedia storytelling strategy.

Starting with an analysis of the concept of transmedia storytelling (Section 2.1), this review finds it to be regularly referred to as a strategy for the pursuit of audience engagement. However, within the literature, no existing theoretical framework to facilitate a rigorous examination of transmedia storytelling as strategy was uncovered. When reviewing the concept of audience engagement in this context (Section 2.2), this gap was compounded by the lack of a clear definition for audience engagement in a transmedia context.

To address the gap, Section 2.3 focusses upon the concept of strategy. It draws from strategic management research and broader research within the creative industries to provide a working definition of strategy and to discuss an appropriate framework for the analysis of transmedia storytelling as strategy. This allows for a theoretical lens to be constructed in Chapter Three, a lens that uses the prism of strategic thinking to bring together media culture, marketing and advertising research.

## 2.1 TRANSMEDIA AND TRANSMEDIA STORYTELLING

This section reviews literature concerning the definition of transmedia storytelling. It finds that, while many scholars reference transmedia storytelling as a narrative strategy for creative businesses, there is little to no research that actually applies strategic theory to the field of transmedia (Section 2.1.1). It then provides a historical context for the emergence of transmedia storytelling in contemporary scholarship, demonstrating a bias within transmedia scholarship towards large budget or “Hollywood” projects and identifies a need for a strategic framework that is able to compare uses of transmedia storytelling by different companies in different contexts (Section 2.1.2). Finally, it reviews transmedia storytelling and the broader paradigm of convergence culture, showing that adjustments have been made to Jenkins’ core definition of transmedia storytelling, primarily around the notion of “media platforms”. These adjustments indicate that transmedia storytelling is an audience-focused paradigm and that there is a gap in evaluating it as a strategy for audience engagement (Section 2.1.3).

### 2.1.1 Transmedia Definitions

Transmedia and transmedia storytelling reflect a way of thinking about how media can be organised to optimise audience engagement (Jenkins, 2010a).

*“[Today] media companies are currently exploring multiplatform programming strategies, revaluing digital audiences, and experimenting with interactivity and user engagement as they strive to connect viewers with content in this newly emerging media landscape” (Holt & Sanson, 2014, p. 9).*

Transmedia’s interchangeability with similar terminology for multiplatform strategies, such as cross-media, multi-platform and multimedia, results in no small semantic chaos (Scolari, 2009). Because of this confusion, there is a need for further research into the unique attributes of transmedia storytelling to differentiate it from similar practices (Bolin, 2007; 2010).



Contemporary research shows that it is the construction of a narrative experience across media platforms, in combination with meaning made between those platforms (intermedia), that differentiates transmedia from other similar practices that companies are currently experimenting with (Jenkins, 2006). Higgins labels this concept of meaning made between media as intermedia (Higgins, 2001). Falzon (2012) demonstrate that this is an integral consideration of transmedia practice.

*"The term "transmedia", which comes from the Latin routes that denote "across all media", has been in use over the last two decades, as an alternate name for a category denoting properties that are created, or distributed across various media simultaneously... However, "transmedia" unlike the other terms, is meant to denote not only a collection or a relationship between various media, but a new 'whole' that is greater than its parts" (Falzon, 2012, p. 926)*

Reviewing the concept of transmedia shows that it refers to both the movement of ideas or messages across a mix of media and to how meaning is made by combining different media together<sup>2</sup>.

Transmedia *storytelling* is just one of many approaches under this umbrella paradigm of transmedia. Dena (2009) (transmedia practice), Srivastava (2012) (transmedia activism) and Tenderich (2014) (transmedia branding), for example, all explore different facets of transmedia that are related to, but not the same as, transmedia storytelling. The generally accepted definition of transmedia storytelling, provided (and subsequently updated) by Jenkins (2003; 2006; 2007; 2011), shows it to be a narrative focussed variant of that paradigm.

*"Transmedia storytelling represents a process where integral elements of a fiction<sup>3</sup> get dispersed systematically across multiple delivery channels for the purpose of creating a*

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<sup>2</sup> Dena(2014) argues that transmedia is unique even from the concept of intermedia. Transmedia contains "unmixed aesthetics", with each separate platform delivering a unique and distinct experience while a purely intermedia experience focusses on blending aesthetics together.

<sup>3</sup> It must be noted here that Jenkins is not referring to fiction in the sense of "non-fiction" and "fiction" but rather as an extension of the term narrative. To interpret this definition in the spirit it was intended, rather than literally, is to include any works that tell a story (Jenkins 2006, 2009)

*unified and coordinated entertainment experience. Ideally, each medium makes its own unique contribution to the unfolding of the story” (Jenkins, 2011).*

It is the unique contributions of each medium that Jenkins references here that differentiate transmedia storytelling from other narrative strategies such as adaptation and serialised narrative (Jenkins, 2006). The Producer’s Guild of America supports this view of transmedia storytelling, providing an even more stringent definition than Jenkins. For an individual to receive a credit of ‘transmedia producer’, they stipulate that no extensions can be repurposed and more than three must be created within the same narrative world<sup>4</sup>. “The story that the comics tell is not the same as that told on television or in cinema; the different media and languages participate and contribute to the construction of the transmedia narrative world” (Scolari, 2009, p. 587). Zeiser (2015b) provides the *Star Wars* franchise as a prominent example of transmedia storytelling success. Separate narratives exist across books, films, games and comics, all featuring events bound together by a shared narrative universe. Each of these media depict an expansive, cohesive mythology in which a battle between good and evil constantly rages, fought across galaxies inhabited by space samurai, bounty hunters and aliens.

Defining transmedia storytelling in this way shows it to be a strategic play by media producers to expand their narrative world and/or extend the potential revenue for a narrative product (Edwards, 2012; Pearson, 2013). “If each work offers fresh experiences, then a crossover market will expand the potential gross within any individual media” (Jenkins, 2006, p. 3). Not only this, but alongside the commercial opportunity is an artistic opportunity, the provision of “untapped creative potential” for those making the worlds (Miller, 2014, p. 180). It is for these reasons that Jenkins (2009) focusses the benefits of transmedia storytelling around four core activities:

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<sup>4</sup> “A Transmedia Narrative project or franchise must consist of three (or more) narrative storylines existing within the same fictional universe on any of the following platforms: Film, Television, Short Film, Broadband, Publishing, Comics, Animation, Mobile, Special Venues, DVD/Blu-ray/CD-ROM, Narrative Commercial and Marketing rollouts, and other technologies that may or may not currently exist. These narrative extensions are NOT the same as repurposing material from one platform to be cut or repurposed to different platforms. A Transmedia Producer credit is given to the person(s) responsible for a significant portion of a project’s long-term planning, development, production, and/or maintenance of narrative continuity across multiple platforms, and creation of original storylines for new platforms. Transmedia producers also create and implement interactive endeavours to unite the audience of the property with the canonical narrative and this element should be considered as valid qualification for credit as long as they are related directly to the narrative presentation of a project” (PGA, 2012).

1. Offering backstory
2. Mapping the world
3. Offering us other character's perspectives on the action
4. Deepening audience engagement

Those who use transmedia storytelling are seeking to grow an audience for their narratives among a barrage of media that people are now subjected to in their day to day lives (Giovagnoli, 2011). Edwards (2012) links this to the process of world building;

*"Successful transmedia texts must create a rich, encyclopaedic fictional universe ... Each additional piece of planned content in the larger transmedia text is able to exist on its own but also contribute to the overall story. Each added item also draws on the strengths and features of each medium (such as television's ability to tell stories in on-going episodes and story arcs, film's capacity to be immersive, or a video game's power to let fans explore the world depicted)"* (Edwards, 2012, p. 6).

As Edward's appraisal of Jenkins' transmedia shows, transmedia storytelling has the potential to be a powerful and unique strategy for narrative world production.

Jenkins' definition of transmedia storytelling is not highly contested within the literature and this thesis follows the majority of scholars in this field and uses Jenkins' definition to guide its enquiry. Terminology such as "transmedial worlds" (Klastrup & Tosca, 2004), "cross-media" (Gitelman, 2006) or "distributed narratives" (Walker, 2004) significantly overlap with that of transmedia storytelling, causing scholars such as Scolari to note no small amount of semantic chaos within the field<sup>5</sup>.

*"All of these concepts try to define roughly the same experience: a sense of production and interpretation practice based on narratives expressed through a coordinated combination of languages and media or "platforms,""* (Scolari, 2009, p. 588).

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<sup>5</sup> See Appendix 2.1 and 2.2 for tables of related media terms, constructed by Hsu and Shi (2012) and Gambarato (2012). Appendix 2.1 details the evolution of terms related to transmedia. Appendix 2.2 tables narrative terms related to transmedia storytelling.

However, the point of consensus within the literature is that it is the unique contributions of media platforms within a narrative world that separates a transmedia strategy from other practices. Discussion of transmedia storytelling across the media culture literature has focussed upon transmedia storytelling as a “process rather than an end result”, a *strategic* way of storytelling (Fast & Örnebring, 2015, p. 4).

Yet, despite leading transmedia scholars such as Jenkins (2006), Scolari (2009), Norrington (2010) and Holt and Sanson (2014) all referring to transmedia storytelling as a strategy, this literature review was unable to uncover any frameworks for analysing transmedia storytelling from a strategic perspective. One article did use strategic theory to conduct a resource-based analysis of the Taiwanese television industry. Hsu and Shih (2012) recommend a shift towards the use of transmedia storytelling by public broadcasters as, in their view, it provides them with more sustainable production pathways. Their work demonstrates the benefits of applying strategic theory to transmedia storytelling and that media conglomerates using a strategic approach are likely to be effective in leveraging their resources to help differentiate their narrative experiences. However, it does not provide a framework for the analysis of transmedia storytelling as strategy.

Surveying the literature for research that could be adapted to address the strategy gap, this review found that current research can be divided into four broad categories that each contribute to our understanding of an aspect of transmedia storytelling; 1) defining transmedia practice, 2) fan behaviour and consumption of transmedia stories, 3) how audience make meaning from transmedia texts and 4) integrating transmedia storytelling with marketing and branding research. However, as Table 1 overleaf indicates, none of these research areas directly address transmedia storytelling as a strategy for narrative production.

**Table 1: Research Focuses Within Transmedia Storytelling Research**

Research Focus	Key Sources
Defining transmedia storytelling & theorising it as a practice	(Jenkins, 2003), (Long, 2007), (Dena, 2009), (Aaron Smith, 2009), (Konzal, 2011), (Gambarato, 2012a), (A. Phillips, 2012), (Mittell, 2012), (Hancox, 2014),
Fan behaviour and the consumption of transmedia texts	(Jenkins, 2006), (Evans, 2011), (Beddows, 2012a; 2012b), (Pearson, 2013), (M. Freeman, 2014a), (Holt & Sanson, 2014),
How audiences make meaning from transmedia texts (semiotics)	(Askwith, 2007), (Scolari, 2009), (Hayati, 2012), (Ibrus & Scolari, 2014; Scolari, 2013), (Bertetti, 2014), (Simons, 2014), (Dusi, 2015)
Studies that link transmedia storytelling to marketing and branding research	(Santo, 2006), (Falzon, 2012), (Edwards, 2012), (Hsu & Shih, 2012), (C. Johnson, 2013), (Tenderich, 2013; 2015), (Zeiser, 2015a)

As the raft of strategic considerations found in Appendix 2.3 demonstrates, there is a plethora of tools already created by transmedia scholars to support a significant array of strategic decisions for these narrative worlds. However, missing from the various areas of research represented by this table is a guiding framework for bringing these areas together; a process that contemporary research itself indicates can be filled by treating transmedia storytelling as strategy – by applying strategic theory. What is needed is a framework to bring together and integrate this theoretical knowledge, to focus and unify this research. This represents a core gap found by this review and is the focus of this thesis.

### **Types of Transmedia Strategies**

There are three broad categories for transmedia storytelling types identified by this review: franchise transmedia storytelling, portmanteau transmedia storytelling and hybrid transmedia storytelling. However, no comprehensive framework for the comparison of these types of transmedia storytelling was uncovered by the review.

#### *Franchise Transmedia Storytelling*

Going by different names including franchise, mono-media, Hollywood or “West-Coast” transmedia storytelling, this approach consists of multiple narratives told within the same, larger story world. The individual narratives are often only loosely connected and generally comprise of a successful central platform, such as a feature film or blockbuster game, from

which others expand or extend the world (Dena, 2009; Gambarato, 2012a; Mittell, 2012). *Star Wars*, *Star Trek*, *Doctor Who* and *The Hunger Games* are all examples of this style (Jenkins, 2006; Zeiser, 2015b). Some scholars even go so far as to suggest that this is the only type of true transmedia storytelling, an expansion upon the world building and marketing practices of large, well-funded media conglomerates (Barwell, 2014). However, established scholars and practitioners who are more embedded in transmedia's media culture history, such as Dena (2009), Phillips (2012) and Pratten (2011) disagree. They concur that there is at least one additional way to apply transmedia storytelling.

### *Portmanteau Transmedia Storytelling*

Derived from an English word for a suitcase that split into two halves, Lewis Carol used portmanteau in *Through the Looking-Glass* (1871) to refer to "two meanings packed up into one word"<sup>6</sup>. This style of transmedia storytelling is used by Pratten (2011), Graves (2011) and Gambarato (2012b) to refer to a single narrative told through heavily interconnected media platforms, generally with a reliance upon the audience consuming more than one media platform to understand the whole. Rather than a transmedia franchise, in which each platform is an independent silo that contributes a distinct story and expands a broader fictional world, portmanteau transmedia storytelling is defined by each platform contributing a part of the same narrative (Gambarato, 2012a). For example, to launch the blockbuster film *The Dark Knight* (2008), No Mimes Media developed a project for Warner Brothers, a portmanteau transmedia narrative called *Why So Serious*. Audience members were invited to follow the antagonistic character of the Joker across multiple media, including websites, phone calls, clues baked into cakes and much more. Each instance represented its own small narrative interaction, but all formed part of a larger single narrative, that of the Joker's corruption of the city and the rise of Harvey Dent, an important character in the upcoming film (Budica, Puiu, & Budica, 2010).

### *Hybrid or "Complex" Transmedia Storytelling*

A blend of both the mono-media and portmanteau approaches, Pratten (2011) introduces this third category of transmedia storytelling as a blend of the first two, seeing no reason for

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<sup>6</sup> See page 6 of Sabian Assembly's full text of *Through the Looking-Glass*, available at [http://sabian.org/looking\\_glass6.php](http://sabian.org/looking_glass6.php)

the previous styles to be mutually exclusive. Indeed, many large franchises such as *The Dark Knight Trilogy* (2005, 2008 and 2012) blend both approaches. *Why So Serious?* drove audiences to the launch of the second movie in the trilogy. *The Dark Knight* producers were already using interconnected franchise stories in the form of film, comic and games to engage the audience with their narrative world and thus *The Dark Knight Trilogy* showcases both portmanteau and mono-media characteristics.

Each of these approaches has literary analysis that defines it as a type of transmedia storytelling and yet, little cross-analysis of the different types of approaches for creating a world and engaging an audience was found throughout the literature by this review. Scholars such as Phillips (2012), Konzal (2012) and Hadas (2014) all differentiate between large and small scale transmedia storytelling in their work, prescribing labels of franchise or portmanteau transmedia to examples of transmedia worlds without addressing why these strategies form in this way and why they were advantageous for those particular companies. Practitioners and scholars alike need to not only consider what it means to use transmedia storytelling as a strategy for their narrative, but also what kind of transmedia storytelling best suits their business and creative needs and why.

### **The Need for A Strategic Discussion**

As 2.1.1 demonstrates, there is a gap in the transmedia storytelling literature in viewing transmedia storytelling as strategy. Section 2.1.2 reviews the context and history of transmedia storytelling and demonstrates a bias towards the discussion of “Hollywood” transmedia. It demonstrates that there is a need for a framework for analysing why large conglomerates and niche independents alike choose transmedia projects and how those projects differ when made by companies with different capabilities.

#### **2.1.2 Context and History**

Transmedia storytelling’s inception in scholarly literature can largely be traced back to Kinder (1991) and her discussions of “transmedia intertextuality”. She observed that children were purchasing merchandise related to *The Teenage Mutant Ninja Turtles*, because it empowered them to imagine their own stories. This then evolved into discussions of

transmedia storytelling around the 1999 film *The Blair Witch Project* and finally to the popularisation of the term transmedia storytelling by Jenkins (2003; 2006; 2010a).

However, a cursory review of media culture literature shows that transmedia storytelling is not restricted to the contemporary context of digital interactivity. Transmedia worlds were created prior to the digital age<sup>7</sup> and even today these worlds can involve no digital elements at all (Ewalt, 2013). Transmedia storytelling has even been evidenced as a practice intertwined with the history of narrative itself, with some scholars finding evidence of transmedia methods in the conveyance of cultural myths such as King Arthur, Robin Hood and the Bible (Evans, 2011).

*"In the Middle Ages, to compensate for widespread illiteracy the church provided parishioners with multiple ways to experience the stories in the Bible. These took the form of hymns, sermons, artefacts, and, perhaps most spectacularly, enormous stained-glass windows. Are these transmedia extensions? One might argue that since a parishioner could first experience the story of Genesis through a rose window, then Exodus through a sermon, then Leviticus through hymns, and then Deuteronomy through paintings, the Bible has always been a transmedia franchise..."* (Long, 2007, p. 24).

As this quote illustrates, transmedia storytelling is not a new phenomenon. Transmedia storytelling today is simply operating in a more conducive environment within the digital era; media is becoming much cheaper and cheaper to produce (Deuze, 2012), narratives are now available to many people through many channels and devices (Jenkins, 2006)<sup>8</sup> and connected devices allow for easier transitions from one platform such as a film, to another such as an e-book, which can both be viewed on the same device such as a tablet and downloaded via the internet (Pearson, 2013). To most, it is the discussion and analysis of transmedia storytelling in a scholarly setting that has only emerged in the digital context of

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<sup>7</sup> Such as those created by Walt Disney Studios in the 1950s, with projects like *The Shadow* in the 1930s (Fast & Ornebring 2015) or by Commedia Dell'Arte companies producing Punch and Judy shows in 16<sup>th</sup>-18<sup>th</sup> century England (Fagence 2013, Peacock 2014). Reaching further back into history, Miller(2014) links transmedia storytelling to the symbols, songs and stories of the Egyptian pharaohs and the German concept of *gesamtkunstwerk* (art that spans several art forms) and Evans(2011) discusses transmedia storytelling used in Western cultural mythology, both around the Bible and the narrative of King Arthur.

<sup>8</sup> Banet-Weiser qualifies this changing phenomenon, noting that this only refers to those in countries where digital infrastructure is of a high enough standard to allow for increased digital literacy and access to connected devices (Banet-Weiser:2011).



the last decade. Because of this, the scope of transmedia discussion has a bias towards Hollywood projects and the contemporary setting (Miller, 2011).

This bias is due to Hollywood's long term visibility as leaders and often controllers of the entertainment market (Norrington, 2010). Use of a transmedia-like strategy can be seen in the practices of early Hollywood film production companies. These companies created narrative newspaper articles and book excerpts to engage audiences for forthcoming films (Lewis, 1933). From as early as the 1940s and 50s, Hollywood began to undertake horizontal integration<sup>9</sup>, leveraging their control of different media silos such as radio, film and television, to create greater success for the enduring media franchises of its various entertainment properties (Freeman, 2014b). Since Hollywood conglomerates then already owned various distribution platforms and media production pathways, when the digital era dawned in the late 1990s, it made logical sense for them to evolve their strategies to include transmedia storytelling so that they could further leverage their horizontal control (Fast & Örnebring, 2015). Because of this natural proclivity, there are even those that argue that transmedia storytelling, as a strategy, is best suited for the creation of big "Hollywood" style story worlds (Johnson, 2012a; Zeiser, 2015a).

However, Jenkins (2006) and Cunningham (2012) discuss transmedia storytelling as an equal opportunity for media conglomerates and independent storytellers alike. Similarly, leading practitioner Bernardo has written books, magazine articles and trade publications evangelising transmedia storytelling as a tool for small-scale, independent storytellers (2011a; 2014; 2015a; 2016). Texts by other practitioners such as Phillips (2012) and Pratten (2011) also speak to the advantage that transmedia storytelling can provide small scale producers, because they use different methods to large scale producers e.g. portmanteau storytelling. Synthesising current research to discuss how production resources and context

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<sup>9</sup> Horizontal integration refers to the ownership of multiple interrelated media platforms, production pathways and distribution outlets that are then used in tandem to forward their business needs (Barton 1992). For example, when producing a feature film, a horizontally integrated conglomerate like Disney or Warner Brothers could sell toys at outlets *they own*, saturate the media with news articles about the film *in their newspapers* and promote the film on television networks *they control the content of*. This makes business sense and promotes market dominance because it reduces overheads and allows for greater control of the overall impression that the audience makes of the story world throughout the various media they consume (Smith 2009). It also keeps revenues "in-house" circulating them within the corporate family rather than losing them to external partners in such a venture (Kotler 1999). This approach is reflected in the business writings of corporate strategy scholars such as Brian Leavy, who sees horizontal partnerships and integration as a core component of business success in the oncoming digital century (Leavy 1996). To Leavy, businesses need to have some measure of control over every area that their work influences and is influenced by, such as distribution partnerships for their products and partnerships surrounding the resources that underpin the production of those products.

influence the development of story worlds is paramount to understanding why producers choose transmedia storytelling and how different uses of the strategy may be linked to different production contexts. The focus upon the use of transmedia storytelling by large “Hollywood” style media conglomerates within the literature highlights another gap in the literature concerning the context in which transmedia storytelling approaches are developed.

### 2.1.3 Media Platforms and Story Modes

Section 2.1.1 argues that transmedia storytelling is reliant upon two core components: the use of multiple media platforms to deliver multiple narratives that all work together to construct a story world, and the independent but interconnected nature of those media narratives. However, this section reveals that the term “multiple media platforms” is problematic, because it contradicts the ways in which audiences are thought to be consuming narrative content.

Transmedia storytelling is a practice that leverages convergence culture, a term coined by Jenkins to describe the collective blurring together of technological, cultural, economic and political experiences that people have in contemporary life. Convergence, to Jenkins, is;

*“The flow of content across multiple media platforms, the cooperation between multiple media industries, and the migratory behaviour of media audiences who will go almost anywhere in search of the kinds of entertainment experiences they want... Convergence is taking place within the same appliances, within the same franchise, within the same company, within the brain of the consumer, and within the same fandom. Convergence involves both a change in the way media is produced and a change in the way media is consumed”* (Jenkins, 2006, p. 2).

Convergence is a widely accepted paradigm for describing the current moment of change, regardless of arguments between scholars about how fast this change is occurring (Cunningham et al., 2010). To Jenkins, convergence is a paradigm shift that reflects the realisation that consumers are able to view and interact with multiple media on a myriad of

different devices, that new strategic approaches are required of creative practitioners as they deal with a digitally connected and potentially empowered audience (Jenkins, 2006). If we accept convergence culture as a paradigm for understanding contemporary consumer/producer interactions around media, then transmedia storytelling represents a strong strategy for future story development, a strategy focussed upon audience engagement (Dena, 2009). However, it is the very notion of convergence that this review found problematic when following Jenkins' definition of transmedia storytelling as something that operates across different media platforms.

At first, alternative descriptions of the impacts of convergence culture would appear to fully support Jenkins' claims that a story world constructed over multiple platforms has a proclivity for expansive audience engagement and thus success in the contemporary environment. Schultz (2006) calls for greater coordination of media marketing. He argues that consumers assemble their own meaning from the multitude of interactions they have with media, synthesising this into a larger impression. Schultz's extended body of work has significant parallels with that of Jenkins, focussing on how marketers must create synergy in their media and have them work together, or they will not be able to create strong, long lasting messages that they desire in the minds of their audience (Schultz 2006; 2008; Schultz, Block, & Raman, 2009). Schultz's ideas are not new either, with scholars such as Achrol and Kotler providing extensive research on synergistic marketing communications (Achrol & Kotler, 1999; 2010; 2012) and movie marketers as early as the 1920s writing about the need to coordinate their media campaigns.

*"Laemmle highlighted the need to integrate all of the campaign communication elements in order to present a consistently clear message to target audiences: 'The prospective patron is therefore sold through an association of ideas which link up all the advertising mediums'"*(Laemmle 1927 in Silver 2007, p. 327).

However, despite this interdisciplinary support for the practice of coordinating media platforms, the term "media platforms" becomes problematic when considered in the context of contemporary convergence culture.

*"They [media] utilise different modes and contexts as a framework for structuring a single narrative. For example, media in The Matrix franchise could refer either to the aesthetic constitution of form, such as comic serial or animation, or a delivery system for content, such as the cinema, home PC or mobile device"*(Beddows, 2012b, p. 29).

If this line of thinking is then applied to Jenkins' definition of "multiple media platforms" it raises some questions over whether media platforms refers to narrative forms or to delivery forms or technologies. The term media contains two meanings; media is a technology that enables communication, but it is also a set of associated social and cultural practices (Gitelman, 2006). In the context of defining transmedia storytelling, this then means that a practitioner could claim a narrative told over multiple media platforms as transmedia without fulfilling the goals of transmedia in having separately enjoyable components *in the minds* of the consumer.

Instead of media platforms, Beddows (2012b) proposes the use of the terminology "story modes", which is built upon "modes of use" theory (Leeuwen & Kress, 2001). Story modes describes the type of consumption that a narrative mode, such as a television series, creates, rather than the physical platform of a television set from which it would originate. In her words, "by story mode I refer to the storytelling conventions associated with a particular narrative form" (Beddows, 2012b, p. 30). For example, television today can refer to a television program consumed on a phone, tablet or computer or on a television set itself. It can refer to content broadcast over airwaves, streamed illegally online or provided via a pay per view service, such as Amazon Prime. Moloney (2014), supports this distinction, using "form" and "channel"<sup>10</sup> to distinguish transmedia from similar practices such as crossmedia and multimedia. "Multimedia, crossmedia and transmedia are points on a fluid spectrum that blend from one to the next. Every point on that spectrum has a unique storytelling advantage" (Maloney 2014). To him, transmedia is unique because it includes multiple narrative forms as well as multiple channels for delivering those narratives.

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<sup>10</sup> "Media form is a language a story uses, and it can include text, photographs, illustrations, motion pictures, audio, graphic nonfiction, interactive forms and many others. These forms are then reproduced someplace and that place is a media channel. Journalism channels can include newspapers, magazines, books, television, radio, lectures, museums, game consoles, the Web or a mobile app among many others" (Maloney 2014). Maloney's article defines multimedia as "one story, many forms, one channel", crossmedia as "one story, many channels" and transmedia as "one storyworld, many stories, many forms, many channels". Moloney supports Beddows' inclusion of story modes academic discussion of transmedia strategy and provides a delineation between similar strategic forms, vital for additional research suggested within Section 8.3.

However, as Beddows (2012b) argues, scholars and practitioners need to discuss story modes as it allows for the differences in forms between media despite similar delivery formats. A film is different to a game or a television series even though all can be delivered on the platform of a computer or tablet, what defines them is their form, rather than their delivery method. Even within one media channel, such as cinema, black and white cinema represents a different narrative form, retaining meaning like old art, yet seeming “unacceptably unreal” to modern audiences unless created as a throwback (Gitelman, 2006, p. 4). Similarly, games software and hardware can be out-dated as soon as 2 years after their release. However, while old games are often held in high regard, their technical components and associated aesthetic properties are not generally sought after by a contemporary audience as they represent a different mode of play and game experience (p. 422). Transmedia storytelling is better defined as the practice of telling a larger narrative through the use of multiple story modes, which, even when delivered on the same platform, allow the audience to enjoy different narrative experiences (Beddows, 2012b). In constructing an experience that offers audiences backstory, different perspectives and different modes of use in the way they experience it (the goals outlined in Section 2.1.1 by Jenkins in defining transmedia storytelling), the evolution of the definition to include story modes makes sense.

If audience conception of story modes guides transmedia storytelling, how then do producers design experiences for this when they deal with individual media platforms? Understanding the strategy of transmedia storytelling means understanding how producers go about engaging their audiences with transmedia narratives. To understand how transmedia storytelling operates as a practice for audience engagement, addressing the strategy gap is of paramount importance.

#### **2.1.4 Section Summary**

This section has identified that the term transmedia storytelling refers to a narrative strategy for audience engagement. In its review of literature concerning what transmedia storytelling is, this section finds that there are two core gaps in the current literature;

1. The literature lacks a cohesive, holistic framework to bind together current research so that we can understand *why* a particular producer would choose transmedia storytelling for their narrative world.
2. The literature indicates that transmedia storytelling is considered by many as a strategy and yet there has been no consistent application of strategic theory to the concept.

## 2.2 CONVERGENCE CULTURE AND AUDIENCE ENGAGEMENT

This section focuses upon the concept of audience engagement in a transmedia context. Whether it is Beddows (2012) talking about the consumption of transmedia stories by audiences and their construction of story worlds or Long (2007) contemplating the aesthetic drivers for a deeply engaging narrative construct, nearly every piece of literature in this emerging area is focused upon how the audience will perceive or react to the story world. However, in seeking a definition for what is meant by audience engagement in a transmedia context, this review encountered two significant issues; 1) there is no transmedia specific definition for audience engagement and 2) convergence culture, on which transmedia engagement is predicated, is based on assumptions that are heavily contested within the literature.

The first section, Section 2.2.1, shows that audience engagement is a nebulous, multi-faceted concept that often means very different things to different people and in different contexts. The second, Section 2.2.2, examines Jenkins' notion of convergence culture<sup>11</sup>, a key paradigm under which transmedia strategies are developed. It shows that, while few contend with the conceptual ideal of the convergence culture paradigm, there are those who would find its scope, some of its assumptions and the extent to which it is believed to impact upon consumption of narrative worlds problematic.

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<sup>11</sup> Convergence culture loosely refers to the "kludge" like joining together of media, in a technological, cultural and mental sense. In short, we may be able to now view all of the media components of a multiplatform story in one device, such as a watching television, playing online games and participating in an ARG all with your phone. But it also means that audiences are perceiving their various interactions across media as one conjoined experience as well (Jenkins 2006, 2010).

### 2.2.1 Defining Audience Engagement within a Transmedia Setting

Jenkins is a pivotal figure in defining and expanding transmedia study. His work on contemporary consumer culture largely underpins most transmedia research (Gambarato, 2012a). However, there are certain issues that arise from a dependence upon Jenkins' work when the concept of engagement itself is considered.

Jenkins situates transmedia storytelling within a world where fans and the wider audience are "hunters and gatherers" who search for relevant information and content across media platforms (2010a). This "optimistic view" of audience engagement is contested by media culture scholars such as Couldry (2011), Bird (2011) and Carpentier (2011). They question the level to which fans and the broader audience are actively engaged in searching for information or entertainment<sup>12</sup>. Other noted transmedia scholars, Dena (2008) and Hayes (2011), prefer to utilise a model of tiered engagement, where only a small percentage of fans are avid hunters and gatherers<sup>13</sup>. An in-depth reading of Jenkins' work actually supports this tiering, with Jenkins himself admitting that the majority of audiences may be highly engaged in a story, but might often "simply want to watch" (Jenkins 2006, p. 139). Even transmedia scholars who rely upon the work of Jenkins to form the foundations of their arguments, such as Beddows (2012b), Evans (2008) and Gambarato (2012a), all highlight a need for further research into current consumer culture and how "active" the audience actually is.

However, before transmedia research can be aligned with research into audience engagement and contemporary consumer culture, there is perhaps an even larger disciplinary fracture that needs to be considered; what exactly is meant when scholars use the term engagement within a transmedia context?

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<sup>12</sup> They, alongside transmedia scholar Long cite a lack of empirical evidence to support Jenkins' assertions. "Although Jenkins' scholarship serves a pivotal role in the study of transmedia storytelling by providing a conceptual vocabulary and a convergence paradigm, he does not provide significant empirical evidence to support his claims about the cultural transformations occurring to the text-audience, producer-audience, and audience-audience relationships" (Graves 2011, p. 336). However, it is noted that their work highlighting these problems also lacks empirical evidence to support their more moderate claims. What they serve to highlight, as a whole, is a lack of empirical evidence regarding audience behaviour in this sphere.

<sup>13</sup> These tiers usually comprise of a top 5% being a dedicated, highly engaged fan base, another 15% being quite engaged and occasionally seeking out content related to the story world, and other 80% only wanting to watch and passively receive content (Phillips 2012).

Edmonds (2006), Aswktih (2007), Smith (2009) and Beddows (2012b) all argue that engagement is not a term specific to media culture, advertising, marketing or any of the other disciplines that demand consideration when analysing content consumption.

*"A viewer's engagement with a given media, content or advertising brand ("object") can be defined as an overall measure describing both the depth and the nature of an individual's specific investments in the object. Yet, since engagement can take a range of different forms, and simultaneously reflect and serve a number of different needs and desires, there is no simple formula or scale for conducting this measure, nor a single "type" of engagement that describes the range of possible investments (financial, emotional, psychological, social, intellectual, etc.) that a viewer can make in a media object (Askwith, p. 49).*

Here Askwith's work highlights the problematic nature of engagement research conducted from the perspective of a single discipline. To define audience engagement purely from a media culture perspective, for example, preferences the emotional and social investments that a viewer can make with a media object<sup>14</sup>. He presents five logics of engagement (entertainment, immersion, social connection, mastery and identity) to explain why audiences continue to interact, across platforms, with their favourite narrative worlds<sup>15</sup>.

No simple formula or scale for measuring audience engagement, was found in this review of the transmedia literature. Beddows does link engagement in transmedia texts to coherence of narrative and an ability for transmedia texts to sustain strong characters across story modes (2012a). Likewise Gambarato (2012a) provides a toolset for metrics and actions that can be quantified to assess the effectiveness of a transmedia story. However, Askwith's model<sup>16</sup> is the most comprehensive in the literature that directly relates to the consumption

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<sup>14</sup> Askwith goes on to surmise that: "A viewer's overall engagement with an object can be expressed as the sum total of the viewer's behaviours, attitudes and desires in relation to the object, including: consumption of object-related content and products, participation in object-related activities and interactions, identification with aspects of the object, both to self and others motivations (or desires) for each of the above" (Askwith 2007, p.49).

<sup>15</sup> See Appendix 2.4 for a detailed description of each logic from Askwith (2007).

<sup>16</sup> Askwith presents five logics for multiplatform engagement (entertainment, immersion, social connection, mastery and identity). Chapter Three integrates these logics into the construction of the analytical lens so that we can better understand transmedia audience engagement.



of media texts<sup>17</sup>. In the absence of a transmedia specific model for audience engagement and given cross-discipline support for Askwith's model, it is this model that is considered, in conjunction with related earlier consumer behaviour theories of audience involvement from Zaichkowsky (1986; 1994) and Andrews et al.'s (1990), that this study uses to conceptualise audience engagement.

### **Involvement and Tiers of Engagement**

Expanding the review beyond media culture literature and into the interdisciplinary realm between advertising and marketing theory, it becomes clear that there are additional factors that need to be considered for understanding engagement in a transmedia context. Edmonds, Muller and Connel (2006) indicate that a beneficial state of contemporary engagement for constructing a transmedia story world needs to consider not just the reasons for a person's engagement, but also why the engagement has direction, intensity and persistence<sup>18</sup>. This is a state that the marketing and advertising literatures on consumer behaviour refer to as involvement; "an individual, internal state of arousal with intensity, direction and persistence properties" (Andrews, Durvasula et al. 1990 p. 28). The key to this definition is that it is based on the individual and factors that influence the longevity and intensity of their engagement. Involvement is not initiated by the media, objects or situations, but by the individual drivers of arousal of each person with whom engagement is sought (Andrews, Durvasula et al. 1990 p. 28).

Zaichkowsky (1986) defines three key influencing factors on involvement<sup>19</sup>: 1) the personal characteristics or value systems and unique experiences of the consumer, 2) the physical

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<sup>17</sup> It is noted that the USC Annenberg Innovation Lab has applied persona theory and developed a fan focussed iteration of these logics, extending it to eight; entertainment, immersion, social connection, play, identification, pride, mastery and advocacy (Pierce 2014). However, when considering Askwith's logics in connection to the concepts of involvement, it was found that, while effective in describing particular desirable fan behaviours, as a framework for analysing producer actions, Askwith's five logics provide more clarity than this extension of his thinking by Feldman and Pierce. Feldman and Pierce's additional logics of engagement have significant overlap with other logics. For instance, the logic of pride speaks to self-concept, a concept of identity an already existing logic (Andrews et al. 1990).

<sup>18</sup> In the creative literature, Edmonds, Muller and Connell argue that creatively engaging artworks have three attributes; attractors, "those things that encourage the audience to take note of the system in the first place"; sustainers; "that is those attributes that keep the audience engaged during an initial encounter" and relaters "aspects that help a continuing relationship to grow so that the audience returns to the work on future occasions" (Edmonds, Muller et al. 2006, p. 307).

<sup>19</sup> Zaichkowsky's articles have been cited extensively by scholars both in and outside her field. She believes that, *involvement is manipulated by making the ad "relevant" to the receiver in terms of being personally affected and hence motivated to respond to the ad... Parallelism is often found between involvement and personal relevance* (Zaichkowsky 1986, p.5). While it can be argued that Zaichkowsky's work concerns advertising and not a broader involvement construct, her theories, at their core, center on consumer response to messages imparted by a firm or producer to their audience. Her work is corroborated and its relevance extended beyond the advertising field by contemporary scholarly works such as *Consumer Empowerment Through Internet-Based Co-Creation*, which states that "the perceived personal relevance of an object or activity to a consumer determines the person's involvement with that object or activity" (Fuller, Muhlbacher et al. 2009,

differences of the methods by which the consumer receive the messages intended to involve them and 3) the situational differences in which each consumer interacts with the advertisements or product messages (Zaichkowsky 1986 p. 6). In reviewing her theory in a later article, Zaichkowsky also includes the consideration of emotional factors.

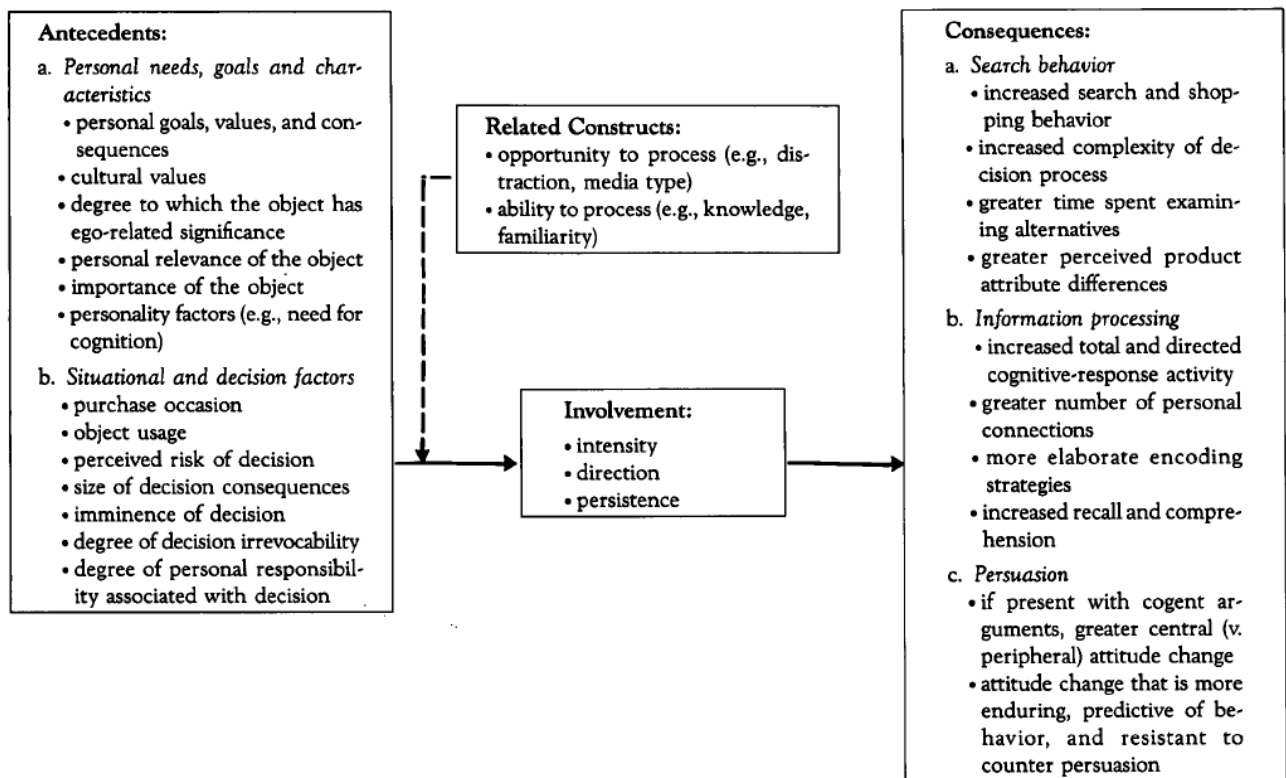
*"A person can be emotionally as well as cognitively involved with an advertisement and the definition of involvement focusing on personal relevance does not change. These emotions or feelings exist in the antecedents of involvement, namely within the person or the situation, and are brought out when they interact with the stimulus object. Therefore, to measure only thinking without feelings when referring to involvement may lead to omissions in capturing the relevance of the object to the individual"* (Zaichkowsky 1994 p. 60).

These four factors of involvement correlate strongly with the ideals put forward by transmedia scholars for optimal practice. The transmedia storytelling practice of leveraging individual media platforms to create maximum audience engagement (Phalen & Ducey, 2012) is clearly grounded in Zaichkowsky's consideration for physical and situational differences impacting on engagement. Similarly, the idea that the story components should be viewable both on their own and as part of the larger narrative (Jenkins 2006), also finds backing in Zaichkowsky's third concept, that it is important to consider and respond to the situational factors that may influence a consumer's level of involvement. Andrews, Durvasula and Ahkter (1990) build upon Zaichkowsky's findings and, as is shown in Figure 2, demonstrate the need to consider involvement when analysing engagement.

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p.78). If a transmedia producer is seeking to engage their audiences, whether or not direct advertising is being used, Zaichkowsky's theories have relevance.

Figure 2: A Framework for the Conceptualisation and Measurement of the Involvement Construct (Andrews, Durvasula et al. 1990 p. 29)



NOTE: Solid arrows represent direct influences, while the double-ruled arrow represents a mediating influence.

This framework implies that, to sustain audience engagement, producers need to balance situation, personal relevance and the audience’s ability to engage with the content. This is in addition to the logics for engagement discussed earlier. In a transmedia context, this means that producers who are trying to optimise audience engagement should not only consider why, when and by what method audience members/consumers will be engaging with a content, but also how their relationship with that content stimulates emotional responses that heighten their engagement.

This is not to say that there hasn’t been some level of consideration for involvement within the transmedia storytelling literature. Dena (2008), Beddows (2012b), Phillips (2012) and Evans (2008; 2011) all divide audience engagement into three tiers that are defined by an audience member’s level of involvement. These are illustrated in Table 2, below.

**Table 2: Tiers of Audience Involvement in Transmedia Worlds**

<b>Tiers of Involvement</b>	<b>Description</b>
Low	These audience members only desire or are able to engage briefly with the content. They are either too busy or too uninterested to invest significant amounts of time or energy into the story world (Dena, 2008).
Medium	These audience members invest some time and energy to interact with others about the world and find additional platforms or story modes (A. Phillips, 2012).
High	These audience members drive conversation, seeking out, sharing and curating every piece of content that they can find or interact with in relation to their beloved story world (Evans, 2011).

While these scholars divide audience engagement into these tiers, they do not consider involvement when analysing audience engagement or consult the vast available literature on involvement available in related fields of consumer behaviour in the advertising and marketing literatures. This represents a key gap in the transmedia literature - further research needs to consider why people are engaged with a media property (engagement) as well as how that engagement is given direction, intensity and persistence (involvement) by the strategic actions of producers. Tiers of audience engagement can be used to divide the type of engagement that audiences are exhibiting. However, as this section demonstrates, it is the interdisciplinary concept of involvement that needs to be integrated to fully describe audience behaviour.

### **2.2.2 Challenging the Assumptions of Convergence Culture**

The previous section established the interconnected nature of transmedia storytelling and audience engagement, as well as a lack of research that considers both involvement and engagement within the transmedia discipline. While being largely concerned with audience engagement as a process, transmedia storytelling case studies typically begin with a survey of the context in which their project operates and then nearly always link that concept to Jenkins' notion of convergence culture (e.g. Perryman, 2008; Ward, 2009; Farber, 2013; Franquet & Montoya, 2014; Fast & Örnebring, 2015; Tepper, 2015). Convergence culture is a foundational concept upon which a large amount of transmedia theory is predicated. However, this review found that convergence culture is a highly contested theoretical arena with many theoretical gaps in need of further research.

## What is Convergence Culture?

There are growing assertions that audiences have more power in the digital era because, amidst this blurring of platforms and delivery methods, digitally-enabled audiences are able to choose how they interact with media experiences, rather than having how they are able to interact with stories dictated to them (Jenkins, 2006; Briggs, 2010; Deuze, 2012). Grounding transmedia storytelling, Jenkins (2006) introduced the concept of convergence culture; a blend of three concepts that explain changing behaviour in how and why people are engaging with media in the contemporary landscape. These concepts were:

1. Media Convergence – *“Convergence occurs within the brains of individual consumers and through their social interactions with others”* (Jenkins, 2006, p. 3). It also refers to the physical convergence of media, a new space where *“media systems coexist and where media content flows fluidly across them”* (Jenkins, 2006, p. 130).
2. Participatory Culture – *“The term, participatory culture, contrasts with older notions of passive media spectatorship. Rather than talking about media producers and consumers as occupying separate roles, we might now see them as participants who interact with each other according to a new set of rules that none of us fully understands. Not all participants are created equal. Corporations-and even individuals within corporate media - still exert greater power than any individual consumer or even the aggregate of consumers. And some consumers have greater abilities to participate in this emerging culture than others”* (Jenkins, 2006, p. 3).
3. Collective Intelligence – a term borrowed from French media theorist Pierre Levy. *“None of us can know everything; each of us knows something; and we can put the pieces together if we pool our resources and combine our skills. Collective intelligence can be seen as an alternative source of media power”* (Jenkins, 2006, p. 4).

These concepts alone appear to describe a highly conducive environment for transmedia storytelling to occur in. However, when Jenkins’ notion of convergence culture is contrasted with a review of alternate convergence scholarship, each of the three concepts that he

outlines<sup>20</sup> represent a gap in the literature concerning our understanding of why producers would choose variations of transmedia storytelling as strategies for their narrative content.

### **Media Convergence**

Media convergence represents a problematic notion for transmedia strategists. While media may be converging in the minds of consumers, it is also occurring on a physical level within media platforms. Physical production for multiple platforms can actually represent a divergence in the toolsets needed to address this convergence. As narratives are constructed across multiple media platforms, a wider grasp of technologies is required to produce narratives across various platforms (O'Donnell, 2009; 2011). As well as this, there is also an accompanying need for a wider grasp of how audiences interact and engage with those physical platforms.

*"Convergence, then, is not a space where 'media systems coexist and where media content flows fluidly across them' (Jenkins, 2006: 322), but a labour space where media producers work extensively to keep media technologies, digital encoded data in proprietary formats, and media organizations with little interest in cooperating with one another beyond economic gain, from flying apart into their 'component parts' (O'Donnell, 2011, p. 282).*

If this view of media convergence is taken, transmedia storytelling strategy needs to account for a higher degree of understanding for how media platforms and audience behaviours associated with them operate. Evans raises this as a gap in current transmedia research as the interactions of different platforms in the minds of consumers are still, for the most part, uncharted and can lead to conflicting forms of engagement (Evans, 2008). For media extensions to the *Spooks* television series, there was a lack of crossover between the game and the television show because they both represented different forms of engagement. The show allowed people to passively immerse themselves in the narrative, living vicariously through the characters. The game, on the other hand, required active engagement and a first person scenario, shaping what was on screen. In Evans' opinion, the *Spooks* branded game

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<sup>20</sup> Media convergence, participatory culture and collective intelligence respectively

shut off the form of engagement most desired by the audience, which was living vicariously through the characters on screen. She identifies a gap in transmedia scholarship in relation to understanding and planning for different forms of engagement in media platforms without shutting off the primary drivers for why people are engaging with the narrative world in the first place (Evans, 2008).

Even if we apply the earlier notion of story modes instead of media platforms that was discussed in Section 2.1.3, narrative producers need to consider both the physical requirements of media platforms that the various story modes of their narrative universe are being constructed upon, as well as the different forms of engagement that each story mode will engender. As Section 2.2.1 discusses, using strategic thinking enables us to unify analysis of engagement and involvement with an understanding of the context in which a narrative world is operating. This represents a key gap in need of further research and, by using interdisciplinary literature to address this gap, it also represents a unique contribution of this thesis.

### **Participatory Culture and Collective Intelligence (Passive Spectatorship)**

According to Jenkins, implementing a transmedia strategy is suited to the current climate, because audiences acting like “hunters and gatherers” of entertainment content that interests them. Audiences want to participate and there are multiple points of contact available in transmedia worlds that can appeal to multiple levels of interest (Jenkins, 2006). This, in turn, allows audiences to engage in as much of the story world as they wish. It engenders further engagement by rewarding this hunter/gatherer persona. The transmedia experience built around the television show *Lost* is used by multiple scholars as an example of this (Ward, 2009; Graves, 2011; Smith, 2011; Matsunaga Sasaki, 2012; Mittell, 2012; Scolari, 2013). Audiences were given an augmented reality game centred around a fictional research project called *The Dhamra Initiative*. Additionally, they were also given podcasts, online video and websites to expand the world beyond the television show. This was designed so that the more an audience member wanted to hunt for answers to mysteries within the world of *Lost*, the more they would be rewarded with clues and additional narrative to motivate them further, resulting in deepening their level of engagement with the brand.

This type of storytelling creates deeper engagement with a fan base because it speaks to the collective intelligence of fan groups. Transmedia storytelling provides a space in which audiences feel free to become “prod-users”<sup>21</sup>, interacting with and promoting the story world through their own fan-produced media such as videos and fan-fiction (Bird, 2011).

*“Jenkins, in defining the prod-user, argues that there is ‘a new kind of cultural power emerging as fans bond together within larger communities, pool their information, shape each other’s opinions, and develop a greater self-consciousness about their shared agendas and common interests’ (2007, pp. 362-363). Media producers have been pushed to modify their products in response to fan demands: ‘we might think of these new knowledge communities as collective bargaining units for consumers’ (p. 363)” (Carpentier, 2011, p. 506).*

Prominent transmedia practitioner Lance Weiler goes even further than Jenkins, claiming that notions of a passive audience member are now dead and that producers are faced with an active audience that expects to be involved in discussions about content and to feel like they are able create their own additions to the story world (Weiler, 2010).

However, there are those that caution heavily against assuming that an active audience is the dominant consideration in constructing entertainment. In a critique of Jenkins’ convergence culture, Bird (2011) cautions that, “in our embrace of the prod-user, we should not lose sight of the more mundane, internalized, even passive articulation with media that characterizes a great deal of media consumption” (p. 505). There is a key difference between someone *interacting* with a media world, and someone *participating* in that world by actively creating their own content and participating in discussion boards (Balnaves, Donald, & Shoemith, 2009). A person can passively interact with media. It requires an active audience member to participate by actively making decisions and driving that interaction (García-Avilés, 2012) There may be a growing culture of participation at present, but in implementing a transmedia strategy, a gap in the literature is apparent in conceiving how transmedia narratives are constructed to balance passive/active audience participation.

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<sup>21</sup> A term borrowed from the work of Axel Bruns on consumer culture (Bruns 2006).



For transmedia storytelling to be a useful strategy for practitioners, it means that a practitioner must design for both interaction and participation in how audiences will engage with the story world. As is highlighted in Pearson (2013), communities and discussion generated by an audience is the most effective kind of engagement, with top-down or producer controlled communities often considered inauthentic and lacking in providing fans with permanence or identity. Producers today need to constantly adapt to the actions of a small but highly active portion of the audience (Budica et al., 2010). Further research into audience engagement in the transmedia context is clearly necessary to ascertain how passive and active members of the audience interact and, as a result, influence the engagement of other audience members and the overall success of the story world. This is a key consideration found by this literature review and built into the construction of the theoretical lens that follows in Chapter Three.

### **2.2.3 Section Summary**

This section established that there are substantial gaps in the creative literature due to a focus on transmedia storytelling being predicated upon the idea of convergence culture and transmedia's focus on generating audience engagement. Section 2.2.1 examined the idea of audience engagement and the disciplinary fracture that it represents to transmedia storytelling. It found that, despite a focus upon audience engagement in transmedia research, there is yet to be a definitive model for audience engagement in transmedia storytelling. It also found that the media engagement model provided by Askwith can provide a framework for an initial analysis of transmedia's capacity to engender audience engagement. Section 2.2.2 then reviewed Jenkins' notion of convergence culture and its relation to audience engagement in the context of transmedia storytelling. It found gaps in the existing literature relating to all three of the interrelating concepts of participatory culture, media convergence and collective intelligence that he bases the introduction of convergence culture upon. All of these gaps pointed to the need for further study in transmedia storytelling to consider how transmedia strategies are used to create and maintain audience engagement.

The next section, Section 2.3, reviews the business and economic literature concerning strategic thought and establishes foundational strategic concepts that are needed to

construct an analytical framework through which transmedia storytelling can be analysed to determine the form and role of strategy/strategic thinking in its ability to engage an audience and produce a creative and commercial success.

## 2.3 LITERATURE REVIEW: STRATEGY THEORY

The previous sections establish that there are key gaps in the literature regarding the analysis of transmedia storytelling as strategy (Section 2.1) and current conceptions of audience engagement in a transmedia storytelling context (Section 2.2). This section reviews strategic management literature to develop an understanding of relevant strategic concepts that can then be directly applied to the analysis of transmedia storytelling.

Section 2.3.1 defines strategy and relates this definition to the gap in the literature found by Section 2.1. Section 2.3.2 investigates appropriate strategic frameworks for addressing the strategy gap. It finds that current strategic models integrated into creative industries analysis are too macro-focussed to enable an effective analysis of transmedia storytelling strategy in practice. Section 2.3.3 argues that existing theory specifically concerning the pursuit of competitive advantage is better suited to this task. Section 2.3.4 then explores differing perspectives on achieving competitive advantage, reviewing theory on strategic thinking and strategy formation. It finds that a consideration for why and how different transmedia storytelling strategies are formed is missing from current scholarly analysis.

### 2.3.1 Defining Strategy – historical context

Rooted in ancient military tradition<sup>22</sup>, but only emerging as a discipline of theoretical inquiry in the post-World War II era, strategic management theory has a 60+ year old history of intensive research and theoretical discussion. Despite this longevity there is no universally agreed definition of strategy (Oliver, 2001). This literature review and analysis did however, identify two patterns of definition that have direct relevance to the analysis of transmedia storytelling. The first is viewing strategy as a complex blend of pre-planned and reactionary, interactive activities that are undertaken to achieve a goal or objective (Leavy, 1996). This

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<sup>22</sup> Military leaders in Ancient Greece would take the title of *Stratégos* - those who were in charge of coordinating soldiers and resources to best achieve the army's objectives (Hamel 1998). Early scholars, such as Chandler (1962) and Ansoff (1965) rooted their concepts of strategy in this military tradition (Leavy, 1996).

view analyses strategy as "the pattern of objectives, purposes or goals and major policies and plans for achieving these goals" (Learned et al. (1965) in Hax & Majluf, 1986). The second pattern is that those same activities are related to the pursuit of a sustainable unique position within a marketplace (competitive advantage) (Porter, 1985; Magretta, 2012).

The first view does not adequately encapsulate the entire process of strategy, especially in a transmedia storytelling context. It encompasses the pre-planned pathway that an organisation undertakes (Ansoff, 1965; 1979) and the nuanced analysis of how that organisation reacts to changes within the environment (Mintzberg, 1990). However, viewing strategy as a stand-alone process does not consider contextually why an organisation develops that strategy for a business in the first place or how strategy can be used to do more than optimise processes or just imitate competition (Hamel & Prahalad, 1989). Using the first view of strategy would result in an analysis of transmedia storytelling that omitted comparative differences between organisations making different narrative worlds to serve different markets and achieve different objectives.

The second view is that strategy is a process for achieving competitive advantage. This view was introduced by Porter(1985), and is commonly used in contemporary strategic theory to refer to "the long-term tactical philosophy adopted by the organisation through which to outperform other organisations"(Chaston, 2012, p. 22). From this perspective, seeking to outperform other organisations undertaking the same activities (i.e. making better films or writing better novels) is not strategy, it is instead the pursuit of operational effectiveness (Porter, 1996). Strategy is what a company does *differently* to its rivals, the activities that it undertakes that give it a unique position and a sustainable competitive advantage (Porter, 1980; Magretta, 2012). Whether it is by focussing on growth and optimally leveraging available resources (resource-based view) (Penrose, 1959; Wernerfelt, 1984; Furey & Friedman, 2012) or by identifying unsatisfied customer or audience opportunities and reshaping an organisation, by stretching existing resources to capitalise on those opportunities and provide superior value to those customers (audiences) (Hamel & Prahalad, 1989; Vorhies & Harker, 2000), this view of strategy positions it as the pursuit of a sustainable advantage (Bressler, 2012).

This second definition of strategy is used by this study because it is directly relevant to transmedia storytelling research. Transmedia scholars do not talk about making better media platforms than their rivals, rather their work discusses what it is that makes the transmedia experience different to other audience experiences (Dena, 2009). Following this second view means analysing what it is done differently among transmedia storytellers i.e. *how does the use of transmedia storytelling provide some practitioners with a sustainable competitive advantage?*

### **2.3.2 Finding a Strategic Framework Relevant to Transmedia Storytelling**

With this definition of strategy in mind, this section surveys the literature to identify a relevant strategic framework for the analysis of transmedia storytelling. It investigates two paradigms for thinking about strategy - structuralism and efficiency. It finds that a framework guided by the efficiency paradigm is best suited for the analysis of transmedia storytelling.

Structuralist theory argues that the structure of markets dictates firm conduct which, in turn, determines the firm's performance in the market (Scherer, 1996, pp. 2-4). Strategists following this paradigm, generally apply the resourced-based view (RBV) of strategy which emphasises internal sources of competitive advantage (Barney & Clark, 2007). RBV contends that strategic performance is largely due to how companies leverage their resources to match external threats and opportunities (Wernerfelt, 1984).

Hsu and Shih (2012), the only other researchers found by this review to apply strategic management theory to transmedia storytelling, use a structuralist, RBV approach to guide their analysis. They argue that transmedia storytelling provides practitioners with significant competitive advantage because it allows storytelling companies to form strategic alliances, sharing unique resources to create experiences that competitors cannot replicate. They provide the example of *Fun Travel*, a blend of real-world tours and digital storytelling, arguing that it achieves significant competitive advantage because its producers formed alliances with tour companies, television producers and hotel booking agencies to create a cost effective, multiplatform world (Hsu & Shih, 2012, pp. 18-19).

However, structuralist strategic analysis has a fundamental weakness.

*"[Structuralist analysis] fails to explain, or even address, the central problem of business strategy. Why do some firms do better than others, operating in the same environment?"* (Kay, 1997, p. 2)

Hsu and Shih's framework is highly effective for describing the structural benefits of transmedia storytelling as a strategy for Taiwanese public broadcasters. However, it leaves no room for analysing what it is that differentiates uses of transmedia storytelling strategy. For example, what is it that prevents *Fun Travel* from being replicated and improved upon by a larger conglomerate with access to more resources? Not only this, but Hsu and Shih's framework is at odds with the core focus of leading transmedia research.

When leading scholars such as Jenkins (2006), Dena (2009), Giovagnoli (2011) and Scolari (2013) investigate the transmedia concept, they do so by centring their analysis on the entertainment market. In particular, they analyse how storytelling companies create worlds that leverage changes to audience behaviour within that market. For example, Jenkins (2006) grounds the rise of transmedia storytelling today on storytellers aligning themselves with their audiences; creating experiences that appeal to a modern audience empowered by digital technology (convergence) to work together (collective intelligence), share and participate in narratives that they enjoy (participatory culture). This focus upon the audience reflects an opposing way of thinking about strategy to structuralist enquiry, that of the efficiency paradigm.

The efficiency paradigm proposes that the actions of firms determines industry structure, that dominant firms are those who are more efficient than their rivals (Rosenbaum, 1998). By knowing a market better (Porter, 1991), being more efficient at generating value for that market and its customers (Rosenbaum, 1998) and/or avoid competition altogether (Kim & Mauborgne, 2013) a firm succeeds and industries develop. Analysing strategy under this paradigm means analysing how firms differentiate themselves from one another by understanding their market (market dynamics, competitive environment and consumer behaviours) and then aligning their resources accordingly (Collis & Montgomery, 1998).

Competitive advantage is a vital consideration within this view of strategy, as it focusses analysis upon the different ways that companies leverage their resources to succeed (Hamel & Prahalad, 1989)<sup>23</sup>.

The efficiency paradigm directly reflects the way that transmedia storytellers, such as Dena (2008), Phillips (2012) and Bernardo (Bernardo, 2011a; 2014) write about their uses of transmedia storytelling. Bernardo describes the process of developing the project *Sofia's Diary* as based on his understanding of how Portuguese teenagers were consuming media. Narratives, platforms and strategy were developed with this understanding of the audience in mind so that *Sofia's Diary* would be unlike anything those teenagers had experienced before. Throughout the experience, Bernardo consistently analysed audience response and adjusted *Sofia's Diary* to maximise engagement.

As this section demonstrates, a comprehensive analysis of transmedia storytelling strategy requires a framework guided by the efficiency paradigm. Under this paradigm, examining transmedia storytelling means returning to concepts of competitive strategy, concepts that 2.3.1 demonstrates are directly linked to competitive advantage and Porter.

### **2.3.3 Porter and Transmedia Storytelling Strategy**

Chaston (2012) argues that any discussion of competitive strategy needs to be informed by the seminal work of Michael Porter. Porter's concepts of strategy directly inform and guide contemporary strategy scholarship (Magretta, 2012). Even rivals, such as Christensen(2003) and Kim & Mauborgne(2013) leverage Porter's contention that the ideal form of competitive strategy, when seeking to differentiate your business, is strategy that leaves you with no direct competitors (Porter, 1980). As this section demonstrates, not only is competitive strategy reliant upon an understanding of Porter, but portions of his work have direct relevance to discussions and analysis already occurring within the transmedia literature. This relevance can be divided up into two areas:

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<sup>23</sup> Hamel and Prahalad (1989) epitomise this perspective, arguing that a company can establish a vision for success based on a desired position within a market and then stretch their resources to achieve that goal (strategic intent). However, an alternate, resource based view also exists within this paradigm in which a firm is seen as making the most profit by optimising available resources to meet market demand (Barney 2007).

1. Porter's Harvard Business Review (HBR) article *Know Your Place* (1991) is directly relevant to debate about transmedia storytelling as a tool for large established incumbents and independent storytellers alike because it highlights that individual company strategies differ in their approach dependent upon market context, their competitive capabilities and the objectives of the organisation.
2. Each part of his definition of strategy in Porter's HBR article *What is Strategy?* (1996) reflects the goals outlined by media culture scholars for the development of transmedia storytelling. Porter links sustainable success to "combining activities" and amplifying the value produced by a business (p.73), a process that is also the guiding ethos of transmedia producers who seek to create a "whole that is bigger than the sum of its parts"(Falzon, 2012, p. 926).

*Know Your Place* (1991) argues that individual strategies differ because of a company's competitive capabilities and the goals of an individual firm. As this sub-section shows, this aligns directly with a current gap in transmedia storytelling research<sup>24</sup>.

A pervasive discussion within transmedia and broader media culture scholarship is that large, dominant incumbent media producers, such as Hollywood studios, and small independent and/or emerging producers use transmedia storytelling to compete in a vast, expanding and increasingly crowded global video market.

*"Many scholars and critics have noted that media ownership is controlled by an increasingly small number of mega-corporations. Viacom, Time Warner, News Corp, Clear Channel and Disney all have separate divisions for the creation of TV shows, films, comics, and video games. These divisions allow media conglomerates to retain a percentage of the profits from each branch, rather than having to outsource such components to a competitor. Due to this horizontal integration, the entertainment*

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<sup>24</sup> Bressler(2012) even argues that Porter is directly relevant to how large and small businesses interact, as "according to Porter (1996), "strategy can be viewed as building defences against the competitive forces or as finding positions in the industry where the forces are weakest" (p. 35)".

*industry has an incentive to produce content that moves fluidly across media sectors”*  
(Smith, 2009, p. 10).

Smith argues that incumbents within the media production sphere have been able to adapt and hold on to their place of dominance by using transmedia storytelling. A small oligopoly of Hollywood production companies has dominated media production related to the motion picture business for the last century (Silver, 2007). This is perhaps why the most visible and most commonly studied examples of transmedia storytelling in the literature are those undertaken by large companies, such as the major Hollywood studios.

Alongside these highly visible, larger budget narrative worlds, there is also consideration of low budget and niche styles of transmedia storytelling within the literature. Cunningham (2013) discusses how smaller companies turn to transmedia storytelling, because they are forced to innovate in order to remain competitive. Similarly, Bernardo (2014) writes that transmedia storytelling allowed him to develop and grow successful and sustainable narrative worlds on relatively small budgets by targeting specific under-served audience segments that main stream media were ignoring. This directly reflects the core message of Porter’s *Know Your Place* article.

*“Unlike the giants, small businesses cannot rely on the inertia of the marketplace for their survival. Nor can they succeed by brute force, throwing resources at problems. On the contrary, they have to see their competitive environment with particular clarity, and they have to stake out and protect a position they can defend”* (Porter, 1991, p. 1).

To apply this sort of media culture research effectively and analyse how and why these organisations chose transmedia storytelling in both contexts, there is a need for a framework that allows for direct comparison of why different organisations adopt transmedia storytelling.

Porter (1991) argues that competitive advantage can be attained using three generic strategies: 1) differentiation to a mass audience, 2) cost leadership (i.e. low cost) to a mass

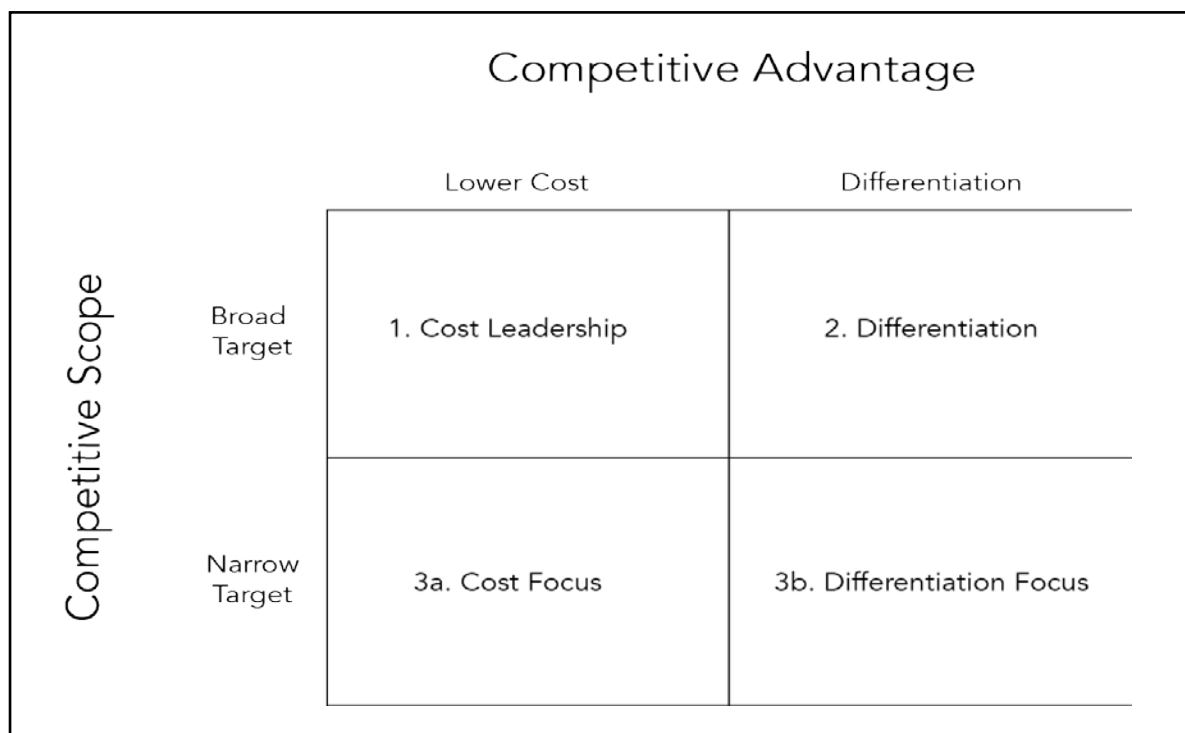


market or 3) focus - targeting specific market segments/audiences and within that segment using either differentiation or cost leadership to a niche audience.

*"You can have consistently lower costs than your rivals...alternatively, you can differentiate your product or service from your competitors, in effect making yourself unique at delivering something your customers think is important. That allows you to command a premium price"* (Porter, 1991)

Referencing his earlier research on generic strategies for competitive advantage, Porter's article *Know Your Place* puts forward the following framework (Figure 3 below) for comparing the strategic decisions of different organisations. In particular, he links smaller independent companies to a narrow competitive scope, with their strategies specifically catered towards niche audience targets, and large companies to a broad target audience.

**Figure 3: Porter's Generic Strategies**



(Diagram from the University of Cambridge (2015), reproduced from pp.11-15 of Porter 1985)

As Figure 3 above illustrates, the scope of a company's target audience or marketplace combines with the focus of a company's activities, allowing for an analyst to assess three generic strategies: differentiation, cost leadership and focus.

1. *Differentiation* refers to a firm seeking to compete by being unique to its buyers. Uniqueness is often used to command a premium price by appealing to one or more aspects of a product that the customers of that industry perceive as important. True differentiation establishes a position that is very difficult to replicate and thus generates sustained competitive advantage (Porter, 1985).
2. *Cost leadership* refers to a firm becoming the leader of its industry based on lower operational costs than its competitors. This can refer to economies of scale, proprietary technology, access to raw materials – anything that produces a sustainable advantage through a superior return on investment for the firm (Porter, 1985).
3. *Focus* refers to a company either;
  - a. seeking to compete in a niche market segment by providing a lower cost product that represents good value
  - b. seeking to differentiate their product from others in a niche market, either servicing an unusual need or creating superior value in a different way e.g. a delivery system that best serves that market (Porter, 1985; University of Cambridge, n.d.)

Each of these categories, when considered alongside existing transmedia research, provide classifications of storytelling strategies that allow for large and small scale story world approaches to be equally investigated and compared.

A company that has a broad scope, “serving more or less all types of customers in an industry” (Porter, 1991), reflects the wide audience sought by Hollywood style transmedia (Phillips, 2012). Within this broad scope, there is also room for considering whether an organisation is focussed on cost.

*“The bigger players, including PSBs [public service broadcasters], have learned lessons about the cost-effectiveness of multi-platform productions (high costs are not necessarily reflected in audience numbers), and they take care to produce only small numbers of blockbuster products - heavily marketed content brands” (Ibrus & Ojamaa, 2014).*

As this quote demonstrates, not only does the scope component of Porter's generic strategies have relevance in a transmedia storytelling context, but discussions of cost-leadership and differentiation are vital in comparing transmedia strategy.

Smaller projects often differentiate themselves by appealing to specific niche audiences, creating culturally relevant entertainment experiences that appeal to too small of an audience for larger conglomerates to bother. For example, *the American Journal of Public Health* directly attributes the transmedia project *East Los High* as provoking discussion of health issues and the use of health services specific to Latin American youth in Los Angeles (Wang & Singhal, 2016). Coordinating with a plethora of NGOs, such as The Planned Parenthood Federation of America, the producers of *East Los High* expanded upon a central television series. They created online blogs and additional narrative content, hosted on their website, that used character driven narratives to deal directly with issues such as unplanned pregnancy and correct condom use. The relevance of this program to a young Latina/o audience, and the additional social benefits provided by the transmedia narrative, led to the independent production being renewed for four seasons (Gambini, 2016). This represents a vastly different type of transmedia strategy to the use of transmedia by large Hollywood conglomerates, who seek to differentiate their narrative worlds through investment in expensive immersive content, big name stars and expensive special effects (Fast & Örnebring, 2015). In both cases evaluating scope and the way in which production companies differentiate their narrative worlds is important to understanding why their strategy works.

Similarly, media culture research tells us that cost-leadership in transmedia storytelling does not only have to refer to the cost of production, but can also reference lowering the cost of engaging with content for audiences. Transmedia worlds can be made with a focus on connecting different experiences together, either lowering the risk for the audience to engage with multiple narratives through familiar characters or mythology (Beddows, 2012b), or lowering the time that an audience member has to spend seeking out different, but enjoyable narratives (Gambarato, 2012a). For example, *Doctor Who* is a global brand centralised around a highly successful television series. It uses online blogs, websites, radio, educational apps, live entertainment and more to reach an international, all ages audience.

However, as a project created by a public broadcaster, the BBC, it can't afford to operate with the same production values as other global brands (such as those created by Hollywood)<sup>25</sup>. Instead it competes by proving itself to be a cost-effective investment, delivering a mix of social, cultural and commercial outcomes with its narrative world that are often easily accessible and freely available to the general public (Johnson, 2013). Comparing how these strategic uses of transmedia storytelling differ is vital to our understanding of when and why a producer could use a transmedia storytelling to their advantage.

The frameworks put forward by Porter, provide a way for strategic investigation to address these considerations at an individual, project by project level. They mirror current debate within transmedia scholarship and highlight that the strategy gap is about conceptualising how different production companies use transmedia storytelling to perform effectively in their own individual circumstances, whether that be as global brands or niche producers.

### ***Similarities in Objectives***

Not only does Porter provide a methodology for considering the differences between worlds created by well-funded entertainment incumbents and smaller scale independent studies, but, as this sub-section outlines, Porter's elements of business strategy also align with objectives for story worlds discussed within transmedia research.

*What is Strategy?* breaks the analysis of strategy into three segments: defining a company's unique position, trade-offs and strategic fit (Porter, 1996). These segments then drive the success of a strategy – its ability to achieve competitive advantage. A definition of each is found below, followed by a discussion of how each aspect of competitive advantage aligns with transmedia storytelling research.

Porter defines each component of competitive advantage as follows:

**Unique positioning** means delivering “a unique mix of value... Choosing to perform activities differently or to perform different activities to rivals” (Porter, 1996, p. 64).

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<sup>25</sup> This is explored in greater detail in Chapter 4, which is dedicated to a case study of the *Doctor Who* property.

It involves a linking together of the value proposition (what the company or organisation is providing for its audience) and the value chain (how the company or organisation coordinates its resources to create the maximum value for that audience (Magretta, 2012)<sup>26</sup>.

**Trade-offs** refer to the necessary sacrifices that a company or firm intentionally makes to create their unique position and ensure its sustainability. A unique position cannot be attained without actively making trade-offs that forgo the advantages of another position (Porter, 1996).

**Strategic Fit** stipulates that strategy is about *combining* activities. "Fit locks out competitors by creating a chain that is as strong as its strongest link" (Porter, 1996, p. 70). It is broken into three tiers:

1. Simple consistency between activities and overall strategy
2. Each activity reinforcing other activities
3. Optimisation of effort

Each of these components of competitive advantage has direct parallel in the context of transmedia storytelling.

**Unique positioning** reflects research on best practice in transmedia. In transmedia worlds, leveraging a unique mix of media platforms to tell a narrative provides an audience with new forms of engagement that keep them interested, engaged and entertained (Alexander, 2011). For example, Smith (2009), Graves (2011) and Scolari (2013) all demonstrate that the variety of media platforms that expand the narrative world of the *Lost* transmedia franchise created a unique and ultimately successful experience for its audience. Not only did *Lost* provide additional narratives and story modes for the engaged audience members to explore (augmented reality games, novels, web content and music videos), but they also used these

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<sup>26</sup> Magretta writes specifically about Porter's relevance to contemporary business practices, showing that these particular advances on strategy, while now two decades old, still underpin the majority of business thinking today. She argues that those who content with Porter about these elements of strategy are often actually expanding upon his ideals rather than proving any logical inconsistencies.

narratives to bring audience attention back to the central story mode of the television series. Audiences were presented with a truly unique experience, with the ability to explore the mystery of the television narrative through this mix of immersive, personal and participatory story modes.

**Trade-offs** touches upon the considerations for audience engagement explored in Section 2.2. Mixing different platforms and forms of engagement represents a trade off in the benefits and restrictions that each story mode provides for audience interaction and participation among those narrative pieces<sup>27</sup>. For example, the *Syfy* world *Defiance* attempted to heighten engagement by coordinating a game and television show simultaneously. This unique engagement resulted in high initial audience numbers for both platforms but quickly fell off, as most audience members did not have time to constantly travel back and forth between both platforms to gain the full experience (Graser, 2013). Later the producers adjusted their strategy to preference the television series. However, the enhanced cost of maintaining both core platforms eventually led to the series' cancellation after three seasons, trading longevity for experimentation and an enhanced experience for consumers of both story modes.

**Strategic Fit** directly reflects the transmedia ideal (outlined in Section 2.1.1) of each platform working together to create a whole that is greater than the sum of its parts. In particular, Section 2.2 of the literature review highlighted that producers have a growing focus upon maintaining and rewarding their hard-core fan communities to create and sustain audience engagement. For example,

*"Lizzie Bennet Diaries invited all audiences into the tent, whether they sought a linear or a fully-immersive experience. The transmedia project explored the boundaries of perspective storytelling using multiple platforms to present different characters' POVs; it authentically told the story in real time with real-world platforms; it engaged and interacted directly with its audience ambassadors; and it responded to their reactions, allowing them to shape storylines and character development"* (Zeiser, 2015a, p. 408).

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<sup>27</sup> For example, choosing a video game to relay a portion of narrative relies upon the audience to drive the narrative themselves and to actively want to participate in the narrative, rather than simply sitting back and watching (Evans 2008).

This thesis capitalises on the cross-compatibility of concepts described above to integrate Porter's notion of strategic competitive advantage into the construction of a theoretical lens. This lens then facilitates the collection and analysis of data pertaining to three original transmedia case studies in this thesis (Chapters Four, Five and Six). As is shown through the summary of transmedia research on different narrative approaches in Appendix 2.3, current scholars have provided us with media culture based considerations when analysing narrative choices. However, no-one has addressed the need for a comprehensive framework for the holistic analysis of narrative works. This section, therefore, confirms the need for construction of a holistic framework for transmedia theory and demonstrates the applicability of Porter's strategic framework as a viable solution.

#### **2.3.4 Forming Strategies**

As the previous section established, analysing transmedia storytelling through a Porterian lens involves an investigation into how each component of the strategy (unique position, trade-offs and strategic fit) works to provide competitive advantage for the producers that choose to undertake it. However, as a further review of the literature has found, it is insufficient to consider how a strategy is constructed and implemented without first considering how and why it has been formed. A point of unity within both media culture and business strategy is the consideration of external environments in which strategies take place and analysing the impact that that has on the formation of strategies. Strategic theorists Aaker (1998) and Chaston (2012) as well as transmedia researchers Perryman (2008) and Fast and Örnebring (2015) are explicit in considering the influence that context has upon how people form their approaches to their business (or story worlds). Having linked transmedia storytelling to Porter's competitive strategy in Section 2.3.1, this section expands our understanding of strategy in a transmedia setting by reviewing literature concerning strategic formulation.

#### **The Strategic Formulation Process**

Reviewing business literature indicated that how transmedia strategies are formed is a key consideration in analysing how transmedia storytelling operates in practice. The review found that strategic formulation is generally broken up into a balance of one of two broad

schools of thought; a pre-planned extrapolation of the past (Ansoff & Antoniou, 2004; Moussetis, 2011) or an incrementally developed reaction to current events (Mintzberg, 1990; Mintzberg & Lampel, 1999). Both of these paradigms are not mutually exclusive and are influenced by mixture of external and internal pressures on the organisation developing the strategy for that particular business venture (Aaker, 1998). For instance, the economic resources of the organisation, the demands of an already established audience for the organisation or the individual expertise of those in charge all represent different influencing factors on strategic development.

This type of analysis is directly called for in the transmedia literature. Fast and Örnebring use a case study of *The Shadow* (1931-present) and *Transformers* (1984-present) to argue that more research is needed to compare projects with “planned, strategic aspects” and those that are “more ad hoc/contingent than planned; and/or contain disjunctions that are actually the result of strategic planning decisions” (Fast & Örnebring, 2015, p. 2). Likewise, transmedia case studies of *Doctor Who* (Perryman, 2008, Johnson, 2013), *Buffy* (Beddows, 2012a), *Marvel: Agents of S.H.I.E.L.D.* (Hadas, 2014) and *Lost* (Graves, 2011; Matsunaga Sasaki, 2012; Scolari, 2013) all involve an explicit consideration of context. They all search for why particular strategies formed the way that they did. Analysing transmedia storytelling from a strategic standpoint provides us with a language and a set of tools for reviewing this aspect of transmedia storytelling. Considering the context and why particular companies chose to adopt transmedia storytelling as a response to that context will help us to understand why particular approaches, be they cost, differentiation or focus, were chosen and how they differ. In combination with Porter’s generic strategies for competition (Section 2.3.1), this will provide a holistic framework for the analysis of transmedia storytelling approaches.

#### 2.4 CHAPTER SUMMARY AND GAPS IN THE LITERATURE

This chapter reviews the literature on transmedia storytelling strategy. It establishes a working definition, parameters for transmedia storytelling, and that transmedia storytelling is a strategy focussed upon audience engagement. However, throughout this review no literature was found that analysed transmedia storytelling as a strategy. *This is a key gap in*



*the literature*. While various theories in the field of transmedia account for elements of strategy, none of those theories provide a comprehensive framework for its analysis. An analysis of literature in the field of business strategy established that Porter's strategic frameworks can be applied to transmedia storytelling to supplement this gap.

### **Chapter Summary**

Throughout this chapter, each section has established key facets of this gap.

#### **Section 2.1: Transmedia**

- There is an absence of literature that analyses transmedia storytelling using strategic thought, despite consistent references to it in the literature as a strategy.

#### **Section 2.2: Audience Engagement**

- There is a lack of a transmedia specific framework for understanding audience engagement.
- Established a need for further study in transmedia storytelling to consider how transmedia strategies are used to create and maintain audience engagement.

#### **Section 2.3: Strategy**

- A need to consider how and why transmedia strategies are implemented.
- A need to also consider why different transmedia strategies form and how this influences their form and development.

In uncovering these gaps, a core theme emerged from each section of the review. From Section 2.1 it is clear that, while there is a growing body of research on transmedia storytelling, transmedia storytelling as strategy requires further analysis. Section 2.2 establishes a fundamental link between the implementation of transmedia storytelling and the pursuit of audience engagement by practitioners. Section 2.3 then links that pursuit of strategy with the pursuit of competitive advantage, showing that existing transmedia scholars have begun to discuss various methods for achieving a unique position with their narrative worlds. However, it also highlighted that current research lacks the guidance of a framework, such as strategic thinking, to bring these elements together.

### ***A Direction for the Research***

According to Denzin and Lincoln (2011) qualitative research as consists of three generic activities: theory, method and analysis (ontology, epistemology and methodology).

*"[A] situated researcher approaches the work with a set of ideas, a framework (theory, ontology) that specifies a set of questions (method, epistemology), which are then examined in specific ways (analysis, methodology). That is, empirical materials bearing on the question are then analysed and written about"* (Lincoln & Denzin, 2011, p. 11).

This chapter has undertaken the first step, drawing out a set of ideas and a framework of theory by reviewing literature relevant to transmedia storytelling and strategic thinking. Combining the gaps in the literature identified together, two guiding questions for the research become apparent;

- 1. Why do some producers choose to use transmedia storytelling as a strategy for constructing a narrative world and engaging their audience with that world?*
- 2. How is the type of strategy chosen linked to and influenced by the broader context in which it is created?*

The next chapter, Chapter Three, specifies a set of guiding questions and uses them to create a theoretical framework from relevant literature to facilitate a rigorous examination of three original transmedia case studies developed for this study. This framework is constructed in the form of an analytical lens and is guided by the questions above. The theoretical lens holistically integrates key existing theories drawn from inter-disciplinary fields. Its construction creates a "specific way" or methodology for analysing transmedia storytelling strategy that is tested by its application to three case studies in Chapters Four, Five and Six.

## CHAPTER 3: METHODOLOGY

The previous chapter, the literature review, establishes two guiding questions for this research:

1. *Why do some producers choose to use transmedia storytelling as a strategy for constructing a narrative world and engaging their audience with that world?*
2. *How is the type of strategy chosen linked to and influenced by the broader context in which it is created?*

To address these questions, this chapter outlines the methodology of this thesis, which is broken into two stages.

Stage one, found in Section 3.1, is the construction a theoretical lens, patterned after Jones (2001) and Silver (2007). This lens is designed to holistically integrate relevant business strategy research together with relevant findings from media and cultural studies, marketing and advertising research. This enables a rigorous investigation of transmedia storytelling from a strategic perspective.

Stage two, found in Section 3.2, is a traditional case analysis approach. This thesis conducts three original case studies of successful, pioneering transmedia projects. Each case is individually analysed through the 'theoretical lens', to enable the researcher to identify what forms of transmedia storytelling strategy were used by the practitioners and to determine what the critical factors were that facilitated both creative and commercial success in each case.

### **Precedent for this Method**

Use of a theoretical lens not only has precedent within qualitative media culture methodology (Denzin & Lincoln, 2011; Wertz, Charmaz, et al. 2011; Hartman, 2015), but also within business literature directly concerned with the media industry. Specifically, it has previously been used to enable a better understanding of creative enterprise within the motion picture industry (Jones, 2001; Silver, 2007). In the first study, Jones (2001) established

a theoretical lens that integrated relevant theories in order to “gain better understanding of the co-evolutionary processes of entrepreneurial careers, institutional rules and competitive dynamics in emerging industries” (Jones, 2001, p. 911). Her study focused on the motion picture industry during its formative years in the silent film era. The second study, Silver (2007), integrates relevant economic, management and marketing theory into a theoretical lens through which a century of historical data is analysed to answer the research question: *how did Hollywood’s dominance arise in the movie industry and how has it been maintained?*

As the key gap identified in the literature review was an absence of the application of business theory to transmedia, this thesis is patterned after the empirical method of Jones (2001) and Silver (2007). Both studies provided a methodology for the application of business theory to the creative industries.

### 3.1 CONSTRUCTING THE THEORETICAL LENS

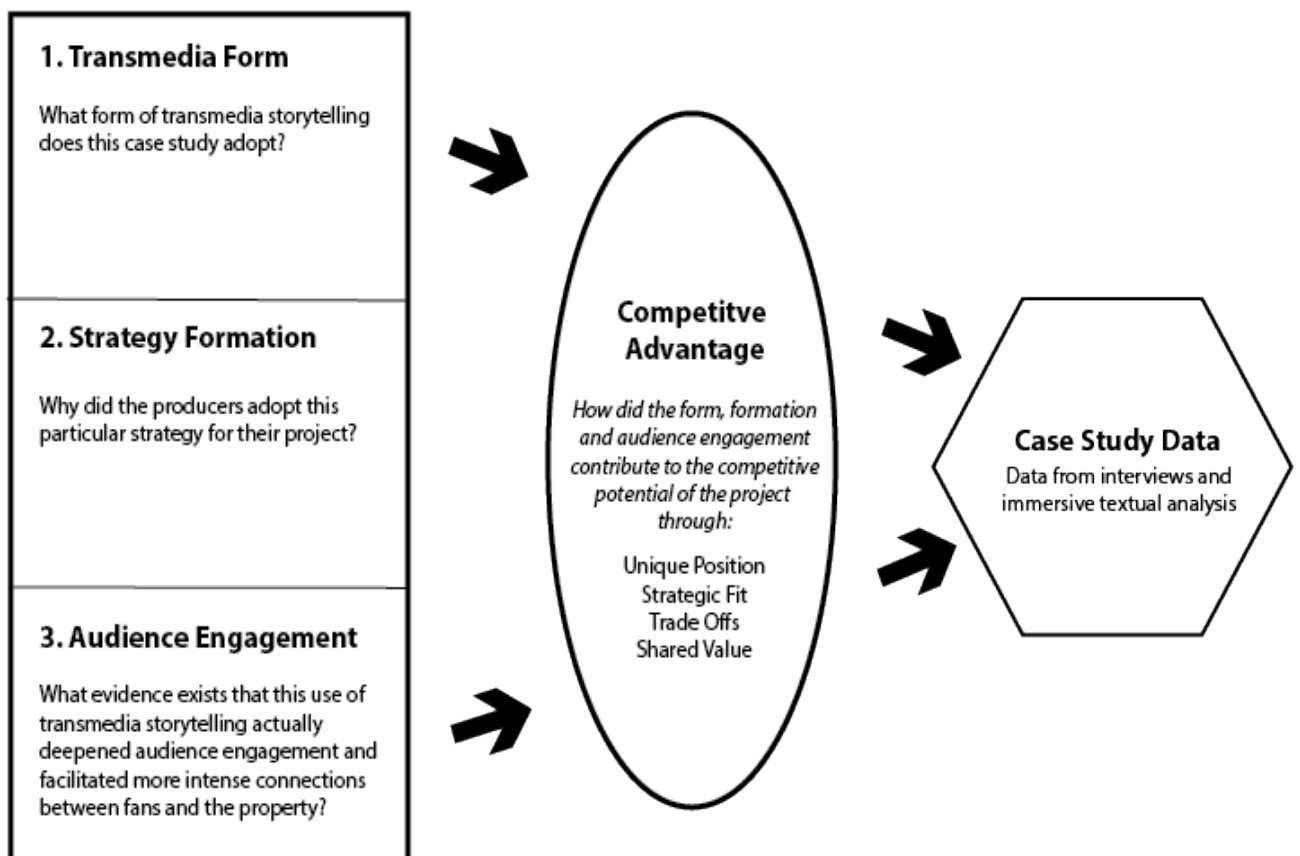
This section charts the development of the theoretical lens that this thesis constructs for transmedia case analysis. Patterned after Jones (2001) and Silver (2007) the theoretical lens is an original contribution to transmedia research. It draws together transmedia scholarship and transmedia practice and integrates it with strategic management and marketing theory, providing a tool for researchers and practitioners alike.

The literature review identifies clusters of transmedia research that could explain portions of the transmedia construct. However, none of the available research was able to holistically and comprehensively address each element of what it means for a practitioner to apply transmedia storytelling strategies to engage an audience. For example, Smith (2009) provides a model for analysing transmedia production. However, his model focuses on only a portion of the transmedia construct, television, and did not address the consumption of transmedia, the trade-offs required to adopt a transmedia approach, transmedia beyond the context of a central televised text or prolonging audience engagement with transmedia. Likewise Gambarato (2012a) provides a model for analysing the signs and systems of transmedia narratives through semiotics and both Dena (2008) and Phillips (2012) detailed how audience behaviour can be divided into different tiers of participation. Each explain an

aspect of transmedia storytelling but do not address the gap identified by this literature review, that of strategic analysis. It is from drawing together and synthesizing the early work of theoretical models like these, that this thesis applies strategic theory to create a holistic lens.

Creating such a theoretical lens involves the construction of a 'soft model', a holistic framework that synthesises existing theories for data analysis, centred around a gaps found by a review of the literature (Silver, 2007). This chapter creates guiding questions, structured around gaps identified in the literature review, which are then synthesised through the strategic framework for competitive advantage, adapted from Porter (1996). This then creates the soft model for analysing transmedia strategy, found in Figure 4, below.

*Figure 4: Strategic Lens*



The purpose of aligning elements through a lens like this is to have them “fit together” within the framework to provide a means by which the author can gain qualitative insights” (Silver, 2007, p. 43). In the case of this thesis, the purpose of such insights is to ascertain how transmedia storytelling strategy operates and how it can provide competitive advantage for practitioners in a cluttered video market.

The lens has four components, each of which is explored through a section of this chapter. First, it analyses the type of transmedia storytelling strategy being used (3.2.1). It then applies considerations for how a strategy is formed, seeking to understand why a producer chose a particular strategy and what influenced the producer’s decision to use transmedia storytelling strategy (3.2.2). Third, it provides a relevant framework for analysing how the producers designed the project to engage audiences (3.2.3). Finally, it distils this information through the lens of Porter’s competitive advantage (3.2.4).

### **3.1.1 Form of Transmedia Storytelling Strategy**

This component of the lens asks: *what form of transmedia storytelling does the project adopt?* It follows the typology of transmedia storytelling discussed in Section 2.1 of the literature review to classify different projects:

#### **1) Centralisation**

Is the transmedia story world centred on a particular story mode, decentralised or somewhere in between?

#### **2) Franchise, Portmanteau or Hybrid**

Is transmedia storytelling being used to tell one narrative (portmanteau transmedia), multiple narratives that are not dependent upon one another (“franchise” or “mono-media” transmedia), both or somewhere in-between (hybrid transmedia)?

### 3) Evergreen, Finite or Hybrid

How long is the world designed to be in operation? Is the story world intended to continue for as long as possible (evergreen) or is designed to be a finite project with a definitive start, middle and end?

In reviewing the literature, many scholars used oppositional language to aid in the comprehension of their findings, creating “either or” questions. For example, Phillips (2012) provides a strong counter point between “East Coast” and “West Coast” transmedia, positioning them as oppositional approaches by different types of producers with different goals. She ties together aspects of decentralisation and portmanteau transmedia under the banner of East Coast storytelling and the idea of centralised mono-media storytelling as the West Coast approach. However, at this stage it is unknown as to whether any of these elements represent spectrums of oppositional thought or are in fact interchangeable facets of a transmedia storytelling that can easily be used in conjunction with one another. Using the lens as a tool for analysis, this thesis is able to identify and compare various types of transmedia storytelling as they appear, acknowledging correlation, interrelation and interaction between the different forms of strategy. Applying the next two elements of the lens allows for comparative analysis of what these different forms of strategies achieve in practice for producers.

#### 3.1.2 Why Choose Transmedia Storytelling as a preferred Strategy?

Drawing from the strategic theory discussed in the literature review, the next part of the lens is led by the guiding question; *why did the producers choose this form of transmedia storytelling strategy for the project?* This allows for comparison between what caused different companies and producers to use transmedia storytelling and how and why these strategies were formed. As this section details, this helps to address gaps in the literature surrounding intention, external and internal influencing factors, strategic goals and strategic orientation.

## Intention

Section 2.3 of the literature review in Chapter Two acknowledges that extensive debate has been undertaken within the strategic literature relating to best practice for the formation of strategies. The differing schools of thought on strategic formulation represent different responses to threats and opportunities present in any marketplace (De Wit & Meyer, 2005). More broadly, however, they also illustrate that intention and implementation are often two different influences upon the formation of a strategy. A strategy does not need to be intentionally used to be in effect (Mintzberg, 1990), so consideration of this aspect of the lens must be given for both implementation and intention. Condensed into a question, this means we must ask, *did those creating the transmedia world deliberately intend to implement a transmedia storytelling strategy and how did that intention affect the formation and implementation of the strategy?*

## External and Internal Influences

A common aspect of strategic discussion found both in the transmedia literature and in the business literature by the review found that strategy is the result of competing influences from both external and internal sources (see Section 2.3.4). Scholars in the strategic literature recommend practices such as SWOT analysis<sup>28</sup> - considering the strengths, weaknesses, opportunities and threats represented by both external pressures on the organisation and internal strengths and weaknesses (Kessler, 2013; Moussetis, 2011). In the media culture literature, discussion is less direct but nonetheless acknowledges the same influencing factors. For example, Fast and Örnebrig (2015) dedicate a large portion of their case studies to discussing the context in which Hollywood producers were operating and how that influenced production of different story worlds. Similarly, Perryman (2008) demonstrates that both the public and the BBC's position as a public institution have heavily influenced the budget, goals and creative direction of *Doctor Who* throughout its lifetime. Analysing what significant external and internal factors influenced the creators of a story world to choose their particular type of transmedia storytelling is fundamental to establishing an understanding of why and when a particular iteration of this type of strategy is appropriate.

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<sup>28</sup> Many attribute SWOT analyses to Albert Humphrey and his work analysing Fortune 500 companies in the 1960s and 70s although he himself does not claim credit.



## **Direct and Indirect Competition**

The literature review of strategy established that Porter's concept of competitive advantage has direct relevance to transmedia storytelling analysis. However, as is discussed by Magretta (2012), sometimes the best form of competition is avoiding competition altogether. Reviewing expansions of this concept published within the Harvard Business Review, this thesis puts forward Kim and Mauborgne's concept of 'Blue Ocean Strategy' to conceptualise this facet of narrative world analysis (Kim & Mauborgne, 2005; 2013; 2015). They divide a corporation's goal into choosing to create a totally new market niche and eliminating immediate competition altogether (blue ocean strategy) or choosing to directly compete with rivals in an open market where the sharks and other large predators swim (red ocean strategy). This has direct relevance to the analysis of transmedia storytelling. Understanding the goals of transmedia producers, whether their aim is to establish a new niche for a special audience or to directly challenge existing rivals for a broad audience with a more intensive engagement strategy, is inevitably going to influence their decision to use transmedia storytelling. Knowing this is crucial to our understanding of what kind of competitive advantage transmedia storytelling can actually provide video content creators, and whether the transmedia storytelling strategy changes when goals or types of transmedia storytelling are different.

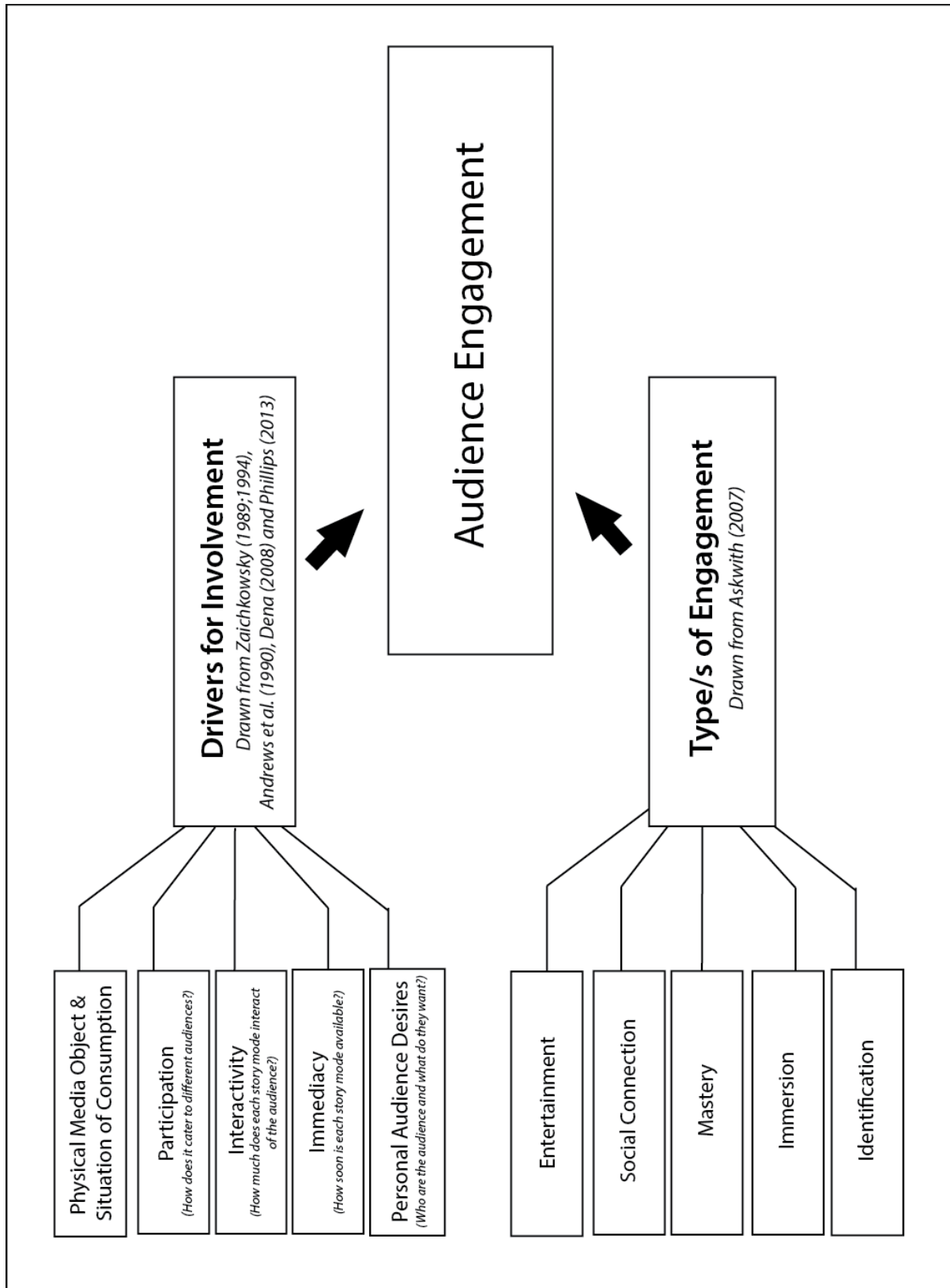
## **Section Summary**

This component of the lens, investigating why a producer chose a particular strategy and what the focus of that strategy was, allows the analysis to build upon the findings of the previous guiding question. Understanding both what form the transmedia strategy took and then why a successful producer chose to adopt that particular type of strategy in that instance, allows us to understand how and when a producer could use this approach to their advantage in future. The next section of the lens addresses the impact of that strategy, drawing together interdisciplinary theory to assess its impact on audience engagement.

### **3.1.3 Transmedia Storytelling Strategy and Audience Engagement**

This section incorporates the findings drawn from the analysis of audience engagement in Section 2.2 of the literature review. Having established that a unifying objective of transmedia storytelling strategies is their focus upon audience engagement, this component of the lens is constructed so that we can distil how audiences engage with transmedia worlds. This section is made up of two components – types of engagement and drivers of involvement. Both are shown overleaf in Figure 5 and then outlined in their respective sub-sections. Types of engagement is drawn directly from Askwith (2007). It adapts his five “logics” of engagement to codify the various ways that a transmedia universe might provide drivers for an audience member to engage with a story world. Drivers of involvement, refers to the aspects of the narrative world that facilitate the direction, intensity and persistence of an audience member’s levels of engagement within a story world. This section draws from a combination of marketing and advertising on consumer behaviour theory and media culture theory on audience engagement.

Figure 5: Components of Audience Engagement in Transmedia Storytelling



## **Types of Engagement**

As the literature review discussed, amongst the nebulous and often contradictory definitions of audience engagement present in the creative literatures, Askwith's Five Logics of Engagement provide a foundational base for analysing how producers are using transmedia to engage audiences. It is acknowledged that there are multiple frameworks in the literature for conceptualising aspects of engagement. However, Askwith (2007) is both multi-platform specific and holistic in its consideration of a broad range of engagement theory. By analysing the television centred transmedia franchise of *Lost*, Askwith proposed five different logics for why audiences engage with a creative product.

### **The Logic of Entertainment**

This refers to the capacity for each story mode to deliver the pleasure of being entertained, to escape reality, to simply want to watch and be entertained.

### **The Logic of Social Connection**

This tribal logic refers to the capacity for the story world to provide a social connection for its audience by providing fodder for social conversation that also generates a sense of belonging in audiences once they bond with others through the shared connection of the story world.

### **The Logic of Mastery**

This refers to the capacity for the narrative world to deliver a feeling of mastery for the audience. "Mastery describes a mode of engagement that satisfies the viewer's intellectual desire to master complexities, interpret nuances, and solve the challenges" (Askwith, 2007).

### **The Logic of Immersion**

The idea of "being there", the engagement logic of immersion refers to how the story world is able to satisfy "the viewer's imaginative or emotional desires to be "surrounded" or "subsumed" by the narrative world that they actively consume (Askwith, 2007, p. 109). This can include both immersion in the text itself but also in extra-textual processes such as access to "behind the scenes" content that the enables them to experience how an individual story

mode, such as a film, was created thus facilitating deeper immersion and resulting in higher engagement.

### **The Logic of Identification**

Askwith uses the logic of identification to explain “the range of ways in which engagement with television content may both help viewers to formulate and/or reaffirm their own personal identities (self-identification) and allow them to express and/or signal those self-perceived identities to others (social identification)” (Askwith, 2007, p. 114).

### **Summary of Engagement**

In the framework presented in Figure 5, each of Askwith’s engagement “logics” is deployed to provide an understanding of the type/s of engagement that are possible when designing transmedia storytelling strategies. Within the overall lens on audience engagement, Askwith’s five logics of engagement can then be combined with additional research conducted in Section 2.2, which indicates an additional need for consideration of the concept of consumer involvement as well as audience engagement. As Section 2.2 finds, transmedia storytelling analysis needs a framework that not only accounts for why an audience member is interested in a particular narrative world but also what it is about each story mode and the world as a whole, that keeps them interested over time.

### **Drivers for Involvement**

Often confused with and enmeshed with the term engagement, involvement refers to factors that provide direction, persistence and intensity for an audience member’s engagement with something (Budica et al., 2010; Kozinets, de Valck, et al. 2010). The elements chosen for the inclusion in the aspect of the audience engagement lens are physical attributes, participation, interactivity, personal audience desires and immediacy. Each is discussed below.

#### **Physical Attributes**

Touched upon by Askwith (2006), this aspect is drawn from consumer behaviour and advertising research conducted by Zaichkowsky (Zaichkowsky, 1986; 1994). It asks how does the physical make up and situation of a media platform influence how the consumer engages

with the narrative world? For example, Dena (2008) shows that playing a video game represents a different form of interaction and engagement, one that is far more dependent upon the audience member being active in driving the story along, than if that same audience member was to watch a film. Dena (2008) and Evans (2008) both highlight that this is can be a problem in transmedia stories. If an audience member first experiences the narrative world as a game where they take a first-person perspective and significantly influence how the narrative plays out, they can experience dissociation and dissatisfaction when then presented with a passive, third-person type of narrative such as a film. The literature review found that balancing these expectations and considering what it is about the physical media themselves that an audience member is interacting with is core to understanding why an individual continues to engage with a story world.

### **Participation**

Section 2.2 of the literature review established that the most common practice in forming and analysing transmedia strategies is to divide the audience into tiers of participatory interest. Analysing transmedia strategies through this lens allows for a testing of the general “rule of thumb” used by transmedia scholars and practitioners (Phillips, 2012). This “rule” is to divide the audience into a top tier of 1-5%, who will be the most engaged and seek to actively participate in the story world, a middle tier of 10-20%, who will be moderately engaged and sometimes seek to participate in the story world, and a bottom tier of around 80-90% of the audience who will simply want to watch, seeking the lowest level of participation possible to enjoy the narrative story modes (Dena, 2008; Evans, 2008; Pratten, 2011; Phillips, 2012).

### **Interactivity**

Section 2.2 of the literature review identified that there is a difference between the concepts of interactivity and participation when defining an audience’s engagement with a story world. Participation refers to some level of active agency on behalf of the audience. It reflects a drive and desire exhibited by them to become immersed in and engaged with the larger narrative (García-Avilés, 2012). Interactivity, on the other hand, refers to the way in which an audience actually interfaces with the story modes of the transmedia world (Beddows, 2012b). For example, a game requires more intense interactivity than a film because in a

game the audience member is actively controlling the character and making choices whereas in a film the method of interactivity is vastly different, involving a receptive and highly internalized, physically passive method of cognitive interaction.

### **Personal Audience Desires**

This element of the involvement construct refers to how a transmedia strategy speaks to and interacts with the personal drivers that audience members have for engaging with a story world. The empirical research of Zaichkowsky (1986) and Andrews et al. (1990) shows that identifying who the core audience is and what it is about who they are that impacts upon their engagement with the narrative world is paramount in effectively involving them. A common example of this found when reviewing the creative literature is the enduring headache for creative content producers of fan fiction<sup>29</sup>. Producers of creative content want to be able to leverage the creativity and obviously deep engagement that these fans have with their story world (Ford et al., 2006; De Kosnik, 2009; Stuller, 2013). However, current research indicates that the more that the original creator exerts influence over a fan community, the less likely that that fan community is to continuously exhibit strong engagement, as control contradicts their personal driver for cathartic self-expression in generating fan content (LaChev, 2005; Pearson, 2013). This component of the engagement framework in Figure 5 involves analysing how transmedia strategies accommodate and leverage personal audience desires to generate audience engagement and involvement.

### **Immediacy**

The literature review found that, particularly relevant to contemporary storytelling, is a consideration for the immediacy of different story modes available and how that impacts on the audience's experience (Bostan & Marsh, 2012). This aspect involves a consideration for timing as well as availability (Maxwell & Miller, 2011). Was there anything that was released at a specific time or had limited availability to generate heightened engagement? How readily accessible are each of the transmedia story modes to the audience?

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<sup>29</sup> This is the practice of fans writing alternate versions of events within a story world and it is widely agreed upon that it is a cathartic mode of self-expression for fan-writers (Pearson 2013).

## Section Summary

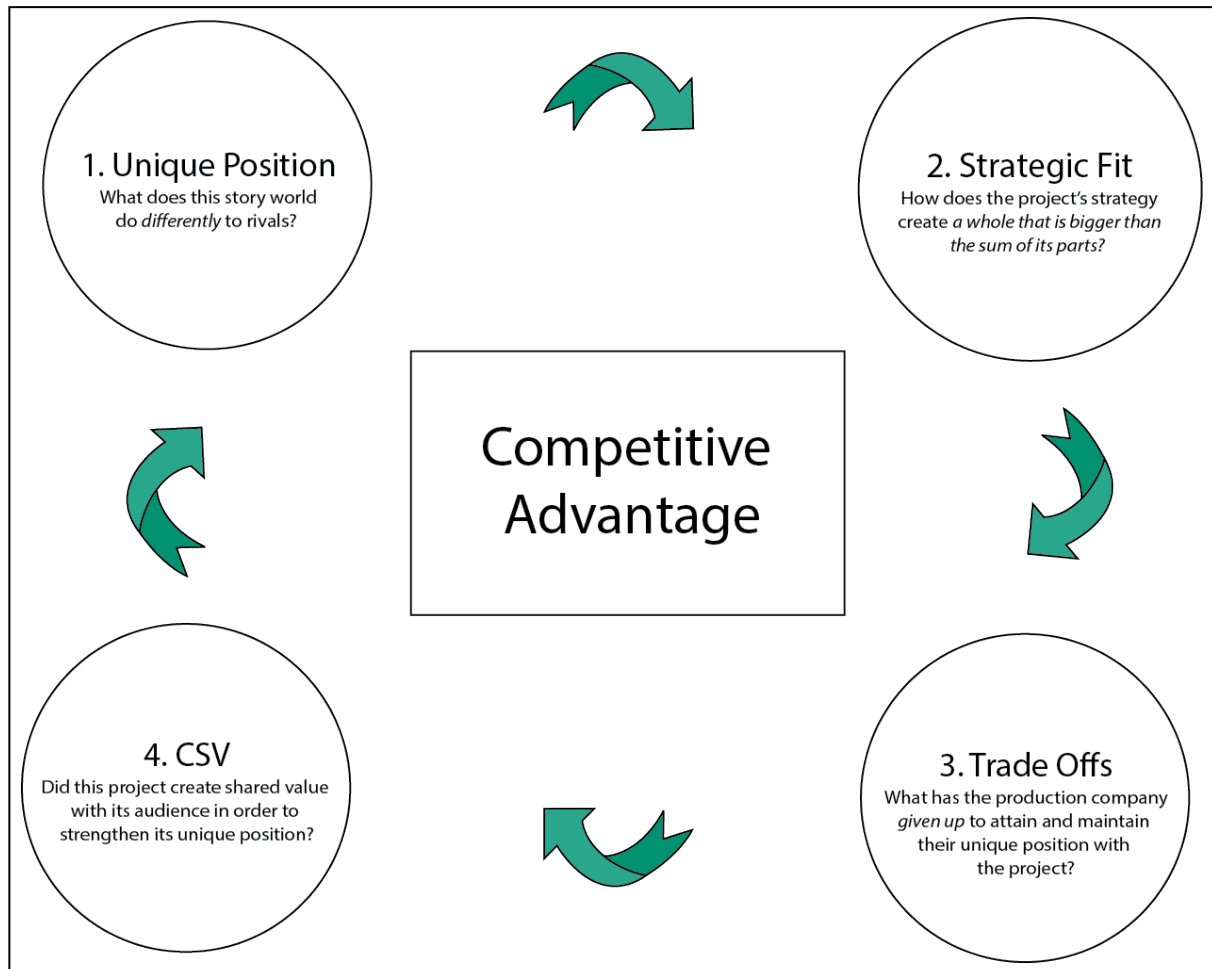
The audience engagement component of the overall lens consists of a consideration for both the way in which engagement is attained and influencing factors on the persistence of that engagement (involvement). To understand audience engagement in transmedia strategy, this lens adapts Askwith's five logics of engagement their television-based context to a transmedia setting. A synthesis of marketing, advertising and media culture literature also provides five factors of involvement that compliment these logics of engagement. An analysis of involvement as well as engagement creates a holistic tool for conceptualising how transmedia projects capture and maintain a relationship with their audience.

### 3.1.4 Competitive Advantage

As discussed in Section 2.3, while there are multiple schools of thought regarding strategic analysis, this thesis leverages the foundational work of Michael Porter. Section 2.3.3 demonstrates that Porter's work on strategy and competitive advantage, in particular Porter (1996), is strongly aligned to current transmedia methods. The last step in applying the lens then is a consideration of the elements of competitive advantage. Porter saw strategy as a coordination of three elements; unique position, strategic fit, trade-offs. These elements were then supported by the creation of shared value (CSV). By coordinating these components, a producer, company or organisation constructs a strategy that gives them competitive advantage in relation to their competition. The image in Figure 6 represents the lens of competitive advantage, through which an analysis of the other components of the lens can be synthesised. Following the diagram, each subsection contains a summary of the elements of competitive advantage explored by Section 2.3 of the literature review.



Figure 6: Components of Competitive Advantage (adapted from Porter 1996)



### Component 1: Unique Position

Porter (1996) argues that the first consideration in competitive advantage is unique positioning of what a business or organisation has to offer. In the context of transmedia, this unique position is adapted by this lens to refer to why an audience member should invest their time and energy into a particular story world and not into the myriad of other content that is widely available. It could be argued that unifying various narrative pieces into one larger, interconnected whole through transmedia storytelling represents unique positioning in comparison to other media strategies. However, there are many different ways of applying transmedia strategy to construct story worlds and comparative analysis needs to be undertaken of differing approaches. By evaluating case studies by asking what companies do differently to their rivals, we can analyse and compare how they sought to achieve a unique position in the cluttered contemporary marketplace. This is important to the overall

study, as it will provide foundational knowledge for both scholars and practitioners alike regarding how different uses of transmedia storytelling engages an audience.

### **Component 2: Strategic Fit**

As is discussed in Section 2.3, Porter's concept of 'strategic fit' reflects how each individual element of a transmedia story world is designed to seamlessly work together and create a whole that is greater than the sum of its parts. The three aspects of fit that this component assesses are:

1. Simple consistency between the overall strategy and individual activities used to generate story modes
2. Each activity reinforcing other activities
3. Resulting in optimisation of effort

Discussing and analysing this element of competitive advantage helps to focus analysis of transmedia strategies on how might streamline processes to generate greater audience engagement and/or reduce costs in achieving that engagement.

### **Component 3: Trade-Offs**

Trade-offs, to Porter, refers to the *necessary* concessions that must be made in order for a particular strategy to be able achieve its goal. Every successful strategy involves such key concessions, so that the core strategy is not easily able to be replicated by competitors (Collis & Montgomery, 1998). Trade-offs, in the context of transmedia storytelling, involve an analysis of both the artistic, aesthetic properties of the narrative story modes as well as the commercial design of those modes for consumption (Beddows, 2012a). For example, in choosing to make content appeal to a local audience by adopting their language, speech patterns and cultural references a storyteller makes a trade-off. The project gains a higher potential for appealing to that specific audience but loses some capacity to immediately appeal to a wider audience group who may not understand those references or that language. Analysing transmedia storytelling through this component of a competitive advantage lens, enables scholars to understand both the benefits and pitfalls of different transmedia storytelling strategies as they operate in practice.

#### **Component 4: Creation of Shared Value**

The literature review indicated that the creation of shared value (CSV) is not a stand-alone consideration but rather a continuous consideration when assessing various uses of transmedia strategy. Porter argues that CSV is a fundamental component in the sustainability and growth of customers of a business (or in this case story world) under a particular strategy (Porter & Kramer, 2011). This kind of thinking follows a trend across the media culture, business and marketing literature of greater consideration for audiences and the positive benefits for a producer of undertaking activities that increase the audience's quality of life experience (Jenkins, 2006; Schultz, 2006; Kotler, 2010; Banet-Weiser, 2011; Flew & Swift, 2014). It is imperative to sustainable competitive advantage for a project to give audiences places where they can discuss their interests. It also provides those projects with a channel of communication for the producer to their target market (Kozinets, 2010).

#### **3.1.5 Section Summary**

This section outlined each component of the analytical lens that this thesis will apply to analyse commercially successful transmedia case studies to facilitate learning about transmedia storytelling as a strategy. Section 3.2.1 detailed the theoretical components used to analyse the form of the preferred transmedia storytelling strategy. Having identified what type of strategy was in-play in each of the three case studies, Section 3.2.2 provided tools for the analysis of why that particular strategy was chosen, including a consideration for both the environmental context and specific organisational goals. Section 3.2.3 applied concepts of both engagement and involvement from across various literatures so that we might better understand how a transmedia storytelling strategy influences the design of a story world and the audience's resulting degrees of engagement with that world. Finally, Section 3.2.4 outlined Porter's theory of competitive advantage and how the transmedia case studies can be analysed from that perspective to provide meaningful insights on transmedia storytelling as a strategic choice.

### 3.2 DATA COLLECTION: CASE STUDY, INTERVIEW AND LITERATURE

This section concludes the method chapter by outlining the data collection methodology of this thesis.

In the first stage of research, preliminary interviews were conducted with key practitioners. These involved questions centred on the practitioner's understanding of how transmedia operates and why it is used. They also included a discussion of specific transmedia projects that those practitioners have undertaken. Following this, the next stage involved the immersive analysis of case studies. Each case study, and the interview data associated with it are compared to further inter-disciplinary literature consultation and analysis. The findings associated with this analysis can be found in the three case studies, Chapters Four, Five and Six respectively. Finally, in Chapter Seven, a comparative analysis draws these case studies together contrasting them to create an understanding of how strategic thinking applies to transmedia storytelling.

Due to its direct precedent as an interview based enquiry, this thesis adapts the iterative qualitative methodology for transmedia enquiry established in Konzal (2011). In constructing his conceptualisation of "entertainment architecture" (Entarch), a more refined subset of transmedia storytelling, Konzal used a four-step research plan for investigating internet-native entertainment:

- 1) **Interviews and Surveys** to understand reasons, motivations and cultural assumptions of practitioners and participants
- 2) **Immersive Textual Analysis** – a novel mode of analysis that Konzal developed for his thesis to allow for a greater conceptualisation of consumer experience. It involves the analysis of a case from both the producer and consumer perspectives to allow for the conceptualisation of a text as a whole.
- 3) **Consultation of Literature** to consolidate relevant knowledge across disciplines
- 4) **Conceptual Framework Development** that ties together the previous three steps to create a theoretical image<sup>30</sup>.

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<sup>30</sup> Taken from Konzal (2011 pp.17-20)

Each of the following subsections (3.2.1 – 3.2.3) provides an overview of why each method has been included for data collation and analysis. Section 3.4 then details how these differing methods are synthesised through the application of a theoretical lens to each case study. This provides an overview of how the lens was constructed and how it will be applied to the research.

### 3.2.1 Semi-Structured Interviews

Practitioner interviews provide a voice of practical experience and represent the different “narratives” or interpretations that a concept or theory has when applied in-practice (Silverman, 2013, pp. 120-130). Compounding this, interviews are highly common in qualitative research because it is “always possible to learn a lot from very little data” (Travers, 2001, p. 3). It is for this reason that interviews are most often used to support and explore other data that is gathered for analysis (Hansen & Machin, 2013, p. 45). This section discusses why this thesis uses semi-structured interviews as both preliminary data gathering and to guide each case study.

Semi-structure interviews allow for flexible and “naturalistic” responses, while maintaining a unified and comparable focus (Flick, Kardoff, & Steinke, 2004, p. 8)<sup>31</sup>. There is also direct precedent of this style of interview in the transmedia literature (Giovagnoli, 2011; Phillips, 2012). To illustrate differing perceptions of and uses for transmedia storytelling Giovagnoli (2011) interviewed leading transmedia scholars and practitioners Christy Dena, Lance Weiler, Drew Davidson and Jeff Gomez. The semi-structured nature of his questions allowed for each practitioner to express their opinion on what transmedia storytelling is, despite none of them being in complete agreement on any of the interview topics. It provides comparable data without the responses of the subjects being guided or clouded by a rigid question and answer structure (Stake, 2011). Mirroring this style of research, this thesis interviewed some of the leading practitioners - Jeff Gomez (*Pirates of the Caribbean, Hot Wheels, Spiderman*), Nuno

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<sup>31</sup> Described as “conversation with a purpose” (Esterberg 2002, p.88), semi-structured interviewing “involves the implementation of a number of predetermined questions and topics, but the interviewer is free to digress and probe beyond the answers to the prepared questions” (Beddows, 2012 p.126). As this approach stresses the evolution of a theory from data, the flexibility of semi-structured interviews is a necessity. In comparison to unstructured or “open” interviews, this method will also allow for a comparative framework between different interview subjects.

Bernardo (*Sofia's Diary, Dark Siege*), Christian Fønnesbech (*Cloud Chamber*) and Steve Peters (*Why So Serious, Lonely Girl15*) on transmedia storytelling strategy. A full list of these practitioners who were interviewed for this thesis can be found in Appendix 3.1.

Methodological scholar Folkestad (2008) summarises this type constructivist and iterative interview analysis as a three step process:

1. Data reduction - initial interview readings produce concepts, methods, subjects and phenomenon that are then contrasted and selected for analysis.
2. Data display – drawing meaning from a “limited” part of the data (summaries, diagrams and text-matrices for analysis)
3. Conclusion – “*comparing, contrasting, searching for patterns, triangulation etc.*” from among the various interview responses.

Using this method in this thesis, semi-structured interviews with key professionals about their experiences of transmedia and audience culture provide valuable data for this thesis. Structured around the gaps identified in the literature review (Chapter Two), the interviews conducted opened an open dialogue about practitioner and scholarly perceptions of transmedia storytelling strategy. Following the methodology of similar transmedia studies (Beddows, 2012b; Giovagnoli, 2011; A. Phillips, 2012), each interview participant was chosen because they have produced significant transmedia works. Their insight allowed for unique perspective on the decision-making processes behind each project that complimented data gathered from literary consultation and reviewing primary source materials.

### **3.2.2 Cross-Disciplinary Literature Consultation**

Ongoing review and consultation of literature is a fundamental process in qualitative research (Berger, 2011; Hansen & Machin, 2013). In this thesis the collection and analysis of data from interviews and immersive case studies is complimented by ongoing consultation with current literature and scholarship in inter-related disciplines. Cross-consultation in this qualitative manner allows for the inclusion and appraisal of both quantitative and qualitative data from other literatures, while also allowing for a broader perspective on the context in

which the data and conclusions of those quantitative studies were drawn (Flick et al., 2004, p. 9). Being a constructivist qualitative study, the inclusion of further consultation with the literature acknowledges that transmedia scholarship, in particular that relating to Henry Jenkins, does have a situational bias towards American or Western popular culture and a focus upon audience culture in areas that are highly technologically developed (Hay & Couldry, 2011). While this is regrettably difficult to mitigate, as the most prevalent forms of transmedia for cultural analysis come from developed Western countries, it serves as a limit to the scope of the thesis' research into transmedia audience culture<sup>32</sup>. Despite this restriction of scope, an ongoing consultation with literature is a fundamental component of the methodological process of this thesis.

### 3.2.3 Immersive Textual Analysis (Case Studies)

Yin (2009) argues that a case study approach is the ideal course of investigation when a particular phenomenon and the context within which that phenomenon operates are not separated by clear boundaries (Yin, 2009, p. 18). As the literature review established that contemporary transmedia research suffers from unclear boundaries between research into the context for its emergence (audience behaviour, marketing research, technological change and associated cultural shifts) and the phenomena of transmedia storytelling itself, this makes case analysis highly effective in the context of this study.

Following the interview stage, three key case studies were selected for immersive textual analysis<sup>33</sup>. First, this thesis conducted a pilot case study on the BBC's *Doctor Who* franchise, testing its 'lens' methodology on a global brand produced and distributed by a major media company. In contrast, it then conducted two other smaller pioneering case studies that both enjoyed considerable commercial success – a pioneering transmedia project *Sofia's Diary* that emerged from Portugal and was the first recognised commercially successful custom-designed transmedia project and *The Lizzie Bennet Diaries*, an innovative transmedia project

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<sup>32</sup> It must be noted that even in countries such as Australia, transmedia projects still have a middle class, Caucasian audience skew, albeit with comparable uptakes of new technologies for audience interaction with content and the producers of that content (Ward 2009, p.155).

<sup>33</sup> To Konzal, a researcher should look beyond a simple analysis of the transmedia world and take into account the elements that construct the experience of the overarching narrative for both producer and audience (Konzal, 2011 p.19-23). Undertaking the research in this method allows the researcher to focus upon how a transmedia property works from an audience's perspective and to not be clouded by the positive light in which a producer may present it (Konzal, 2011 p.17)

created by YouTube star Hank Green that was adapted from Jane Austen's novel *Pride and Prejudice* and is told in the form of Vlogs on YouTube. Chapters Four, Five and Six conduct individual case analysis using the theoretical lens. This is then followed by cross-analysis of the cases in Chapter Seven, guided by Porter's generic strategies, which are discussed in Section 2.3 of the literature review.

Each case was chosen based on four criteria. First, it must be a project that has been completed or, in the case of prominent ongoing projects such as *Doctor Who*, that it has a significant history of production that can be analysed over time. Second, the project's producers must have agreed to be interviewed as part of this study or, if not available for interview, then previously published interviews relevant to this research needed to be available to the author for further analysis. Third, each project must have had significant success in achieving its original goals. Both, *Sofia's Diary* and *The Lizzie Bennet Diaries* helped to establish independent production companies<sup>34</sup> and *Doctor Who* has enjoyed financial and creative success and maintained a story world that has lasted for over 50 years. Finally, the projects were selected because they all represented a prominent transmedia project that has had at least some degree of analysis in the past. As this research is applying a new method of analysis (business strategy to transmedia storytelling) and seeks to draw a hypothesis from the data itself, balancing the opinions of previous scholars helps to alleviate potential bias. It is normally up to the researcher to decide what is included and not included in a case study which unconsciously or consciously, privileges a subjective reality dictated by that researcher (Stake, 2003, pp. 134-140).

### 3.4 CHAPTER SUMMARY

This chapter outlines the lens based methodology of this thesis and the four-pronged data gathering technique that it employs. The research sources data from practitioner interviews, immersive case studies, and further consultation of relevant literatures. Drawing data with these varied methods provides a rounded and comprehensive information resource suited to the analysis of a complex phenomenon like transmedia. Using strategic management

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<sup>34</sup> *The Lizzie Bennet Diaries* was also intended as a creative experiment and both executive producers for the project, Bernie Su and Hank Green have stated that, while it did not return a large profit, it was never intended to be blockbuster entertainment and it exceeded their expectations in experimenting with storytelling across YouTube and social media (Green 2009, Bushman 2014)



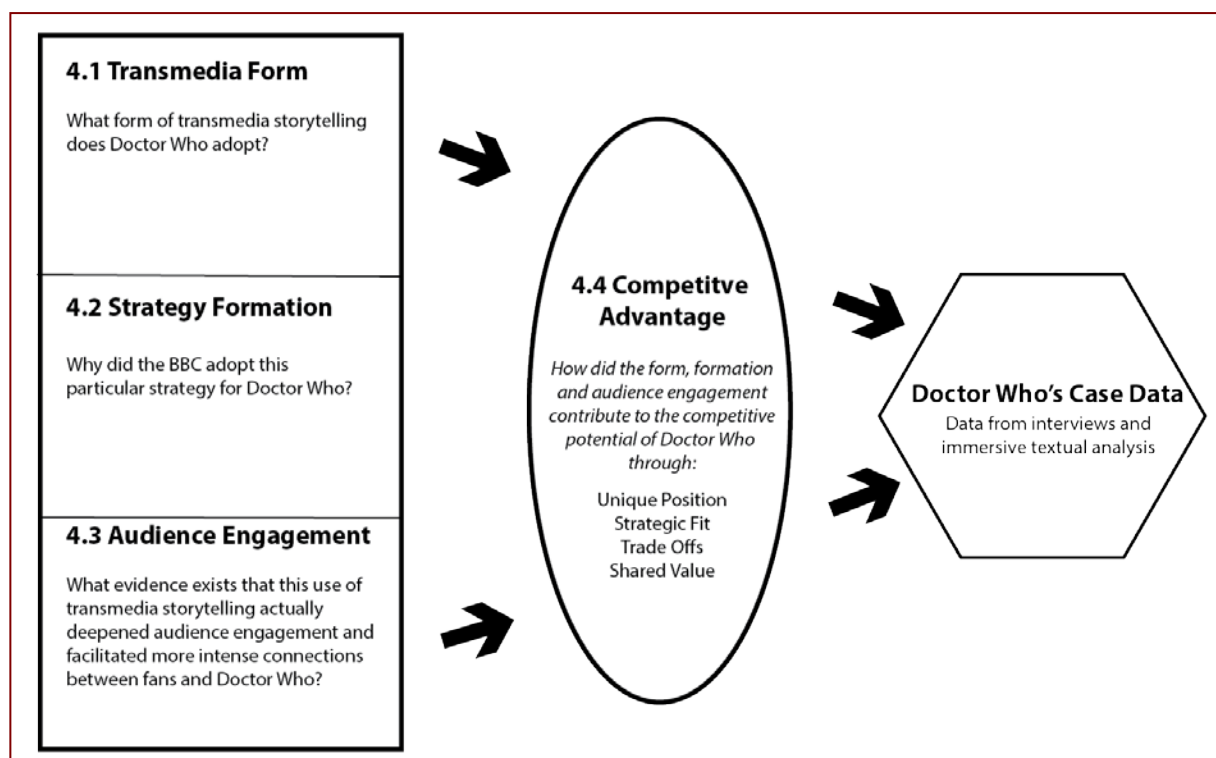
theory, this thesis draws together existing media and cultural studies, marketing and advertising research to create a framework, a 'lens' for analysing this data. As this chapter demonstrates, the strength of this approach is that application of a lens provides both practitioners and theorists with holistic insight into transmedia storytelling as a strategy. It provides understanding of when, how and why the producers of each of the chosen case studies adopted transmedia storytelling as their guiding approach. As a result, not only is the lens a unique contribution to knowledge, but the data gathered also provides comparative insight on different uses of transmedia storytelling strategy (explored further in Chapter Seven).

## CHAPTER FOUR: DOCTOR WHO

This chapter investigates the first or “pilot” case study of this thesis, *Doctor Who*, which began as a television series for the British Broadcasting Corporation (BBC) in November 1963. Today, that television series is now broadcast to over 50 countries with over 70 million viewers worldwide, forming the centrepiece of a narrative world that plays out across radio, television, film, web, games and printed text (van der Graaf, Reyes, & Long, 2010). An enduring franchise with a well-documented history, both by the BBC and by media historians, this case study is the ideal candidate for analysis within this thesis.

To analyse *Doctor Who*, this chapter follows the methodological structure outlined in Chapter Three and illustrated in Figure 7, below.

*Figure 7: Applying the Strategic Lens to Doctor Who*



As the figure shows, Section 4.1 analyses the form of transmedia strategy used to create *Doctor Who*. Section 4.2 then analyses why the BBC chose to use that form of transmedia storytelling and how it provided the BBC with a competitive edge for the project. Section 4.3 reviews how that form of strategy was used by the BBC to engage audiences and sustain the

project over its long history. Findings from each section are then summarised through the lens of competitive advantage in Section 4.4. Prior to this analysis, however, it is first necessary to map the history and development of *Doctor Who*.

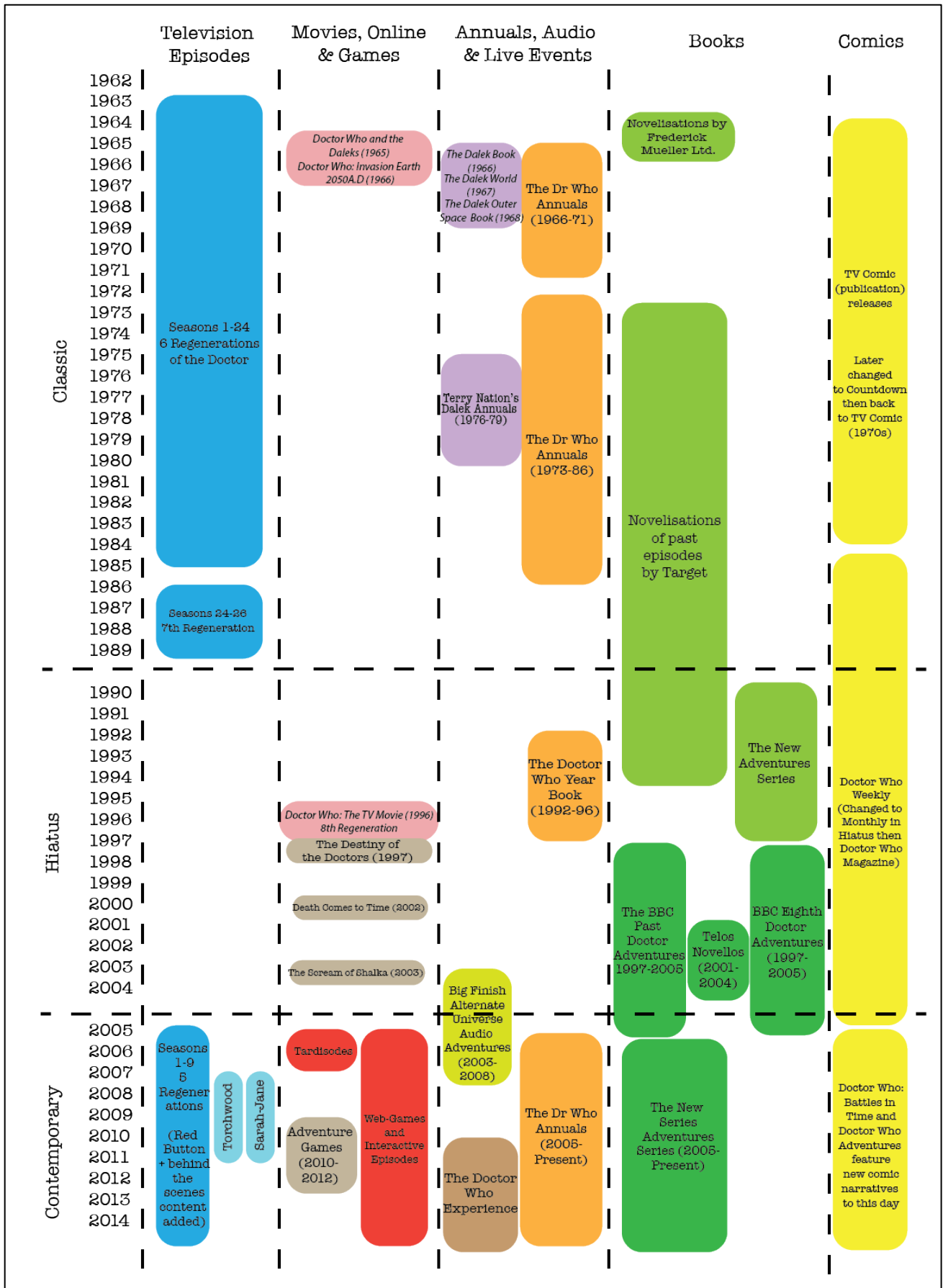
### **The History and Development of *Doctor Who***

*Doctor Who* is a Sci-Fi/fantasy world built around the “flagship” BBC television show of the same name (Evans, 2013). In the show a humanoid alien known simply as “The Doctor” travels through time and space with his companions, combatting evil (Johnson, 2012b).

*“The basic premise of the show was a senile old man who had escaped from an alien planet on a spaceship, and the spaceship had the capacity to go forward and backward through time”* (Newman in BBC Worldwide, 2006).

This premise was designed with a specific strategic goal; to fill a programming gap for the BBC between the sports program *Grandstand* and the teen targeted soap-box show *Jukebox Jury* on a Saturday afternoon (Chapman, 2014, p. 46). Appealing to this broad, combined family audience and keeping them from switching channels to the rival commercial network ITV, was a core objective of the team tasked with creating *Doctor Who* (Johnson, 2013). This section charts the development of *Doctor Who* over time, beginning with an illustrated chronology in Figure 8 below. A detailed description of each story mode in Figure 8 can be found in Appendix 4.1.

Figure 8: A Chronology of Doctor Who Content



Airing on 23 November 1963, the initial run of the television show lasted 36 years (Akass, 2014). Hallmarked by low budget effects and a quirky central character, this run of the show consisted of 26 annual series, 159 televised narratives and seven different actors playing the lead roll (McKee, 2001). This time period, 1963-1989, is referred to as 'Classic Who' in this thesis. Figure 8 shows that from 1964, one year after it premiered on TV, *Doctor Who* began releasing branded content across multiple platforms and multiple story modes. "From its start in 1963, *Doctor Who* has been a playground of storytelling that transcended the medium that housed it, jumping from television to radio to comic books and so on" (van der Graaf et al., 2010, p. 4). Some of these extensions, such as the *Dalek Annuals* and comics produced in *TV Comics* were new narratives and natural transmedia extensions to the television series. However, more often than not, additional stories would not follow the narrative world of the central television series. Rather, as is exemplified by the *Dalek Movies* (1965, 1966) some works adapted or re-imaged the world of *Doctor Who*, forming incomplete extensions that contradicted the central series. As a result, this as a time period in which elements of transmedia storytelling were present but that there is no evidence of a pre-planned or ongoing transmedia storytelling strategy.

Following low ratings and then the television show's eventual 'resting', the second period of *Doctor Who's* history (1989-2005) is commonly referred to as the Hiatus period (Bain, Jensen, Sangruengkit, & Zi, 2013). In the Hiatus period, *Doctor Who* demonstrates its first, intentional use of transmedia storytelling to appeal to its remaining fans. During this time period, new *Doctor Who* adventures in books and radio plays were published at a rate of two a month (McKee, 2001, p. 9). For the fans; their own clubs, the advent of video tapes, a 1996 telemovie starring Paul McGann and these new narratives sustained a world that had previously depended upon televised content (Johnson, 2012b). A niche international fan following also grew, with tape recordings of the original television show migrated across the Atlantic to the United States of America (Chapman, 2014). This led to two core groups of consumers for the story world – a small group of hard-core fans in Britain who mourned the loss of an institutional ritual, the television show, and a new selection of international fans who were just discovering the series for the first time (Jones, 2013a).

It was not until 2005 that the central television show returned to air, a period of production that this thesis refers to as 'Contemporary Who'. This represents a time period in which *Doctor Who* is guided by the intentional, pre-planned use of transmedia storytelling (Perryman, 2008). As is shown in Figure 8, prequel web videos were used to foreshadow the series' return. Still aimed at a broad family audience, the series then returned to air alongside an ever expanding world of cross-media content. To this day, the narrative world, while still centred around the television series, consists of integrated web content, radio plays, books, interactive "red button" technology<sup>35</sup>, spin-off television franchises, behind the scenes content and more (Johnson, 2013). With over 50 years of narrative production history, *Doctor Who* is now the BBC Worldwide's largest export and its third highest merchandise seller (Chapman, 2014, p. 56).

#### 4.1 DOCTOR WHO: STRATEGIC FORM

This section applies the first lens component, investigating *what form of transmedia storytelling did Doctor Who use?* It reviews the development of *Doctor Who* as a narrative property, using primary records from the BBC, alongside interviews and secondary scholarly analysis to analyse the choice of strategy used by the BBC. First, the analysis shows how *Doctor Who's* use of transmedia storytelling has always been centralised around a single story mode, that of the television show, even when it was off air during the Hiatus period. Then it shows how this centralisation is part of *Doctor Who's* type of transmedia strategy, a franchise approach. It argues that the show is a relatively low budget but expansive world made up of narrative silos that, while taking place in the same narrative universe, operate independently of one another. Finally, this aspect of the lens to *Doctor Who* shows the "evergreen" objective of the project, that it is a narrative world designed to grow and expand as long as is economically viable.

##### 4.1.1 A Centralised Use of Transmedia Storytelling

The evidence indicates that, since its inception, *Doctor Who* has always been centralised around one story mode - the television series. Transmedia storytelling expands the narrative

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<sup>35</sup> "Red Button" is the collective term given to interactive experiences that the BBC has tied to Internet connected, televised content. It refers to content that users can interact with either via their computers or using their television remote (BBC, 2015).

world of *Doctor Who* beyond a single story mode, but the television serial, from the beginning of *Doctor Who*, has always been the centre-piece of the narrative world.

For example, despite experimenting with multiple narrative extensions, the BBC commissioned audience reports throughout Classic Who (1963-89) that only took into account television ratings and sentiment towards the television show (Audience Research Department of the BBC, 1963; 1966; 1984; 1987). The Hiatus period (1989-2005) is *defined* by the absence of the show. New stories in books, on film and on the radio were created in this time period. However, as Johnson argues, these were the actions of BBC Marketing as they sought to capitalise on residual fan interest and the world itself only subsisted as fans mourned the loss of the television series (Johnson, 2013). When the narrative returned to air in 2005, contradictory narrative of other story modes such as the 1996 movie and the online animation *The Scream of Shalka* (2003), were overwritten and discarded in favour of those put forward by the television text, emphasising its centrality (Johnson, 2012b).

Contemporary Who (2005-present) brought back the television series as the centrepiece of a flagship, multi-platform brand for the BBC (Perryman, 2008). Behind the scenes content, such as *Doctor Who Confidential* promotes the creative excellence of the central television text. Alongside the television show, the BBC has experimented with character driven web-blogs (such as those created by the character Mickey in 2005/06) that either foreshadow or extend narratives introduced by the central television text. Spin-off television series *Torchwood* (2008-2011) and *The Sarah Jane Adventures* (2007-2011) are directly impacted by events and characters from the central television show and act to immerse specific audience segments (adults and children respectively) who are already part of the broad *Doctor Who* audience (Booth & Burnham, 2014).

#### **4.1.2 Franchises within Franchises**

Further analysis demonstrates that the transmedia strategy of *Doctor Who* also reflects an ongoing use of franchise transmedia storytelling. Franchise transmedia, as was discussed in Section 2.1 of the literature review, is a style of transmedia in which the narrative world is mostly made up of independent media silos that operate in the same narrative universe but

tell different stories. Contemporary *Who* exemplifies this type of storytelling strategy. As the chronology in Figure 8 shows, the central television series is expanded by story modes (books, comics, animations, radio plays and even an interactive live experience (*The Doctor Who Experience*), that impart separate, stand-alone narratives. Behind the scenes content and online web-episodes form extensions to the central story mode, amplifying audience immersion while still being created as stand-alone programming. *Torchwood* and *The Sarah Jane Adventures* are made with separate micro-franchise strategies, with stand-alone radio plays and books providing additional adventures featuring the main characters of those television serials. Characters appear across these spin-off series, often created in the *Doctor Who* television series and travelling between different television programs to increase audience awareness and interaction with these different silos (Yarbrough, 2015). Even in the Hiatus period, in which no television content was available, franchise transmedia storytelling is clearly the dominant form of transmedia strategy as the books, animations or *Doctor Who: The Movie*, exist as separate experiences unified only by their use of similar characters and the same topological setting. With *Doctor Who* the television series at its centre, this style of franchise transmedia storytelling can be seen as expanding out the story world through independent narrative silos, with spin-off series supporting interest in the narrative universe with their own franchise transmedia strategies.

Franchise transmedia is not the only transmedia strategy at play in *Doctor Who*, but it is the dominant strategy that guides the world's development. There is evidence of portmanteau storytelling; an alternate form of transmedia strategy in which one narrative is told across multiple platforms instead of multiple narratives being contained within individual story modes. For example, the 2005/06 run of the central television show had its narrative expanded by interlinked websites and interactive content, story extensions that existed only to add to what was appearing on TV. However, these experiences are often not separately enjoyable from their accompanying television story modes and represent peripheral, ancillary experimentation by the BBC in enhancing the audience's experience. They indicate that the BBC is willing to experiment with multiple forms of strategy. The guiding form of strategy for *Doctor Who*, however, is clearly that of franchise transmedia storytelling.



### 4.1.3 Evergreen Transmedia and the Unending World of Who

Successful franchise transmedia storytelling is often the pursuit of large media conglomerates as they search for the next *Star Wars* or *Pokémon*, unending “evergreen” narrative worlds that can continue to grow and expand over time (Gomez, 2015). Analysing the BBC’s strategy for *Doctor Who* shows it to be no exception to these evergreen strategic objectives.

*“From 1989 the development of Doctor Who as a brand at the BBC can be understood to function within the context of a broader corporate strategy to exploit the series’ longevity, transferability and multiplicity in order to increase the BBC’s commercial activates and extend its digital provision”* (Johnson, 2013 l.2191 of 5388).

Today, *Doctor Who* continually experiments with new narrative forms to expand the series, changing the format and tone of the television series frequently and testing new story modes such as educational games<sup>36</sup> and live experiences (Chapman, 2014). Even before 1989, *Doctor Who* was constructed with the ambition of lasting as long as possible. The narrative device of “regenerating” the lead character effectively created an immortal but interchangeable crux for the central narrative and when the show was eventually taken off air, the BBC avoided cancelling the show, instead using the ambiguous terminology of the series being “rested” (Perryman, 2008).

Traditionally, this style of transmedia is practiced by well financed media conglomerates (Fast & Örnebring, 2015). However, as the next section discusses, despite being a public entity and frequently working with restricted budgets for individual story modes, the BBC has clearly developed its own way of reaching a broad audience through a cost-effective, centralised, franchise approach.

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<sup>36</sup> The BBC has released Dalek and *Doctor Who* coding games for children on tablets that contain micro-stories to encourage school students to both learn and engage with the world of *Doctor Who* (BBC, 2015).

## 4.2 DOCTOR WHO: STRATEGY FORMULATION

This section applies the second guiding question of the analytical lens: *why did the BBC choose this style of transmedia storytelling strategy?* In doing so, this pilot case study demonstrates the potential impact that the goals and obligations of a public media entity, such as the BBC, have upon individual projects that they create. First, it analyses the BBC's Charter and how the obligations it contains have impacted upon *Doctor Who*. Then this chapter charts how the BBC's desire to directly compete for a broad audience has been influenced by the creative direction of lead producers and, in turn, how this has impacted upon the development of its transmedia strategy. Finally, this chapter demonstrates how available expenditure influenced why the BBC chose to employ a cost-focused variation of franchise strategy for *Doctor Who*.

### 4.2.1 The Influence of the BBC's Charter

Searching for why the BBC chose to use franchise transmedia storytelling for *Doctor Who* this chapter found that it is the BBC's position as a public institution and, in particular, the manifestation of its obligations to the public in its charter, is one of the strongest influencing factors on the strategic development of *Doctor Who*. As a government controlled entity, the BBC's charter stipulates that it "exists to serve the public interest... to inform, educate and entertain" (Department of Culture, Media and Sport, 2006, p. 2). This includes "promoting education and learning", "stimulating creativity and cultural excellence" and, more recently; "helping to deliver to the public the benefit of emerging communications technologies and services and, in addition, taking a leading role in the switchover to digital television" (Department of Culture, Media and Sport, 2006, pp. 2-3).

The influence of these elements can be seen at play in the development of *Doctor Who* as a transmedia entity. For example, the BBC's Charter changed at in the 1990s to include experimenting with emerging technologies and digital television as objectives for the BBC. This directly correlates with experimentation with narrative platforms in *Hiatus Who*. This same experimentation lead to Contemporary *Who* being spread across books, games and online animations, as well as conducting narrative experiments of its own with online blogs, interactive television and educational mobile games (Johnson, 2013). Even during Classic

Who, the narrative of the television series was heavily influenced by the BBC's Charter. Despite increasing popularity and record viewership, the BBC was forced to abandon darker, more adult narratives in 1977 when a group of "concerned mothers" petitioned the BBC about the nature of *Doctor Who* content. Transitioning from gothic horror to a lighter, more comedic tone at this time was a direct result of the BBC being forced to act in accordance with its obligations as a public entity (Jones, 2013a). As Leach summarises in his appraisal of *Doctor Who*;

*"Although Doctor Who became an international phenomenon, it grew out of a specific conjuncture in the history of British television, and its own subsequent history was shaped by its uneasy position within the institutional structure of the BBC"* (Leach, 2009, p. 3).

*Doctor Who's* position within the institutional structure of the BBC is clearly a strong external influence upon the development of *Doctor Who* as a transmedia narrative property. The next section builds upon this discussion, linking this external organisational influence with the internal influence of individual producers upon *Doctor Who's* strategic development.

#### **4.2.2 Production Signatures and Transmedia Storytelling**

Based on Jenkins and Tulloch's investigation of fandom in the *Star Trek* and *Doctor Who* communities, Jones argues that one of the most influential forces on the development of *Doctor Who* as an ongoing franchise is "the adoption of new narrative approaches and plotlines, often associated with changes in producer" (Jones, 2013a, p. 40). To contextualize this in the case of *Doctor Who*, Jones presents a summation of production signatures based upon Chapman's text *Inside the Tardis* (Chapman, 2013). This is seen overleaf in Table 3, a table this thesis updates to include the production signatures of recent 'showrunners'<sup>37</sup>.

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<sup>37</sup> Often referred to as an executive producer outside of North America, this title is an informal one given to "the person who has overall creative authority and management responsibility for a television programme: from the character arcs to the look of the show and even the soundtrack, it's all down to the word of the showrunner" (Dictionary.com, 2016)

**Table 3: A Typology of On-Screen Doctor Who ' Production Signatures'**

(Sources: Chapman 2013; 2014, Jones 2013, Hills 2013 and Hearn 2013).

Production Timeline	Producer	Period	Type of Story
Classic Who	Verity Lambert	1963-65	'Adventures through history'
	Innes Lloyd	1966-68	'Monsters'
	Barry Letts	1969-74	'Action adventure'
	Philip Hinchcliffe	1974-77	'Gothic horror'
	Graham Williams	1977-80	'Comedy'
	John Nathan-Turner	1980-89	'Hard science fiction'/ 'self-reflexivity'
Hiatus	Philip Segal	1996	'American cultural imperialism / hero narrative' <sup>38</sup>
Contemporary Who	Russell T. Davies	2005-2009	'Brand entertainment', 'epic soap opera' & 'romance and monsters'
	Steven Moffat	1999, 2009-Present	'Return to origin'/ 'fantasy, fairy-tale and fable'

Each production signature reflects an internal adaptation in strategic direction to external pressures on the BBC at the time, showing that the BBC's use of transmedia storytelling strategy was responsive to outside forces and intertwined with the larger strategic objectives of the organisation. For example, the absence of a central story mode in the Hiatus period correlates with a notable lack of production signatures and indicates a lack of strategic control and influences during this time period (Chapman, 2014). Fans took the helm and turned the show into something that they claimed ownership of through the creation and maintenance of fan communities (Hadas, 2014). In comparison, when the central television platform returned to air, Davies' production signature of epic, soap opera like branded entertainment reflects the BBC's focus upon appealing to a more global, internet connected audience (Perryman, 2008).

In both 1963 and 2005, *Doctor Who* was introduced at a time period when the BBC was looking to out-compete rival television networks (Yarbrough, 2015). To do this, the BBC engineered *Doctor Who* to appeal to as broad an audience as possible (Johnson, 2013). Davies was a proven writer, creating highly popular fan-fiction and then books for *Doctor Who* during the Hiatus period. To then launch the television series as a multi-platform brand in

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<sup>38</sup> Segal attempted to convert the show into an American style show with the aesthetics of American block-buster entertainment (Jones 2012, Johnson 2013).

2005, guided by Davies' branded entertainment style shows how internal and external pressures can align to develop a franchise transmedia approach. Analysing production signatures highlights that at least part of the strategic objective for *Doctor Who* was and still is guided by the internal BBC goal of creating effective, broad reaching entertainment. This is, in turn, influenced by the BBC's position as a public entity.

### 4.2.3 Audience Centric Strategic Development

This section shows that contrary to other franchises that also appeal to a broad audience (such as *Star Wars* or *The Marvel Cinematic Universe*), *Doctor Who* built a narrative world that does not attempt to differentiate itself by having expensive visual effects or block-buster narrative extensions. Rather, with commercial and cultural restrictions imposed upon *Doctor Who*'s development, from its development until the present day, the BBC's available expenditure and a need to maximise return, both commercially and culturally, have heavily influenced the transmedia strategy of *Doctor Who*. As a result, the BBC has consistently taken an audience centric, low-cost approach to developing *Doctor Who*.

Those responsible for "Classic Who" in the early days of production were handed a double-edged sword in the resources they were provided to create a new show. On the one hand the producers were given access to the BBC's extensive special effects department, allowing them to embrace the science-fiction aesthetic that the show was aiming for (Clark, 2004). On the other they were only provided with a restrictive budget of £2000 per episode to get the show off the ground in 1963 and a similar budget for the majority of Classic Who (Perryman, 2008). This restrictive budget shapes the aesthetic of *Doctor Who* even today<sup>39</sup> and consistent audience reports by the BBC during Classic Who demonstrate a focus on the audience in the development of the series (Audience Research Department of the BBC, 1963; 1966; 1982; 1987).

Prior to the pre-planned resurgence of Contemporary Who, however, *Doctor Who* did not include transmedia storytelling as core part of strategic formulation.

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<sup>39</sup> This restrictive budget and emphasis on the science-fiction elements of the series created a lasting set of influences on its aesthetic development, including the creation of monsters like the Daleks that were very easy for fans to recreate at home, a regenerating main character who could be played by any lead actor or actress and a focus upon character and story (Chapman 2014). Low contributions to the budget meant a higher focus on creating characters that would be relatable to a broad audience (Leach 2009).

*"The licensing of spin-off films, books and merchandise were not core to the BBC's activities, but peripheral, and often responsive rather than strategic. By contrast, in the 2000s the extension of television programmes onto other media has become a more central strategy for the BBC, leading to greater emphasis on the need to manage and coordinate such activities... The need to manage brands is not just driven by commercial imperatives, but also by the need to ensure that the range of programme extensions does not undermine the BBC's 'values' and 'integrity'... Understanding Doctor Who as a brand, therefore, involves exploring and unpacking the tensions and contradictions inherent in the BBC's attempts to manage and reconcile its increasing commercial activity with its core public service remit and identity"* (Johnson, 2013 l. 2639 of 5338).

As Johnson's analysis of *Doctor Who* as an international brand demonstrates, the development of the franchise has today been the result of an intensive audience focus, not just for commercial reasons but also because of the BBC's cultural obligations to the public. Failures such as the cessation of the game, *Doctor Who and the Eternity Clock* (2010), and previous narratives, such as *The Scream of Shalka* (2003) being ignored by the new *Doctor Who* television series in 2005, illustrate the willingness of the BBC to test, learn and adjust their strategy in reaction to audience reception. Throughout Contemporary Who, the BBC have retained the lower budget aesthetics for the television show. Unlike big budget Hollywood franchises, they have instead chosen to compete in three areas of cost-efficiency:

1. By appealing to the ease at which audiences can access material. Central content is nearly always released online, for free with exceptions usually applying only to ancillary content such as games and book (e.g. the Nintendo DS game *Doctor Who: The Invasion of Earth*).
2. *Doctor Who's* relevance to the public as per its charter. Educational games and multiple television shows have been produced for multiple audience groups (e.g. *Torchwood* for adults, *Sarah Jane Adventures* for children).
3. Leveraging platform production channels that the BBC already controls to produce content. BBC Books publishes the *Doctor Who* novels, BBC Radio broadcasts the radio dramas, BBC TV and BBC iPlayer broadcast episodes to the UK.

New forms are experimented with but only those that provide economic return (i.e. spin-offs) and those that provide cultural and education return (i.e. educational apps) are continued. Instead of competing on special effects, or with star power, this section shows that BBC leverages its position as a public organization and focusses on providing the maximum engagement for investment in *Doctor Who*.

### 4.3 AUDIENCE ENGAGEMENT AND THE WORLD OF DOCTOR WHO

As was previously discussed in 4.1 and 4.2, *Doctor Who* is a broadly focussed narrative world, built to appeal to an audience that ranges from young children to older fans who've experienced over half a century of content. This section applies the third and final guiding question - *how has transmedia storytelling impacted upon the way that the producers sought to engage with their audience?* To do this, this section charts the evolution of engagement strategies as *Doctor Who* has evolved over time. This section shows that *Doctor Who* maintains a primary focus upon entertainment and immersion when engaging its audience. Broadcasting narrative modes that are accessible to as wide an audience as possible, it relies upon entertainment and immersion to spur connection and communication among its audience.

Guiding the analysis of each of these sub-sections is the application of the engagement lens, which is shown in Table 4, overleaf.

**Table 4: Engagement and Contemporary Who**

<b>Tiers of Involvement (Zaichkowsky)</b> <i>The capacity of the audience to continue to engage with something. Factors include time, personal relevance of the product, access to the product and skills needed to use the product (Andrews et al., 1990).</i>	<b>Types of Engagement</b> (Dena, 2008; Beddows, 2012b; A. Phillips, 2012)	<b>Methods and Logics of Engagement</b> <i>Linking activities that the audience could undertake to Askwith (2007)'s logics of engagement: entertainment, immersion, social connection, identity and mastery.</i>
Low	Passive	<ul style="list-style-type: none"> <li>• Watching the central television texts, reading books and listening to radio plays – <b>entertainment</b></li> <li>• Watching behind the scenes content – <b>entertainment, immersion and mastery</b></li> </ul>
Middle	Some passive and interactive elements	<ul style="list-style-type: none"> <li>• Playing <i>Doctor Who</i> games and learning new skills (i.e. coding) - <b>entertainment and immersion</b></li> <li>• Finding and engaging with additional narratives (books, radio plays, games etc.) – <b>mastery, entertainment and immersion</b></li> <li>• Discussion of plot points with other viewers – <b>social connection</b></li> <li>• Wikis, fan groups and fan meet ups – <b>mastery and immersion</b></li> </ul>
High	Highly active	<ul style="list-style-type: none"> <li>• Making fan-fiction and having it recognised by plot within the show – <b>identity and immersion</b></li> <li>• Buying merchandise of the series to wear – <b>identity</b></li> <li>• Visiting the <i>Doctor Who Experience</i> – <b>immersion, mastery and identity</b></li> <li>• Searching for and uncovering mysteries hidden in the show (i.e. Bad Wolf) – <b>social connection, identity</b></li> </ul>

Each following sub-section analyses findings uncovered in when analysing *Doctor Who* through this framework. Section 4.3.1 discusses the BBC's focus upon largely one-directional forms of entertainment to engage and immerse their audience, relying on larger, passive groups of audience members to watch the majority of their content. Section 4.3.2 then demonstrates how the BBC has learnt to include basic elements of social connection into their strategy, acknowledging strong sentiments of fan ownership that grew during the Hiatus period. However, it also shows that additional forms of engagement beyond entertainment and immersion are clearly not the focus of the BBC in the way it constructs its transmedia story world.



### 4.3.1 A Narrative World Focused Upon Entertainment and Immersion

Table 4 shows that the logics of entertainment and immersion are the most common forms of engagement in for *Doctor Who*. Today,

*"Multiple iterations of the Doctor can be "known" at once: through DVDs, streaming, and downloading, Doctor Who is literally never unavailable... the always available technology of the rebooted New Who creates an indelible textual presence that closes narrative gaps and facilitates greater cult character structure" (Booth & Burnham, 2014, p. 214).*

In Contemporary Who, the BBC makes *Doctor Who* content (television narratives in particular) freely available across multiple distribution platforms<sup>40</sup>, including older episodes broadcast before 1989. This leverages the immediacy of modern technology to enhance the potential for an audience member to immerse themselves in a world of entertaining content. This strategy in itself is not new or unique but it indicates a clear advantage provided by the platform-agnostic transmedia strategy of *Doctor Who*. Immediacy and immersion are clearly at the forefront for the BBC in engaging the audience with their narrative world. Capitalising on this, the BBC also uses tie-in content available on the platforms on which it broadcasts the television episodes, such as *Doctor Who Confidential* or casual web based games available on its website when an audience member uses the BBC's online distribution platform iPlayer.

The focus on a world of immersive content by the BBC is also not without its drawbacks. Evans (2008) notes that game content often contains modal barriers to entry for those used to interacting with content in the passive **participatory** manner of one directional media, such as television. It could be that this is partially for this reason that attempts at gaming story modes for Contemporary Who have sometimes lead to short lived life cycles (e.g. *Doctor Who: The Eternity Clock (2012)*). Simmons (2013) believes that the people who play *Doctor Who* games are often not typical "gamers", with many never having played computer games before. These people are fans first and gamers second and often had problems

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<sup>40</sup> For example, the television episodes are immediately available across iPlayer, mobile and online when they are broadcast on television.

engaging with the more game-like<sup>41</sup> aspects of *Doctor Who* games. This has, in turn, led to poor reception for *Doctor Who* games targeted at consoles and hard core gamers (as well as technical problems causing significant backlash) and greater success in “casual” gaming platforms such as the web-games and the interactive *Adventure* episodes of 2010 (Simmons, 2013).

These issues with the more interactive components of storytelling within *Doctor Who* only serve to highlight the focus of the BBC on reaching their broad audience with one-directional, immersive entertainment. Even the *Doctor Who Experience* is an interactive adventure that the audience is guided through in person, rather than shaping or influencing the narrative through their real world interaction. Spin-off franchises like *Torchwood* serve new content to specific audience segments, but they replicate the same model as *Doctor Who* in emphasizing story modes that focus on stories told to audience members and an ancillary world of immersive content.

Instead of investing too heavily in new forms of engagement, the BBC has consistently focused leveraging its available resources to create new narrative modes that interlink with one another, once again demonstrating the focus upon cost-effectiveness in transmedia strategy demonstrated in the previous section (4.2). For example, the *Doctor Who Experience* is built so that the BBC can capitalize on the already existing warehouse of props used in *Doctor Who* over its history, turning it into both a museum and a story mode. Similarly, books, radio plays and web-games all are produced by creatives and actors already employed by the BBC and distributed on platforms already controlled by the BBC (Yarbrough, 2015). The BBC does have a history of experimenting with new narrative modes, as per their charter, but it only invests significantly in new modes that prove their viability (such as the books and radio plays during the Hiatus period).

This is not to say that the BBC does not also experiment with other forms of audience engagement. As the next section discusses, the BBC has learnt over time, to leverage social connection and fan identity among its audience members, even while focusing on entertainment and immersion.

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<sup>41</sup> Juul argues that the more ludological or “game-like” something becomes, the less it can fulfil a role as a narrative created by producers for audiences as the audience themselves are the ones who create their own story when they game (Juul, 1998).

### 4.3.2 Socially Connecting Audiences in a Fan-Brand Franchise

Building upon its place as an already existing narrative world, this section shows that engagement strategies used within Contemporary *Who* have been shaped by the strong feelings of fan-ownership and fan-activity that some audience members exhibit.

In the U.K. most of the passive, lower tiers of engaged audience members with *Doctor Who* faded away as the television series dipped in ratings and then was taken off air in 1989 (Chapman, 2014). However, those audience members who had been immersed in the world and exhibited higher levels of involvement kept their engagement going through their own *Doctor Who* related social activities. They created fan magazines, used home cameras and consumer editing software to make fan videos (vidding); they wrote and shared fan fiction both online and, prior to the proliferation of the internet, in hard copy (Scott, 2010; Tulloch & Jenkins, 1995). The new Doctor introduced in the 1996 movie even gave the broader fan base a boost, supplementing the absence of a central entertainment pillar (the television show) and capitalising upon social connection between remaining fans of the property<sup>42</sup>. The BBC responded to this renewed interest by increasing the amount of immersive entertainment available, producing new novels available and experimenting with web-animation (*The Scream of Shalka* (2003)) and increased radio play production (Perryman, 2008). From the Hiatus period onwards, *Doctor Who* was a brand with which large segments of its audience felt strong impulses of ownership (L. Johnson, 2012b).

Contemporary *Who* has to operate in this fan-brand landscape with multiple fan communities existing online for *Doctor Who*, showcasing their enhanced mastery through the collective intelligence of wikis and forum sites<sup>43</sup>. While the focus of Contemporary *Who* is still largely on entertainment and immersion to engage audiences, the BBC has learnt from

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<sup>42</sup> Prior to 1996, the other group of audience members - those who had not grown up with *Doctor Who*<sup>42</sup> - came into contact with the series through "vicarious nostalgia"; repeats of episodes on television or shown to them by friends, charity specials, purchasable collections of old episodes and new media incarnations (Johnson 2013). While this provided them with engagement through social connection (being introduced to the series through friends and family) and entertainment (experiencing the show as a central pillar of entertainment), it left them with no doctor of "their own" to identify with (Freund 2013). The new incarnation Doctor from the 1996 movie provided someone for Hiatus fans to identify with as "their" doctor, as inconsistent as he was with the past narrative (Jones 2013). Although it must be noted that some fans consider the 1996 movie's style and take on the Doctor to be "Americanised" and inconsistent with their personal versions of the story world. As the show has become more prevalent on the international stage in recent years, this is a tension has continued within *Doctor Who* to this day (Porter 2012).

<sup>43</sup> See [tardis.wikia.com](http://tardis.wikia.com), [doctorwhonews.net](http://doctorwhonews.net) and [outpostgallifrey.com](http://outpostgallifrey.com) (based on a fan society that has existed since 1970) as examples of this.

the Hiatus period and actively seeks to stimulate and nurture social connection in their use of transmedia strategy in the Contemporary Who era.

The distribution of fan art and fan fiction has been encouraged and occasionally licensed by the BBC, being sold at conventions organized by fan societies such as *Gallifrey One* (Gallifrey One, 2015). When fan expression does not directly contravene the monetisation of the world, the BBC can be seen as largely supportive and inclusive of these alternate forms of engagement spending additional effort and evolving their strategy to be socially inclusive, if still not focussed on social connection (Pearson, 2013). The creators of the *Doctor Who* show even include various “tips of the hat” to popular fan versions of the world, celebrating fan **identity** and **interaction**. A key example of this is their treatment of *SuperWhoLock*<sup>1</sup>, of recognising a niche fandom by having the Doctor pretend to be Sherlock Holmes in the 2012 Christmas Special *The Snowmen* (Perez, 2013). These kinds of actions, in turn, generate greater buzz about the show and demonstrate the influence of social connection among audience members on the franchise strategy of *Doctor Who*.

Still maintaining their focus on immersing audiences in the content of their central silos, the television series, the most visible approach to stimulating social connecting and fostering greater audience engagement within *Doctor Who* is the use of intertextual references to create narrative gaps for the audience to fill. An example of this is the use of the phrase “Bad Wolf” in season one of Contemporary Who.

*“It did not take long for the fans to start speculating about what ‘Bad Wolf’ could mean, and they took their speculations online to unofficial blogs like ‘Scott’s Place’ that hosted a lengthy thread on ‘Bad Wolf Hunting’ (Scott, 2005), and the popular online Doctor Who forum ‘Outpost Gallifrey’ (Gallifrey, n.d.) which boasted a community of over 18,000 users. Theories ran riot. Suggestions for who or what the ‘Bad Wolf’ was ranged from the Doctor’s arch enemy, the Master, to even the Doctor himself. Speculation became so fevered it even reached high-street betting shops...” (Perryman, 2008, p. 28)*

The mystery of what Bad Wolf meant was inflamed by both official websites for the television show and websites “created” by characters within the television show providing

clues and hints (Collins, 2010). Due to the success of this experimentation, the BBC used 23 different websites to fuel audience intrigue and discussion between seasons 1-3 of the new series alone<sup>44</sup>.

Jeremy Sarachan, a scholar in fan cultures, activism and digital technologies uses these fan related activities to link Contemporary *Who* to the benefits Jenkins' prescribes for effective transmedia storytelling. He believes that the application of media in this way by the BBC, "creates a framework for fans to become part of the overall narrative and permits them to engage with the mythology of the program and appreciation that all elements – professional or amateur... offer value and enhance engagement" (2013, p. 138). Socially connecting actions are clearly used by the BBC to enhance the potential participation by audiences within the world of *Doctor Who*, despite the BBC's focus being held primarily on creating engaging and immersive content centred around the television series.

#### 4.4 COMPETITIVE ADVANTAGE

This section provides a summary of each section within this chapter, distilling the findings within through Porter's framework for competitive advantage (unique position, strategic fit and trade-offs) to show how and why *Doctor Who* has developed into a broadly focussed, transmedia narrative world. It proposes that transmedia strategy has had a consistent, significant impact upon the competitive advantage of the narrative universe of *Doctor Who*. It also illustrates how the BBC has undertaken certain trade-offs in developing *Doctor Who*, delicately balancing commercial and cultural obligations as a public entity.

##### 4.4.1 Section Summary

This chapter details the evolution of *Doctor Who* from a Sunday afternoon television program into an enduring, modern day transmedia franchise.

Section 4.1 shows how that evolution resulted in a pre-planned transmedia strategy in Contemporary *Who* (2005-present), one aimed at reaching as broad an audience as possible.

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<sup>44</sup> See the Tardis Data Core ([tardis.wikia.com](http://tardis.wikia.com)) for an in depth list. Since the changeover in lead producer to Moffat, however, this style has become more centralised, with blogs and information being filtered back through the main *Doctor Who* site at <http://www.bbc.co.uk/programmes/boo6q2xo>.

To reach that audience, the BBC have maintained a centralised focus in developing their story world, with the development of any aspect of the narrative world interlinked with the television series.

Section 4.2 then outlines the delicate balance that the BBC has had to strike in developing their strategy for *Doctor Who*. Their use of transmedia has consistently been influenced by the commercial viability of platforms and the BBC's obligation to the public to "educate, inform and entertain"(Department of Culture, Media and Sport, 2006). To strike this balance, BBC have consistently oriented themselves towards their audience, testing new content and story modes and measuring the value of each new mode by both its cultural and commercial outcomes.

Finally, Section 4.3 demonstrates how the BBC leverages transmedia storytelling to engage audiences while achieving these goals. Through a focus on immersing their audience in a world of narrative entertainment the BBC uses multiple story modes to appeal to different audience segments; adult content (*Torchwood*), interactive content (games or the live event of *The Doctor Who Experience*) and an expansive world of passive entertainment for all ages (television series, books, radio plays, etc.). This section also shows the development of small activities that foster and embrace social connection among the *Doctor Who* audience as, over time, the franchise has evolved to embrace its place as a "fan-brand".

#### **4.4.2 Applying Competitive Advantage Theory**

Examining these findings through a consideration of Porter's (1996) components of strategy; unique position, strategic fit and trade-offs, we gain an understanding of the significant impact that transmedia storytelling has had on the world of *Doctor Who* and why the BBC has developed the world in this way.

##### **Unique Positioning**

Beyond the unique aesthetic provided by low-budget sets and an interchangeable cast and setting, *Doctor Who's* structure provides a unique experience for audiences as they engage with a narrative world that they love. Highly involved and active audience members can

master an expansive world of content while passive, low involvement audience members can simply watch the television series and still follow the central narrative. Findings relating to this unique position are as follows:

- In stand-alone story extensions that seek to appeal to particular audience segments unique positioning can be consistently sought and provided by micro-transmedia storytelling strategies (e.g. *Torchwood*, created to appeal to adult audience members, has its own transmedia roll out with books, games and behind the scenes content of its own).
- The transition from Classic to Hiatus and then Contemporary *Who* illustrates how the story world can change from offering centralised adventures for a wide audience (the television show) to fragmented adventures for a highly involved, niche audience (books, magazines and comics in the Hiatus period).
- **However**, *Doctor Who's* unique position is largely dependent upon the narrative provided by the central story mode. Further research is required to confirm the findings of this case study but it could be inferred from this case that, if the *Doctor Who* television series fails to provide audiences with something substantially different to its competitors, its unique position might begin to falter, that could result in another period of hiatus. Should *Doctor Who* fail to produce a cost-effective, culturally beneficial return (as per the BBC's charter), then it will likely once again find itself on hiatus.

### **Strategic Fit**

To create a "whole that was greater than the sum of its parts" (M. Porter, 1996, p. 2) analysing *Doctor Who* showed that transmedia storytelling can balance and even leverage corporate obligations and commercial return to provide audiences with an easily accessible and cost-effective narrative world.

- Large, separate but interlinked pillars in the central television series and spin-offs such as *Torchwood* overlap consistently with one another, sharing characters but consistently generating their own unique narratives. This incentivises audience to experience more of the narrative world.
- The way they used key authors, resources and actors to create multiple story modes represents strategic fit (e.g. turning the prop museum into an interactive narrative). This affirms current transmedia theory that it is highly advantageous to use key characters and crew to draw audience across platforms and to lower overheads but not having to employ and train multiple staff (Jenkins, 2006).
- To maximise strategic fit in Contemporary *Who* and cope with the production divergence of attempting to create multiple interrelated narratives in Contemporary *Who*, the BBC producers moved all creative production into one physical location (BBC Cardiff Studios).

### **Trade-Offs**

As Porter contends, no strategy generates a sustainable unique position without significant trade-offs and this case study of *Doctor Who* illustrated that franchise transmedia storytelling is no exception. Ultimately, each trade-off within the world of *Doctor Who* shows a consistent focus on providing value to as broad an audience as possible by supporting their most popular narrative component, that of the central *Doctor Who* television series.

- The broad audience focus of the overarching *Doctor Who* strategy, as well as its centralisation on one television series, has also been linked to a finite lifespan for every other additional narrative story mode so far, including the additional spin-off television series.



- Ancillary stories that were popular with small audience groups, such as *The Scream of Shalka* and *Doctor Who and the Eternity Clock* had their narrative contributions erased from canon by new story modes, shortening their life spans and lowering the potential audiences for those projects.
- Embracing their audience and reviving the central platform after the Hiatus period meant interacting with what had now become a brand partly owned by the fans. To this day, the BBC has had to consider and embrace vocal fan groups when developing their narratives, whether that was concerned mothers during Classic Who (Chapman, 2014) or modern fans concerned about the “Americanisation” of *Doctor Who* as Moffatt searches for a large global audience (Porter, 2012).

### Chapter Summary

This chapter provides the first or ‘pilot’ case study for this thesis. By applying the analytical lens, it demonstrates that *Doctor Who* has actively used transmedia storytelling to attain competitive advantage in the contemporary marketplace. It shows that *Doctor Who* focuses upon entertaining a broad audience and immersing that audience in a world of content, largely leaving other forms of engagement, such as social connection, for the audience to instigate. Through a strategy centralised around a core television series, *Doctor Who* used and continue to use transmedia storytelling to experiment with different forms of storytelling. However, strategic analysis shows that this experimentation is guided by and dependent upon the BBC’s Charter as a public broadcaster. The BBC use transmedia storytelling for *Doctor Who* because it provides a return to the general public that satisfies their commercial, educational, cultural and technological obligations.

As a pilot case study for this thesis, this analysis demonstrates that the analytical lens can provide valuable insight into transmedia storytelling. It provides a strategic rationale for the way in which franchise transmedia storytelling was and still is used by the BBC with *Doctor Who* to reach a broad audience and provide entertainment and cultural and commercial value. The next case study, *Sofia’s Diary*, charts a completely different use of transmedia storytelling, showing how the strategy changes when used by an emergent company seeking sustainable success in a crowded content marketplace.

## CHAPTER FIVE: DIARIO DE SOFIA (SOFIA'S DIARY)

"People don't buy content, people buy experience, people buy context" (Bernardo, 2015b)

In contrast to the previous chapter on the BBC's big budget, global brand and 50-year franchise *Doctor Who*, the case study in this chapter focuses on a low-budget, independent and experimental project originating in Portugal – *Diário de Sofia (Sofia's Diary)*. *Sofia's Diary* achieved such popularity that it has been adapted to over 30 territories in ten languages and *Sofia's Diary* is regarded as one of the earliest success stories from the pioneering years of digital transmedia (Gambarato, 2012b; C. H. Miller, 2014). However, while often cited superficially in the scholarly literature, this thesis found no rigorous interrogation of the project within transmedia research beyond books published by the project's creator, Nuno Bernardo (see Bernardo, 2011a; 2014). This makes it an ideal candidate for study in this thesis. This chapter demonstrates how and why *Sofia's Diary* differed fundamentally in its goals, form, scale and strategy from the kind of ongoing franchises<sup>45</sup> such as *Doctor Who* or those frequently created by Hollywood – blockbuster movie franchises supported by big-budget, global distribution and saturation marketing campaigns.

In a face-to-face interview conducted specifically for this thesis, producer Bernardo indicated that he deliberately chose to create *Sofia's Diary* as a different type of project to his competitors (Bernardo, 2015b). *Sofia's Diary* was a project that, unlike Hollywood's ongoing blockbuster franchises, had a pre-determined and finite life span based around a teenage girl as she grew up during her high school years. Bernardo, while working across a range of industries for other companies, undertook market research that told him that there was a gap for an experience that truly connected with female, Portuguese teenagers. Because of this *Sofia's Diary* focussed on fostering a sense of connection with its audience by telling its story across radio, SMS messages, online blogging and, eventually television so that it would mirror the way in which teenage girls were already using media at the time (in 2003). This case analysis demonstrates how, producers through a deep understanding of an audience and that audience's behaviour, can successfully differentiate lower budget content and

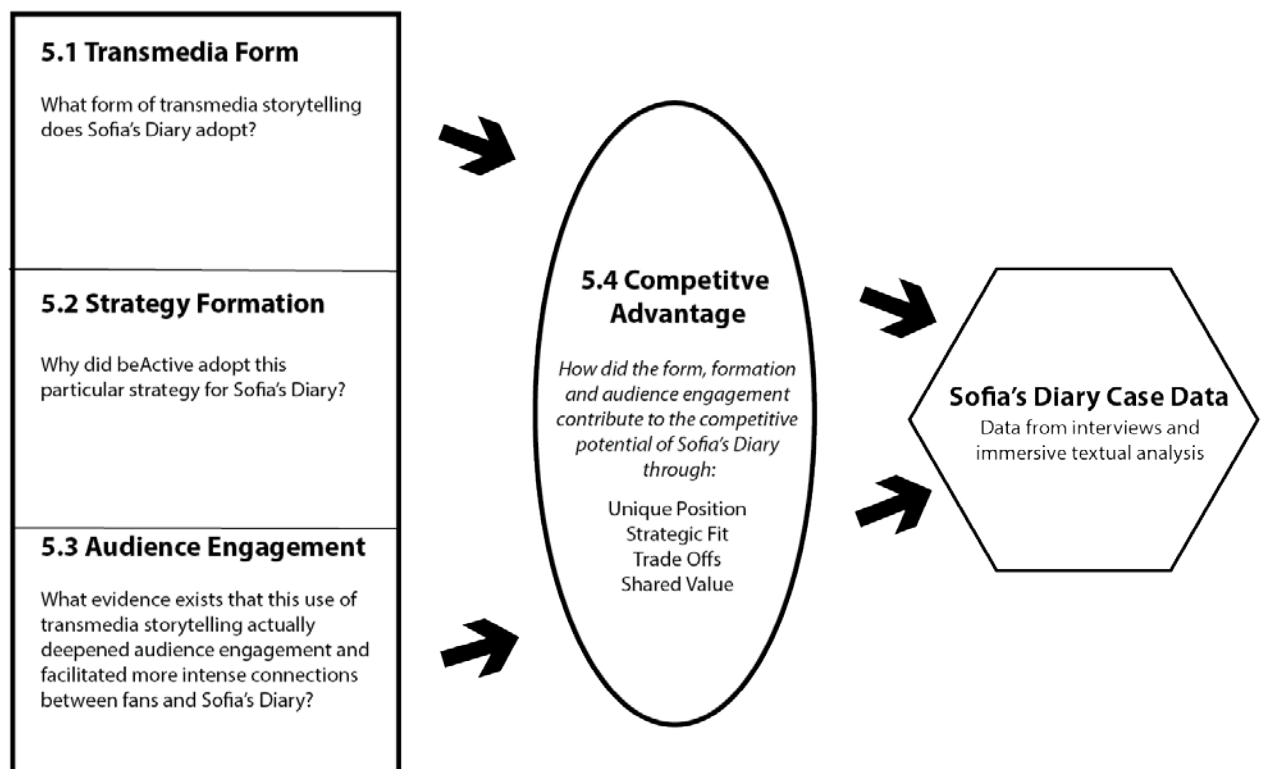
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<sup>45</sup> Often referred to as Hollywood or 'West Coast' transmedia (Phillips 2012).

create their own market niches for their work with transmedia storytelling (what Kim and Mauborgne (2005) term a blue ocean strategy).

Figure 9, below, illustrates how each stage of the 'analytical lens' developed in Chapter Three is applied to this case study.

*Figure 9: Application of the Analytical Lens to Sofia's Diary*



As with the previous case study of *Doctor Who*, the analysis begins by reviewing the history and structure of *Sofia's Diary* as a project. Having mapped the project, this chapter then analyses the form of strategy present (Section 5.1), why this form of strategy was undertaken (Section 5.2), how that impacted upon audience engagement with the narrative world (Section 5.3) and then synthesises these findings through Porter's theory for strategic competitive advantage (Section 5.4).

## The Project

*Sofia's Diary* follows the daily troubles of a teenage school girl. Each day, the audience would be presented with a dilemma that the main character, Sofia, faced. Typically, this involved something like whether Sofia should go and see the boy that she liked or if, instead, she should study for a test the next day. The audience would be invited via SMS and online blogging to provide their opinions on the dilemma, enabling them to discuss it with each other online and to help Sofia make a decision. The next day, via various story modes, the audience could find out the resolution to that dilemma and would then be presented with a new one (Bernardo, 2011a; 2014). The narrative modes used with the narrative world to facilitate audience engagement with the content comprised of an SMS message service, online blogs, television episodes, a magazine column, radio drama and 18 books.

Created in 2003 as the first wave of internet investment began to die off, this project is a valuable case study in understanding how transmedia storytelling operated at the dawn of the current digital era. The project was initially pitched to local Portuguese networks as a television show with integrated interactive phone and online components that would make the audience feel like they were a part of Sofia's life. Despite positive feedback from the network, *Sofia's Diary* was rejected because of its experimental approach. The network deemed it too risky and lacked confidence that it was a financially viable project due to its non-traditional and unusual multiplatform approach (Bernardo, 2011a). So Bernardo initially launched the project as an interactive online game that combined web blogging with an interactive mobile subscription service.

A press release from the project's launch proclaims,

*"This game, never seen before in Portugal, gives the participants the power to 'decide' Sofia's daily actions: if she will go to a lesson or not, if she accepts her boyfriend's request, making new friends, introducing or expelling a character, and many other decisions" (beActive, 2003).*

Creating the project as a transmedia narrative was a deliberate strategic choice by beActive so that audience members would feel like they were one of Sofia's friends (Bernardo, 2015b).

This format allowed them to be part of Sofia's life advising her and helping her deal with the same issues that they were dealing with every day at school (Bernardo, 2011a; 2014).

From its initial "game" roots, the project developed into a narrative that was deliberately and strategically spread across different platforms so that it mirrored the way that its target audience, teenage girls, were actually using media in their daily lives (Bernardo, 2015b). As the popularity of Sofia's Diary grew online among teenage girls, the producers employed a publicity stunt to cast the face of Sofia<sup>46</sup> hoping to stimulate further interest in the program. The casting announcement resulted in thousands of teens lining up around a city block hoping to become the face of the project, and television studios that had originally rejected Bernardo's concept<sup>47</sup> approached beActive to make a television component. Soon audiences could also watch daily 5 minute shows after school that continued the narrative of *Sofia's Diary* (Miller, 2014). At its peak, every Monday to Friday the audience could listen to a piece of the narrative on the radio on their way school in the morning. Then they could interact with Sofia during the day on their phones. In the evenings they could read her blog online and watch the television show. Fans could even read a column in a teen magazine once a month that summarised how Sofia was going or buy books that recapped each season of the show<sup>48</sup>.

*Sofia's Diary* became a runaway success, far exceeding beActive's expectations. Not only did the blog have over 200,000 monthly visitors online, 19,000 mobile subscribers and 4 seasons on state television broadcaster RTP2 (Stack, 2008), it also sold over 500,000 books in a country of just 10 million people (Bernardo, 2011a). The multi-platform format for the show<sup>49</sup> was licensed by Sony Pictures in 2006, which adapted the narrative to over 30 territories and 10 different languages around the world (Stack, 2008; Madden, 2009; Bernardo, 2015b). The format even enjoyed success in China, a market that has traditionally been hard for Western

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<sup>46</sup> A publicity strategy that can be traced back to producer David Selznick in 1937-38 to cast the role of Scarlett O'Hara in 'Gone with the Wind' (Bridges 1989, pp.212-229).

<sup>47</sup> Their reception was positive but they could not commit to financing the story due to uncertainty over financial returns from this untested format.

<sup>48</sup> A publishing deal was reached and books were also made available that mainly acted as physical recaps of the Monday to Friday events in Sofia's life. "The big fans, they already knew the story, it was just about being connected, having the book, having the physical product connected to the brand they love" (Bernardo 2015). While this shows that there was some overlap among story modes in the content they covered, each story mode provided its own additional perspective and formed a larger, transmedia whole.

<sup>49</sup> A format, language most often used in the television production space, refers to a particular structure for telling a story. Producers control the intellectual property relating to how their story is told, even when it is dispersed across multiple platforms and this allows them to license or sell that format to other production companies who wish to use that structure (Bachmayr 2010).

programming to enter. *Variety* and *The Wall Street Journal* reported that in China *Sufeis Diary*, an Estee Lauder sponsored adaptation, attracted over 20 million viewers across 40 episodes online (Coonan, 2009; Fong, 2009).

## 5.1 TRANSMEDIA STORYTELLING FORM

This section applies the first lens component, investigating *what form of transmedia storytelling did Sofia's Diary use?* First the analysis reviews *Sofia's Diary's* use of transmedia storytelling, finding it to be an example of portmanteau transmedia - a low budget project that tells a single narrative through independent but highly interconnected story modes (Gambarato, 2012a). *Sofia's Diary* exemplifies a form of transmedia storytelling that focusses upon small, low-cost experiences (Section 5.1.1). Then, Section 5.1.2 shows that *Sofia's Diary* was a project designed to be finite and scalable, grown experimentally from small interactive components into a format that could be on-sold and licensed to larger production companies. *Sofia's Diary* forms a counterpoint to the typical ongoing or 'evergreen' project that transmedia storytellers have come to associate with big budget transmedia franchises (see Gomez, 2013; 2015)<sup>50</sup>. In *Sofia's Diary*, finite experiences are packaged together to form a single narrative, an experience with a finite beginning, middle and end.

### 5.1.1 Portmanteau Transmedia Storytelling

*Sofia's Diary* is an implementation of portmanteau transmedia storytelling – a type of transmedia storytelling that Pratten (2011) and Gambarato (2012a) define as focussed upon telling a single narrative through multiple story modes that each drive the main story forward. Using low cost, fragmented and interlinked media components, Bernardo told the single narrative of Sofia's life. Rather than seek long-term engagement with individual story modes, *Sofia's Diary* used different story modes to provide alternate perspectives (such as the books and online blogs<sup>51</sup>), methods of interaction (active discussion and SMS

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<sup>50</sup> When interviewed for this thesis, prominent practitioner and transmedia advocate Jeff Gomez cited "evergreening" as a core objective for most large media conglomerates. He used it to refer to their pursuit of an undying narrative world in which one could endlessly create new stories and content for an audience. *Star Wars*, *Pirates of the Caribbean* and *Magic the Gathering* are all examples of this type of transmedia strategy (Gomez 2015).

<sup>51</sup> The books provided two forms of alternate perspective. In the series penned from the perspective of the main character, *Sofia* they helped to provide additional information from her point of view on events that had already happened. In another series, they reimagined events from the perspective of her younger sister, still covering the same single narrative but from a different perspective. Additional perspective is something that Jenkins recognises as part of transmedia storytelling's power to provide independent but interlinked story modes that further a narrative world and an audience's engagement of that world (Jenkins 2007).

interactions and passive television viewing) and new pieces of information (radio, television and SMS). These elements worked holistically together, adding different dimensions to the single narrative of Sofia's daily dilemmas.

*"They [the audience in 2003] consume content in different ways throughout the day - they listen (to) radio in the morning, they use their mobile phone during the day, they use computers when they get home and they watch television at night - we needed to create an entertainment experience that could be there throughout the day. Whatever is in one device, it really uses the best of this device. So I'm not taking a language from one platform and bring it to the other... I need to create a language for this device because the way people behave with these devices is different... We analysed how a teenager behaves during the day and then we created story that could be broadcasted or webcasted on different platforms"* (Bernardo, 2015b).

This quote illustrates the level of marketing orientation and audience centred design that went into beActive's choice to use portmanteau transmedia. beActive relied upon audiences traversing multiple story modes to experience different beats of Sofia's narrative because market research and experience to the producers that this was how their target audience were already using media in their daily lives. In this way, their narrative world relied both upon the stories in each story mode and upon the meaning that audiences could make by the *spaces between media* or, as Higgins terms it, intermedia (see Higgins, 2001). Dena (2014), Santo (2006) and Gambarato (2012a) all describe this aspect of transmedia strategy as arranging story modes in certain ways so that *the way that the story is told* as well as the story itself imparts narrative meaning to the audience. For example, in *Sofia's Diary*, the SMS service provided a personal communication with the audience that hinted at events to come later in the day. When this was then contrasted with her blog posts later in the day, audiences would see what she had chosen to bring out for discussion with the online audience and what she had kept to herself. In this way both the SMS service and the blog imparted narrative but also the space between them told a story for the audience.

The television episodes, books and online blogs often covered similar content, blurring the “unique contributions” of these story modes<sup>52</sup>. However, these different mediums also provided different perspectives that, when combined together, created greater meaning for the audience and fall within the parameters of transmedia storytelling (Dena, 2014). Portmanteau transmedia, allowed beActive to create an immersive and engaging environment for the audience. It aided them in generating short interactions that leveraged media platforms that audiences were already using as part of their daily routine. It helped to decentralise the narrative experience, allowing the audience to consume components of the larger narrative via whatever platform and story mode was most convenient to them.

### **5.1.2 A Finite Use of Transmedia Storytelling Creates a Re-Sellable Format**

Bernardo knew, from the beginning, that he was creating a narrative that had to end when the lead character of Sofia graduated (Bernardo, 2015b). beActive even made Sofia repeat a year so that they could stretch out the project and its associated revenue while still remaining within their finite format. When examining the type of transmedia storytelling present in *Sofia’s Diary*, it is clearly then an example of a finite approach. Rather than facing ongoing production costs and dealing with periods of lacklustre engagement such as Hiatus Who (covered in the previous chapter), beActive felt that their narrative was best suited to a finite format. Creating an experience with a foreseeable end allowed them to sell *Sofia’s Diary* as a format to the Sony Corporation, to enjoy sustained revenue from licensing rights and format right as their finite story was retold and adapted in different countries and territories (Bernardo, 2011a; 2011b).

#### **Summary**

This section demonstrates that *Sofia’s Diary* clearly deployed a finite, portmanteau type of transmedia storytelling strategy. This strategy was undertaken in the pursuit of two key advantages. First, it created easy to access, short portions of story that allowed the audience to easily take part in a single narrative as it progressed throughout each day. Combining these story modes together, the producers were able to generate enhanced meaning from how story modes were arranged as well as the story modes themselves. Second, it also

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<sup>52</sup> As Section 2.1 of the literature review outlines, this is a fundamental factor in separating transmedia strategy from other narrative strategies.



allowed the production company to generate a re-sellable format from the production. Each iteration would provide continued income for the company, beActive, that they could then invest in future projects. In this way there is both a focus upon the audience and a focus upon maximising financial return by beActive in producing *Sofia's Diary* with their transmedia storytelling strategy. One that resulted in a strategy focussed upon a creating a different and relatable experience based for a specific audience segment, Portuguese teenage girls.

## 5.2 STRATEGY FORMATION IN SOFIA'S DIARY

This section applies the second guiding question of the analytical lens: *why did beActive choose this style of transmedia storytelling?* It employs a three tiered analysis of strategic decision making within *Sofia's Diary*, show how beActive's decision making was influenced by context (Section 5.2.1), the corporate strategy of beActive (Section 5.2.2) and beActive's strategic objectives for *Sofia's Diary* (Section 5.2.3).

Section 5.2.1 begins by analysing the strategic context for beActive as a production company. It finds that the strategic direction for *Sofia's Diary* was significantly influenced by the landscape of media production for independent companies in Portugal in 2003 and Bernardo's previous experience as a media producer and researcher in that marketplace.

Section 5.2.2 analyses beActive's strategy as a production company. It finds beActive's use of transmedia storytelling with *Sofia's Diary* to be a result of a corporate nano-studio strategy – an approach centred around adapting the structure of large Hollywood studios, retaining control of the intellectual property of projects and the revenue associated with those projects to establish a sustainable business.

Finally, given these contextual and corporate influencing factors, Section 5.2.3 looks at how beActive intended to use transmedia storytelling to establish a unique market position with *Sofia's Diary*. It links *Sofia's Diary's* strategy to the pursuit of a uncontested market space, also known as "blue ocean strategy" (Kim & Mauborgne, 2004; 2013).

### 5.2.1 Strategic Context

At the time when *Sofia's Diary* was conceived (and arguably still today), independents in the European market and in particular in Portugal, generally relied upon traditional financing approaches to make the majority of screen content (Miller, 2014).

*"Unlike Hollywood studios, European independents must generate a production model on a project-by-project basis because they can only produce the film if they get funding from third parties. When they do receive backing and produce a film, they must reassign almost all of their works' rights to external companies in order to facilitate the distribution and marketing of their work"* (Bernardo, 2014, p. 18).

The problem facing Bernardo's fledgling production company was that relying on a traditional approach to financing projects would leave them without the control, revenue or sustainability that came from funding their own intellectual property. To create narrative content with this model an independent production company such as Bernardo's faced a constant reliance on the input of others (Bernardo, 2015b).

Also influencing Bernardo's thinking when he established beActive was his own interdisciplinary experience. He was trained at university as a journalist, then worked in advertising, marketing and, finally, on an interactive television project for Microsoft in 2002 (Bernardo, 2011a; 2015b). Due to this cross-platform experience, he wanted to create *Sofia's Diary* because he saw an opportunity from working with a multiplatform methodology to target an underserved portion of the market. Bernardo's personal development reflects the ideals of a transmedia producer (at least according to transmedia's strongest evangelists)<sup>53</sup>.

*"The reason we wanted to do a teen diary was because, at the time of course we needed to make some money and we needed to make this a very commercial experience. At the time I wrote some studies and the studies said that the big consumers of mobile entertainment, the ones who were really paying for content, were teenage girls. They*

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<sup>53</sup> Bernardo's profile fits with the type of person that Jenkins(2006), Smith(2009) and other transmedia scholars describe as a "super producer" or ideal producer in the transmedia space; someone who is skilled in multiple disciplines and understands the demands of making high quality content in each discipline.

*were not paying for music, they were not paying for videos, because they're downloading it illegally. But they were paying for ring tones, for the cute bears for wallpaper for their phone... people don't buy content, people buy experience, people buy context"* (Bernardo, 2015b).

Bernardo is not only talking about his need to fulfil the income requirements needed to establish a fledgling production company but he is also demonstrating a marketing-oriented approach, an approach that was externally focussed upon the market context and a centred on the potential teenage audience. Similar to *Doctor Who* and the BBC's consistent use of audience reports, Bernardo indicates that it was audience research and observed market/audience behaviour that dictated his use of transmedia storytelling strategy<sup>54</sup>. This enabled him to create a narrative world, an experience that teenage girls would purchase for their entertainment.

In this context, the use of transmedia storytelling by beActive was highly experimental. When the project was created in 2003, Bernardo and beActive had not even heard of transmedia storytelling (Bernardo, 2011a; 2015b). Buzzwords such as "triple play"<sup>55</sup> and "second-screen content"<sup>56</sup> had begun to enter the vernacular of practitioners but a lack of precedent for this type of project is precisely why beActive faced rejection from traditional financing sources when Bernardo initially pitched *Sofia's Diary* to television networks. The term transmedia had also only just begun to enter theoretical discussion, transforming from Kinder's transmedia intertextuality (Kinder, 1991) to Jenkins' more popularised notions of transmedia storytelling (Jenkins, 2003; 2006). Bernardo stated that the discovery of the term transmedia storytelling, for him, was more like finding a name and a category for what he was already attempting to do with *Sofia's Diary* (Bernardo, 2015b).

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<sup>54</sup> Bernardo reports that at the time he noticed that audiences "love to talk, to discuss and this is nothing new with technology... What was different was that with phone calling, with sms, then internet, was the fact that now audiences could not just talk with each other but could talk, discuss or vote with the shows" (Bernardo 2015a) this mirrors the advantages of transmedia storytelling - to invite interaction and the feeling of participation that some transmedia storytelling scholars highlight such as Smith (2009), Beddows (2011) and Long (2007).

<sup>55</sup> Triple play was a concept popular in the early 2000s at conferences such as MIPCom and it referred to the capacity for content to be replayed across multiple devices such as mobile, television and online (Bernardo 2015).

<sup>56</sup> Second screen content is another term coined in the same era. It refers to a practice of creating content for the additional screen that audiences are interacting with while watching their primary screen, such as television. For example, second screen content might be developed in a phone app or for a tablet, allowing audiences to access additional video during the ad breaks of their favourite TV show. It does not take the place of the television experience but rather adds to it, providing more information or narrative context (Miller 2013).

This section shows that *Sofia's Diary* was an intentional use of transmedia storytelling that not only predates the intentional implementation of transmedia storytelling seen in the previous case study of *Doctor Who*, but also represents an experimental rather than evolutionary development of that approach. This was due to the context in which *Sofia's Diary* developed, with Bernardo's personal experience and the low revenue and control offered by traditional production methods to independent producers in Portugal in 2003.

### **5.2.2 Corporate Level Strategy: Retaining Control with a Nano-Studio**

Bernardo leveraged the opportunity provided by this particular strategic context to his new company's competitive advantage. Taking inspiration from the Hollywood studio model, Bernardo engineered beActive to act like a small scale or "nano" studio and retain control of their intellectual property. This strategy is outlined in Table 5, overleaf, which is taken from Bernardo's recent book *Transmedia 2.0* (Bernardo, 2014).

**Table 5: From Studio to Nano-Studio (text Transmedia 2.0, Bernardo, 2014)**

	Studio Approach (Hollywood)	Nano-Studio Approach
Stage 1	Hollywood studios own a vast libraries of past productions that generate steady income streams from video and TV sales which allows studios to cover business overhead costs and to use as collateral to facilitate finance for future content	Early-development funding sourced independently from government film funds, private equity and/or revenue streams from catalogue of existing titles (Sofia's Diary, Flatmates, etc.).
Stage 2	Credibility and collateral allows studios to attract private equity investments which spreads and thus reduces risk; co-venturing on big budget blockbuster productions costing \$200 million to produce	Develop story world/multiple platform content and seed online with big partners who can ensure global digital distribution (YouTube, Wattpad, Machinima.com etc.)
Stage 3	Pre-sales and distribution further reduce producer's/distributor's risk	Sales driven through premium content and/or advertising
Stage 4	Marketing, public relations and distribution are controlled in-house <sup>57</sup>	Depth of story world and the longevity of brand ensure sustained revenue

The approach outlined in this table is centred around creating and maintaining control of an intellectual property. Bernardo summarises the benefits of this approach to a production company as the capacity to:

- Approve or “greenlight” their own projects, rather than depending upon external funding and opinion.
- Promote/distribute their own content by dealing directly with audiences.
- Build a library of titles, like Hollywood, with their own audiences and resulting cash flows.
- Use ongoing revenues to cover expenses and invest in new projects

<sup>57</sup> While it is worth noting that the Hollywood Antitrust Case of 1948 does prevent Hollywood studios from actually owning exhibition in the form of cinemas for their films (Gil 2010), marketing, public relations and other methods of distribution are often still controlled by studios in a process called horizontal integration. “Horizontal integration refers to the way a number of complementary economic activities existing ‘alongside’ each other, so to speak, can become internalised into the single firm and become part of its own business” (Thompson 1991, p.1).

As Table 5 and the accompanying text above shows, the nano-studio approach is a corporate level strategy but designed with transmedia storytelling in mind. Bernardo talks about two concepts in particular for beActive projects that scholars propose are desirable outcomes for independent producers from transmedia storytelling - "depth of story world" which enriches audience experience and can deepen engagement (Jenkins, 2009) and "longevity of brand" that can facilitate sustainable revenue streams (Tenderich, 2013; 2015). "One of the advantages of a transmedia approach is that it allows small companies to control the marketing and distribution of their own content via digital networks" (Bernardo, 2014, p. 16). This strategic alignment of beActive illustrates a transmedia philosophy guiding beActive's business strategies and a proclivity for the use of transmedia storytelling strategy by the business<sup>58</sup>.

As Stage Two of Table 5 highlights, beActive were not looking to compete with larger companies but rather entice them to collaborate and to partner by funding further content. Bernardo specifically mentions "seeding online content" with "big partners who can ensure global distribution". This allowed beActive to focus upon proving the excellence of their own productions rather than worrying about what their competitors were doing. This directly reflects Porter's concept of "positive-sum" competition. In Magretta's argument for the relevance of Porter's theories to contemporary practice, she links this practice most strongly to the arts, stating that "*competing to be unique is unlike warfare in that one company's success does not require its rivals to fail... Each finds and creates an audience. The more good performers there are, the more audiences grow and the arts flourish*" (Magretta, 2012, p. 31). To make the nano-studio approach work on a sustainable basis required beActive to continually produce a volume of innovative, differentiated content that would continue to engage and attract new audiences and resultant revenues. So their strategy for content creation needed to dovetail seamlessly into the higher corporate level nano-studio strategy. It is because of this corporate positioning that *Sofia's Diary* grew to become a transmedia project. As the next

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<sup>58</sup> However, it must be noted that it does not mean that the nano-studio approach requires transmedia storytelling strategy to be used in each and every project that a company chooses to create. Jenkins(2006), Evans(2011) and Phillips (2012) all illustrate that transmedia as a design philosophy informs how we can use different approaches in aspects of corporate, business and functional level strategy. They are quite clear that transmedia *storytelling* strategy is not the same as transmedia marketing, transmedia branding, transmedia activism etc. (although they can all overlap and become part of the one approach). What examining this nano-studio approach does do, however, is illustrate that their corporate level strategy was designed to work well with a business level transmedia storytelling strategy and that the goals informing beActive's implementation of transmedia storytelling with *Sofia's Diary* were centred around profitability and sustainability.

section examines, beActive used transmedia storytelling to create *Sofia's Diary* with a “blue ocean” strategy i.e. the pursuit of uncontested market space in which a company, new or old, can attract audience attention and avoid competition (Kim & Mauborgne, 2013).

### 5.2.3 Using Transmedia Storytelling to Sail a Blue Ocean

Kim and Mauborgne analysed 30 different industries operating at different times across the 20<sup>th</sup> century and their work, published by the Harvard Business Review, shows that when a company generate “blue oceans” or “uncontested spaces where the competition is irrelevant... you invent or capture new demand”(Kim & Mauborgne, 2013, p. 124)<sup>59</sup>. In blue ocean strategy, rather than competing in an existing market or “red ocean”, a company focusses upon creating value in a way that previously did not exist<sup>60</sup>. This type of approach can be used to explain why beActive used transmedia storytelling strategy as the guiding strategy for *Sofia's Diary*. Bernardo attributes a large part of the project's success to the fact that other television shows or radio broadcasts were not offering a similar interactive experience (Bernardo, 2015b). Combined with the findings of Section 5.1, this shows that beActive generated a unique position in the market for *Sofia's Diary* using finite, portmanteau transmedia storytelling to engineer an experience that was not quite television, radio, SMS narrative or online blog but rather a unique holistic blend. This blend compelled audience members to engage with the larger narrative; the daily dilemmas of Sofia.

To achieve this unique “blue ocean” blend and to grow the narrative world of *Sofia's Diary*, Bernardo and beActive used a strategy called “‘reverse content windowing’ – where a project starts on the web and ends up on television” (referred to as a transmedia approach in Cunningham, 2013 l.1022 of 3916). This is seen through the launch of *Sofia's Diary* via low cost, novel<sup>61</sup> story modes (mobile SMS interactions and blogging). These Individual story

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<sup>59</sup> A core example of this that they use is that of the famous entertainment company Cirque De Soliel. More than a decade ago, Cirque De Soliel exploded into a global force by generating their own market. Instead of using the expensive animal acts of a circus or the dialogue dependent storylines of traditional theatre, they blended acrobatics and showmanship with music and mime, creating a new market that was not quite theatre or circus and directly competed with neither (Kim and Mauborgne 2013). While some consider these strategies directly contradictory to the warlike grounding of Porter's notions of competitive strategy, Magretta (2012) reminds us that to do so is a fallacy born from a lack of interrogation of Porter's work over time. Porter's strategy evolved to become essentially about the pursuit of uniqueness, rather than competition, an ideal of Kim and Mauborgne's blue ocean ideals.

<sup>60</sup> Kim and Mauborgne essentially divide Porter's concept of strategy into two arenas – in the red ocean, strategy is about undertaking different activities to compete more effectively in the same market as other companies. In the blue ocean, one undertakes different activities to compete in a different market to other companies.

<sup>61</sup> These were novel at the time as people were still experimenting with the way that these new technologies worked

modes created a narrative that made audiences interact with fictional characters in a way that was deeply personal and reflected how they used different media to communicate, something they weren't used to at the time (Fong, 2009). Then, to capitalise on growing popularity for the narrative, beActive used a live casting event to demonstrate the size and engagement of their audience base to other business who would be interested in partnering with them (beActive, 2003). Over a thousand fans lined up around the block to be chosen as the face of Sofia or her boyfriend, both of whom were being cast to match descriptions put forward by fans of the mobile and online narrative (they had not yet seen what Sofia looked like) (Bernardo, 2015b). This event, helped fans immerse themselves in the story, to provide them with a sense of community and ownership, components of involvement that the literature review shows are known to prolong audience engagement (Andrews et al., 1990; Zaichkowsky, 1986; 1994).

This approach generated a 'blue ocean' for *Sofia's Diary* as the narrative world was not directly competing with any similar experience on any of its platforms. The radio programming, television interstitials etc. were part of a collage-like meta-narrative that mimicked audience activities throughout the day rather than forcing them to only be able to interact with the narrative at certain times or in certain ways. Individual story modes created a narrative that made audiences interact with fictional characters in a way that was deeply personal and reflected how they used different media to communicate, something they weren't used to at the time (Stack, 2008). This differentiated Sofia's Diary from other content as it was aimed at a younger female audience and was not the one-to-many narratives experienced by audiences watching televised soaps<sup>62</sup> or reading magazines or teen novels.

This focussed differentiation, to borrow from Porter (1980)'s generic strategies, reinforces the idea that a marketing orientation was driving how beActive formed their transmedia storytelling strategy. It also mirrors a successful use of the "editorial logic" that Dena (2009) and Deuze (2010) find common among new creative businesses. In an editorial logic, creating

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<sup>62</sup> "For me, what was eye opening was that I came from a country where our prime time is filled with soap operas. We have like 3 soap operas in a row on every free to air channel. So, and everybody thinks well audiences love soap opera and this is why they keep make many of them and keep producing them and creating 300 episodes of soap operas. But for me what was eye opening was that, when we were running that service, the audiences, the people at home have our interactive television service and we have people from young people to 80 something years old users, and for none of them, soap operas were their favourite show..."(Bernardo 2015a).



innovative content allows creative businesses to be noticed so that they can carve out a new niche. This shows that, when we apply the strategic formation component of the analytical lens, *Sofia's Diary* clearly used transmedia storytelling strategy as a way to establish a unique market position. In this case, beActive was offering a novel form of narrative to the younger, female Portuguese audience built upon an acute understanding of the marketplace that Bernardo and beActive attained from his earlier industry experience and from later audience research.

## Summary

This section has shown how beActive's use of transmedia storytelling was heavily influenced by two core factors. The first was its strategic context and the second was beActive's nano-studio approach. Bernardo's guiding objective for beActive was to retain control of beActive's intellectual property in order to build company assets (a library) and to facilitate future financing without a reliance upon traditional independent methods. Guided by these objectives, BeActive introduced a new way of telling a story to the Portuguese and wider European media marketplace, which enabled it to avoid direct competition and establish a 'blue ocean' niche strategy. However, Porter (1996)<sup>63</sup> and Kim and Mauborgne (2015) warn that simply because something represents as a unique way of doing something does not prescribe it any form of sustainable competitive advantage. It does not explain the longevity of *Sofia's Diary* or the willingness to replicate it as a format by the Sony Corporation. With technology and methods of content interaction constantly evolving, and change becoming the "new normal" and with old and new media interacting in even more complex ways (Cunningham et al., 2010), we cannot simply equate novelty or the specific layout of story modes to developing a sustainable competitive advantage.

beActive attempted to directly replicate their approach from *Sofia's Diary* with two other future projects, *Looking for Miguel* and *Dark Siege* but both projects failed to attract a large or actively engaged audience and both failed commercially (Bernardo, 2015a)<sup>64</sup>. The next

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<sup>63</sup> Key to Porter's definition of strategy is the differentiation between the concepts of strategy and operational effectiveness. Operational effectiveness is simply doing something the same as competitors but better. Porter's breakdown of strategy in *What is Strategy?* highlights that strategy is about "deliberately choosing a different set of activities to deliver a unique mix of value" (Porter 1996, p.64).

<sup>64</sup> Not only this but beActive would soon find themselves competing with larger rival companies who replicated their operations to edge them out of the market. "If rivals all pursue the "one best way" to compete, they will find themselves on a collision course" (Magretta 2012, p.35).

section, Section 5.3, leverages the last lens component of the theoretical framework employed in this thesis - audience engagement - in order to delve into the sustainability of *Sofia's Diary's* strategy in greater detail. It explains how strategic engagement methods employed by the production company facilitated a sustainable competitive advantage for *Sofia's Diary*. This sustainable advantage guided it as it evolved from an online interactive transmedia game into a licensed format television program that was adapted across different cultures and countries, in different languages and on multiple technology platforms as different iterations were produced all over the world.

### 5.3 AUDIENCE ENGAGEMENT AND SUSTAINING A UNIQUE POSITION

As was previously discussed in 5.1 and 5.2, *Sofia's Diary* was a type of transmedia storytelling that intentionally focussed social connection – i.e. how audiences were already interacting with one another and with media - in order to entertain and engage its audience. This section applies the third aspect of the lens asking *what evidence exists that the use of transmedia storytelling in Sofia's Diary actually deepened audience engagement and facilitated more intense connections between fans and Sofia's Diary?* To do this this section is divided into two. First it analyses the way in which beActive sought to engage its audience, mapping how *Sofia's Diary* focussed primarily on entertainment that mirrored existing audience behaviour. It shows that across various engagement levels, *Sofia's Diary* sought to create a sense of social connectivity for its audience so that they would have long lasting engagement with the narrative world. Following this, this section discusses how, when *Sofia's Diary* grew in popularity, there was a shift in focus by the producers from this social connection to one of greater immersion and entertainment for the audience. A larger audience meant that *Sofia's Diary* transformed from its niche focussed use of transmedia storytelling to one more reflexive of the broadly targeted and less personal strategies of larger media companies such as the BBC in *Doctor Who*.

#### 5.3.1 Audience Engagement Tiers

*Sofia's Diary* had a core focus in how it engaged its audience that permeated every aspect of the project.

*"That show was tailor made the way technology and the kids behaved at that day and age and that's one key secret. One key element of Sofia's Diary was that this was a conversation between friends. The way that the character presented herself on all mediums was a conversation with the fans"* (Bernardo, 2015b).

The narrative played out on platforms that the audience were naturally using as part of their daily lives. This can be seen in Table 6 which applies the third component of the analytical lens (involvement and engagement) to show how audience engagement was captured and then maintained by the actions of the producers in *Sofia's Diary*.

**Table 6: Tiers of Involvement in Sofia's Diary**

<b>Tiers of Involvement (Zaichkowsky)</b> <i>The capacity of the audience to continue to engage with something. Factors include personal relevance of the product, ability to easily access the product, available time and skills needed to use the product (Andrews et al., 1990).</i>	<b>Types of Engagement</b> (Beddows, 2012b; Dena, 2008; A. Phillips, 2012)	<b>Methods and Logics of Engagement</b> <i>Linking activities that the audience could undertake to Askwith (2007)'s logics of engagement: entertainment, immersion, social connection, identity and mastery.</i>
Low Involvement	Passive	<ul style="list-style-type: none"> <li>The daily narrative told via web, mobile, TV and radio provided <b>entertainment</b></li> <li>The wide spread of media helped to <b>immerse</b> the audience in the story, most requiring only passive spectatorship from the audience.</li> </ul>
Medium Involvement	Some passive and interactive elements	<ul style="list-style-type: none"> <li>SMS message interactions were already in use by audience members and they were used mainly to report updates of Sofia's life. Yet, they still represented an active method of engaging with the story as audiences had to sign up for them and they required a different method of narrative interaction than audiences were used to – <b>identity and immersion and imitation of social connection</b></li> <li>Online blog provided a portal through which audiences could either just watch or could also actively participate – <b>entertainment, social connection and identity</b></li> <li>More engaged audiences could purchase magazines with articles from Sofia in them as well as read novels from her perspective. These provided their own overarching forms of <b>entertainment</b>. They helped audiences to recap events, to passively engage and yet achieve <b>mastery</b> via their knowledge of events – <b>entertainment &amp; mastery</b></li> </ul>
High Involvement	Highly active	<ul style="list-style-type: none"> <li>Licensing deals allowed for the production of merchandise which audiences could purchase to celebrate their <b>identification</b> with the story</li> <li>Discussing these findings with others on online community message boards – <b>identity and social connection</b></li> <li>Live event to cast Sofia helped audiences to <b>connect</b> with other fans while also promoting <b>mastery</b> for those involved in voting for the face of Sofia and her boyfriend, an ephemeral experience never to be repeated – <b>mastery and identity</b></li> </ul>

Table 6 demonstrates that the producers of *Sofia's Diary* made sure to map out the average daily routines of the teenagers and put the narratives on the "right platforms at the right

time” so that audiences could easily come into contact with them as part of their daily routine (Bernardo, 2015b). In the morning audience members could listen to *Sofia* talking to them via the radio on the way to school. At school she would text them. After school they could log in online and see her posts and discuss them or they could watch the television series - which acted like flashbacks build from *Sofia’s* perspective. In constructing the narrative world of *Sofia’s Diary*, beActive’s strategy clearly went much deeper than conventional passive one-to-many television or radio entertainment. It was built around a knowledge and an understanding of how audiences were naturally interacting both with media and with one another and this was a critical success factor in deciding how the format could be adapted to different social and political contexts, when a new version was made for different audiences.

The competitive strategy used by beActive within a ‘blue ocean’ niche market segment, facilitated the antecedents of high involvement (Andrews:1990wv. Zaichkowsky, 1994) and enabled deep engagement to occur because the teenage female audience could not only identify with Sofia and her daily life but could also interact with her and tactically influence her daily decision making. This built a strong emotional connection between the audience and the character and brand. It also consolidated audience members own personal sense of identity (Askwith 2007). Analysis of the design and construction of *Sofia’s Diary* in Table 6 clearly indicates that the narrative and strategies devised were intended to make the content both personally relevant as well as easy to access online by teenage girls at times during the day that were convenient to them and by using devices that could access platforms that were readily available to them.

Wherever *Sofia’s* narrative was broadcast, audiences were invited to discuss issues directly relevant to them. This is especially relevant in later iterations such as the British version of *Sofia’s Diary*, a licensed format television version that Bernardo and beActive were contracted to create. Each season of the British television show would tie in to particular issues such as moving home and schools during season one, to directly tying into road safety campaigns during season three (Bernardo, 2015b). As the tiers of audience involvement (Table 6) highlight, *Sofia’s Diary* became a story that audiences could either passively watch on TV or could interact with on interactive platforms that provoked discussion about issues relevant to the core teen female audience. While the evidence indicates that the narrative

was designed to appeal to audiences with many differing tiers of involvement in this way, it also shows that, as the world grew, there were significant trade-offs.

### 5.3.2 Growth and Shifting Engagement Focus

As *Sofia's Diary* became more successful its growth evidenced a trade-off of responsiveness and reactivity to audience. In the project's infancy, the mobile and blog story modes were highly responsive and adaptive, designed to be adjusted each day to how audiences interacted with narrative content (Bernardo, 2014). The web-blog in particular was a story mode that Bernardo talks about as easily adjusted, with content written each day in response to audiences interacting with the dilemma of the previous day (Bernardo, 2015b). As the project grew, however, Bernardo also noted that he was forced to shift from a script approach that was initially highly responsive to audience feedback to a traditional TV script process which was more a pre-planned approach as growth placed a larger strain upon the narrative production infrastructure and available resources of beActive. In particular, the production schedule of the television broadcast story mode necessitated episodes to be filmed and completed far in advance (Bernardo, 2015b). This resulted in a trade-off, responsiveness for pre-planned narrative progression.

While the audience was made to feel like they could interact with *Sofia* and influence her decisions, *Sofia's Diary* was never a type of transmedia strategy in which the "audience can influence on the result and change the story", something that Gambarato terms an "open-system" use of transmedia (Gambarato, 2012b, p. 12). The audience never had control significant influence over the narrative, it was simply the focus of Bernardo and his team that the audience *feel* like they were having some impact upon the story, especially when the project was just beginning (Bernardo, 2015b). Rather, beActive simply re-designed its strategy from directly interacting with fans to stimulate conversation among them, to focussing on broadcasting dilemmas that audiences would resonate with so that they could discuss it among themselves. This allowed beActive to plan further in-advance, while still stimulating feelings of self-concept and social connection which, as Zaichkowsky (1986) points out, are crucial drivers for any audience member to remain engaged with something. In this way Bernardo's work suggests that true responsiveness and interactivity are only as

valuable in transmedia storytelling as the feelings of interaction and self-efficacy that they engender in an audience using them. If a show is created to stimulate conversation, conversing with the audience is not as important as stimulating conversation between audience members and other audience members with transmedia storytelling strategies.

Table 6 also indicates that *Sofia's Diary's* growth also introduced another trade-off in the centralisation of audience attention. The pre-planned story mode of the television series grew to become the central platform for the experience. At the end of each day it would synthesise the resolution of the day's dilemma, posing a new problem for Sofia to be faced the following day (a mini-cliff hanger). Whereas previously, the audience could scatter their attention across various modes throughout the day, personalising their engagement with the property, now they were funnelled towards the central televised story mode that held appeal for a much broader audience. Further research and comparative case studies are needed, but this would seem to concur with scholars such as Evans (2008), Jenkins (2010a) and Beddows (2012a) who indicate that central story modes are often inescapable when transmedia storytelling grows and is used to attract a larger, main stream audience.

## Summary

Analysing *Sofia's Diary* showed that this type of transmedia storytelling strategy is more about dynamic adaptation to potential opportunities than it is about audience interaction. beActive's use of transmedia storytelling strategy not only demonstrates an ability to achieve a unique position within a niche "blue ocean" audience/market segment but also to change and re-formulate strategy to adjust to shifting audience engagement potential<sup>65</sup>. Growth across traditional television platforms necessitated strategic adaptation and the producers began to focus more on passive forms of engagement more aligned with format television. This indicates that while portmanteau transmedia storytelling might be useful initially for interacting with highly engaged members of the audience, growth and commercial success came with significant trade-offs. Wider audiences with potentially more passive tastes and lower levels of engagement needed to be catered for. Perhaps a larger company serving a larger and more traditional market may have been able to balance both

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<sup>65</sup> A concept also known as strategic learning in the strategic management literature, something vital to an organisation maintaining long term competitive advantage (Mintzberg 1999)

aspects better than a nano-studio attempting to retain control of its intellectual property. However, as a tool for emerging practitioners, this case study indicates that substantial growth and commercial success is tied to centralisation, economies of scale and therefore development of more passive story modes when using transmedia storytelling based around traditional television platforms.

#### 5.4 COMPETITIVE ADVANTAGE

This chapter used *Sofia's Diary* as a vehicle for analysing transmedia storytelling strategy within a vastly different strategic context to that of the pilot case study, *Doctor Who*. *Sofia's Diary* was found to be an intentional use of transmedia strategy that resulted from a market orientation. An analysis of audience behaviour on the part of the production company, beActive, that identified a 'blue ocean' opportunity with a female teen market for a new type of screen content – a transmedia project (Section 5.1). Attempting to find financial sustainability while retaining control of their own intellectual property, be Active used *Sofia's Diary* to carve out its own niche market with little to no competition (Section 5.2). It did this by creating a finite narrative that encouraged personal interaction by and a social connection with the audience, mirroring how teenage Portuguese girls who were already consuming media and communicating with one another in 2003 (Section 5.3).

*"A few years after the initial success of Sofia's Diary, we were able to adapt it to 10 different territories and we thought we'd cracked the code to producing multi-platform entertainment. So we went ahead and applied the formula we'd used to develop and market Sofia, to different concepts intended for different target groups. We created a project similar in format to Sofia's Diary called Looking for Miguel, which featured an older male character. We also developed a concept for an interactive fantasy adventure called Dark Siege. Both projects failed to attract an audience. Their floundering made it clear to us that different target groups respond in different ways to characters, plot points, and interactivity; a one-formula-fits-all was never going to work"* (Bernardo, 2015a).



Beyond the structural and mechanical operations of transmedia storytelling in *Sofia's Diary*, this chapter applied competitive advantage theory to learn what it was about the way that beActive approached production with *Sofia's Diary* that made it a success. Distilled through Porter's concepts of strategy, unique positioning, strategic fit and trade-offs, this final section summarises the enduring strategic lessons that we can take from *Sofia's Diary* and its approach to audience engagement.

### Unique Positioning

As a new entrant to the entertainment market, simply performing the same activities as their rivals<sup>66</sup> was never the focus of beActive with *Sofia's Diary*. Rather, it sought to avoid direct competition altogether using a blue ocean strategy. *Sofia's Diary's* unique position came from:

- Identifying and catering to an under-served audience, in this case teenage girls. BeActive looked at the social behaviours of the target audience and designed a narrative experience with both passive and active elements. They used portmanteau transmedia to focus on content that female, Portuguese teenagers would naturally interact with throughout their daily routine.
- Rather than acting as another competitor product, *Sofia's Diary* became a potential investment for larger, resource-rich rival production companies and broadcasters. Seeing the success of *Sofia's Diary* on other platforms, radio stations, book publishers and television networks approached them to produce the additional story modes.
- Creating a finite story world allowed for that world to be packaged, on-sold and licensed to provide sustainable revenue streams and finance future projects.

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<sup>66</sup> What Porter (1996) dubs operational effectiveness, the antithesis of strategy, which focuses on doing different activities.

## Strategic Fit

Analysis of *Sofia's Diary* reinforces the strong link between transmedia and the concept of 'strategic fit' - aligning the activities of a narrative world to produce a whole that is greater than the sum of its parts.

- Each story mode built upon the activities of other story modes to tell the same larger story, leveraging the specific elements of the way it was told to engage the audience. For example, SMS messages provided immediacy, giving live updates for the narrative, while the television episodes provided dramatized recaps of the day's events and the online blog provided a place where audiences could discuss and argue, expressing their self-concept as part of a community
- Story modes also doubled as marketing and engagement tools – the live casting event – the search for Sofia, not only promoted the show but also drove the story forward by giving audience a face for Sofia and for her boyfriend, as well as creating a physical demonstration for audiences of the growing community of followers for the project that they were all a part of<sup>67</sup>.

## Trade-offs

Every trade-off<sup>68</sup> for *Sofia's Diary* was linked to the objectives of a guiding corporate level strategy. beActive's nano-studio approach centred on retaining control of intellectual property to optimize financing opportunities and potential licensed revenue streams.

- beActive made creative trade-offs to retain the engagement focus upon social connection and self-identity, using small, fragmented media that placed more of a demand on consuming multiple story modes than on a traditional franchise model. This meant limiting the highly engaged audience to those that could consume

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<sup>67</sup> "What differentiated *Sofia's Diary* from them (other projects), however, was that we had an original idea about how we would produce the story that was allied to a development plan showing how we would grow the characters and story over time... This development work, building up the story components, creates a much more complex product and is what sustains a Transmedia franchise" (Bernardo 2011, p.14).

<sup>68</sup> "Strategy is making trade-offs in competing. The essence of strategy is choosing what not to do. Without trade-offs there would be no need for choice and thus no need for strategy" (Porter 1996, p.70). In synthesising Porter and his relevance to the contemporary setting, Magretta(2012) highlights how trade-offs represent "forks in the road", choices that are made exclusive of other options that aid in the sustainability of the project at hand. Despite the self-investment required, beActive committed to controlling their intellectual property from the outset, only relinquishing control when they could sell their format to generate sustained revenue to finance future productions. This approach heavily influenced the design of narrative world and the trade-offs they made to sustain their transmedia strategy.

multiple story modes, which allowed them to create a deeply personal experience for those viewers.

- Specifically related to the “portmanteau” or patchwork transmedia strategy, it was quite clearly differentiated from “Hollywood” ongoing franchise content by three trade-offs: shorter duration story modes that have more of an onus upon interaction and participation, a lessening of responsiveness to audience interaction when the narrative grew to include more pre-planned story modes (traditional TV program content) and a reliance upon audience discussion and interaction to sustain audience engagement.
- The finite, patchwork strategy developed for *Sofia’s Diary* demonstrates a reliance upon social connectivity and shared value in growing an audience with blue ocean transmedia. While evergreen transmedia hopes to make a story world last as long as possible through multiple self-contained story modes and forms of engagement, the creative strategy at work in *Sofia’s Diary* focussed on making a replicable format that relied upon shared value and interlinked story modes.

## Conclusion

In analysing *Sofia’s Diary*, this chapter demonstrates that transmedia storytelling can be used to generate competitive advantage for small, independent production companies, even in the context of emergent and uncertain markets. Unlike the expansionist strategy seen in *Doctor Who*, the case of *Sofia’s Diary* provides an example of transmedia strategy acting like a finite funnel for audience attention. The unique positioning of the narrative world came from an alignment with a clear goal; in this case that meant creating a meaningful social connection for an audience of teenage girls. This connection gave those teen audiences a friend, a fictional character who instigated discussions about the same kind of issues and dilemmas that the audience experienced in their daily life. Not only does this chapter demonstrate that portmanteau transmedia storytelling is an effective strategy for emerging production companies, but it also reinforces a potential link between market orientation and use of successful transmedia storytelling strategy in the digital era.

So far, the two cases studied have demonstrated two types of transmedia strategy. *Doctor Who* has shown the strategic structure of an approach with the goal of unending expansion and maintaining growth. In *Doctor Who* transmedia storytelling has been used as a competitive weapon, creating an experience that differentiates the narrative from others produced by competitor companies such as ITV (red ocean transmedia strategy). Comparatively, *Sofia's Diary* provides a case study of an independent project that sought to maximise a finite experience, using portmanteau transmedia to carve out a market niche in a previously uncontested space and then on-selling the structure of the experience (the format) to larger, better funded production companies to provide revenue streams to provide profit and possible financing for future projects (blue ocean transmedia).

The next case study, that of *The Lizzie Bennet Diaries (LBD)*, also reviews a smaller independent project. However, unlike *Sofia's Diary*, LBD already had an audience for its content. Its transmedia strategy centred around proving to that audience that LBD would present an adaptation of *Pride and Prejudice* in a way that they had never experienced before.

## CHAPTER SIX: THE LIZZIE BENNET DIARIES

*"When I'm talking to producers or at pitch meetings, I like to say that where you might see a boring old book that nobody cares about, I see blockbuster entertainment with a 200-year track record. It may take a little work to get to what makes the story that way, but it's there"* (Bushman in Klose, 2013).

The previous chapter, Chapter Five, examines the case of one of transmedia's pioneering properties in the digital era, *Sofia's Diary*. It found that use of transmedia storytelling by beActive, the producers of *Sofia's Diary*, helped them to establish themselves as a production company and had substantial impact on the competitive advantage of the project. Using transmedia storytelling, beActive were able to create an immersive and socially engaging experience for their audience. Their strategy positioned *Sofia's Diary* so that it had no direct competitors, focussing on being both novel and unique in the Portuguese marketplace. This chapter builds upon that analysis, applying the analytical lens to a similar contemporary property, *The Lizzie Bennet Diaries* (LBD).

LBD is a multi-award winning adaptation of the novel *Pride and Prejudice* (1813) by Jane Austen. Modernising Jane Austen's work, LBD retells the iconic story via YouTube video blogs. It then extends that narrative through realistic character interactions on social platforms (primarily Twitter, Facebook and Tumblr). By doing this LBD avoids competition with already existing adaptations of Jane Austen's work, developing its own market niche. LBD has over 40 million views and 265,000 subscribers for its main YouTube channel (Pemberley Digital, n.d.) and its Kickstarter campaign sold thousands of DVDs for a video series that is freely available online (Miller, 2014). LBD is an online narrative who's use of immersive, socially focussed transmedia strategy makes it an ideal candidate for analysis in this thesis.

To analyse LBD this chapter follows the methodological structure outlined in Chapter Three. First, this chapter maps LBD to provide the reader with a contextual understanding of the project. Second, as in previous chapters, this case is analysed by applying the guiding questions of the theoretical lens. Data for this analysis is drawn from a mixture of primary

and secondary sources, including online websites, scholarly publications and interviews as well as a practitioner interview conducted specifically for this thesis with LBD Transmedia Producer, Jay Bushman. Finally, using Porter's framework for competitive advantage (Porter, 1980; 1996), the separate threads of analysis are drawn together and discussed holistically to determine what, if any, lessons can be learned for scholars and industry practitioners from this case.

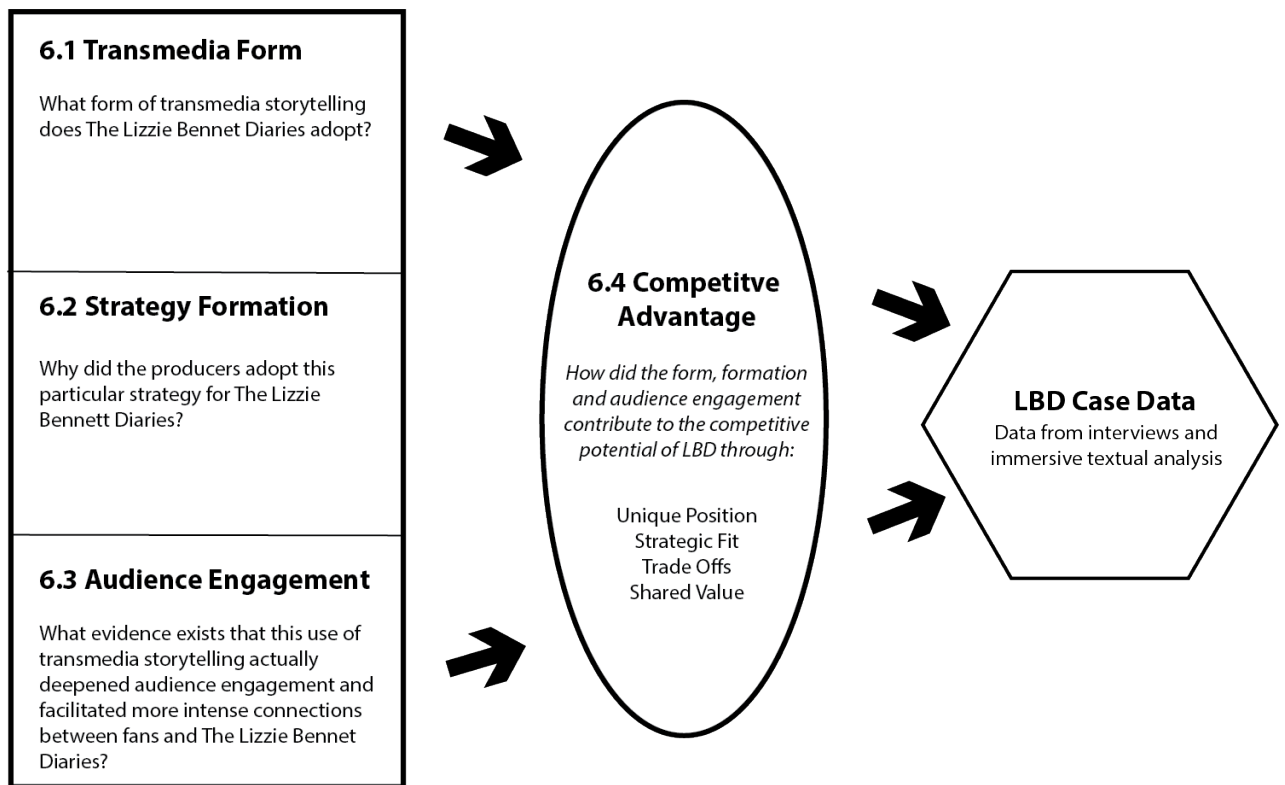
### **Case Three: The Lizzie Bennett Diaries (LBD)**

This chapter outlines how an independent production company, Pemberley Digital, used LBD as a building block from which to establish themselves as a leading competitor in a digital market niche; becoming a company that specialises in adapting popular, classic narratives into online, social experiences for young women<sup>69</sup>. Figure 10, overleaf, outlines the structure of analysis within this chapter and how the analytical lens, developed in Chapter Three, is applied to this case study.

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<sup>69</sup> Pemberley Digital have also used LBD to launch two additional interlinked narratives based on Jane Austen novels – *Welcome to Sanditon* and *Emma Approved*.

Figure 10: Application of the Theoretical Lens to the Lizzie Bennet Diaries



As this figure shows, this analysis begins by determining what form of transmedia storytelling was used to create LBD (Section 6.1). It then reviews why this strategy was chosen and the unique position it provided LBD (Section 6.2). Following this, it looks at how the producers used audience engagement to sustain the unique position of the project (Section 6.3). Finally, it draws these elements together through the prism of Porter's competitive advantage to provide a summary of when and why producers could adopt this approach (Section 6.4). Prior to this analysis, however, it is important to acknowledge the history and structure of LBD.

### Mapping The Project

LBD is a direct adaptation of Jane Austen's iconic novel, *Pride and Prejudice*. *Pride and Prejudice* is the story of the five Bennet sisters. Centred on the second Bennet sister, Elizabeth, it charts her journey from loathing to love with Mr Darcy while interweaving the romantic lives of her four unmarried sisters. It focusses on themes of class, the search for one's self and the impact of one's environment or upbringing on the development of their character and morality (The Republic of Pemberley, 2012). Used as a teaching text in schools

throughout English-speaking cultures, *Pride and Prejudice* is a classic narrative with a large global fan base. It is listed as one of the top 10 romance novels of all time by Time Magazine (Myers & Grossman, 2010) and at the time of writing maintains a 4.2 out of 5 with over 1.7 million ratings on goodreads.com (goodreads, 2016). LBD takes this popular but aging narrative and adapts it to reflect the values and aesthetics of the contemporary millennial generation (Farber, 2013).

To make LBD, Pemberley Digital reduced the number of Bennet sisters from five to three. However, they still used the second sister of “Lizzie” as the focus of the larger narrative.

*“It began as a YouTube series structured as a fake vlog. So twice a week Lizzie Bennet would post a video from her bedroom. For the first part of the show it was just Lizzie, two sisters and her friend Charlotte, who is behind the camera and editing. But we also put the characters on social media, so all the characters had their own Twitter accounts, they had Facebook pages, Tumblr pages they posted with regularity. They had conversations between themselves in between the videos that were story beats in and of themselves”* (Bushman, 2015).

From its beginning on April 9<sup>th</sup>, 2012 until the last video blog on March 28<sup>th</sup>, 2013 audiences could tune in twice a week to video blogs from Lizzie as she discussed her family, romantic adventures and personal growth<sup>70</sup>. Additional video blogs from other characters meant that over 150 episodes were broadcast across five YouTube channels, amassing over 40 million views (Pemberley Digital, 2013c). This was supplemented by 35 social media profiles for key characters, with social interaction and fan activity being key metrics of success for the show’s creators (Farber, 2013). Characters the audience hadn’t even encountered on the video blogs yet were interacting on social media and filling in their own narrative plot points. This “real time” narrative rewarded audiences for seeking out further story and engaging with their character’s social media activities, despite them not being crucial to understanding the blogs or vice versa. The project culminated in a Kickstarter crowdfunding campaign that raised

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<sup>70</sup> Each of these topics mirroring the central themes of *Pride and Prejudice*.



\$462,405 to produce DVDs of the show and a Lizzie Bennet book, more than seven times the campaign's target of \$60,000 (Pemberley Digital, 2013b).

*"The anchoring work, or "mother ship," as Henry Jenkins calls it, is certainly the Lizzie Bennet YouTube videos, which unfold like a linear television narrative in bi-weekly episodes. But the series could not exist without those "textual outposts," or "paratexts" - "all those things that surround [a property] but aren't quite the 'thing' (or the 'text') itself"" (Grey 2010 in Tepper, 2015, p. 50).*

The independent but interlinked nature of the social components and YouTube blogs are two distinct story modes which, in turn, fulfil this thesis' definition of a use of transmedia storytelling strategy.

The project was a privately financed venture by one of YouTube's most prominent personalities, Hank Green. Hank, an award-winning musician, and his brother John, an award-winning author, began their YouTube channel Vlog Brothers back in 2007, using it as a tool to reconnect and bond. Building on that channel, they now run one of YouTube's largest networks, producing blog style content covering everything from science to politics, philosophy, education and lifestyle to over 8 million subscribers across 34 different channels (YouTube, 2016). Their work also includes an online collective of fans and followers, called the Nerdfighters, a vibrant online community, Nerdfighteria (Zeiser, 2015a, p. 402). Making the show meant unifying Hanks existing fan base with global fans of *Pride and Prejudice* while also attempting to draw in new fans. The way that Pemberley Digital leveraged these existing fans and used interactive social platforms to solidify their market niche and attract new audiences speaks to a strategy with a strong marketing orientation, one that deploys the principles of transmedia storytelling in tandem with a deep understanding of its intended audience. LBD's independent, issue focussed strategy is far more common than the "mainstream" big budget franchises focussed upon by most transmedia literature (Hancox, 2014). Analysing this strategy is key to developing further understanding of this popular but under-researched use of transmedia storytelling.

## 6.1 ANALYSING LBD'S TRANSMEDIA FORM

This section addresses the first guiding question of the analytical lens: *what form of transmedia storytelling is the Lizzie Bennet Diaries?* It charts the development of LBD as a property, using primary and secondary sources to analyse the choice of transmedia strategy by LBD's producers. It finds it to be an example of finite transmedia storytelling strategy, without ambition to create an ongoing narrative world. It also finds it to be an example of portmanteau<sup>71</sup> style transmedia storytelling, that it was independently produced and that the narrative experience is centralised around one story mode, that of Lizzie's YouTube video blogs. While it does have some strong similarities with the previous case study of *Sofia's Diary*, it is a property built around audience interaction and made to leverage pre-existing fan-bases. This gives it a unique and valuable contribution to this thesis and broader understanding of how transmedia strategy works.

### 6.1.1 Portmanteau Transmedia Storytelling

The evidence shows that LBD clearly a portmanteau type of transmedia strategy by using video blogs and social media extensions to tell a single narrative. They fuse self-documentary techniques with digital storytelling strategy, with events covered in the video blogs often mentioned and expanded by the social profiles of the characters and vice versa (Hancox, 2014). In this way their approach to portmanteau transmedia leverages "intermedia"; the meaning made by the spaces between story modes (Higgins, 2001), to drive the story forward. For example, when the secondary character of Lydia Bennet begins to encounter trouble in her personal life she video blogs and uses Twitter less. This allows the audience to see her character's development not just through her content but then through a lack of content and how that effects/is affected by the rest of the story. The type of transmedia storytelling at play here is one that generates meaning for the audience through the interaction of story modes and not just from the story modes themselves.

Another character, Gigi Darcy, doesn't appear in the YouTube blogs until the tenth month of the twelve-month show. However, her entire life was given a real "footprint" before then for

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<sup>71</sup> A single ongoing narrative that is told through smaller, independent but interlinked story modes. This style often has an emphasis on the audience consuming multiple story modes to take significant meaning from the project, unlike "franchise" or "silo" transmedia which deploys multiple large story modes as part of a broader world without an emphasis on the audience consuming more than one to engage fully with the narrative world (see Section 2.1 of Chapter Two).

audiences; actions like her tweets and favourites on Twitter, the change in her music playlists on This is My Jam and the change in her movie choices reflected the emotional development of her character. According to Bushman, how the characters within LBD produced their blogs and social media was just as important to this type of storytelling as the content itself (Bushman, 2015).

### 6.1.2 Finite Storytelling

Adapting the narrative of *Pride and Prejudice* with a portmanteau style strategy also resulted in a finite life cycle for LBD. In *Pride and Prejudice*, once the sisters are married to their respective spouses, we receive an overview of their married life and the book ends. As a direct adaptation based on that narrative, LBD was largely restricted to alternate versions of these events. There are later extensions within the same narrative world, *Emma Approved* and *Welcome to Sanditon*. However, while they used the same type of strategy these are separate projects (Su & Bushman, 2014). Not only this, but all of these projects leveraged the same aesthetic and so ended after the modernisation of each text was completed.

The ephemeral nature of the project, in particular, the show happening in real-time<sup>72</sup>, is attributed by many scholars as a valuable engagement component (Farber, 2013; Miller, 2014; Stein, 2015). However, as is touched upon in an interview conducted for this thesis with the show's Transmedia Producer, Jay Bushman, there was also a significant drawback to this approach. Audiences who viewed the property later would not get the same experience and, due to the fleeting nature of social media conversations, it was impossible for the show's producers to truly replicate or store the experience so that fans could replay it effectively (Bushman, 2015). Bushman is among a number of producers working on solutions for this at the moment in their work but, for LBD, immediacy and authenticity came with a trade-off for replicability, longevity and resale potential.

It could be argued that LBD helped to establish Pemberley Digital, which has found success with this type of strategy on multiple occasions, re-imagining classic tales and creating a sort

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<sup>72</sup> By real time this thesis refers to how LBD releases content in its story modes as if the events depicted in Jane Austen's novel had happened in real life. When a week passed in the real world, so did a week of the adapted events of the novel.

of evergreen corporate strategy. However, the narrative strategy at play here is clearly finite and without the same evergreen goals as the traditional “franchise” approach. While successful in launching a production company and promoting a heavily popular format today, producer Jay Bushman notes that this kind of production is incredibly lean and unable to be grown (at present) into large budget franchise work with high returns. It provides a sustainable but not incredibly profitable or expandable universe (Bushman, 2015). While the corporate strategy may or may not have found some sustainability, the strategy for LBD is undeniably to produce a finite and faithful, if modern, adaptation.

### 6.1.3 YouTube Blogs as a Central Story Mode

“There’s been a lot of drama around here and it’s always been indirectly or directly related to these videos” (Episode 100 of Pemberley Digital, n.d.).

In the words of Hank Green, LBD was “a work of fiction adapted into a video blog” (Green, 2012b). LBD creates its world by fusing a fan fiction ethos with that of professional production (Stein, 2015). Adapting the “what if” aesthetic of fan fiction<sup>73</sup> the project treats its characters as an extension of the audience’s media habits, exploring what *Pride and Prejudice* would have looked like if its narrative happened today. Like other prominent adaptations such as *Pride and Prejudice and Zombies* (2016) and *Lost in Austen* (2003), this led to a narrative world built around the character of Lizzie. While the social components are enjoyable as a story mode on their own, the overarching narrative is driven by and centred around Lizzie’s YouTube blogs. Spin-off series, *The Lydia Bennet Diaries* follows the same format as well as directing viewers back to Lizzie’s videos. This creates a form of transmedia storytelling strategy that is centralised, with audiences being directed back to Lizzie’s YouTube channel as their primary form of engagement with the LBD narrative. One could follow the social media story mode without engaging with the blogs but the discussions often talk about the video blogs themselves.

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<sup>73</sup> Fan fiction often uses the characters and/or plot points of one story and then transposes them to a scenario relevant to the individual writing it. The main pursuit of its writers is primarily a cathartic one, exploring an aspect of their own personal lives through the characters and settings of a story that they identify with (Pearson 2013). In this case: what if the events of *Pride and Prejudice* took place in today’s society?

In this way, the audience were constantly being funnelled by social media comments back towards the YouTube video blogs. In his interview, Bushman refers to this as fusing “magic circle” storytelling with a traditional Aristotelean narrative. To him LBD exemplifies this, having a strong central story mode (the video blogs) in which the audience experiences a beginning, middle and end (Aristotelean narrative) and then a broad, expansive set of other story modes that are not necessarily bound by conventional narrative tropes but perform a more interactive and exploratory function (magic circle storytelling). Su, head writer and executive producer for the show summarises this perspective on transmedia storytelling’s use in an interview with Zeiser as part of her analysis of LBD.

*“In transmedia multi-platform storytelling you create a great story world and surround the simple narrative with other great content. So, it’s out there if you want to consume it as a user. You can go on Lizzie Bennet’s personal YouTube channel and click “play.” And, if you want to dive deeper, you click around. You click on Lizzie’s Twitter and see who she’s talking to. You click on Lydia’s YouTube channel and see what she’s doing when Lydia and Lizzie are sharing the same room together. You can even see what Gigi’s doing ten months before she actually appears on screen” (Su in Zeiser, 2015a, p. 408).*

In this way, LBD’s form of storytelling is not just finite but centralised, directing the audience’s experience towards a central story mode, that of the video blogs on YouTube.

#### **6.1.4 Leveraging Interaction and “Real”-ness**

What helped to distinguish LBD from other *Pride and Prejudice* adaptations is that fans had a level of interactivity with and influence over the story. All media platforms used in the narrative, apart from books published after the completion of the main narrative, had a basic level of communication built in. Tumblr, Facebook and YouTube, all central platforms for the project, have built-in message boards, ratings and communicative cultures. Characters in LBD would also respond to and interact with audience members and bring them into the narrative (Weitbrecht, 2014).

Believability and making the characters behave like normal people on YouTube and social platforms was a core component to the interactive and immersive type of transmedia storytelling that LBD was constructed to be. “Every time a new character was brought into the world we filled out their social media life before their entrance so they had this footprint in the real world” (Bushman, 2015). LBD sought to build a truly immersive world for their audience that leveraged audience interaction to help drive the story. To executive producer, co-creator and writer Bernie Su, a core strategy with LBD was to interact, listen and respond to what fans wanted so that Pemberley Digital could adjust their project, to cut costs and identify new revenue pathways while the project was in production (Weitbrecht, 2014). Again in applying the lens we can see a clear strategy of emulating the aesthetics and ethos of fan-fiction and using transmedia storytelling to achieve this.

### **Section Summary**

This section shows that the type of transmedia storytelling used by Pemberley Digital to create LBD was centralised around the fan interaction and making their version of *Pride and Prejudice* feel authentic to their target audience of young women. To do this, LBD uses a type of transmedia labelled portmanteau transmedia storytelling, where a single overarching narrative is told through separate story modes that each drive the main narrative forward. Using this style for adaptation resulted in a finite project life span for LBD, trading a long project life span for the ability to be seen as a faithful adaptation by pre-existing Jane Austen fans. Seeking to build a truly immersive adaptation of Jane Austen’s world, the producers relied upon a central story mode, that of Lizzie’s YouTube video blogs, as the primary narrative experience. Other story modes, those playing out across realistic, interactive social media presences for the characters in LBD’s fictional world, provided extensions for the central narrative. However, the type of transmedia storytelling used in LBD clearly relied upon YouTube video blogs to determine the success or failure of the property.

## **6.2 STRATEGY FORMULATION**

This next section addresses the question of *why did the producers adopt this specific strategy with LBD?* In particular, how did their approach construct a unique position for LBD in the marketplace? To answer this, it considers both the external and internal factors that

influenced Pemberley Digital's decision making and, as a result, LBD's development. It finds that the producers intentionally used transmedia storytelling, blending experimental processes with practices tested by other earlier projects, such as *Sofia's Diary*. As an established YouTube producer, the show's co-creator, Hank Green, guided LBD to focus its production on YouTube, using this style as its unique value proposition in comparison to other *Pride and Prejudice* adaptations. However, this came with a need to cater to pre-existing audiences. On top of this, the chosen nano-studio approach<sup>74</sup> meant a reliance on converting previous audiences for Green's other YouTube content into viewers of the project for LBD to become a success.

### 6.2.1 The YouTube Nano-Studio

Aaker (1998) argues that the manner in which a company differentiates itself from others and provides unique value with its projects is as much a result of external influencing factors as the design of the projects themselves. Investor, executive producer and co-creator Hank Green was already part-owner of a successful YouTube nano-studio (the Vlog Brothers) when he approached co-creator Bernie Su to help him create LBD. He financed the initial stages of the project himself and the usage of public platforms like YouTube, Twitter and Facebook enabled Pemberley Digital to keep control of LBD's intellectual property, even as the show's viewership grew and external sponsors helped to finance the show (Su & Bushman, 2014). The Vlog Brothers channel also already used a large amount of the infrastructure needed to make LBD, with shows such as *Crash Course* and *Brotherhood 2.0* utilising the same blog aesthetic as LBD (Stein, 2015). This evidences that LBD was the foundational project for a nano-studio focussed on transmedia storytelling, similar to how *Sofia's Diary* acted as a foundational project for beActive (as seen in Chapter Six).

Green already had experience producing YouTube blogs for the Vlog Brothers channel and he already had a large fan base for that content. While LBD itself was not created with the intention of launching a production company, this thesis argues that his experience with YouTube and his access to and experience with the resources needed to create video blogs

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<sup>74</sup> A nano-studio is an independent production model evangelised by Portuguese producer Nuno Bernardo. He uses it to describe how a small, lightly financed production team can emulate large Hollywood studios by rejecting traditional finance models and retaining intellectual property rights. In this approach a production company relies upon self-investment and investigating new or unconventional market niche's to establish its revenue streams rather than directly competing with other companies (See Chapter Five).

heavily influenced LBD to become focussed on YouTube as its central story mode. This, in turn, influenced LBD to become the launch project for YouTube based nano-studio in Pemberley Digital (Green, 2012a). Following the success of LBD, Pemberley Digital established themselves by creating to generating more adaptations of Jane Austen and other classic, young female focussed authors, such as Mary Shelley (*Frankenstein M.D.* based on *Frankenstein or The Modern Prometheus*) and Louisa Alcott (*The March Family Letters* based on *Little Women*).

This strategy is epitomised in Pemberley Digital's company mantra - "timeless stories in innovative ways" (Pemberley Digital, 2013a). This demonstrates that, like the other case studies so far, LBD's use of transmedia storytelling was symptomatic of higher level strategic forces. In the case of LBD, transmedia storytelling does not act as a corporate level strategy<sup>75</sup>, dictating the strategic goals and direction of Pemberley Digital. Rather, it operates as a strategy for an individual creative endeavour of Pemberley Digital because it was best suited to take advantage of internal and external factors. In the case of LBD, these were the resources of the company (Green's YouTube history and fan base) and a desire to retain control over the process (nano-studio strategy).

### **6.2.2 Intentional Transmedia Strategy to Create an Experimental Narrative**

Using transmedia storytelling to create LBD was an intentional and pre-planned strategic choice. When LBD was created, transmedia storytelling was no longer in its infancy. The Producer's Guild of America had incorporated its professional credit for a transmedia producer in 2011 and it had been a decade since scholarly literature had begun debating the term (Jenkins, 2003). Green and Su, the show's co-creators, hired Bushman specifically as the transmedia producer for the project. From the outset they intended to use multiple story modes in an interlinked manner to create their adaptation (Bushman, 2015). However, while they intended to use transmedia methods, the specific way that transmedia was used to generate a unique position for LBD was largely untested and experimental.

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<sup>75</sup> A corporate level strategy, in this case, refers to the strategy for the corporation or group of producers who are making the individual project. This is different to business level strategy, on which transmedia storytelling is operating in this case, as business level strategy refers to the strategy of the business that the corporation or company is choosing to take part in (De Wit & Meyer, 2015). In this case, that is the business of "social video" (Stein 2015). For Pemberley Digital, the corporate strategy is "timeless stories in innovative ways" which may or may not then lead to a use of transmedia storytelling as a strategy for telling a specific story (such as LBD).



After making eight episodes, Green blogged about LBD, asking his Vlog Brothers audience to watch the project. "I consider it to be an extremely exciting experiment... it's very different to how fiction has been told before and it is entirely possible that it just won't be a good way to tell a story" (Green, 2012b). Green was highly conscious of needing enough people to watch it so that they could get a sponsor or simply get enough views for YouTube's ad revenue to pay for it to keep going (Green, 2012a). This was because the structure of LBD, of translating a popular narrative into video blogs on YouTube was largely untested (Tepper, 2015).

Earlier projects such as *Sofia's Diary* had experimented with using transmedia storytelling as a tool for blending old and new media. However, LBD relied entirely on platforms like YouTube that were, at the time, untested as viable broadcasters for story modes like fictional narrative blogs and adaptation (Green & Burgess, 2009). The show's producers were prepared to test and fail with this concept and financial return was not a priority over narrative experimentation.

*"At the beginning it was like we're going to shoot a couple of months of the story and we'll see what happens. We had no idea we were going to get any kind of audience much less the audience that we got, so there was always a possibility in the back of our minds that we'd do two months or three months and then we'd be done because we couldn't afford to go any further. It very quickly became 'what the hell is going on' and just having to keep up out of necessity. That whole dynamic emerged out of necessity"* (Bushman, 2015).

Bushman positions this production methodology as a sped up version of the feedback loop of television. Content was produced largely "in a vacuum", without much external input, such as when Lizzie talks about her sister Lydia and calls her a slut. However, when segments of the audience reacted with strong negativity to this slur through the comments of the broadcast platform in YouTube and across Twitter in which the narrative was also being played out, that character arc was played down and the pre-written material quickly adjusted (Bushman, 2015). This shows that the goal in using transmedia storytelling for the project was clearly as a scalable and experimental strategy from which they could learn about both

about the creative process of adapting an established narrative and about their market in a rapid and iterative manner.

### 6.2.3 The Need to Leverage and Cater to Pre-Existing Audiences (External)

This chapter has already highlighted that, as an adaptation of *Pride and Prejudice*, LBD had the potential to tap into a substantial international fan base. This meant that LBD had to distinguish itself from a myriad of professional *Pride and Prejudice* adaptations, including *Pride and Prejudice and Zombies*, various *Pride and Prejudice* films (dates) and pre-existing fan-fiction on sites such as [archiveofourown.com](http://archiveofourown.com) and [livejournal.com](http://livejournal.com). It also meant that its target audience that was invariably internet savvy, young and female (Bushman, 2015).

*"Between the Nerdfighters and Jane Austen fandom, The Lizzie Bennet Diaries was positioned from the start within established traditions of fandom and active networks of millennial culture, networks that were ready to engage with the transmedia series"* (Stein, 2015 l.1988 of 2690).

The core young female demographic from which a larger audience eventually grew, was also drawn from Green's own YouTube following. He released multiple video blogs on his own channel during LBD's life cycle candidly urging fans to go and watch the YouTube series as, without more viewers, they would not be able to pay for the project and keep it running (Green, 2012c). Eventually, the project found more substantial success and drew in sponsors and significant numbers of viewers. But, with a very lean budget containing almost no significant investment in traditional marketing or advertising, its strategy was based on word of mouth between audience members. This made it highly reliant upon the intersection of *Pride and Prejudice* fans and fans of the Vlog Brothers to sustain and promote the show (Su & Bushman, 2014). When considering transmedia storytelling as a strategy being used intentionally and experimentally to adapt another text, LBD's reliance upon pre-existing fans can be seen as an unavoidable strategic trade-off.

#### 6.2.4 Leveraging an Authentic Narrative Aesthetic

LBD found its unique position by leveraging the YouTube “broadcast yourself” aesthetic, “specifically, the seemingly amateur, single-camera, confessional-style video blog or vlog” (Stein, 2015 l.1960 of 2960). LBD embraced the style and tone of amateur opinion and self-cataloguing to make LBD feel authentic to its audience, presenting the themes and characters of Jane Austen’s world in a way that mimicked videos the audience themselves could make (Farber, 2013; Miller, 2014). This approach provided multiple story modes, multiple points of interaction and an ability for the audience to become active, commenting and immersing themselves in the story, unlike other notable adaptations of *Pride and Prejudice* (summarised in Appendix 6.1).

Stein calls the video blogs “an embrace of the affective economy of YouTube” as they tapped into the “language and logic of YouTube blogging culture”. She labels the character’s social media actions “micro-narratives” that provide “web footprints as if they were real people”, combining with the video blogs to “generate a playfully realist transmedia form” (Stein, 2015, p. 48). She argues that LBD draws on Green’s millennial fan base and upon an “enthusiastic Jane Austen fan base, with its organized networks of appreciation and community” (Stein, 2015). The project used realistic actions by their characters, centralised through the story mode of video blogs, to engage their audience. Not only is access to all of the media used by the creators to broadcast the story free<sup>76</sup>, removing price competition, but it was able to differentiate itself from other *Pride and Prejudice* adaptations by using the way audiences were using those media to interact with one another as the vehicle to modernise Austen’s narrative. Applying Porter’s generic strategies for competitive advantage, this can be seen as transmedia storytelling being used for focussed differentiation, as LBD sought to appeal to a narrow market niche (fans of both *Pride and Prejudice* and YouTube-style content). The unique position of the project can be seen as one based on authentic, fan-focussed retelling.

On first glance, the approach that LBD’s producers took could be easily aligned with Kim and Mauborgne’s (Kim & Mauborgne, 2013) ideals of “blue ocean strategy”; creating a new

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<sup>76</sup> Aside from a book published for sale later within the LBD universe and the necessary requirement of an internet connection to access the show.

market niche without direct competitors. LBD's strategy was novel and provided the property with a unique position, presenting *Pride and Prejudice* to audiences in a way they had never experienced before (Tepper, 2015). However, "uncovering a niche in an existing place is not the same thing as identifying new market space" (Kim & Mauborgne, 2015, p. 70). A niche strategy is not the same as one that creates a new market (Uzuegbunam, 2008). LBD represented a new way of retelling Jane Austen, finding a niche compared to other Jane Austen adaptations.

The market that it operated in, however, was not a new one. Audiences had been following narratives, albeit largely non-fiction ones, from YouTube bloggers and through social media long before LBD. Substantially lower viewing figures for Pemberley Digital's later work, as well as the plethora of fictional adaptations now found on YouTube that leverage the same approach to generating a niche through interwoven social media and blogging videos, indicate that LBD was one of the first to generate this kind of content. Today, their marketplace represents more of a red ocean; a space that is rapidly filling with similar, competing content (Kim & Mauborgne, 2013). Later projects by Pemberley Digital, *Frankenstein M.D.* (2014) and *The March Family Letters* (2015), both have approximately 130,000 subscribers and anywhere from 300,000 to 60,000 views per episode. While this is a sustainable and significant audience base it is far lower than LBD's subscriber base of over 265,000 and approximate average viewership of over 300,000 per episode. Other competitor shows such as *Carmilla* (2014-Present) have the same number of subscribers (160,00) but average over 600,000 views per episode.

### **Section Summary**

This section shows that LBD's producers intentionally chose portmanteau transmedia storytelling as their guiding strategy because it allowed them to experiment with narrative form and potential business models. The producers needed to cater to a pre-existing fan base of *Pride and Prejudice* and chose to also leverage co-creator Green's own personal fan base. Using transmedia storytelling gave them a unique position in comparison to other Jane Austen adaptations as their narrative was inherently social in nature and reflected how young women, the target audience for *Pride and Prejudice*, were using media in their daily

lives. Using this approach, LBD was able to develop content that incorporated audience feedback and was scalable to the level of its success.

### 6.3 AUDIENCE ENGAGEMENT

This section applies the third guiding question of the lens: *what evidence exists that this strategic approach actually deepened audience engagement and sustained interest throughout the project?* It finds that LBD created a rich experience for Jane Austen fans through a focus upon social connection and, primarily, identification that the audience had with the original *Pride and Prejudice*.

#### 6.3.1 Every Platform Contained Interactive and Social Connection Tiers

Every single story mode within LBD was broadcast on platforms that allowed audiences to either passively watch or actively interact with social situations.

*"Each platform contributes something distinct to the property; YouTube offers up a space for more traditional episodic storytelling; Facebook can directly connect creators with the audience; and, yes, Twitter's real time accompaniment still contributes to a sense of live viewing, which serves to both connect audiences that are watching the story unfold together and give the characters dimensionality in familiar, "real world" territory" (Tepper, 2015, p. 48).*

Twitter and Tumblr, the primary communication devices for the characters, are conversation based communities which are based entirely on digital conversations between people. However, on both, an audience member could still passively lurk and follow conversation threads to enjoy the story or tweet/post to the characters and, occasionally, the characters would respond (Klose, 2013). Even the most passive story mode of the video blogs, in which a YouTube LBD playlist now lets the user sit back and watch episode one to one hundred without stopping, contains a comment section. Success on YouTube linked is to and often determined by participation, interaction and sharing of "seemingly authentic" emotion (Green & Burgess, 2009). Four years after the first episode was aired, people are still

commenting and interacting with one another in the comments section, making viewing the show a potentially social experience (Pemberley Digital, n.d.).

Social connection and identity were key logics of engagement for LBD. Even if an audience member simply engaged for the purposes of entertainment, the purpose of translating *Pride and Prejudice* to a modern context was to explore how *Pride and Prejudice* mirrored the personal issues that a contemporary audience might face (Farber, 2013). This meant that an audience member without the want to socially engage could still identify with and feel connected to the narrative. They were able to view the social connections of others and resonate with their conversations through the visible discussions that take place on Twitter and within YouTube comment sections.

LBD's success at engaging audiences with transmedia storytelling came through creating multiple potential tiers of engagement, a strategy espoused by transmedia and outlined in Section 2.2 of Chapter Two.

*"Lizzie Bennet Diaries invited all audiences into the tent, whether they sought a linear or a fully-immersive experience. The transmedia project explored the boundaries of perspective storytelling using multiple platforms to present different characters' POVs; it authentically told the story in real time with real-world platforms; it engaged and interacted directly with its audience ambassadors; and it responded to their reactions, allowing them to shape storylines and character development"* (Zeiser, 2015a, p. 408).

To explore these tiers, Table 7 uses Zaichkowsky (1986; 1994)'s advertising framework for low, middle and high engagement, as well as the antecedents for the persistence of engagement (involvement) discussed by Andrews et al (1990) to illustrate the way in which LBD provided different tiers of engagement for its audience. "Fans were able to follow the individual characters across platforms, and experience parts of the story in greater detail or as teasers"(Weitbrecht, 2014). Dependent upon the individual needs of engaged audience members, they could engage as much or as little as they wanted.

*Table 7: Tiers of Involvement in LBD*

<b>Tiers of Involvement (Zaichkowsky)</b> <i>The capacity of the audience to continue to engage with something (Andrews et al., 1990).</i>	<b>Types of Engagement</b> (Beddows, 2012b; Dena, 2008; A. Phillips, 2012)	<b>Methods and Logics of Engagement</b> <i>Linking activities that the audience could undertake to Askwith (2007)'s logics of engagement: entertainment, immersion, social connection, identity and mastery.</i>
Low	Passive	<ul style="list-style-type: none"> <li>• Watching YouTube blogs – <b>entertainment</b></li> <li>• Following characters on Twitter/Facebook – <b>immersion and entertainment</b></li> </ul>
Middle	Some passive and interactive elements	<ul style="list-style-type: none"> <li>• Discussing plot points with other viewers on YouTube – <b>social connection</b></li> <li>• Searching Twitter followers of characters to discover other characters and their conversations – <b>mastery and immersion</b></li> <li>• Funding the IndieGoGo campaign to own a DVD box set of the series – <b>mastery and identity</b></li> </ul>
High	Highly active	<ul style="list-style-type: none"> <li>• Making fan-fiction to celebrate <b>identity</b> and having it shared by the show's official Tumblr – <b>identity</b></li> <li>• Buying merchandise of the series to wear - <b>identity</b></li> <li>• Joining in Twitter conversations between characters – <b>social connection</b></li> <li>• Sorting through the social activities of characters to match them to events and character arcs from <i>Pride and Prejudice</i> – <b>mastery and immersion</b></li> <li>• Discussing these findings with others on community message boards – <b>identity and social connection</b></li> </ul>

As Table 7 demonstrates, LBD was strategically organised so that the producers could reduce barriers that normally existed between fictional characters, content creators and an audience, “instigating dialogue from fan to fan, fan to character, and fan to creator”(Tepper, 2015, p. 48). These engagement and involvement tiers show how LBD maintained its unique position for audiences, using socially connected, real-time storytelling to appeal to multiple tiers of potential audience involvement.

However, today an audience member who wishes to activate a higher tier of engagement and involve themselves by interacting with the characters in the story or with others experiencing the narrative at the same time, simply can't. They will never know the particular reward that other viewers had when the project was in production, of discovering character interactions as they happened or, at an even higher level, interacting with the characters themselves.

### 6.3.2 Audience Co-Creation and Authorial Control

As Bushman's interview revealed, storytelling to the audience was the primary objective LBD's strategy. "There's this assumption that because we were pushing all this stuff out on social media that the audience had a hand in creating the character, which they never did" (Bushman, 2015). Rather, to foster shared value<sup>77</sup> with the audience, the producers of LBD focused on creating *feelings* of ownership and interplay with the audience.

*"Helping people find that excitement about stories is one of the most useful and amazing things that anyone can do. It's about stripping away all of these artificial things that would keep people away from a classic story and finding a way to translate it to them that makes complete sense in the modern world"* (Bushman in Klose, 2013).

In this way the producers took on the role of translators, maintaining control of the translation for LBD while using transmedia storytelling to make the translation as relevant as possible to a socially engaged audience. Fan drawings were frequently shared by the creators of the series on Tumblr. Characters would interact with audience members and audiences were rewarded for their active agency in searching out social interactions between characters with pieces of narrative that were separately enjoyable and added to their understanding of the LBD world (Whyte, 2013). The producers would listen to and adjust their content to take advantage of the way that audiences reacted to various plot points, but, as the publishers of video content and administrators of social interactions, they always retained the position of author and authorial control (Bushman, 2015).

### 6.3.3 Immersion and Mastery Through Real World Footprints

For those seeking greater immersion in and mastery of LBD, the adaptation relied upon audiences seeking out and finding narrative components grounded in the real world. The authors maintained control of the narrative, but it was up to the audience to drive and shape their own experience. In his interview, Bushman gives the example of audience members being encouraged to seek out layered, Twitter-based backstories.

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<sup>77</sup> Shared value is the value that a company can generate with its activities which is beneficial to both the business and the customers of that business. If a customer's life is improved by the company then they are in a better position to be a frequent customer of the company, whether it is having more money to spend or promoting the company to their friends and family because of what it has done for them (Porter 2011).



*"About a month into the show, at the moment in the narrative when Bing and Jane meet they hit it off really, really well and they do what people today do when that happens, they start following each other on Twitter. And so the fans who are following Jane's twitter account suddenly saw "Jane is being followed by Bing Lee" or "Jane is now following Bing Lee" so they found Bing's twitter account, and through that they found Caroline's, and through that they found Darcy's and through that they discover an entire month of story that had been hiding in plain sight that they just didn't know was there but paralleled everything that they just did. So suddenly this story that they thought was just this, was this. That was a technique we used all throughout the show where we just kept enlarging the world" (Bushman, 2015).*

Similar to *Doctor Who*, LBD demonstrates a reliance upon the agency of highly engaged audience members, seeking to engage them so that they, in turn, promote the work to less engaged audience members. Now that the series has concluded, a casual observer can use the Pemberley Digital website to view an archive of relevant conversations. But, at the time of the projects live run, an audience member needed to seek out these interactions themselves or have them pointed out by another audience member with a higher level of involvement.

### **Section Summary**

This section shows that LBD used socially connected content with layers of potential engagement that existed to appeal to different audience tiers of engagement. To sustain its unique position as a faithful but socially relevant adaptation, LBD created real world footprints for its characters. These social media activities formed more than a history that a passive viewer could read and search for, but represented an option for highly engaged viewers to directly communicate with the fictional characters of the story. Retaining their position and control of the narrative as author, Pemberley Digital gave their audience a feeling of ownership for the story, reacting to audience interaction to tailor some of the narrative to audience response. This created longer lasting engagement for highly involved audience members and allowed the project to "mushroom" beyond the core audience it began with fans, both *Pride and Prejudice* and Green's Vlog Brothers channel.

## 6.4 COMPETITIVE ADVANTAGE

This analysis of LBD shows it to be a fan-focused example of transmedia storytelling strategy. LBD modernises a popular, classic narrative (*Pride and Prejudice*) and activates pre-existing audiences to snowball the success of their project. This case demonstrates how transmedia storytelling can be used as a tool for translating a narrative into a different context (YouTube) by appropriating the tropes and advantages of different story modes common within that context. This section provides a summary of each section and then distils the findings within through the last aspect of the analytical lens, competitive advantage.

Section 6.1 demonstrates that a portmanteau transmedia storytelling strategy was used by LBD to adapt *Pride and Prejudice*. This resulted in a central story mode driving the overarching narrative forward (video blogs on YouTube) while believable online social interactions between characters formed a secondary expansion of the world. Section 6.2 finds that, like *Sofia's Diary*, LBD is an example of low-budget, targeted transmedia storytelling that provides its creators with control over intellectual property. Influenced by the background of co-founder Green, LBD chose to trade traditional storytelling platforms for the socially connected, self-controlled broadcast arena of web video. This allowed them to capitalise on the success of the project and use it to establish a nano-studio, Pemberley Digital. They created and now continue to create content with a unique position in the marketplace, differentiating itself through greater social connection and mimicry of the way their target audience, young women, use social media. Section 6.3 shows that LBD sustained this unique position by designing their narrative so that audience members could draw out different depths of engagement depending on their capacity and want to involve themselves in the story. Whether they just wanted to sit and watch or to fully engage and interact with the characters in the story that they were consuming, transmedia storytelling helped create scalable immersive tiers of activities for all audience members.

Porter's three key components of competitive advantage (unique position, strategic fit and trade-offs) are used by this section to provide a summary of how Pemberley Digital used transmedia storytelling to succeed with LBD.

## Unique Position

LBD distinguishing itself from similar projects by:

- Using multiple story modes, all with the capacity for social connection. These presented a known narrative (*Pride and Prejudice*) within a new context (social video) with greater personal relevance for the target audience of modern young women.
- They were able to iteratively experiment with narrative form, scaling their production against audience engagement. Once certain viewer milestones were reached, more characters were moved upstream from low-cost social platforms and brought into the primary story mode of the video blog on YouTube (Bushman, 2015).
- Fans became both an audience and a co-creative resource in this project. They added to the story with their visible interactions on social platforms (i.e. Tweets and Tumblr posts to characters and each other) and helped to finance the project with their viewership and direct to producer purchase of merchandise (ie. the DVDs and book created through LBD's successful IndieGoGo fundraiser).
- Provided a vehicle for audiences to explore issues directly relevant to them and then discuss those issues with others, socially connecting and taking ownership over their interpretation of the text.

## Strategic Fit

The strategy helped the narrative to become a "whole greater than the sum of its parts" (Gambarato, 2012a) because:

- The choice of narrative platforms leveraged Green's pre-existing YouTube audience and created vibrant online fan communities of *Pride and Prejudice*.

- Social interactions between characters provided both singularly enjoyable narrative beats and interlinked backstories that active audience members could explore. This provided greater depth to the narrative being played out on the central YouTube blog.
- The narrative took place across the same interfaces that audiences were already using to communicate with one another, heightening the potential for word of mouth to organically grow and promote the project.
- The show's producers celebrated fan-fiction and fan drawing about LBD, affirming the audience's choice to create content about the show. This rewarded both the content creator and helped the show's producers to engage at a deeper level with their fans

### **Trade-Offs**

To achieve and maintain its unique position, LBD's use of transmedia storytelling involved significant trade-offs:

- Their use of transmedia storytelling actually prohibited them from creating an evergreen property in this case. As a direct adaptation retelling *Pride and Prejudice* in real time, the project would always be finite. Once the events of the source material finished, so would the project's narrative. The aesthetic that drew audiences to the project also meant that it could not significantly expand to leverage growing popularity.
- Maintaining control over intellectual property, as a narrative experiment produced by a nano-studio, meant that the producers of the project launched the show with little traditional marketing and a reliance upon it growing organically from word of mouth.

- The success of the show allowed them to later create Pemberley Digital, making more projects like LBD and experimenting further with social video strategy. However, this meant shouldering a large amount of initial risk regarding the project's success or failure.
- LBD's method of taking a popular older novel with a wide readership and translating it to the contemporary context has since been replicated by dozens of YouTube production companies, such as *Carmilla* (2014), produced by KindaTV and *The New Adventures of Peter and Wendy*(2014), produced by EpicRobotTV. Seeing the success of LBD and with the relatively low cost of creating similar content, competitor projects such as *Carmila* and *The New Adventures of Peter and Wendy* could pattern themselves on LBD's successful strategy and have since meant lower viewership for later series by Pemberley Digital.

## Conclusion

The use of transmedia storytelling in LBD resulted in significant competitive advantage, helping to differentiate the project from both other YouTube content and from competing adaptations of Jane Austen material. The competitive advantage provided by transmedia storytelling strategy for LBD can be summarised as follows:

- It provided consistent engagement for the average audience member with views on the central YouTube platform remaining at a consistent number throughout all LBD episodes (Tepper, 2015). This included approximately 70,000 early in the project to an average of over 600,000 per episode today, 260,000 Pemberley Digital subscribers and over 800 pieces of fan art being created for the show (Pemberley Digital, 2013a)<sup>78</sup>.
- Spreading the story out across self-contained but interlinked story modes, on social platforms and via video blogs, gave the characters of the world a "real footprint"

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<sup>78</sup> This may seem small in comparison to a project that is the size and scale of *Doctor Who* but, especially at the time, it provided a return on investment and was a high level of engagement for a YouTube series.

which engendered immersion and social connection among audience members, heightening overall engagement.

While the competitive arena for web based, social adaptations of older stories has since become more saturated (Farber, 2013), LBD still provides a valuable example of transmedia storytelling in practice. It shows that transmedia storytelling is a viable tool for experimental narrative storytelling in new niche markets, provided that the niche in question has a natural proclivity for cross-platform storytelling. It shows that, as a tool for adaptation, transmedia storytelling can provide a unique way for producers to make their text personally relevant and deeply engaging. LBD did this by embedding their fictional narrative with the way their target audience was already using different story modes to consume non-fiction material in their daily lives.

This chapter develops a case analysis that demonstrates how transmedia storytelling was used by Pemberley Digital to leverage freely available and socially connected story modes and deeply engage their audience. It affirms the findings of the previous case studies, in particular, that there is a strong link between audience centricity (a marketing orientation) and the successful implementation of transmedia storytelling strategy. The next chapter cross-analyses the findings each of these case studies.

## CHAPTER SEVEN: COMPARATIVE ANALYSIS

Three case studies of significantly different scale and scope are developed and discussed in Chapters Four, Five and Six. Each case study is individually analysed through the theoretical 'lens' that was developed in Chapter Three, a lens that holistically integrates leading interdisciplinary theories on competitive advantage and strategy.

In each case – *Doctor Who*, *The Lizzie Bennett Diaries* and *Sofia's Diary* – data drawn from a combination of face-to-face interviews, interviews with leading creators already published within the literature, and other secondary sources (trade journals, expert blogs and scholarly literature) are analysed through the theoretical lens in a four-step process. First, the form of transmedia storytelling used by the producer is determined and analysed. Second, drawing from those same sources, each individual case chapter then describes how the storytelling strategy is formulated and implemented by the producers. Third, this implementation, as a means of reaching target audiences and optimising their engagement with the project, is analysed. Finally, each case chapter utilized the lens, drawing specifically upon Porter (1991; 1996) to facilitate a strategic assessment. This included an analysis of how each project's transmedia strategy influenced its commercial success.

Leveraging the lens and, in particular, Porter's framework for competitive advantage, this chapter provides a comparative analysis of transmedia storytelling in operation as a competitive strategy for serialised, video-based narrative worlds. This helps to identify critical success factors across the three case studies, provide useful learning for practitioners and to contribute to the body of knowledge on transmedia storytelling.

To do that, this chapter conducts a cross-comparison of the three case studies, addressing each of the guiding questions embedded within the theoretical lens:

1. *What form/s of transmedia storytelling strategy does the evidence indicate is/are present within each case study?*
2. *Why was that particular strategy chosen and what key factors influenced the formation of that strategy?*

3. *How did the strategy used seek to optimize the target audience's level of engagement with the project?*

Section 7.1 compares the form of transmedia storytelling identified in each case study. It uses this cross-comparison to relate these forms to Porter's three 'generic strategies' for building sustainable competitive advantage (differentiation, low cost or focus). Section 7.2 reviews why these particular strategic approaches were chosen by the producers of each project, comparing how different contexts and company objectives have influenced the formation of transmedia storytelling strategies. Having compared what kind/s of strategy were chosen and why, Section 7.3 then builds upon this analysis by comparing the approaches to audience engagement of each producer and how their use of transmedia storytelling strategy influenced the way in which their projects established and maintained audience engagement. Finally, Section 7.4 evaluates the competitive advantage of each project. It compares the ways in which each project used transmedia storytelling to establish a unique position in their market and the trade-offs that were involved in creating and sustaining those positions. Through the cross-application of the theoretical lens the research is able to complete this thesis' analysis of what transmedia storytelling strategy is and the how it relates to the competitive advantage of different projects.

### 7.1 GENERIC STRATEGIES AND TRANSMEDIA STORYTELLING

This section cross-analyses the data presented when examining each case study as it related to the first guiding question of the lens; *what form/s of transmedia storytelling did the evidence show were present within the project?* It compares the different forms of transmedia storytelling presented by the cases in this thesis and relates these findings to the different forms of generic competitive strategy that Porter uses as a foundation of his work. A summary of these findings is presented in Table 8, overleaf.



**Table 8: Cross-Comparison of Guiding Question #1: Strategic Form**

*What form/s of transmedia storytelling strategy does the evidence indicate is/are present within each case study?*

Sub-Questions	Doctor Who	Sofia's Diary	The Lizzie Bennet Diaries
<i>What was the intended lifespan of the project?</i> (Falzon, 2012; Gomez, 2015; Mittell, 2012)	Indefinite  The project is intended to last as long as possible, with no foreseeable end point.	Finite  The project could only last while the main character Sofia attended school i.e. her teenage years.	Finite  The project covered the same time-span as the events in the book that it was adapted from.
<i>What style of transmedia storytelling is most evident?</i> (Dena, 2009; Pratten, 2011)	Franchise <sup>79</sup>	Portmanteau <sup>80</sup>	Portmanteau
<i>What was the project based on?</i> (Bourdaa, 2013; Fast & Örnebring, 2015; Aaron Smith, 2009)	An original TV series	An original story, launched through an interactive SMS service and online blog	Book adaptation of famous novel
<i>Was the project focussed on a single central story mode?</i> (B. Clark, 2011; Jenkins, 2010a; Mittell, 2012)	Yes – the television series	No – the story was evenly dispersed across most story modes.	Yes – the video blog of the main character, Lizzie
<i>How did the use of transmedia affect the way in which audiences experienced the narrative?</i> (Gambarato, 2012a; Aaron Smith, 2011)	It <b>expanded</b> the world and provided additional narratives for them to explore.	It <b>extended</b> the experience of a single narrative i.e. Sofia's daily diary entry.	It <b>expanded</b> the world through multiple individual story modes that added different perspectives to their adapted version of <i>Pride and Prejudice</i> .
<i>Was transmedia storytelling designed and implemented from the beginning of the project?</i>	No – evolved over time (decades)	Yes	Yes

This table presents a compilation of different analyses of 'form' within the transmedia literature. The application of the strategic lens allows for a comparison of these varying aspects. Despite some similarities, different forms of strategy are evident within the three case studies.

*Doctor Who* represents a project that has evolved over time into a story world that contains multiple separate narratives, with no end planned for the overall world. In industry terms this is regarded as an 'evergreen' property (Mittell, 2012; Gomez, 2015). Growing in popularity, it has expanded its original concept across multiple platforms, experimenting with various approaches until settling on transmedia storytelling as a method for sustaining the current iteration of the narrative world. It has always tied its fortunes to the success and failure of its

<sup>79</sup> Dena (2009) describes this type of storytelling as mono-media - a world built around largely independent story modes that are not part of one single narrative. Rather they exist within the same narrative world and typically focus less on interconnection with one another and encouraging audiences to traverse to other story modes than another style, such as portmanteau. This is also often associated with large transmedia franchises.

<sup>80</sup> Portmanteau transmedia storytelling refers to a particular type of storytelling where a single narrative is told through multiple interlinked but stand-alone story modes (Pratten 2011). For example, *Sofia's Diary* is a single larger narrative, that of Sofia's daily struggles as a teenage girl. The blog, television episodes and text messages tell different parts of a larger narrative.

central story mode - the *Doctor Who* television series - and has used transmedia storytelling to expand the appeal of aspects of that story to various audiences around the globe.

In contrast, *Sofia's Diary* created a single original narrative that was then able to be purchased by other production companies as a format. Sofia's transmedia narrative was packaged, adapted and recreated in more than thirty territories worldwide. *Sofia's Diary* focussed on providing a different narrative experience for teenage girls in Portugal. Transmedia storytelling, as it relates to *Sofia's Diary*, is about telling a narrative in a way that mirrored the day to day life of the target teenage audience. Multiple story modes were leveraged through a portmanteau style of transmedia storytelling - the audience experienced the single central narrative of Sofia's daily dilemmas through multiple touch points as if they were Sofia's friend and confidant.

*The Lizzie Bennet Diaries* (LBD) also reflects portmanteau transmedia; the intentional conveyance of a single narrative through multiple story modes. LBD was an intentional recreation of the ways in which some people today use social media to reflect on, to document and/or discuss events in their daily lives. However, unlike *Sofia's Diary*, LBD had a central platform, the main character Lizzie's video blogs on YouTube. The project was also built as an adaptation of already famous source material, *Pride and Prejudice*. The strategy at work here was more about expanding an audience's experience of the *Pride and Prejudice* narrative, providing fans of the source material with a different way to experience and interact with the classic tale and also providing an accessible gateway through which a new generation of teen girls could relate to Jane Austen's work.

Identifying the various aspects of form present in these case examples establishes clear depictions of the strategies being cross-analysed through the theoretical framework of competitive advantage. In particular, these forms of strategy can now be related to Porter's three 'generic strategies' for competitive advantage. Section 7.1.1 conducts a discussion of these generic strategies in a transmedia context, informed by the findings of each case study. Section 7.1.2 applies this theoretical framework to each case study individually, comparing the forms of their competitive strategy.

### 7.1.1 Porter's Three Generic Strategies for Competitive Advantage

As is discussed in Section 2.3 of the literature review, Porter (1985; 1996; 2008) argues that sustainable competitive advantage is attained through one of three generic strategies: 1) differentiation, 2) low cost or 3) focus – targeting specific market segments/audiences through either differentiation or cost<sup>81</sup>. This is shown in Figure 11, below.

**Figure 11: Porter's Generic Strategies for Competitive Advantage**

(Diagram from the University of Cambridge (2015), reproduced from pp.11-15 of Porter 1985)

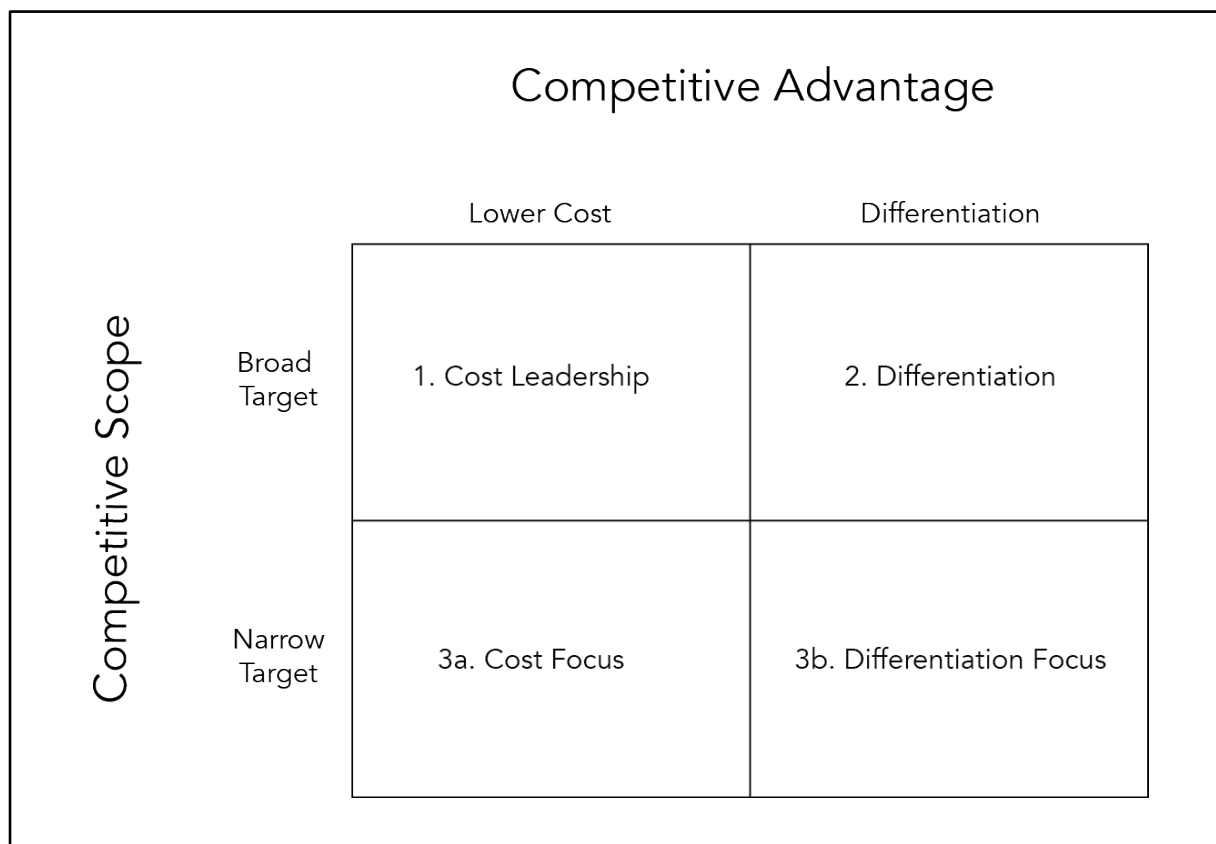


Figure 11 reflects two broad target strategies; *cost leadership* through a focus on low cost production, creating a higher return from your product than your rivals and *differentiation* - the generation of superior value, which enables premium pricing. This figure signals that in film, television and transmedia, a differentiation strategy can provide a sustainable competitive advantage by producing premium value for a broad audience.

<sup>81</sup>"You can have consistently lower costs than your rivals... Alternatively, you can differentiate your product or service from your competitors, in effect making yourself unique at delivering something your customers think is important. That allows you to command a premium price" (Porter 1991 p.2)

Hollywood does this with its big budget blockbuster projects, featuring big stars, innovative special effects and extensive story worlds (Zeiser, 2015b). Since the late 1910s when Adolph Zukor's Paramount Pictures adopted this approach and other major studios followed, this strategy has provided Hollywood conglomerates with competitive advantage for their cinema centric projects (Silver, 2010). They create high barriers to entry for independent producers and other competitors seeking to target a broad audience (Geroski & Jacquemin, 2001). These other competitors cannot compete with Hollywood movies in terms of budgets, stars, special effects, media expenditure and domination of distribution channels to cinemas (Olson, 1999), hence Hollywood's sustainable competitive advantage for over a century (Silver, 2007).

Similarly, U.S. television networks adopted a differentiated strategy to television production for a mass audience and since the 1950s American programming has also heavily impacted television markets around the world (Smith, 2009). Large American media companies have also historically road-blocked access by independents to video distribution outlets, although new players have emerged in the online world to challenge those roadblocks (Cunningham & Silver, 2013). Hollywood franchises regularly use high cost, large-scale transmedia campaigns to launch and sustain blockbuster story worlds. This can be seen through the current literature's analysis of franchise transmedia worlds like *Star Wars*<sup>82</sup>, *The Dark Knight*<sup>83</sup>, *The Matrix Trilogy*<sup>84</sup> and *Lost*<sup>85</sup>. This use of differentiation gives the producers a sustainable competitive advantage, because it further raises barriers to entry for global cinema, video and TV markets.

Similarly, Figure 11 shows that an alternative approach when targeting a mass audience is a cost-leadership strategy. Digital distribution and particularly the Internet, has provided new entrants like Netflix, Hulu, Amazon and Google/YouTube with opportunities to challenge Hollywood's audience dominance of mass audience screen content consumption. Netflix makes entire seasons of its original TV content like *House of Cards* widely available as soon as it is released, available every hour of every day. These born online rivals to Hollywood

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<sup>82</sup> For examples of *Star Wars* transmedia research see Harvey (2013), Jenkins (2015) and Zeiser (2015a).

<sup>83</sup> For examples of *The Dark Knight Trilogy* transmedia research see Smith (2008), Gambarato (2012a) and Hadas (2014).

<sup>84</sup> For examples of *The Matrix* see Jenkins (2006), Long (2007), Beddows (2012) and Reinhardt (2013).

<sup>85</sup> For examples of *Lost* see Smith (2011), Graves (2011) and Scolari (2013)

leverage new digital platforms and also alternatives to traditional cinema and TV business models such as SVoD (subscription video on demand – Netflix, Amazon, Hulu, YouTube Red) and AVOD (advertising video-on-demand – Hulu Plus and YouTube) (Cunningham & Silver, 2013). They provide audiences with a different value proposition than Hollywood-produced premium content. Similarly, independent film and television producers in this arena often compete through innovation, lower production costs and lower pricing (Cunningham, 2013). They focus their content on a more specific, niche audience, beginning with highly engaged users in the hope of eventually translating this into broader mass audience interest (also known as reverse content windowing) (Cunningham, 2012).

The third generic strategy illustrated in Figure 11 is *focus*; using a narrower scope to reach a specific target market. Porter (1980, 1991) proposes that within a narrower market (i.e. a segment, genre, national or regional market or distribution channel) companies can create a sustainable competitive advantage through either differentiation (creating higher value products that can command higher prices within the narrower market) or cost leadership (low cost products sold at cheaper prices or products that are able to be accessed at less cost to the consumer). Porter (1991) links the generic strategy of focus to the strategies used by smaller independent companies and there is no reason why small independent companies that use transmedia storytelling should be exempt.

Porter's focus strategy is the most advantageous positioning strategy for smaller independent firms with fewer resources than industry leaders because it forces them to focus on what is achievable with their level of resources (Porter, 1991). Small firms can evolve over time into major industry players. Disney began life as a small animation studio in the 1930s and today is perhaps the largest Hollywood major. Similarly Miramax grew from a two-person studio into a mini-major and a global brand in the movie business (Rossiter, 2003; Silver, 2007).

Transmedia storytelling can provide significant differentiation for independent producers by providing greater immersion and interaction for regionally focussed and niche audience centric projects. In Australia, Brisbane based independent studio Hoodlum produced two transmedia projects that were clearly differentiated from traditional television programming

that were launched onto a local network accompanied by a transmedia campaign - *SLiDE* and *Fat Cow Motel* (Ward, 2009). For a similar cost to their competitors, Hoodlum created multiple layers of interaction and engagement for their audience, giving their most avid fans the opportunity to deeply involve themselves in the story worlds of each project. Alternatively, popular YouTube based series such as *Carmilla* (2014), *The Lizzie Bennet Diaries* (2012-2013) and *The New Adventures of Peter and Wendy* (2015) also target niche audiences with a focus strategy. However, they deploy Porter's second variation of focus, differentiation, by adapting classic novels into online video and social media stories. These examples indicate that transmedia storytelling can be an important creative and business strategy by which independent producers can optimally exploit commercial opportunities within the current tumultuous environment of converging media and increasingly cluttered video content markets.

### 7.1.2 Applying Generic Strategies to Transmedia Storytelling Forms

As stated earlier, in Chapter Three, a transmedia case study focused on a large Hollywood media franchise, for example *Star Wars*, *Star Trek*, *Lost* or *Buffy*, has intentionally been omitted from this thesis. Such properties have already attracted the attention of transmedia scholars and are well-documented in the literature, almost to the exclusion of small to medium size transmedia storytelling projects. They generally employ broad scope (mass audience) differentiated strategies that leverage their dominance of traditional global distribution channels for film and video content. Independents cannot compete with Hollywood on that scale and scope.

The purpose of this study is to identify critical success factors in transmedia strategy that of benefit to *all* practitioners. Table 9, overleaf, illustrates, this thesis has collected three substantially different case studies that each provide valuable data on alternate uses of transmedia storytelling strategy to the traditional 'Hollywood' approach.

**Table 9: Generic Strategies and Transmedia Storytelling Cases**

Project	Generic Strategy (Porter 1980, 1991)
<i>Hollywood Projects</i> Drawn primarily from literature on <i>The Dark Knight</i> , <i>Star Wars</i> , <i>Buffy</i> and <i>Lost</i> <sup>86</sup>	<b>Broad scope</b> (mass audience) based on <b>differentiation</b> N.B. Findings drawn from literature instead of case study.
<i>Doctor Who</i>	<b>Broad scope</b> (mass audience) based on <b>cost leadership</b>
<i>The Lizzie Bennet Diaries</i>	<b>Narrow scope</b> (niche audience) based on <b>differentiation</b>
Sofia's Diary	<b>Narrow scope</b> (niche audience) based on <b>cost leadership</b>

As is depicted in Table 9, *Doctor Who* provides an example of transmedia storytelling as a broadly focussed, cost-leadership strategy. *Doctor Who's* production values and aesthetic have always been shaped by available budget and with the intention of providing the most accessible service possible to the BBC's broad target audience<sup>87</sup>. During Hiatus Who (1989-2005) when the central story mode of television was off-air, the marketing department of the BBC argued for the creation of more low cost *Doctor Who* content because mail from fans strongly indicated that they still wanted to engage with the world (C. Johnson, 2013; Jones, 2013b). By centralising production at BBC Wales during Contemporary Who (2005-present), the BBC reduces production costs (Yarbrough, 2015). Even today, with a larger budget and a global audience for Contemporary Who, the charter of the BBC dictates the *Doctor Who* must provide easily accessible content for its primary UK audience, content that also experiments with new ways to educate, entertain and to tell stories (Chapman, 2013; Department of Culture, Media and Sport, 2006). Throughout its history and arguably still today *Doctor Who* has consistently demonstrated a cost leadership strategy targeted at a broad audience.

In contrast, *Sofia's Diary*, in all of its iterations, has been tailored to a specific target audience (teenage girls). It provides an example of the generic strategy of focus, targeting a specific geographic region (originally Portugal but then the United Kingdom, Ireland and more than 25 other regions by Sony) and a specific audience (young women in those regions). The

<sup>86</sup> For *Dark Knight* see Klastrup et al. (2004), Gambarato (2012a), Bostan (2012) and Zeiser (2015b). For *Star Wars* see Jenkins (1985), Harvey (2013), Tenderich (2013) and Zeiser (2015a). For *Buffy* see Abba (2009), Beddows (2012a, 2012b) and Stuller (2013). For *Lost* see Askwith (2007), Graves (2011), Smith (2011) and Scolari (2013).

<sup>87</sup> There are elements of differentiation in regards to the "quintessential Britishness" of the series and providing both educational content and experimenting with narrative form (Chapman 2014). However, as a public entity, their responsibility is first and foremost providing an easily available service of most value to the public. This is most apparent in times such as the 1970s when differentiation via darker, more adult narrative material provided greater profits. Despite increased viewership and profits from merchandise sales, they were forced to return to softer narratives as it did not fit the BBC's charter to provide an entertainment service that was accessible to children.

producer Nuno Bernardo indicated in his interview that the core objective of the project was always to relate to that target audience and make the main character act like and resemble a friend to those audience members (Bernardo, 2015b). By doing this, he actively lowered the cost for audiences of engaging with *Sofia's Diary*, making the project available without them having to stray from their daily routines. Whether it is the original Portuguese iteration or even the Chinese adaptation, *Sufei's Diary*, developing a tailored product for a niche audience was a key focus of the style of transmedia storytelling present in that project (see Chapter Six). They began with two cost-effective media forms (SMS and online blogs) and then grew the world only when they had proven their success on those platforms. Within this narrow focus, *Sofia's Diary* developed a unique position for beActive (its production company) through a consistent focus on cost leadership.

Chapter Six shows that LBD was designed to be an experiment in adapting *Pride and Prejudice* to the contemporary context. An example of focussed differentiation, this project concentrated on appealing to a combined niche audience of Jane Austen fans and teenage YouTube followers, who were already fans of executive producer Hank Green. It differentiated itself from other Jane Austen adaptations by modernising its source material and telling the narrative over multiple modes in real time within a contemporary setting. This focussed differentiation now guides other projects for the production company, *Pemberley Digital*. Its slogan is "timeless stories in innovative ways" and they focus on adapting well known classic books into multi-platform narratives (Pemberley Digital, n.d.).

Using Table 8 and Table 9, Porter's generic strategies provide a collective language for the description of types of transmedia storytelling. By applying the lens to understand the form of transmedia, we are closer to having a discourse for what transmedia storytelling actually achieves for producers. The finite portmanteau storytelling of *Sofia's Diary* and *The Lizzie Bennet Diaries* can be associated with a focus strategy for their stories. The broad focus of *Doctor Who* places it within the same competitive arena as content from large American conglomerates. However, the BBC's place as a public broadcaster has meant that its narrative world is focused on matching the obligations of its charter rather than delivering substantially differentiated product through aspects such as marketing, special effects or expensive stars.



This section shows that strategic theory can be used to coordinate the scattered findings of various studies of transmedia storytelling form. Not only this, but there are also many facets to the ways in which transmedia storytelling strategy can be used, which can, in turn, be better understood through the application of this strategic framework. The next step is to build upon this discussion and cross-analyse why the producers of each case study chose those particular forms of transmedia storytelling strategy.

## 7.2 CROSS-COMPARISON OF STRATEGY FORMULATION

This section cross-examines findings relating to the second guiding question of the lens; *why did producers chose that particular form of transmedia storytelling strategy for their project?* Table 10, overleaf, provides a summary of findings relating to why each particular form of strategy was developed for each case study, providing a cross-comparison of the factors that made transmedia storytelling the ideal process for each of these successful projects.

**Table 10: Cross-Comparison of Findings Regarding Strategy Formulation**

*Why did producers choose that particular form of transmedia storytelling strategy for their project?*

Finding Category	Sub-Questions	Doctor Who	Sofia's Diary	The Lizzie Bennet Diaries
Context	What kind of company created the project?	Public broadcaster and large media conglomerate	Independent production company	Independent production company
	What were that company's objectives?	- To satisfy the BBC charter; to educate, entertain and experiment with new ways to tell stories. - Obligations both financially and as a public entity.	Establish a new independent studio. Retain control of intellectual property and associated revenues.	Test a new business and creative model centred around adapting pre-existing, classic narratives.
	What was the market for the project?	- <b>Classic Who</b> (1962-89) UK television, prime time, mixed audience of adults and children - <b>Hiatus Who</b> (1989-2005) Remaining fans still purchased additional content, global niche grew, primarily in America. - <b>Contemporary Who</b> (2005-present) Broad family audience in the UK takes primacy, then global market place, existing fans and a converging media-escape.	Portugal – small national market, non-English speaking (export potential limited to Brazil and perhaps other former Portuguese speaking colonies).	Produced in America, in English, for a global YouTube audience.
Competition	How did the company seek to compete with the project?	Directly with other rivals targeting a mass audience (red ocean strategy)	Creating a new market niche (blue ocean strategy)	Creating a new market niche for existing content (blue ocean strategy)
	Did the project leverage existing audiences/fans?	<b>Yes</b> – Classic Who (1963-1989) was created to fill a programming gap between sports and teen content. Contemporary Who leveraged an existing audience of <i>Doctor Who</i> fans world-wide to relaunch its television series.	<b>No</b>	<b>Yes</b> – two audiences. Audience #1 – Jane Austen fans Audience #2 – <i>Nerdfighters</i> , the fans of co-creator Hank Green
Intention	Was the project developed with the audience as its primary consideration for decision making?	Yes – marketing orientation evident.	Yes – marketing orientation evident.	Yes – marketing orientation evident.
	Was transmedia storytelling intentionally used as a strategy?	<i>Classic Who</i> – No <i>Hiatus Who</i> – No <i>Contemporary Who</i> - Yes	Yes	Yes

As Table 10 shows, context, competition and intention heavily influenced why producers chose to implement their successful variations of transmedia storytelling strategy in each case study.

### Context

When *Doctor Who* was created in 1963, the BBC was seeking to fill a programming gap on British television between two broad audiences: the sports audience of *Grandstand* (mid-afternoon, largely adult) and the teen/family audience of *Juke Box Jury* (evening and teen

*focussed*). Over time, this audience has continued to grow into an international market with fans accessing it from all over the world (Perryman, 2008). However, as a public broadcaster the BBC cannot command a premium price for their content within their core British market as it had and still has obligations beyond providing entertainment. In particular the company's charter specifies a need to educate as well as entertain audiences and to experiment with new types of storytelling (Department of Culture, Media and Sport, 2006). This is not to say that the BBC have not experimented with various attempts at differentiation, such as the *Doctor Who* movie co-produced with U.S. studios in 1996 or significant expenditure on advertising for Contemporary Who<sup>88</sup> (Johnson, 2013). But, as Perryman (2008) and Yarbrough (2015) observe in their analysis of *Doctor Who*, most of these decisions are reactive and cannot be attributed to any sort of grand strategy. These strategic decisions happen in response to the creative impulses of lead creatives like Russel T. Davies and the financial return that the BBC sees from leveraging that creative direction (Akass, 2014; van der Graaf et al., 2010). Obligated to serve a broad British audience the *context* of *Doctor Who* has always guided the BBC's strategy back towards a low cost, broadly focused approach.

Larger studios, like the BBC, can leverage their scale in distribution and production to control the flow of the content that they make, to networks in local, national and international markets (Jenkins, 2006). On the other hand, smaller independent production companies simply can't compete on a level playing field with the major studios and television networks. Faced with that kind of market behaviour by major companies that employ differentiation or cost leadership strategies at scale in order to dominate mass markets, Porter (1991, p. 3) argues that "for small companies, the operable choice is normally what is known as focus (strategy): narrowing the strategic target and dedicating every action to serving that target". Likewise, Dena (2009) and Deuze (2010) in the media culture literature, support that position. They argue that small creative businesses rely on innovative content to differentiate their stories from bigger competitors. As is shown in Table 10, both *Sofia's Diary* and *The Lizzie Bennet Diaries* were created by independent production companies that tested experimental strategies for telling stories to specific target audiences.

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<sup>88</sup> Including specific promotional programs to promote new casting choices and behind the scenes moments (Johnson 2013).

*Sofia's Diary* turned a regional, non-English speaking market into a significant advantage. beActive developed *Sofia's Diary* as a new form of narrative for Portuguese teenagers. Bernardo saw the potential of interactivity and reach of the Web and then linked that strategically to the daily behaviour of Portuguese teenage girls, their use of mobile phones, the Internet and listening to radio. Making this content so social and accessible to that target niche meant that they focussed on lowering the relative cost of engaging with that content for that audience. It became easier to access throughout the day than other, less targeted narratives.

Apart from its teenage focus, the content of the story - a teenager's diary, was not too different from soap operas playing on television. Instead it was the form of Sofia's story - an interactive and multi-platform narrative that differentiated the experience for the teenage audience. beActive was able to package the intellectual property into a 'format show' incorporating the transmedia storytelling strategy. Its success allowed it to be sold internationally as a programme that could be re-made and localised in other countries like many games shows and reality shows. This allowed beActive to gain additional revenues and royalties outside of Portugal from companies like Sony that adapted it to other regional audiences across the globe. This financial focus of *Sofia's Diary* demonstrates a cost-leadership type of strategy, one similar in some ways to *Doctor Who*. However, unlike *Doctor Who*, this strategy also follows Porter's generic strategy of focus.

As is discussed at length in Chapter Six, beActive developed *Sofia's Diary* as part of a broader "nano-studio" strategy, a strategy built on retaining revenue for each creative endeavour instead of trading away intellectual property revenue rights to established distribution companies in order to reach broader audience. Analysing *Sofia's Diary* through the lens then demonstrates cost-leadership strategy on two fronts. Not only was the nano-studio model cost-effective in retaining revenue for the nano-studio of beActive, but it was also focussed on lowering the cost for audiences to engage with that content. Both are examples of effective distribution channel selection, a core process of cost leadership argued by Friedman and Fury as essential to a successful strategy in the contemporary connected marketplace (Furey & Friedman, 2012).

LBD was also an experimental project by a small group of independent producers. The project began with a micro-budget<sup>89</sup>, self-funded by executive producer Hank Green. Needing to differentiate itself from other *Pride and Prejudice* adaptations, the context of LBD as a low budget independent project, meant that freely available platforms such as YouTube, Twitter and Tumblr were ideal places for the producers to reach a niche but global audience. Executive producer Hank Green already had a following on YouTube and his experience<sup>90</sup> making content for the YouTube marketplace indicated to him that a niche audience of young fans, a large number of whom were already regularly engaged with his YouTube channels, might be willing to try the project (Green, 2012b). This context for LBD clearly influenced the choice of story modes for LBD and the choice of a differentiated focus strategy. Despite the restrictions of a low budget, the transmedia approach to the way that the video content was conceived and then delivered, across video blogs and social media, served to differentiate it from other previous screen adaptations of *Pride and Prejudice*.

### Competition

The way in which the production companies for *Doctor Who*, *Sofia's Diary* and *The Lizzie Bennet Diaries*, sought to compete within their respective markets also had significant impact on the types of creative and business strategies used in each case study.

Minutes from planning meetings that led to the creation of *Doctor Who*, show a desire by the BBC to develop content so that they could directly compete with the rival ITV network (Webber, 1963). This desire to compete directly with rivals, otherwise known as red ocean strategy (Kim & Mauborgne, 2005), has shaped *Doctor Who's* strategic development over the last half-century. A lack of competitive success with the central television story mode during the Hiatus period meant that low cost, fan targeted media such as books and radio plays became the strategic focus. Then, when the BBC conducted further market research and found that they needed to develop multi-platform worlds to compete effectively with their rivals. Their market research and their previous experience with *Doctor Who* fans indicated that it was the escapist, immersive experience of the *Doctor Who* story world that audiences

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<sup>89</sup> An investment of less than \$50,000 by Hank Green (Weitbrecht 2014)

<sup>90</sup> As well as that of his team. Bernie Sue, executive producer and co-creator and Jay Bushman, transmedia producer, both had experience in the online space and with innovative narrative content and were familiar with these markets.

were attracted to (Johnson, 2013). They brought back the central television story mode in 2005 with additional online websites, blogs, annuals, books and radio shows already in development as a direct result of this research (Johnson, 2013; Perryman, 2008; van der Graaf et al., 2010). The BBC's urge to compete directly influenced their revival of *Doctor Who* in 2005 as a transmedia story world for a broad, global audience (Chapman, 2013).

On the other hand, both *Sofia's Diary* and LBD, influenced by their position as newly formed independent producers, sought to gain advantage by creating their own competitive arenas. *Sofia's Diary* flowed across radio, mobile, television and the web, in a way that their research and experience told them that teenagers were already using those platforms (Bernardo, 2015b). Short form content on each platform created an interactive experience that did not directly compete with rival content already on those platforms. Portuguese teenagers could easily access the story and had not yet experienced a similar project. In turn this lowered the cost of engaging with the story for the audience, as it was readily and often freely available. As the experience grew over time, beActive were able to show tangible audience interest to investors and invite other would be competitors, such as television networks and book publishers, to invest in creating their streams of content. All the while beActive was able to retain control over the intellectual property, and the revenue associated with it. The way in which beActive used transmedia storytelling was clearly a direct result of the way in which they sought to compete as a company.

LBD, on the other hand, began with two pre-existing potential fan bases; Hank Green's YouTube followers and fan groups dedicated to Jane Austen and her work. In this way we can see a difference between beActive relying on a focussed but low cost variation of transmedia storytelling and LBD being generated as a focussed, niche targeted variant. LBD were leveraging existing content when experimenting with their *Pride and Prejudice* adaptation. This meant that, to avoid direct competition with better-funded rivals for audience attention, such as the *Pride and Prejudice* movies, they needed to substantially differentiate their version to entice fans of Jane Austen to engage with their narrative world. The low return of the YouTube space, in comparison to say feature films, meant that Hollywood studios were not likely to test that space with this style of adaptation for future

projects if it proved successful. This granted them a competitive edge and can clearly be seen to have heavily influenced the development of their strategy.

### **Intention**

Lastly, intention is the third factor that this analysis found to have significantly influenced why producers developed their type of transmedia storytelling strategy in each case study.

As the literature review in Chapter Two outlined, a marketing orientation is the belief that by aligning itself to focus upon delivering superior value to a target market and placing the audience as central to every activity undertaken, a company is able to succeed (Morgan, Vorhies, & Mason, 2009). A marketing oriented production company is one that is externally focussed, both on the audience and competitors, one that responds to external demands and pressure by aligning their products and services (stories) to provide *superior value* (Day, 1994). These types of companies display a proactive orientation in shaping external opportunities into competitive advantage (Vorhies & Harker, 2000). Applying the lens demonstrates that *Doctor Who*, *Sofia's Diary* and LBD, all demonstrate a strong marketing orientation which led to the intentional use of transmedia storytelling strategy.

The BBC had been creating low cost content for *Doctor Who* and testing audience reception to stories told across multiple platforms throughout the Hiatus period (1989-2005). In his case study of *Doctor Who* as a transmedia entity, Perryman found that, upon seeing a necessity for the BBC to undergo a "creative revolution" and develop multiplatform experiences, lead strategists at the BBC intentionally reintroduced *Doctor Who* as an intentional foray into the cross-platform marketplace (Perryman, 2008).

*Sofia's Diary* and LBD were created so that each part of their story world was related to how their audience were already behaving. Both projects found that there was a gap in mirroring how their audiences were already using media to communicate with one another and, by aligning their production processes with a focus on creating narrative that leveraged that behaviour, they were able to gain audience interest and attention.

Further research into the comparative success of transmedia projects that do not use a marketing orientation is needed. However, at this stage, the marketing orientation of each of these case studies, and their associated intentional use of transmedia storytelling as a strategic response, can be linked to their success. Their decision to use transmedia storytelling was clearly influenced by what they understood of their individual competitive arenas and how each company intended to use that understanding to compete in those arenas.

### **Section Summary**

This section has clearly demonstrated that transmedia storytelling is a strategy developed and implemented as a direct response to higher demands within an organisation. It is shaped by the context, competitive desire and intention of the company creating it.

*Sofia's Diary* was created as the founding project for beActive. They turned to transmedia storytelling methods for their business (*Sofia's Diary*) as a result of their corporate strategy (to act as a miniature iteration of a Hollywood studio, a nano-studio). Both *Sofia's Diary* and *Doctor Who* sought to compete by creating content that was cost-focussed, both a lower cost for audience to access (lower barriers to entry) and a cost-focus in how it was produced and distributed. In turn, what this section has shown is that their strategies differ due to the context of each company and the way that that company sought to compete with transmedia storytelling. The BBC sought to compete directly with its large rivals, developing a broad focus and seeking to reach as large an audience as possible, while beActive targeted a specific niche audience (teen girls), seeking to avoid direct competition with better funded rivals because they were a small independent production company and they were based in a smaller marketplace on the edge of Europe.

As Jenkins established in *Convergence Culture*, the transmedia extensions of big-budget Hollywood franchise, such as *The Matrix*, differentiate narrative worlds by adding greater immersion, entertainment and points for connection with the story for fans (Jenkins, 2006). LBD also provides an example of a narrative world built to provide greater points of connection and immersion for potential fans. However, this section shows that their strategy of differentiation developed a specific focus due to both context and the way in which the



producers sought to compete for their audience's attention. LBD was developed by a small independent group of producers who self-funded the project. Their context and their desire to not compete directly with other adaptations and, instead, experiment with modernising the narrative form of *Pride and Prejudice*, clearly influenced their choice to both use transmedia storytelling and the type of strategy they developed. Context, and the orientation of the company to that context, clearly influence why producers choose particular forms of transmedia strategy and how those strategies differ. Cross-comparing this element of the case studies clearly indicates that successful transmedia strategy is dependent upon an understanding of audience and of a production company's context and competitive needs. It is not transmedia storytelling itself that provides a competitive advantage to any practitioner, but how a company adapts to these elements that is crucial to the development of a successful transmedia storytelling strategy.

### 7.3 CROSS-COMPARISON OF AUDIENCE ENGAGEMENT

*How did the strategy used seek to optimize the target audience's engagement with the project?*

The previous sections of this chapter cross-analysed what competitive and creative strategies were chosen for each project (Section 7.1) and why they were chosen by the project's producers (Section 7.2). This section builds upon that analysis by comparing how the producers of each project sought to optimise audience engagement through their use of transmedia storytelling strategy. Findings related to this third guiding question for this thesis have been divided into three parts in this section; 1) the use of the strategy to target specific audiences, 2) the influence of different types of transmedia storytelling on different tiers of audience engagement and 3) how transmedia storytelling influenced the relative cost for audiences to engage with the story world. Table 11 summarises this overview. Each of the following sub-sections then provides a discussion of each part of the guiding question.

Table 11: Cross-Comparison of Audience Engagement

Case Study	Doctor Who	Sofia's Diary	The Lizzie Bennet Diaries
Targeting specific audiences	Central television series targets a broad audience. Specific narratives created to appeal to segments of that audience.	Used personal, interactive media to appeal to teenagers and make the story relevant.	Central YouTube series targets broadest audience and casual viewers. More interactive media, like Twitter, appeals to hard-core Austen fans.
Catering to tiers of involvement	Activities exist for all types of audience members, but engagement is large one-directional and passive unless driven by the audience themselves.	Demanded high levels of activity from audiences initially. As the project grew, this demand decreased.	The social interactions provided a rabbit hole for active viewers while the central series provided a point where casual audiences could simply sit and watch.
Reducing relative cost	The BBC consistently experiments with new narrative forms and methods of making it easier for audiences to experience their narrative.	Made the narrative become part of the audience's daily routine, reaching out to them on the platforms that they were already using.	Made the narrative become part of daily routine. However, also used freely available media platforms to lower potential costs, relying on advertising revenue and merchandise sales.

### 7.3.1 Using Transmedia Storytelling to Target Specific Audiences

Audience centricity has and continues to be at the heart of transmedia storytelling, in both research and practice. This section shows that the strategic management of each project had significant impact on how specific target audiences were leveraged within each case study.

The *Doctor Who* television series was so popular that over time it attracted a broad audience, an increasingly large brand-loyal international fan base that spanned the three different periods of the *Doctor Who* franchise – Original Who (1963-1989), Hiatus Who (1989-2005) and Contemporary Who (2005-present). Throughout its history, specific audience segments have been targeted with individual story modes. In the early 1960s, comics for children could be found in the *Dalek Annuals* (Audience Research Department of the BBC, 1966). Throughout the 1970s until the present day, darker novels containing adult focussed adventures of the Doctor have been published by the BBC or sub-licensed to external providers to create that official content (van der Graaf et al., 2010). In the current iteration of *Doctor Who*, *Torchwood* targeted an adult audience; *The Sarah Jane Adventures* targeted young children and their parents who might have been past fans, and the central television series targeted the broadest possible *Doctor Who* fan-base.

The television series has always been restricted by budgets made available by the BBC and therefore limited to a finite number of episodes per season (Johnson, 2013). However, lower cost transmedia content not only satisfies audience desire for more *Doctor Who* in terms of

volume of available content, but also provides the audience with the opportunity to experience different aspects of the world (Perryman, 2008). As Chapter Four demonstrates, throughout *Doctor Who's* history the BBC has used specifically targeted content, ancillary to the main television series, to appeal to segments of its fan-base.

Like the *Doctor Who TV series*, LBD is a centralised experience. The YouTube blogs were the central attraction providing wide enough appeal to attract and engage not only the traditional Jane Austen fans, but also Hank Green's large and varied YouTube subscriber base. However, unlike *Doctor Who*, and without anywhere near the level of resources available to the BBC or Hollywood studios, both LBD and the earlier *Sofia's Diary*, were able to use narrow focus strategies to target and successfully engage distinct target segments with their content (different audiences with distinct tastes and behaviours).

LBD differentiated its highly original version of *Pride and Prejudice* by considering how it could make the situation, method of communication and the timing of the story relevant and believable to the audience. LBD's range of story modes beyond its YouTube video blogs were designed to provide a more in-depth engagement experience to a core target audience of internet savvy Jane Austen fans. Tweets and Tumblr posts reflected the ways that popular YouTube personalities were already communicating with their audiences, providing social and narrative immersion (Tepper, 2015). This variety of channels provided different entry points to the brand and a method of communication that was directly relevant to the target audience. The availability of YouTube content also meant that fans could engage, for free, with the central narrative as soon as it was published, whether they were on phones, computers or watching on a connected television.

*Sofia's Diary* also reflected this use of personalisation and the consideration of involvement characteristics (situation, method of communication, etc.) to focus a story world on a specific audience. However, beActive deployed a slight variation in the way in which it used transmedia storytelling to appeal to that target audience. With its early focus on low cost production and low cost distribution, *Sofia's Diary* began with story modes that demanded the highest level of interaction (the interactive SMS and online blog service – low cost distribution channels) and then, upon striking some success, leveraged that to attract

investment into more expensive but less interactive story modes, such as the radio show or television series.

In his interview for this thesis, producer Bernardo noted that for this reason, the project may not be viable if done in the same way today (Bernardo, 2015b). *Sofia's Diary* relied upon audience buzz generated by its initial story modes to attract the necessary investment required to produce bigger budget television content that could reach a broader television audience. Today, Bernardo believes, it would make more sense for the narrative to take place on YouTube and on social media with competitor content like LBD's already in the marketplace, because the original strategy in today's more mature online marketplace would not provide sufficient financial returns (Bernardo, 2015b). The cost-leadership strategy driving the early success of *Sofia's Diary* continued to underpin its later success in international markets. Bernardo's observations about the contemporary viability of that strategy are the most likely explanation for why later international formats of *Sofia's Diary*, like *Sufei's Diary* in China (produced by Sony), have switched to using brand sponsored online content as well as social media, because it continues to allow for a focus strategy based on low-cost production, relevance to the audience and low-cost distribution.

### **7.3.2 Catering to Different Tiers of Involvement**

In each of the three case studies developed for this thesis, the story world was found to be one made to accommodate different levels of involvement; the direction, intensity and persistence of engagement for different audience members. Key literature within advertising and media culture literature has already indicated that this is a core benefit of a successful transmedia approach (Dena, 2008; Davis, 2012; Phillips, 2012). However, what cross-analysing these cases illustrates, is that the focus of different strategic approaches has a strong influence on the way in which those engagement tiers were leveraged with transmedia storytelling.

*Doctor Who*, throughout its history, has had a consistent focus on engaging its audience by leveraging one-directional story modes that are passive experiences, demanding little from audiences in the way of participation. As the application of the first guiding question (Section

4.2 of Chapter Four) found, the world of Doctor Who has always been centralised around its television show. Books, radio plays, comics, games and even the live-experience have all provided different narratives, perspectives and ways to interact with the world. However, none of those story-telling modes focus on rewarding fans that demonstrate high levels of involvement and seek to participate at a deeper level than the passive TV audience. Instead, the focus of the BBC has always been on entertainment and scalable immersion for audience members of *Doctor Who*. Audience members with little time or a lower level of interest are able to simply sit back and watch the television series at their convenience, while those fans with heightened levels of interest in the brand are able to immerse themselves in a near endless stream of new narratives delivered in various other forms. Different television shows, behind the scenes content (both online and on television) and the multiple narratives told across books, radio plays and in comics all help to lure in specific interest groups and give them more choices in narrative form with which they could engage with and immerse themselves.

As Chapter Four outlines, audience members with high levels of involvement in *Doctor Who* - those seeking to socially connect with like-minded fans or to further enhance their enjoyment through mastery of the content, are largely been left to their own devices. This mirrors what happened with major Hollywood franchises like *Star Trek* and *Star Wars*. When the *Trek* television series went into hiatus and during the long gap between the first trilogy of movies and the second trilogy when George Lucas rebooted *Star Wars*, the hard-core fans of both franchises were left to their own devices (Tulloch & Jenkins, 1995; Perryman, 2008). It was only ad-hoc transmedia content, the self-driven experience of blockbuster games and fan-made tribute films that kept them going (Jenkins, 2015). Across both types of broad focus strategies, differentiated (Hollywood) and cost-leadership (*Doctor Who*) engagement activities by producers appear to have a primary focus on entertainment and immersion<sup>91</sup>.

Compared to the broadly focussed strategy of *Doctor Who* and Hollywood, *Sofia's Diary* demonstrates that strategic focus is a powerful determining factor for the way in which

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<sup>91</sup> This type of storytelling strategy has also demonstrated that, when a central platform has lacklustre popularity and is taken off air, the world can sustain the interest of some highly engaged audience members via lower cost media, such as books and radio plays. However, large audience numbers and financial success for a world built in this way comes when they are able to engage their audience through entertainment and immersion.

producers can use transmedia storytelling to facilitate and optimise deep audience engagement. *Sofia's Diary* engaged audiences by mirroring the social connection among its target audience, specifically by emulating the way in which Portuguese teenage girls were already consuming content and communicating with one another in their daily lives. The interactive SMS service and online blog that was used to launch *Sofia's Diary* demanded a higher level of interaction than a traditional television series, but was produced at significantly lower cost than a television program. Once this approach demonstrated that it could work with this smaller group of fans, the producers then leveraged the buzz and word of mouth that *Sofia's Diary* had created to reach a much wider audience. Orchestrated fan events, such as casting of Sofia and her boyfriend, helped to attract publicity and demonstrate the popularity of the story world (Bernardo, 2015b).

The success of *Sofia's Diary* on these small initial platforms allowed them to attract investment from other production companies and create broader reaching media, such as the television series and radio broadcast in Portugal. This then grew again in other international markets where the brand was licensed as a format television show and Sofia's story was adapted by local companies and re-developed as local content for a local/regional market (Bernardo, 2011a; 2014; 2015b). Each of these story modes still reflected the identity of the core audience and how they socially connected with one another in their daily lives, both additional components of engagement put forward by Askwith (2007).

Like *Sofia's Diary*, LBD was also constructed to facilitate a strong level of social connection among its fan-base. LBD target two core audiences – fans of *Pride and Prejudice* and a complimentary audience, followers of YouTube star Hank Green, that led to them experiencing the web series in the first place. Lizzie's daily struggles with her own self-identity were specifically designed to strike a chord with these audiences. However, unlike *Sofia's Diary*, LBD was a centralised story world. Like *Doctor Who*, it contained a central primary platform that provided a story mode requiring only a low level of involvement to continually enjoy. What differentiated LBD from both projects is that it invited interaction and audience participation within every story mode without ever requiring it. The central video blogs for LBD were on YouTube with comments enabled and the additional story modes took place

over social media channels, designed to enhance social connection among audiences and foster feelings of engagement.

What this cross-analysis demonstrates is that transmedia storytelling by smaller production companies, specifically those not seeking to directly compete with larger rivals, can be linked to a focus on social connection and identity and primary modes of engagement. Alternatively, story worlds with a broad audience focus, the primary focus turns to immersion, with social connection encouraged but not the central activity of engagement for narrative producers. All three projects reflect a core tenant of innovative business strategy – that understanding who your audience are is not enough, a successful strategy allows an audience to undertake activities that they find meaningful and helpful in their daily lives (Christensen, Hall, Dillon, & Duncan, 2016).

### **7.3.3 The Cost of Engaging with Content**

Business strategy research prescribes that cost isn't solely about the actual price of a ticket or the cost of purchasing a DVD. Cost is a broader concept that can involve other factors that influence the buying decision beyond the actual price (Markides, 2004). This is because the decision to buy is based upon the perceived value that the consumer believes that they will receive from buying a particular product, service or brand (Seles, 2010; Phalen & Ducey, 2012). Therefore, the perceived value to each audience member of engaging with the story world is relative and something that is directly influenced by each individual transmedia strategy and, most importantly, the perceived value that it creates in the mind of each audience member. In the context of entertainment, 'costs' are likely to include how much time is involved, the ease of access to content, the degree of effort that it takes to engage with the content and the emotional energy that it takes to participate with the story world. All of these are key factors in an audience member's buying decision in addition to just the financial cost of consumption. Thus, when this section compares different approaches to audience engagement, when considered from the audience point-of-view, cost-leadership includes a focus on lowering the cost to audiences of investing their time, money and emotional energy.

*Doctor Who's* central story mode is broadcast via free-to-air television and uploaded onto the BBC's website for time-shifted viewing by connected audiences. Similarly, the radio broadcasts and a range of online content, including YouTube behind the scenes videos and in-world websites are available for free to the general public. So, it is only more highly-involved audience members, seeking branded merchandise or additional story modes in the form of books, games and comics, who are required to outlay money to gain access to extra *Doctor Who* content. Making so much of this content immediately available online also lowers the relative cost to audience members of engaging with that content, reducing the time and effort required for them to find it and engage with it.

*Sofia's Diary* also adopted a cost-leadership strategy but differed from *Doctor Who* in that it focused on a niche but rather than a wide audience – teenage Portuguese girls. Producer Nuno Bernardo sought to increase perceived value by lowering barriers to entry for that audience. He achieved this by cleverly mirroring their daily routines in two ways. Firstly, in terms of technology that they used throughout the day, mobile phones and radio were already popular low to no-cost communication channels used to distribute content directly to them. Secondly, *Sofia's Diary* was a daily narrative that each teenage girl could personally relate to in terms of the sequence of events she experienced during an average day – travelling and from to school (radio podcasts), daily dramas at school (SMS service), and preparing for school the next day (television series and *Sofia's* vlog). What underpinned the success of Bernardo's transmedia strategy was that it leveraged as many methods of communication as possible that teenage Portuguese girls were already using. This facilitated ease of access to content and to enhanced *Sofia's* brand value proposition to those girls. *Sofia's Diary* provided enhanced value at low cost because it differentiated its brand from teenage soap operas of similar ilk by providing interactive content via the Internet, on mobile phones and on radio using a distribution strategy 'tailored' to appeal to target audience.

LBD did also use transmedia storytelling to lower the potential cost of audience members engaging with their adapted narrative. Not only where its platforms freely available, but the platforms were often coordinated through the same device with tweets, blog updates and new videos all available through a phone or computer. However, the relative cost of finding different media interactions increased as one moved across the various story modes on social



media. Audiences would have to spend a significant amount of time hunting for various social media profiles and behaviour in online spaces by characters to gather the full story and reward their mastery of the content. This shows that, although freely available, differentiation rather than cost of engagement was the primary strategy. Audiences were rewarded for undertaking higher “cost” activities in hunting down social interactions with characters and interacting with the characters on Twitter or in YouTube comments, presenting a *different* kind of Jane Austen narrative rather than a *low-cost* narrative.

Cross-examining audience engagement in this way affirms the writings of previous scholars such as Dena (2009) and Pratten (2011) who emphasised the potential of transmedia storytelling to lower barriers to entry and thus the relative cost for audiences to engage with a story world. This section argues that transmedia story-telling aided each of these projects when used as a strategy to facilitate high levels of audience engagement. However, the way in which each project’s producers chose to interact with or to leverage different tiers of involvement among their audiences differed depending on the focus of their strategy. The evidence presented signals that transmedia storytelling, as a strategy for audience engagement, is tied directly to how one intends to compete with a project in today’s dynamic and crowded market.

#### 7.4 CROSS-COMPARISON OF COMPETITIVE ADVANTAGE

For Porter (1996), strategy is about doing things differently. Specifically, this means doing three things: 1) establishing a unique position (within a market), 2) optimising strategic fit so that each activity undertaken to achieve that unique position creates holistic value that is greater than the sum of its parts and 3) making trade-offs to sustain that unique position. As with each of the individual case studies, this chapter concludes its analysis by synthesising the findings of each section through Porter’s concept of strategy.

Table 12 overleaf provides a cross-comparison of how these elements have been found to operate in each of the types of transmedia storytelling strategy studied in this thesis. In this way, not only do we begin to understand what is universal about achieving competitive

advantage with transmedia storytelling but also how that competitive advantage differs depending on the goals and guiding strategy of each project.

**Table 12: Cross-Comparison of Competitive Advantage from Transmedia Storytelling Strategies. Based on Porter (1996)**

Strategy for Competitive Advantage	Wide scope Differentiation (Typical Hollywood) N.B. Not a case study but based on previous scholarly research.	Wide scope Cost Leadership ( <i>Doctor Who</i> )	Focused Differentiation ( <i>The Lizzie Bennet Diaries</i> )	Focused Cost Leadership ( <i>Sofia's Diary</i> )
<b>Unique position</b> <i>How did the project create a unique position?</i>	- Scale and scope beyond the capacity of most competitors. Big stars, big budgets, big SFX etc. block out most competitors.	- Provided multiple layers of immersion for a broad audience through cost effective story modes.  - Easy to access story and cost effective production provide the highest possible return to the BBC as per its charter allowing it to compete.	- Used socially connected story modes to avoid direct competition with other <i>Jane Austen</i> adaptations by creating an experience for a global online niche.	- Mirrored how the target audience was already interacting with media in their daily life to avoid direct competition and create relevant, relatable content.
<b>Strategic Fit</b> <i>How did each element of the creative strategy work to create a whole that was greater than the sum of its parts?</i>	- Media conglomerates already own various production and distribution pathways, lowering overheads.  - Audiences immerse themselves in self-contained narratives that provide new experiences within a known world.	- Media production moved to one place in Cardiff  - Leverages BBC control of film, television, radio and book publishing companies  - Turned prop-storage and historical records into story modes  - Actors, writers and other creators work across multiple story modes to increase their output.	- Narrative doubled as communication and social connection as it took place on social media  - audience interaction became part of the narrative, generating story and buzz simultaneously  - low-cost story modes enable company to directly receive and control I.P. revenue	- Story modes also double as marketing and promotion tools.  - low-cost story modes enable company to self-manage I.P. revenue  - linking audiences to other interest areas such as social services fostered deeper engagement while increasing relevance
<b>Trade-Offs</b> <i>What did each company give up to achieve their unique position?</i>	- High budgets elevate risk but also yield higher reward and thin out potential competition  - interactivity and niche audience targeting is difficult due to maintain low returns from small audience segments.	- <i>Doctor Who</i> gains access to all of the BBC's resources but is subject to the demands of its charter	- social platforms provided low income but high interactivity and buzz	- as the project grew in popularity, interactivity had to be scaled back to accommodate the interests of a broader audience.

## Unique Positioning

In each case, transmedia storytelling enhanced potential immersion for audiences in the narrative worlds by providing additional content for them to explore and engage with. However, by cross-analysing different uses of transmedia storytelling, these case studies indicate two distinct trends in transmedia's strategic application.

First, strategies with a broad focus, for example, Hollywood and *Doctor Who*, make immersion their central focus. Attempting to compete for a wide variety of audience members, these large media conglomerates leverage transmedia storytelling so that they can provide different types of interaction to different audiences who are then all brought together by a central story mode. In particular, the multiplicity of *Doctor Who*, in being able to appeal to a wide range of audience segments and then bring those audience members together in the shared experience of a public programme is shown by this chapter to have given the show significant competitive advantage as a cultural icon.

Second, smaller media companies that seek to avoid direct competition with these large immersive worlds focus instead on innovating and leveraging social connection to reach a specific target niche. They then leverage this social connection to better appeal to the identity of that specific audience and establish a unique position. In the focussed strategies of *Sofia's Diary* and LBD, their unique position comes not from an adaptation of their narrative to story modes and distribution channels that reflect pre-existing audience behaviour. Immersion was present and a valuable addition to the effectiveness of these strategies. However, by focussing on social connection with and among audience members, high budgets and broad reach are traded by both the small companies producing each project for stronger personal relevance to a smaller group of consumers.

In *Sofia's Diary* the story modes double as marketing and promotion tools, positioning the story world as a potential investment for larger media companies. Portmanteau transmedia storytelling allowed beActive to present audiences with a story that was accessible throughout the day to Portuguese school girls, an immersive narrative that followed them from the radio in the car on their way to school to blog posts by the lead character later that night that they read before bed. Every single story mode reflected issues relevant to these

young women and was told on platforms that they were already using in their day-to-day life.

In LBD a similar narrow target of personal relevance to a specific niche was leveraged with portmanteau transmedia storytelling. Also appealing primarily to young women, LBD used social connection as unifying theme for every story mode of its narrative. Pemberley Digital was able to differentiate their project because they told their story across multiple story modes in a way that placed the audience as spectators to social connection among their characters. This gave them a unique position, letting them tell *Pride and Prejudice* in a way that was uniquely relevant to a contemporary audience of young, socially connected viewers.

### **Strategic Fit**

Aligning the project so that each activity promotes “a whole that is greater than the sum of its parts” and thus achieves greater sustainability is a point of unification among each transmedia storytelling strategy analysed by this thesis. However, the way in which each narrative world sought to gain success and sustainability differs when the case studies are viewed through Porter’s competitive advantage framework.

*Doctor Who*’s use of transmedia storytelling relies upon strategic fit, making sure its story world can maximize investment against a return of audience engagement. Consuming each story mode as an audience member provides a greater understanding of the world, but it is in constructing the world that *Doctor Who* leverages cost to achieve true strategic fit. Each story mode is made to leverage pre-existing materials; they refitted existing infrastructure (the old storage facility for props became *The Doctor Who Experience*), they reworked fan-fiction writers into leading storytellers (Russel T. Davies) and they re-used resources like actors and writers across multiple story modes to generate the strongest return for their investment in those people (e.g. the character of Martha Jones has appeared across multiple television and radio shows, played by the same actor). Even new story mode was only continued if it provided a valuable return in viewership and/or educational capability. For example, the *Eternity Clock Games*, while providing a novel type of interaction, did not provide educational or commercial benefit and were cancelled despite modest uptake (Reynolds & Nichols, 2013). Finally, to relaunch the television show in 2005, BBC Television

centralised all production staff in on place, Cardiff, to minimise the overheads of this multiplatform world and streamline production (Perryman, 2008).

beActive and Pemberley Digital both employed similar strategies when constructing *Sofia's Diary* and LBD, centralising creative teams under one roof to improve efficiency. However, each differs in how it further achieves fit due to the project's focus on cost-leadership (*Sofia's Diary*) or differentiation (LBD).

LBD invited audience members to seek out different social media interactions to understand what happened previously between certain characters, such as Twitter interactions between Mr. Darcy and Bing Lee. Strategic fit in their use of transmedia storytelling came largely from additive comprehension for their audience members through social connection. Each story mode also had the capacity for social interaction, through comments on YouTube, re-blogs on Tumblr or tweets between characters and the audience on Twitter. Focussed on making their version of *Pride and Prejudice* different through its heightened relevance to a young modern audience, LBD illustrates how a narrow focus on differentiation guided their implementation of fit.

*Sofia's Diary* also mirrored social practices, telling its story via phone messaging and online blogging to facilitate a feeling of social connection to the central character. However, the story modes present within *Sofia's Diary* did not facilitate the same consistent connection between audience members as those used by LBD. Instead, demonstrating the influence of a cost-leadership strategy, each story mode in *Sofia's Diary* focussed on being easily accessible to the core audience in their daily routine. The "whole" in *Sofia's Diary* was enhanced by the immediacy of its storytelling, which created anticipation for additional narrative to come and encouraged audience members to traverse across multiple story modes. *Sofia's Diary* rewarded its blog followers with further insight into the dilemma Sofia would face the next day and published additional weekend content in the first run of books to recap the project. *Doctor Who* also does this with their own cost-leadership approach. For example, events in spin-off series affected and were directly affected by events in the central television show (such as the Doctor's hand being cut off in *The Christmas Invasion* and appearing as a plot device in *Torchwood*). Online blogs from characters (such as Mickey

during the 2005/06 television season) also provided foreshadowing and backstory for events to come, driving audiences across various low-cost story modes and, eventually, towards higher cost story modes such as television.

Strategic fit, while a trait synonymous with successful transmedia storytelling, is clearly differentiated across different objectives for different corporations. Theory for understanding the different forms of transmedia storytelling, the marketplace and the influences on particular production companies already exists, scattered throughout interdisciplinary literature related to transmedia storytelling. However, this section shows that understanding transmedia as a strategy is paramount to bringing together theory on transmedia design, contemporary consumer culture and the evolving marketplace so that practitioners and scholars alike can understand the subtle links between context, competition and types of transmedia storytelling.

### **Trade-Offs**

As Magretta summarises when arguing the relevance of Porter to contemporary business thinking, trade-offs are about choosing what you will and won't do "so that you can deliver your kind of value most efficiently and effectively" (Magretta, 2012, p. 160). As is shown by the literature review (Chapter Two), transmedia storytelling invariably involves an investment in multiple story modes. Multiple story modes demand additional maintenance, financial support, resources and skills in exchange for greater potential immersion for the audience. However, this study shows that it is additional trade-offs that differentiate uses of transmedia storytelling.

Analysing *Doctor Who* highlights a core trade-off for broadly focussed narrative strategies that seek to centralise their audience on a single story mode. *Doctor Who* may have been able to survive throughout the Hiatus period when the central story mode was not in production, but it only thrives when the television show is on air. When the popularity of the television show eventually wanes again, the popularity of other story modes within that world will likely also suffer, unless the BBC can find a new central platform for audience attention. So common is centralisation in transmedia storytelling with a broad focus that scholars have noted that audiences will prescribe a central platform based on their

experience, even if they have not been encouraged to by the producers of that project (Evans, 2008; Beddows, 2012b; Hsu & Shih, 2012).

Specific to the case of *Doctor Who*, the BBC's focus on cost-leadership for a broad audience provides an understanding of the core trade of that *Doctor Who* had to undertake to preserve its unique position as an iconic social narrative. The BBC's vast resources are deployed in *Doctor Who* to develop a broadly competitive narrative, with the BBC encouraged using it to test out new commercial pathways and opportunities as part of the organisations charter. However, as Chapter Four discusses, because of the Charter, the BBC have also had to follow additional restrictions that are often not entirely in the best commercial interests of *Doctor Who*. "Such a strategy functions in part to ensure that the commercial exploitation of the series is not at the expense of the corporation's public service values" (Johnson, 2013 l. 2337 of 5388). The cost-leadership focus of *Doctor Who* has allowed the BBC to leverage the longevity, transferability and multiplicity of the series across generations of consumers but it has come at the price of subservience to broader public policy.

*Sofia's Diary* traded initial exposure and revenue for long term stability. Choosing to grow the project themselves, they were forced to invest in low cost media platforms and to rely upon word of mouth to sustain audience engagement. Avoiding competition with larger rivals meant using unique, untested story modes, such as the SMS service, to deliver the narrative. These untested story modes did provide a heightened level of interaction for the audience but a trade-off came when the project began to grow and succeed. When more traditional story modes were added, such as the television series, interaction had to be scaled back to accommodate higher costs. beActive couldn't afford to have the television narrative change based on audience response, like earlier blogs and SMS discussions had, as it was filmed months in advance from when it would be broadcast (Bernardo, 2015b). As *Sofia's Diary* succeeded and began to grow, it was forced to shift its strategy. The project's broader audience target resulted in less capability for interaction and social connection. This further demonstrates the key finding of this chapter; that a broad focus in transmedia storytelling can be associated with a focus on immersion while narrowly targeted transmedia storytelling by smaller companies can be associated more with social connection and appealing to that specific audience's identity with narrative content.

LBD traded longevity for immediacy, relevance, and relatability in how their narrative was constructed. They sought to differentiate themselves from other adaptations by telling their story in “real time” as their characters would if they were alive today. This use of socially connected story modes made it difficult to replicate the experience fully at a later date. An audience member would have to look back through story to find tweets, blog posts and other pieces of information outside the curated YouTube blogs. Notifications wouldn’t appear for an audience member who began to engage with the social media followings of characters after that part of the project had already taken place, making it hard for audiences who recently discovered the project to experience the narrative at a deep, interactive and immersive level. It is noted that some of those working on LBD have since begun to develop technological solutions to this problem. However, this still highlights a discrepancy; that relying upon the immediacy of social connection for audience engagement can be restrictive for the overall experience as it ties engagement to the ephemeral nature of social communication.

### **Conclusion and Chapter Summary**

Each of the sections in this chapter demonstrates that, when cross-analysed, strategic theory provides a holistic way of applying theory from across disciplines to understand different forms of transmedia storytelling (Section 7.1), why these forms are chosen (Section 7.2), and how each, in turn, influences the ways in which audiences engage with a project (Section 7.3). It finds that contemporary scholars and practitioners are correct in adopting an audience centric approach, with every case study found to have a marketing orientation in its value chain - strategic management terminology for starting with and continuing to rely upon an understanding of the audience and the marketplace.

Influenced by a company’s desire to compete in a broad marketplace, studying large franchise story worlds (*Doctor Who* and Hollywood) has clearly indicated that these companies focus on immersion as a dominant method of audience engagement beyond simply entertaining their audience. Conversely, however, small independent companies cannot hope to compete with the same scale of immersion as these larger franchise worlds. Instead, they provide some immersion for their audience but leverage social connection to reach specific, narrow audience targets. These focussed transmedia strategies trade



expansive immersion for the chance to become more relevant to a specific market. They rely upon mirroring the ways in which an audience is already using social platforms and/or story modes within their daily lives. In this way transmedia strategy form can be linked to the ideas of direct and indirect competition (red and blue ocean thinking (see Kim & Mauborgne, 2013)) in contemporary strategic theory.

This thesis shows that understanding transmedia storytelling and how and why particular producers gain advantage from using it, is about competition. Strategic theory for competition is, therefore, shown by this thesis to be an appropriate guiding paradigm for understanding transmedia storytelling in practice. Successful transmedia storytelling, as shown by this thesis, is about how well producers understand the broader context (Section 7.2), and develop a form of strategy that leverages that context (Section 7.1), competing by engaging audiences with immersive, personally relevant narratives (Section 7.3).

## CHAPTER EIGHT: CONCLUSION

The media and cultural industries are being rocked by digital disruption and “a rapid process of change” (Cunningham et al., 2010, p. 119). New and old media continue to interact in increasingly complex ways and convergence is influencing what producers need to do to effectively produce, distribute and communicate their stories in an evolving digital media landscape (Ryan, 2005; Jenkins, 2006; Flew & Swift, 2014). Producers must fight harder for audience attention (Carpentier, Schrøder, & Hallett, 2013), while audiences today are bombarded more often by uninvited media and advertising than ever before (Kotler, 2010). Producers must deal with an audience empowered by more opportunities to connect with each other and shape their own narrative experiences, an audience who chooses how and when to engage with content in a manner that is most relevant to them (Jenkins et al., 2013). Yet, simultaneously, producers have more tools to help audiences interact with their content (Alexander, 2011). This thesis helps to understand a one key component impacting the contemporary process of change by taking on the challenge of analysing transmedia storytelling.

To analyse transmedia storytelling, this thesis surveyed literature across media and cultural studies, strategic management, marketing and advertising to aggregate theories relevant to the phenomenon of transmedia storytelling. In doing so, Chapter Two identified three key gaps in the transmedia literature:

1. An absence of literature that treats transmedia storytelling as a strategy
2. The lack of a specific transmedia storytelling framework for understanding audience engagement
3. The lack of literature providing a holistic answer for why producers choose transmedia storytelling as a strategy for their creative work

The literature survey also identifies a means of addressing these three gaps by applying strategic theory to transmedia storytelling and aggregating existing scholarship on transmedia storytelling, audience engagement and competitive strategy.

Chapter Three creates an analytical lens through the application of competitive strategy developed by Michael Porter (1980; 1991; 1996). This provides a method for bringing together relevant inter-disciplinary literature and analysing; the formation and type of a transmedia storytelling strategy, design for multiplatform audience engagement within that strategy, how that strategy seeks to maintain and manage that audience engagement (involvement), and different forms of transmedia storytelling. In turn, this lens delivers a holistic framework for analysing the central research questions of this thesis;

1. *Why do some producers choose to use transmedia storytelling as a strategy for constructing a narrative world and engaging their audience with that world?*
2. *How is the type of strategy chosen linked to and influenced by the broader context in which it is created?*

In view of the fact that Porter's original work pre-dates the current era of internet-enabled audience engagement, careful attention was paid to ensuring that Porter's outputs on competitive strategy provided best fit for the intended analysis. A range of different foundational theorists on competitive strategy were consulted, including Ansoff (1965; 2004), Mintzberg (1999), and Christensen (2003; 2016), as well as Porter (1980; 1996; 2008). However, as Chapter Three outlines when discussing appropriate methodologies for this thesis, Porter's strategy research is directly relevant to contemporary competitive transmedia storytelling. Because of this, this thesis argues that Porter's generic strategies for competitive advantage have direct relevance to understanding how transmedia storytelling provides different screen content producers, from big media conglomerates to small independent start-ups, with unique competitive advantage for their story worlds. Reviewing appropriate methodologies, Chapter Three also found that a qualitative case study approach was best suited for testing the application of inter-disciplinary theory to creative practice (Denzin et al., 2006; Yin, 2009).

A pilot case study of the established, successful transmedia property *Doctor Who* was conducted in Chapter Four to test the viability of the theoretical lens. Twelve leading practitioners were then interviewed from Europe, Australia and America and two additional case studies were chosen from that cross-section of production – *Sofia's Diary* in Chapter Five

and *The Lizzie Bennet Diaries* in Chapter Six. At every point, existing media culture theory has provided tools for understanding the detail of transmedia storytelling projects and strategies. However, as this thesis has shown throughout each of its analytical chapters (Four-Seven), it is strategic thinking that creates a binding holistic framework for understanding this detail.

Researching transmedia storytelling in this way, this thesis has created a theoretical lens that works. What applying this lens has shown is that an understanding of and focus upon the audience is central to successful transmedia strategy, regardless of whether it is being conducted by a big media conglomerate or a small independent studio. Transmedia theorists such as Jenkins (2006), Dena (2009), Scolari (2009) and Beddows (2012b) have all been correct in focussing on the audience as the centre piece for understanding effective transmedia storytelling. However, current enquiry has been too disparate in attempting to explain aspects of the phenomenon and it is strategic thinking that allows us to bring these in-depth analyses to bear on transmedia storytelling from a macro perspective. When transmedia first emerged as a scholarly pursuit, many thought it would become an industry in itself (see histories in Jenkins, 2006; Smith, 2009; Johnson, 2012a). However, now it has become understood as a way of doing things within different industries (Gambarato, 2012a), a strategy for media production. As a strategy, it demands strategic analysis.

Analysing *Doctor Who* by applying the theoretical lens in Chapter Four reveals it to be an example of Porter's generic strategy of broadly focussed cost-leadership. It demonstrates a link between the broad target audience of *Doctor Who* and its focus upon creating a wealth of immersive experiences for its audience base. The long-term success of *Doctor Who* is linked to a wide variety of factors, such as its ability to adapt to cultural changes (Perryman, 2008) and its capacity to change actors, setting and theme (Johnson, 2013) and present different stories in the same format (van der Graaf et al., 2010). Its "junkyard" aesthetic and interchangeable actors and themes may indeed provide the stories that it tells with a point of difference (Johnson, 2012b Chapman, 2013; 2014).

However, rather than focussing on whether they do the same activities better than their rivals (such as making more entertaining television or writing better books), Porter's

strategic lens allows us to focus on what they do *differently*. What this thesis has shown is that what sets *Doctor Who* apart is its ability to use transmedia storytelling with a broad focus on cost leadership. This means that they use easy to access story (largely free and broad-cast online in the UK), to appeal to a broad audience and multiple specific audience groups (children, families and adults), with different levels of interest (watching the television series compared to travelling to Cardiff to visit *The Doctor Who Experience*), all the while focussed upon providing the greatest return as per the guidelines set out in the BBC's Charter. By applying the theoretical lens, this thesis has argued that the BBC was able to exploit its position as a culturally embedded media conglomerate to compete by creating easily accessible, low-cost immersive narratives.

Applying the lens to *Sofia's Diary* (Chapter Five) and *The Lizzie Bennet Diaries* (Chapter Six), then demonstrated the contrast between transmedia storytelling for a broad audience and the focus of niche targeted projects. Reflecting two different variations of Porter's third generic strategy of focus, these projects both revealed a stronger focus upon social connection between audience members and making content that reflected their identity – who they were and how they interacted with media and one another in their daily lives.

Chapter Five found *Sofia's Diary* to be a project representative of focussed, cost-leadership driven strategy. The production company, beActive, sought to establish itself as an independent company and achieve financial sustainability. Being a cost-leader with a transmedia strategy, for them, was not just about a superior product but about providing low-barriers to entry and superior access for their specific audience segment. As a result, each iteration of *Sofia's Diary* mirrored how its target audience, Portuguese teenage girls, was already using media to communicate in daily life. Beginning with cheap, interactive media in the forms of SMS interactions and a web blog, the show focussed upon finding audiences where they were, such as at school or on their way home from school. They then used their relative popularity on those platforms to encourage other companies to partner with them to create more content, like the television show or novels. This case study highlights the importance of personal relevance to the design of niche focussed transmedia storytelling. It also demonstrates that a successful, focussed transmedia strategy can help a

small company establish itself without directly competing with larger rivals (blue ocean strategy) (Kim and Mauborgne 2013).

Chapter Six found that *The Lizzie Bennet Diaries* represents a focus strategy. However, the producers of *The Lizzie Bennet Diaries* focus on differentiation instead of on cost-leadership. Applying the lens demonstrates that leveraging social connection was paramount to *The Lizzie Bennet Diaries* proving to its audience that its modern adaptation of *Pride and Prejudice* would be a different, unique experience. Telling their story across media distribution outlets like Facebook, Twitter and YouTube ensured that the audience were always connected to both the story and each other when interacting with the narrative. This turned Pemberley Digital's version of *Pride and Prejudice* into a socially embedded narrative that was interactive, immediately accessible and highly relevant to its core audience, young females who were already using these platforms in this way. Their specific audience, those at a cross-section of *Pride and Prejudice* fandom and fans of YouTube blog content, aided them in avoiding direct competition with Hollywood scale content. Their approach has since spawned direct competition among low-budget YouTube producers who seek to emulate their success with style of content but, at the time, it represented an experimental strategy of focussed differentiation.

Cross-analysis of each case study in Chapter Seven shows that a marketing orientation was imperative to the success of every project, no matter what generic strategy guided the project. Even when considering findings of other scholars on broadly focussed, differentiation transmedia strategies (i.e. Hollywood), this Chapter demonstrated that it is user-first strategic design that is linked to market success. Each case study, while representing a project significantly influenced by external and internal forces (such as corporate obligations, strategic objectives and existing fans), demonstrates that success can come through a focus on how the audience could be reached as a result of those pressures. As a result, this thesis can then link effective transmedia storytelling to the marketing oriented, dominance strategies of Hollywood conglomerates.

While this qualitative analysis does represent a limited sample, this research clearly indicates that strategic theory provides valuable insight on transmedia storytelling. It has paved the

way for further strategic theory to be applied to narrative strategies to help us understand what really influences the creative and business decisions that successful narrative producers make.

## 8.1 LIMITATIONS OF THE RESEARCH

In conducting the research, several key limitations are noted:

1. This is a qualitative and not a quantitative study. The research is only indicative of certain types of transmedia strategies and we need further comprehensive qualitative and quantitative study to compare the various generic strategies as they operate in the transmedia space.
2. The research has a narrow scope, focussing on commercial screen-based episodic content (i.e. worlds build around web-series or television series) in developed countries. This aided in facilitating comprehensive analysis of the projects within and it is acknowledged that further study in this area should include non-digital transmedia story worlds, game centric story worlds, advocacy transmedia strategies, artistic expression through transmedia and other forms of transmedia strategy.
3. The research is focussed upon transmedia *storytelling* and not upon transmedia as whole. Further research should include interrelated concepts such as transmedia for branding, marketing, advocacy, and education. But again, the scope of the project limited this.
4. The research only considers transmedia projects and is not a cross-comparison of different strategies. This was necessary as the first step taken by this thesis was showing that transmedia storytelling could be analysed as a strategy and how that would work. To truly examine competitive advantage further research is needed to cross-compare different narrative strategies.

## 8.2 ORIGINAL CONTRIBUTIONS

Not only has this thesis shown that strategic theory has direct application to transmedia storytelling but it has begun to show how that theory can be used. It has constructed an original theoretical lens that draws on a breadth of interdisciplinary literature to provide a comprehensive analysis of transmedia projects (Figure 4 in Section 3.1). Practically it has also constructed a working framework for audience engagement within transmedia projects (Figure 5 in Section 3.1.3). This allows practitioners as well as scholars to apply a list of criteria to how audiences are engaging with a project to understand what is influencing the direction, intensity, and persistence of audience actions. Three unique case studies, as well as critical analysis of previous literature are leveraged by this thesis to demonstrate different generic types of strategy used by transmedia practitioners. These, as well as general suggestions for their application in practice are summarised below.

In general:

- 1) Transmedia storytelling is strategy. It has been thought of as an industry, a paradigm and a type of narrative form (Dena 2014) but this thesis confirms the most recent findings of leading scholars<sup>92</sup> and practitioners<sup>93</sup>, that it is a part of a “producer’s toolset” (Gomez 2016), a strategy for creating work. Treating it as such means acknowledging that it is just one of many approaches and should only be utilised if it will provide significant competitive advantage for a producer.
- 2) Transmedia storytelling is audience centric. Each successful strategy analysed began with an audience; their needs, their desires and how these align with the goals of the production companies creating the work.

For low budget, independent producers:

- 1) Producers were either immersed in or spent a long time analysing their target audience when developing these projects. This shaped both their strategy and chosen narrative.
- 2) The narratives played out to mimic the way that the target audience was already using media channels in their daily life. This reduced cost for the producers in reaching their audience and reduced the cost to the audience of engaging with that content.

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<sup>92</sup> (Jenkins 2013, Scolari 2013, Dena 2014)

<sup>93</sup> (Phillips 2012, Bernardo 2014, Gomez 2016)



- 3) They often opted to keep direct control of intellectual property, even at the cost of immediate project success or financial gain.
- 4) Low barriers to entry means that other producers can quickly emulate these projects, leading to the quick rise of competitors, such as those on YouTube who emulate the *Lizzie Bennet Diaries*.

For those competing with larger budgets on a global scale:

- 1) The most popular goals of producers in this domain is that of everlasting or “ever-green” projects. They focus mostly upon entertainment and immersion. They create pillars of content that are interlinked, but largely independent, drawing audiences to the narrative world.
- 2) Highly engaged audience members are then relied upon to undertake their own methods of social connection. Unlike niche projects, these strategies focus upon inspiring social connection and not fostering it.
- 3) Central story modes are still key, with most franchises relying upon one primary text, such as a film or television series.
  - a) These primary story modes hold precedence over all other story modes and can overwrite the contributions of other modes to the greater narrative world.
- 4) High barriers to entry means a smaller pool of competing content, with a select few able to afford the upkeep of these high budget projects.
- 5) Cost based competitors (such as *Doctor Who*) can compete in this arena by focussing on return on investment, diversifying into cultural value, social value and cheaper production aesthetics.

As these suggestions indicate, whether it is in business, media culture, education or arts, this thesis has engineered a cross-disciplinary framework that allows for scholars and practitioners to leverage findings across various fields. Analysing how transmedia storytelling strategy is developed and why transmedia strategies work in certain contexts is fundamental to our understanding of how storytelling works in the contemporary environment of rapid and ongoing change. The contributions of this thesis represent fundamental components that further storytelling and creative business research.

### 8.3 RECOMMENDATIONS FOR FURTHER RESEARCH

This research concludes by recommending three areas of further enquiry:

1. The application of this lens outside of the transmedia sphere so that different approaches, such as multiplatform storytelling, augmented reality games and traditional media and marketing, can be cross-compared with the competitive advantage gained from transmedia storytelling.
2. Further case analysis. The limitations of PhD enquiry meant that 13 different leading practitioners were interviewed but only three case studies could be reviewed within this thesis.
3. Finding from this study cannot be generalised because of the small data sample. This thesis recommends further, in depth, quantitative study that cross-compares a broad data set of transmedia projects so that trends, traits and exceptions to theory can be established beyond doubt.

## Appendix 2.1 The Evolution of Media Terms

Terms	Authors
Intermedia	Dick Higgins, 1966
Multimedia	Bob Goldstein, 1966
Cross-media	Paul Zazzera, 1999
Multimodal discourse	Gunther Kress & Theo van Leeuwen, 2001
Superfictions	Peter Hill, 2001
Multiple platforms	Stephen Jeffery-Poulter, 2003
Screen bleed	Matt Hanson, 2003
Networked narrative environment	Andrea Zapp, 2004
Transmedial world	Lisbeth Klastrup & Susana Tosca, 2004
Distributed narratives	Jill Walker, 2004
Hybrid media	Jak Boumans, 2004
Media mix	Mizuko Ito, 2005
Cross-sited narratives	Marc Ruppel, 2005
Deep media	Frank Rose, 2011

This table is taken from Hsu and Shi (2012), who, in turn, adapted it from Gambarato (2012a).

## Appendix 2.2 Multiplatform Narrative Strategies

Approach	Key Source	Summary
Adaptation	(Dena, 2009; Aaron Smith, 2009)	Creating another version of a narrative in a form different from the original. E.g. adapting a book into a transmedia storytelling form for example <i>Pride and Prejudice</i> became <i>The Lizzie Bennett Diaries</i> on YouTube and other platforms.
Augmented Reality Games	(Abba, 2009)	Audience members must transverse platforms to make sense of the story, piecing together a single narrative from multiple pieces scattered across different platforms.
Cross-media	(Mungioli, 2011)	A term often used interchangeably with transmedia, especially in European circles. It can, however, be used as an umbrella term in the same fashion as multiplatform storytelling.
Distinct Media	(Dena, 2009)	Distinct media is a term that Dena coins to refer to the specifically crafted individual media platforms that all are part of a storytelling practice.
Distributed Narrative	(Walker, 2004)	"Distributed narratives are stories that aren't self-contained. They're stories that can't be experienced in a single session or in a single space. They're stories that cross over into our daily lives, becoming as ubiquitous as the network that fosters them" (p.2).
Entertainment Architecture (Entarch)	(Konzal, 2011; 2012)	A sub-strategy of transmedia storytelling that refers to a web-native, specifically interactive form of entertainment.
Intermedia	(Higgins, 2001)	This refers to the imaginative space constructed by audiences "between media". Intermedia is the construct, the emotions and the experiences that people have when various media are combined.
Multimodal Narratives	(Ruppel, 2009)	Used to describe stories told through sequential and causal distribution of story "modes" or components.
Multiplatform Storytelling	(Bolin, 2007; 2010)	Similar to transmedia storytelling except these narrative do not necessarily contain independent narrative extensions. This can be seen as a larger parent term within which transmedia storytelling operates.
Multimedia	(Dena, 2009)	"Multimedia is a terribly polysemous term, it is invoked here rhetorically to denote the conventional association with a mix of text, images, video and sound. The problem with this notion of multimedia is that it is often regarded as being representative of all expressive possibilities, yet is oblivious to other medial factors such as the delivery medium" (p.4)
Serialised Narrative	(Jenkins, 2010a)	Most often applied to television narratives, this refers to stories told one after another that rely upon the narrative contained in the text released chronologically before them to make sense.
Transmedia	(Dena, 2009; Jenkins, 2006)	A larger umbrella term for a mix of media platforms that work together to form something. This can apply to branding, fictional and factual storytelling, activism, franchising, business models, education and marketing.
Transmedia Practice	(Dena, 2009)	"The theory of <i>transmedia practice</i> examines a creative practice that involves the employment of multiple distinct media and environments for expression" (p.1).
Transmedia Storytelling	(Jenkins, 2011)	A narrative or narrative world told through multiple unique but interlinked media platforms. Ideally each platform is its independent, with little to no replication of other platforms.

As this table demonstrates, transmedia storytelling has many overlapping elements with other narrative approaches. This is not surprising as transmedia as a concept is built upon the works of scholars who discussed similar but not identical practices. However, when Jenkins' definition of transmedia storytelling is considered in comparison to the others in the table it is clearly a specific strategy that is unique in what it describes. In particular, a review of the literature indicates that transmedia storytelling is differentiated by unique contributions to the story world that some, if not all, individual media platforms within it make (Bernardo, 2011a; Dena, 2009; Evans, 2011; Giovagnoli, 2011). It is also differentiated by the approach of making each media component of a story world separately enjoyable<sup>94</sup>.

This table demonstrate four key areas in need of further research in transmedia literature:

1. A gap in research in investigating transmedia from a strategic perspective
2. A gap in considering what qualifies as transmedia storytelling strategy
3. A gap in understanding for how transmedia storytelling interacts with and relates to other narrative strategies
4. A gap in considering the various merits and downfalls of particular transmedia storytelling strategies against one another

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<sup>94</sup> You do not have to have seen the game to enjoy the film and vice versa (Jenkins 2006).

## Appendix 2.3 Transmedia Storytelling Sub-Strategies

Strategic Considerations	Relevant Authors	Description
Pre-Conceived Transmedia vs. Natural Extension	(Long, 2012; Aaron Smith, 2009; Walker, 2004)	This strategic balance refers to whether or not a story world has been designed, from the beginning, as a transmedia story world or if it has evolved into transmedia through "natural" narrative extensions to a primary story mode. E.g. A successful feature film ( <i>Star Wars</i> ) becoming a multiplatform story world (books, games, comics etc.).
"Mother-shipping" or Balanced Transmedia	(Graves, 2011; Jenkins, 2011; Long, 2007; A. Phillips, 2012; Aaron Smith, 2011)	"Mother-shipping" is the strategy of centralising the narrative around one core story mode, often a film or game. Other story modes or media platforms are then developed as extensions of the core story mode. They are dependent upon the original story for narrative developments and often direct audience experiences to the central text. Scholars have noted a predilection for audiences to attribute a story mode as core even if the producers of that world have not intentionally created one. Balanced transmedia, while difficult to construct, involves the counter practice of creating each component of the story world as equal. No story mode has precedence over the others and each works together to create an enjoyable story world.
Targeting Hard Core Fans or General Audience	(Hurtado, 2012; Aaron Smith, 2009)	A general strategy within transmedia storytelling is to target a small, but active and vocal group of people who are hard-core fans of key project elements such as genre, individual actors or key creative staff (such as Joss Whedon and the <i>Buffy</i> transmedia franchise). However, a counter-strategy has emerged from large media conglomerates with equally large pools of finance for marketing in which they target broad audience segments, trusting that their content will reach the core-audiences within and generate word of mouth for the project.
Dominant Author or Decentralised Authorship	(Bolin, 2010; Edwards, 2012; Norrington, 2010)	On the one hand, transmedia storytelling often promises decentralised authorship, with a broad variety of story modes requiring large amounts of creators to produce and maintain them. However, counter to this is what some scholars have noted as a celebrity culture in the transmedia space. Audiences are more likely to follow projects that have known cast members and, more importantly, known creative that have a celebrity like status, especially in the hard-core, active audience members.
Embracing or Ignoring User Generated Content	(Bolin, 2010; Christodoulides, Jevons, & Bonhomme, 2012; Jenkins, 2010a; Pearson, 2013)	Fan content, especially fan fiction, is often created as a cathartic release for the fan creating it. A producer that seeks to interact within that space can sometimes be seen as controlling and impeaching upon the audience's freedom, which, in turn, leads to a negative impact rather than a positive one. On the one hand, embracing content created by fans helps to promote engagement through feelings of affirmation, community and inclusion between the producers and the community that they want to engage with. However, doing so runs the risk of contradicting the canon of the original story world and also of impeaching upon the audience's original cathartic intentions of creating content.

What if vs. What is transmedia	(Mittell, 2012)	“‘What Is’ transmedia seeks to extend the fiction canonically, explaining the universe with coordinated precision and hopefully expanding viewers’ understanding and appreciation of the story world. The goal for ‘What If?’ transmedia is to launch off the mothership into parallel dimensions, foregrounding tone, mood, character, or style more than continuing with canonical plots and story worlds”(Mittell, 2012).
Immersion vs. Extractability	(Jenkins, 2009)	“In immersion, the consumer enters into the world of the story (e.g. theme parks), while in extractability, the fan takes aspects of the story away with them as resources they deploy in the spaces of their everyday life”.
Spreadability vs. Drillability	(Jenkins, 2009; Jenkins et al., 2013; Mittell, 2012; “To Spread or To Drill?,” 2009)	“The ability and degree to which content is shareable and the motivating factors for a person to share that content [spreadability] VS the ability for a person to explore, in-depth, a deep well of narrative extensions when they stumble upon a fiction that truly captures their attention” (Jenkins, 2009).
Continuity vs. Multiplicity	(Jenkins, 2009)	“Some transmedia franchises foster an ongoing coherence to a canon in order to ensure maximum plausibility among all extensions. Others routinely use alternate versions of character or parallel universe version of their stories to reward mastery over the source material”.
Subjectivity	(Jenkins, 2009)	“Transmedia extensions often explore the central narrative through new eyes; such as secondary characters or third parties. This diversity of perspective often leads fans to more greatly consider who is speaking and who they are speaking for”.
Seriality vs. Episodic Narrative	(Askwith, 2007; “Revenge of the Origami Unicorn,” 2009)	It is most common for transmedia storytelling to break up a narrative arc across multiple mediums (seriality). However, it can also operate in a separate way, through the deployment of episodic narrative, which, like some television series, produces narratives that are self-contained in their story arcs on each medium within the world. Seriality promotes a transference of audience members across platforms within the world while episodic narratives increase the enjoyment that each instance within the world is likely to give the audience.
Passive vs. Active Audience Architecture	(García-Avilés, 2012; Harrison, 2012; Jenkins, 2010a; Phalen & Ducey, 2012)	When designing a transmedia story world, producers need to give consideration for the balance of passive and active audience interaction they wish to have with the project. On the one hand a passive world that the audience can “sit back” and experience is open to the widest audience segment and requires the least investment from an audience member to achieve full engagement. On the other hand, audiences who have to be active to fully experience a narrative are more invested in that story world and more likely to generate buzz or discussion about the project.
Fragmentation	(Phillips 2013 p.15)	Two different strategies for narratives in transmedia involve either taking a larger story and splinter it across multiple media or you taking a single story mode and continuing to add pieces <i>ad infinitum</i> . One creates a story that has a planned and manageable beginning, middle and end. The other relies upon constantly evolving strategies to keep up with how each new piece will engage the audience and <i>fit</i> with the previous narrative architecture.

Expansion Strategies	(Scolari 2009)	Scolari identifies four ways that transmedia producers seek to extend their story worlds with transmedia storytelling: micro-stories that take place between larger narratives (i.e. web series set between television series), parallel stories (related to another narrative but taking place at the same time), peripheral stories (weakly linked additional stories such as spin-offs) and user-generated content platforms that “allow users to enrich the fictional world” (2009 p.598).
Expansion and Compression Strategies	(Scolari, 2014)	Scolari also lists four narrative strategies for adapting material into a transmedia world. <ul style="list-style-type: none"> <li>1) Expansion of elements of the world (addition)</li> <li>2) Subtraction of elements from the world (omission)</li> <li>3) Changes to the order or arrangement (transposition)</li> <li>4) Substitution of elements (permutation)</li> </ul> In this way certain elements or story modes can compress a narrative world, playing with expectations and intermedial meaning in how an audience experiences an adaptation of a known narrative.



## Appendix 2.4 Askwith's Logics of Engagement

Expanding his four parameters of engagement (consumption, participation, identification and motivations), Askwith provides five logics of engagement that are directly relevant for understanding engagement with transmedia texts. They are:

1. *We like to watch* (Logic of Entertainment)
  - a. *"The most basic desire that compels viewers to seek out and watch television entertainment is just that: the pleasure of being entertained" (p.102).*
  
2. *Did you see that?* (Logic of Social Connection)
  - a. *"A lubricant for social interaction" (p.103)*
  - b. *"Active investment in a specific television program may reflect a desire for social connection with viewers who share similar feelings, with the act of viewing or investing in a program serving as the basis for membership in an imagined community" (pp.103,104).*
  
3. *Everyone's an expert* (Logic of Mastery)
  - a. *"This mode of engagement provides a specific form of pleasure often associated with [but not exclusive to] games: the satisfaction of overcoming a challenge" (p. 104).*
  
  - b. *For narrative, different forms of mastery are more accessible. Mastery of an episodic narrative is more accessible and provides more incentive for new viewers to become engaged, while serial and complex narratives provide greater rewards in their engagement but require more effort on the behalf of the consumer (p.109)*
  
4. *Being there* (Logic of Immersion)
  - a. *Textual Immersion – "a mode of engagement that reflects the viewer's desire to be "lost within" and "surrounded by" a text, to become completely familiar with*

*its texture and details, and to "believe" in the text's narrative world as a real, inhabitable space".*

- b. *Extra-textual Immersion – "a mode of engagement that reflects the viewer's desire to experience a show's production process, and to be involved in (or, failing that, intimately familiar with) the people, places, practices and details that are generally available only to the (relatively) small group of individuals who participate in the show's production" (pp.112,113).*

5. *We are what we watch* (Logic of Identification)

- a. Self-Identification – viewers will often find **validation** *"because they believe that their favourite television characters reflect or embody traits that they perceive or value in themselves"* (pp.114,115) and **emancipation** *through being able to "assume new identities and relate to their characters in order to free themselves from existing social bonds"* (p.115).
- b. Social Identification – *"The desire to signal one's personal preferences and affiliations to others may also help explain the motives of viewers who acquire branded products and collectible merchandise"* (p. 115).

## Appendix 3.1 List of Interviews Conducted for This Thesis

Interview Subject	Location	Key Project/s	Company	Recorded
Nuno Bernardo	Portugal	Sofia's Diary	BeActive	24/07/2015
Robert Pratten	UK	Game of Thrones, The Chatsfield	Transmedia Storyteller, Conducttr	31/07/2015
Simon Staffans	Finland	The Mill, The Energy Ambassador	Media City	10/8/2015
Christian Fannesbech	Denmark	Cloud Chamber	Investigate North	13/08/2015
Katrina German	Saskatoon, Canada	One Day Campaigns	One Story	No
Mark Warshaw	Los Angeles	East Los High	The Alchemists	18/08/2015
Jay Bushman	Los Angeles	The Lizzie Bennet Diaries	Freelance	24/08/2015
Steve Peters	Los Angeles	Why So Serious, Dark Detour	No Mimes Media	28/08/2015
Andrea Phillips	NYC	Zombies Run!, Game of Thrones, Perplex City, The Daring Adventures of Lucy Smokeheart	Freelance	10/9/2015
Jeff Gomez	NYC	Clients include Disney, Coca Cola Amatil, Hasbro, Mattel	Starlight Runner	17/09/2015
Andrea Phillips, John T. Trigonis & Katrina German	NYC	John Trigonis works for IndieGoGo Film	Panel Discussion conducted using the interview questions for StoryForward NYC	21/09/2015
Caitlin Burns	NYC	Disney Descendants	Caitlin Burns & Associates	5/10/2015
Emma Morris	Sydney, Australia	Secrets and Lies	Hoodlum	9/6/2015

## Appendix 4.1 Detailed Explanation of Doctor Who Chronology

### Television Episodes

#### **Seasons 1-24 & Seasons 24-26 (1963-1989)**

The gap represented in 5.2 for the show between 1985 and 1986 represents a brief period when the show was taken off air. Chapman (2014) attributes this absence of the show as the leading cause of a following ratings plummet for *Doctor Who* that followed this brief hiatus. During this first period of "Classic Who" the lead actor changed seven times and the lead producer and their unique production signatures changed five times.

#### **Seasons 1-9 (2005-Present)**

Relabeled by the BBC and by fans alike as a new set of series, the current iteration of the show has featured ten seasons and five regenerations (although only four actors; one did not fully regenerate) (Gunter 2014). The lead producer has only changed once so far in the current series. Additional behind the scenes content in the form of programs called *Doctor Who Confidential* and *Doctor Who Extra* (online) have also been added to this story mode. "Red Button" or digital content tethered to the BBCi's online platforms offers original but interlinked programming for viewers of television episodes in a mixture of audio, animated video and live action.

#### **Torchwood (2007-2011)**

A spin-off TV series that follows the Torchwood institute, a modern day, Earth based anti-alien activity government group headed by ex-companion of the Doctor, Captain Jack Harkness. Audio adventures, behind the scenes television programs, books and comics were also produced to extend this series.

#### **The Sarah-Jane Adventures (2007-2011)**

Another spin-off TV series that follows an ex-companion from Classic Who Sarah-Jane Smith. It also includes books, audio adventures and comics.

**N.B.** A spin-off with K-9, another popular Doctor companion, was trailed but a lack of success lead to it not going forward. Another TV series was also attempted involving K-9 during Contemporary Who in 2009 but it was not produced by the BBC and did not air past the first season.

### Movies, Online & Games

#### **The Dalek Movies**

#### **Doctor Who and the Daleks (1965) & Doctor Who: Invasion Earth 2150 A.D. (1966)**

Movie adaptations of *Doctor Who* that are not part of *Doctor Who* canon and had little to do with the television story. Not produced by the BBC.

#### **Doctor Who: The TV Movie (1996)**

Conversely this movie is part of *Doctor Who* canon, although contains some contradicting story elements to the main BBC TV series. It was a co-production between BBC Worldwide, Universal and Fox in an attempt to rekindle *Doctor Who* in the American marketplace. Although, Chapman (2014) also suggests that it was a means of audience testing *Doctor Who* for its later return.

### **Webcasts**

#### ***Death Comes to Time (2002) & The Scream of Shalka (2003)***

Experimentations with animation and audio drama that were broadcast onto the BBC's website during the Hiatus period. Both represent unique content that was subsequently removed from *Doctor Who* canon by the return of the television series but was part of the story world at the time it was released.

#### ***Tardisodes (2005-2006)***

The "Tardisodes" are set of prequel web-episodes released via mobile phone as well as online during the first season of *Doctor Who's* return. Ratings were not very high, but this is often tied to the limited release it received in format friendly to only a few mobile phones. Their online viewership outside of the mobile market was a moderate success (Bulkley & Bulkley, n.d.).

#### ***Web Games (2005-Present)***

The BBC have released a myriad of online games on the *Doctor Who* website, many being narrative based and including their own independent storylines. This includes a series of puzzle games, flash games, and a free to play MMO called Worlds in Time in 2012. The 2014/2015 release, *the Doctor and the Dalek*, integrates with UK schooling curriculum and helps to teach children to code as well as providing a Doctor based narrative for the children to explore.

#### ***The Adventure Games (2010-2012)***

A series of 5 games for PC in which the player could go on an additional narrative adventure with the 11th Doctor (Matt Smith) and his companion Amy Pond. The fans in charge of the *Doctor Who Wiki* consider it to be an additional episode to the 2011 television series (Tardis Data Core, 2015).

### **Annuals, Audio & Live Events**

#### ***The Dalek Annuals***

Annuals are hardback collections of text stories, illustrations, graphic novels and comics produced by writers for the television series. The Dalek Annuals were texts dedicated to stories of the Daleks, often not featuring the Doctor at all. Terry Nation, in collaboration with David Whitaker, were both writers who came up with the Dalek episodes, with Nation holding the Dalek intellectual property rights.

#### ***The Doctor Who Annuals***

The *Doctor Who* Annuals were similar to the Dalek Annuals but following the adventures of the Doctor. They were released yearly from 1966-86, excluding 1972, and then again from 2005. While *Doctor Who* was off air, annual-like publications called the *Doctor Who* Yearbooks were also released, although they retold some previously released stories as well as releasing new content.

#### ***Big Finish's Alternate Universe Audio Adventures (2003-2008)***

Created along the same lines as the Tellos Novellos, Big Finish produced a number of audio dramas between 2003 and 2008 that explored alternate universes and “what if” adventures in the *Doctor Who* universe.

### ***The Doctor Who Experience (2010-Present)***

A fusion of history museum and interactive live experience, the *Doctor Who Experience* is a place where fans can visit in Cardiff that contains props and sets from the show’s history as well as a unique interactive experience featuring the current version of the Doctor. Actors who play the Doctor have also been known to visit the experience in character to take part in question and answer sessions with their school-aged fans.

## **Books**

### ***Pre-1994 Novelisations***

Commenced initially by Frederick Mueller Ltd., then picked up by Target and later Virgin publishing, re-tellings of televised stories were done through novelisations and audio adventures. This practice did continue on post-1994 but with more original stories (like those below) and with audio books read by the actors who played characters in the series.

### ***The Eight Doctor Adventures (1997-2005)***

A series of books released simultaneously to the *Past Doctor Adventures*, these novels depicted new stories that followed the recent regeneration of the Doctor in the 1996 movie.

### ***The BBC Past Doctor Adventures by BBC Books (1997-2005):***

These books represent new story extensions and not adaptations as the Target publications largely were. “The line featured new adventures of the first seven Doctors, with the exception of four releases: *Scream of the Shalka*, which was a novelisation of a webcast story featuring the alternative Ninth Doctor; *The Infinity Doctors*, featuring an unspecified Doctor; *The Face of the Enemy*, featuring the Master; and one of the last novels, *Fear Itself*, which was the only PDA with the Eighth Doctor in a lead role, acknowledging the coming of the Ninth Doctor on television. The series ended in late 2005 (along with the EDA line) when BBC Books decided to focus its publishing ventures on books related to the revived TV series” (The Tardis Data Core, 2015). There were 75 books in total and these were often written by authors who would later go on to become the lead producers or writers on the new series (C. Johnson, 2013).

### ***Telos Novellos***

A series of “what if” adventures officially licensed by the BBC, these novels focussed on exploring themes and stories that pushed the narrative boundaries of *Doctor Who*.

### ***The New Series Adventure Series (2005-Present):***

Some books in the New Series Adventure Series are interconnected with online content to help break down barriers to entry among hard-core fans (2009 in particular).

## **Comics**

### ***Pre-2004***

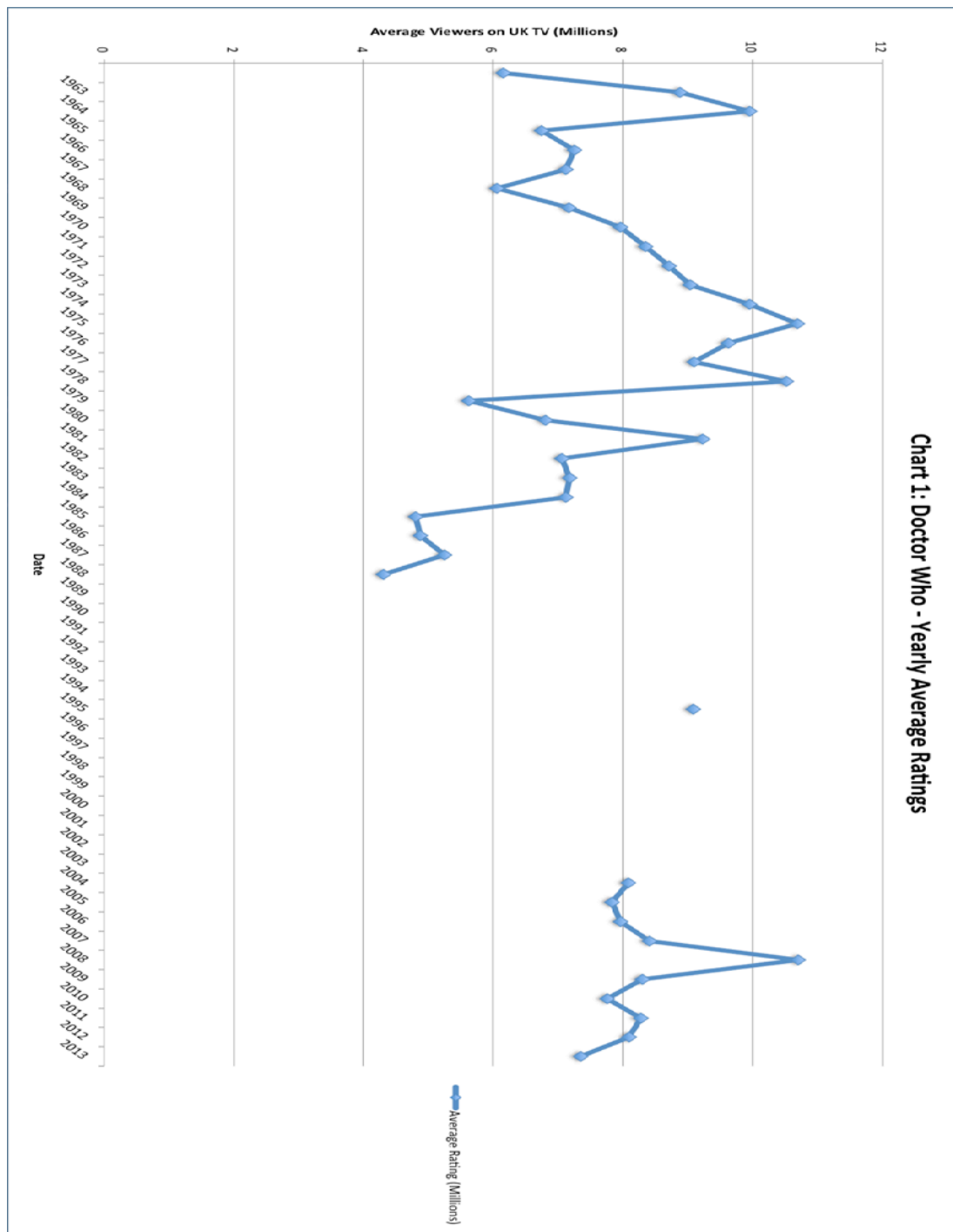
Single page and sometimes multiple page comics were released up to weekly during the first run of *Doctor Who*. These were published in *TV Comics* and, briefly, *Countdown*, then in the magazine *Doctor Who Weekly* that became *Doctor Who Monthly* and then *The Doctor Who Magazine* during the Hiatus period. There was some occasional crossover with the *Doctor Who Annuals* but often they were original stories.

#### ***Post-2004***

Two new sets of comic adventures were added to those being released by TV Comics as the BBC launched both *Doctor Who: Battles in Time* and *Doctor Who Adventures* as stand alone comics alongside the new TV series during Contemporary Who.

## Appendix 4.2 UK Television Views for Doctor Who from 1963-2014

This has been created based on figures from doctorwhonews.net and verified by those reported in Perryman (2008) and Chapman(2013).



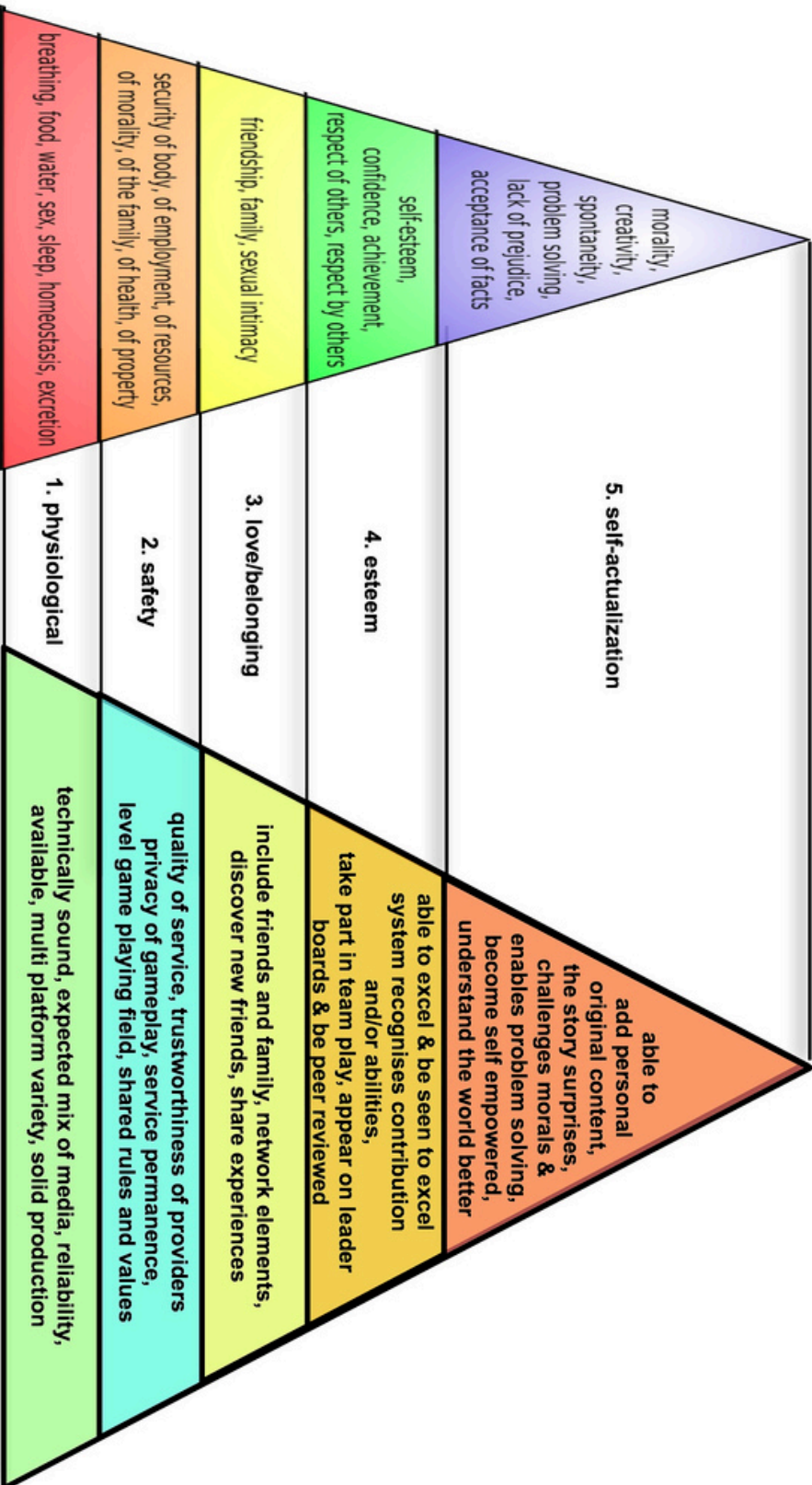


## Appendix 4.3 Hayes' Hierarchy of Needs

Found at <http://www.flickr.com/photos/garyhayes/5455084015/>

### The Transmedia Hierarchy of Needs by Gary Hayes 2010

*Before we can make any creation 'overwhelmingly' engaging for someone else we have to be able to identify & define a broad range of needs*



Maslow's circa 1945

[www.personalizedmedia.com](http://www.personalizedmedia.com)

[www.storylabs.us](http://www.storylabs.us)

[www.muvedesign.com](http://www.muvedesign.com)

[www.garyphayes.com](http://www.garyphayes.com)

Transmedia User Design Needs

## Appendix 4.4 Conversations Regarding the BBC Charter

Early correspondence between the then recently appointed Head of Drama, Sydney Newman and his writing staff as they came up with the concept for *Doctor Who* in 1962 and 1963 clearly evidence a consideration of the balance between pure entertainment value and maintaining educational relevance (A. Clark, 2004; Hearn, 2013; Webber, 1963). In discussion of potential motives for the main character, Newman responded heavily to the Head of the Script department C. E. Webber's suggestion that the Doctor step outside his educational duties.

Webber suggested that perhaps the Doctor had a nefarious secret; that he was intent on destroying the future. Newman responded with,

*I don't like this much - it reads silly and condescending. It doesn't get across the basis of teaching of educational experience - drama based upon and stemming from factual material and scientific phenomena and actual social history of past and future. Dr. Who - not have a philosophical arty-science mind - he'd take science, applied and theoretical, as being as natural as eating (Webber & Newman, 1963, p. 4).*

From this correspondence and more that the BBC have released as part of their 50<sup>th</sup> anniversary for *Doctor Who*, a clear consideration is evident not only for the narrative consistency of the show, but also for the external pressure of the BBC's educational charter. As mentioned previously, *Doctor Who* was conceived to fill a programming gap between the sports show *Grandstand* and the ten show *Jukebox Jury*. In this quote, Newman is clearly balancing the need to appeal to the family demographic present on a weekend evening and the educational stipulations of the BBC's charter as a public entity.

Other evidence of the influence of the BBC's production charter is littered throughout *Doctor Who's* history. For example, between 1975-77 *Doctor Who* reached its highest ever ratings at that time. Chapman attributes this to a focus on darker, more adult centric content. However, because of the more adult content, there were calls from the public to "think of the children" by "self-appointed watchdogs such as Mary Whitehouse and the

National Viewers and Listeners Association” (Chapman, 2014, p. 51). The producers of *Doctor Who* responded to these calls and chose to move in a lighter, more comedic direction to better suit their charter. This shows a clear decision, albeit a reactionary one, to forgo any blinkered focus upon ratings alone and a consideration for the broader purpose of the series (Chapman, 2013; 2014). It is well documented in Perryman’s case study of contemporary *Doctor Who* that a major factor in reviving the show was that it was to become a flagship for the BBC’s efforts to convert people to digital television and emerging communications technologies (Perryman, 2008). This shows that the BBC’s production charter was a significant external influence on the strategic development of the show.

## Appendix 4.5 Influences of Expenditure in Classic Who

- **Audience Engagement**
  - The **audience could easily replicate characters, monsters and villains** in *Doctor Who*. They were made up of cheap props and costumes cobbled together by a restricted but inventive art department. This was quite often obvious to those watching the show and proved divisive. Some audience members ridiculed the cheap props and sets and cite it as a reason for disliking the show (Leach, 2009). Others praise the show's ability to engage them despite this and, alternately, some scholars believe that this made it easy for anyone to pretend to be a *Doctor Who* character, especially children playing dress-ups<sup>95</sup> with household items (C. Johnson, 2013; L. Johnson, 2012b; Perryman, 2008).
- **Mythology**
  - **A tendency to revisit and reuse** a mash up of characters and settings, as well as the **thematic link of unsettling** discussed earlier in 2.1.1, are attributed in part to the spontaneity and inventiveness required to construct a Sci-Fi world from a limited budget. "In the context of fandom, these features of the mythos ensure that its appeal is always based, in part, on a sense of prior acquaintance, an awareness of known or half-remembered components reassembled and reimagined in delightfully skewed and idiosyncratic ways" (I. Phillips, 2013b).
- **Topos/Setting**
  - **Relatable settings** of Earth or Earth-like destinations are consistently present throughout the world, whether they are futuristic environments or historical fantasies (van der Graaf et al., 2010). This contributed to a recurring trope within *Doctor Who* of strange yet familiar landscapes that support a mythology of revisiting and reusing known elements to make new narratives (Chapman, 2014).

These are key responses to low budgetary provisions for 'Classic Who' that were heavily influential in the design of the overall world.

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<sup>95</sup> Chapman in particular names this as one of the factors that contributed to 'Dalekmania', a period near the inception of the show in which teapot looking robots with suction cups and mangled whisks (the Daleks) caught the audience's imagination and greatly increased the show's viewing figures (Chapman 2013).

## Appendix 4.6 Classic Who and the Implementation of Various Narrative World Building Strategies

### Dalekmania (1964 – Onwards)

#### *Pre-Digital Transmedia, Franchising and Cross-Platform Adaptation*

Dalekmania is the name bestowed upon the rise in popularity that *Doctor Who* experienced when the popular nemesis of the Doctor, the Daleks, were first introduced in the 1963 episode *The Dead Planet*<sup>96, 97</sup> (Chapman, 2014). The Daleks were “the ruthless mutants whose recurring presence contributed greatly to the success of the series” (Leach, 2009, p. 6). Due to the Daleks, *Doctor Who* generated significant buzz and to take advantage of the success extra content was produced (A. Clark, 2004; Perryman, 2008; van der Graaf et al., 2010). This strategies behind this aspect of the story world generally followed two forms – comics, including the “Dalek Annuals”, extensions to the TV series that aid it in satisfying definitions of transmedia storytelling, and two *Doctor Who* movies, which are adaptations that are not part of *Doctor Who* world canon.

The Dalek movies, *The Doctor and the Daleks* (1965) and *Daleks’ Invasion Earth 2150 A.D.* (1966) respectively, reflect a process of multiplatform adaptation focussed on short-term audience appeal rather than long-term world building. While the BBC did not produce these films, the BBC and its writers did hold the copyright at the time and would have been fully aware of their production. For the producers of these films who did undertake this strategy of multiplatform adaptation, it received mixed reviews and average audience ratings. A critic from the Times was particularly scathing of the films, stating on the release of the second,

*The second cinematic excursion of the Daleks shows little advance on the first... The filming of all this is technically elementary... and the cast, headed by the long-suffering, much ill-used Peter Cushing, seem able, unsurprisingly, to drum up no conviction whatever in anything they are called to do. Grown-ups may enjoy it, but most children have more sense* (Taylor, 1966, p. 17).

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<sup>96</sup> (The Dead Planet 1963)

<sup>97</sup> The Dalek’s were essentially alien brains encased in a kettle like tin armour that had had all of their emotions removed to streamline them as a species. They had a whisk looking death ray and a plunger as their weapons. Their serial was intended to be a one off. But, on seeing the popularity of these villains, they were included in many consecutive serials until the public began to tire of them.

It could be argued that, since other reviews were slightly more favourable, this may be more of an indication that Dalekmania was starting slightly wear off. However, the popularity of the Darleks continued for at least two years past the date of the last movie. If Chapman (2013) is to be believed, Dalekmania was shortened by oversaturation from adaptations such as these. If this perspective is taken, allowing these multiplatform extensions to go ahead was arguably not in the interests of long-term strategy if the most was to be made for the BBC out of Dalekmania.

This could be considered an example of Jenkins' continuity vs. multiplicity consideration for transmedia storytelling strategy (Jenkins, 2010b). However, Jenkins positions adaptation as a polar opposite to transmedia strategy (2006) and, as these are not alternate versions produced by the BBC but rather adaptations of their story world by a third party, there was no explanation for the audience for why they differed, either in or out of the world. Overall, they would seem to be an example of discontinuous **fit** - a moderately successful multiplatform strategy to earn extra income at best and a negative impact on the overall buzz for the series during Dalekmania at worst.

On the other hand, the annuals can be seen as an example of successfully applied early transmedia storytelling strategy. An annual is the name given to a collection of comics, graphic novels, text stories and artwork periodically published together from 1964. The annuals are collated within hard cover books which fans were able to purchase. As part of Dalekmania, ongoing annuals dedicated solely to the Daleks were also published as well as regular *Doctor Who* Annuals. An optimistic perspective, such as that shown by current *Doctor Who* fans in creating a world wiki called the Tardis Data Core, sees the publication of the annuals as a joint arrangement between the BBC and a writer for *Doctor Who*, Terry Nation, who owned the Dalek intellectual property (Tardis Data Core, 2015). Terry and another writer who worked on the early Dalek serials are credited as creators of the annuals. Within them there are genuine, separately enjoyable but interlinked stories with the television show, something that satisfies the definition for transmedia storytelling established in the literature review. The Dalek Annuals were published for three consecutive years and then, a decade later, annually for four years. They represent a minor

investment in comparison to the movies and demonstrate an application of **fit** in obtaining **competitive advantage**. The same writers working on the television series and the annuals makes the coordination of the content easier to manage and, possibly since there were writing teams of four or more for both aspects, is not shown to have negatively impacted on production of the central television text by diverting the writers' attention. They also represent a coordination of resources to leverage the **unique position** in the market in comparison to other television shows and other Sci-Fi stories. Publishing Dalek specific annuals took advantage of the unique content that the show contained that was generating hype.

## Comics

### *Transmedia franchising*

Similar to the annuals but far more frequent are the additional weekly transmedia extensions of the TV Comics. Sometimes varying but mostly one page in length, each week a *Doctor Who* branded comic was published in the *TV Comics Magazine* from 1964 to 1979. Similar comics were also published in *Doctor Who Magazine* and the *Doctor Who Yearbooks* from 1979 until the series' return in 2005/06. These comics would have provided a small but still recurrent story extension to the *Doctor Who* world. They also provide a third platform (alongside the annuals) needed to satisfy the PGA's definition of transmedia storytelling. It also shows it to be what Pratten (2011) and Dena (2009) describe as transmedia franchising, the syndication of multiple media platforms to forward a large central text. Again this demonstrates **fit** in construction of the story world, with each piece reinforcing the other before the weekly episodes. It also represents a **trade-off** in this type of multiplatform strategy as the publication of these comics in a place such as TV Comics reinforces the position of the TV series as the central focus of the story world. This aspect does raise a question, in need of corroboration with other case studies, of whether or not transmedia storytelling strategy might actually necessitate a central platform, at least in the minds of the audience. Practitioners such as Phillips (2012) and Pratten (2011) suggest that this is possible with *portmanteau* transmedia strategy. However, at this early stage, *Doctor Who* shows that, at least with transmedia franchising, there is some reliance upon the central text of the story world.

## **Novelizations of Episodes**

### *Cross-Platform Replication*

While not a transmedia strategy, the creation of novels that copied the narratives played on television does represent a concurrent reinforcing multiplatform strategy of replication. The novelisation of episodes continued for many years and also continues today. Hubbard, Rice and Beamish (2008) categorise replication with additional features as a goal of short-term competitive advantage. The creation of book versions of the television serials speaks to this short-term competitive advantage through the additional feature of first person point of view and immersion in characters' consciousness' that books provide in comparison to a televised narrative (A. Phillips, 2012). In his case study of *Doctor Who*, Perryman (2008) lists them as an example of Jenkins (2006)'s transmedia storytelling element of "additive comprehension. The longevity of the practice, when placed in a constructivist framework with the other content analysed so far, shows that concurrent strategies of cross-platform replication and transmedia storytelling do not necessarily impact negatively upon one another as the Dalek movies might suggest. Given that video recording was not available until later into the run of Classic *Who*, the books provided episode souvenirs for audience members (Leach, 2009) and would probably have worked together with the other content to ensure short-term and long term competitive advantage for *Doctor Who*.

## **Self-Referential Narrative in the TV Series**

### *Internal Seriality*

The notions of seriality and continuity of narrative are often discussed as components of transmedia strategy. It is worth noting then, as Chapman (2014) does in his discussion of potential causes for *Doctor Who*'s longevity, that there were moments in the show in which attention to the inclusion of past narratives worked both for and against Classic *Who*. The serial *Attack of the Cybermen* (1985) recorded lower than average ratings and audience response. Chapman (2014) attributes this to too many references within the episodes to other episodes that had aired about the Cybermen in the 1960s that many of the target audience (even those that had grown up with the program) would struggle to remember or would have never seen. It also ran the risk of alienating casual or new viewers. Conversely,



he provides the example of the 20<sup>th</sup> anniversary special *The Five Doctors* that also played to “a strategy of self-awareness”. Viewing the episode provides an audience member with a sense of nostalgia and extra understanding for those who have seen past episodes. However, the storyline itself is laid out in a way that is not particularly alienating for new viewers, exhibiting successful seriality and continuity of narrative. Despite *The Five Doctors* as an example of a positive application of this seriality, the increasing amounts of self-reference in the series is “the conventional explanation of the decline of the *Doctor Who* audience in the 1980s” (Chapman, 2014, p. 54). Although Chapman also notes that BBC producers should give equal if not greater weighting to mis-management and negative feelings to *Doctor Who* at the time, the advent of DVR and “time-shifting” and a hiatus during the 1985/1986 seasons that saw the most significant drop in overall ratings for the show. Overall, the application of seriality does show a significant **trade off** present in strategies that seek to use it; the greater the stress on self-reference and internal continuity, the less potential appeal you may have to new or less engaged viewers.

## Appendix 4.7 Analysis of Narratives Through Lens Element 1 in Hiatus Who

### Doctor Who: The Movie (1996)

#### *Problematic Transmedia Storytelling*

A key example of multiplatform testing as a strategy within Hiatus Who is the 1996 Paul McGann movie. Jones (2013b) is explicit in detailing the journey of broadcasts of the television show across the Atlantic and its growing popularity among freshly spawned American fans. Chapman (2013) originally saw this movie as an attempt at reviving the television show in the U.S.A. that also acted as a swansong for the old television series. However, Chapman's 2014 article *Fifty Years in the Tardis*, reverses his earlier opinion of the American based movie, seeing it as sort of a part of the newer iteration of *Doctor Who* to come post-2005. He mentions the "favourable" response it received in the United Kingdom and the average response it received in the United States as indicative of a test for the contemporary market. Despite this, the movie does have continuity issues in narrative, as well as clashes in tone that some fans have labelled "American imperialism" on a "thoroughly British" series (Jones, 2013b, p. 46). This movie can ultimately be seen, then, as a means of using a partial transmedia strategy to test potential **unique positions** in a marketplace and the **trade-offs** that these could include (such as hard-core British fans for newer American ones). The components of the film that exhibit transmedia strategy to provide unique, canonical narrative contributions that are still part of the broader story world for *Doctor Who* stories today. This shows that while transmedia is not the only option for testing via multiple narrative platforms, it represents a **trade off** that provides significant longevity in its use.

### Webcasts

#### *Transmedia Storytelling and Test Content*

Similar to the Hiatus movie, Chapman (2014) positions the web animations of *Death Comes to Time* (2002) and *The Scream of Shalka* (2003) as precursory tests for *Doctor Who's* return to television. Despite both being potentially non-canonical<sup>98</sup>, they were part of canon at the time. *The Scream of Shalka* illustrates the role that if a producer wishes to circumvent canonical issues when using transmedia strategy they can, providing they understand which

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<sup>98</sup> *Death Comes to Time* depicts the ultimate death of the Doctor in his seventh incarnation (Tardis Data Core 2015) and *The Scream of Shalka* (2003) depicts a different Doctor incarnation for the ninth regeneration.

platform has primacy in the audience's mind in their story world. Most fans immediately accepted the ninth Doctor depicted in the *Doctor Who*'s return to television as canon over the different incarnation put forward in *The Scream of Shalka's* animation (Chapman, 2014; L. Johnson, 2012b; Jones, 2013b). This indicates that, in franchise transmedia storytelling, providing one has identified which platform takes complete canonical precedence in the minds of the audience, canon and narrative portions of the world that impede the growth of the world in a desired direction can be overwritten to some degree without significant impact upon the overall function of the world for audience engagement.

### **The Doctor Who Yearbooks**

#### *Transmedia texts and replication of narrative*

Later versions of the Annuals that were produced during Classic Who, the *Doctor Who Yearbooks* were largely new narrative content but did include some replication of past stories as well. Thematically, their content focuses on past doctors and proved to be more of a celebration of the past success of *Doctor Who* for the fans (J. Freeman, 1991; Russel, 1992; see 1995). They represent a use of pseudo-transmedia strategy concerned with **fit** that reinforces the narrative world and provides low cost entertainment for dedicated hard-core fans.

### **Books and the New Adventures of the Doctor**

#### *Transmedia Storytelling As Market Testing*

One of the most obvious forms of testing and adoption of media components in a transmedia manner in the Hiatus period is the publication of the BBC novel series *The Past Doctor Adventures* and the *Eighth Doctor Adventures*. BBC Books undertook both series of novelisation after they rescinded publishing responsibility for the *Doctor Who* series from Target Books in the early 1990s (The Doctor Who Site, 2015; van der Graaf et al., 2010). These represented original story extensions that provided unique narrative contributions through the story mode of novelised experiences, complimenting the movie and radio adventures. Perryman (2008) and Chapman (2014) both position this as a concentrated effort by the BBC to fully control the *Doctor Who* story world before its eventual relaunch on television in 2006.

However, it is worth noting that Perryman was actively looking for examples of successful transmedia storytelling and convergence and Chapman did not link the experience to a holistic strategy beyond property control by the conglomerate. From a more conservative point of view, we can see that retaining control of publishing the novels represents a transmedia method of shoring up of the BBC's **unique position** in the market of controlling successful media platforms within the *Doctor Who* story world. This would have ensured that they maximised revenue through story modes by controlling the resources in their value chain. These books as unique story extensions would also have tested the market, providing constant feedback for reception of new *Doctor Who* stories. These books also created significant **fit** for the organisation in establishing a proving ground for new writing talent that would later be used by the BBC in *Doctor Who*. Russel T. Davies, the show runner and die-hard *Doctor Who* fan responsible for guiding the series' return to television screens was one such writer (as well as writing popular *Doctor Who* fan-fiction) and stocked his writing staff with other writers from the novelisations.

According to Perryman (2008), it was in this time that the BBC used books to publish stories, often submitted by fans, that would never have been possible when it was aiming to appeal to its conservative audience. They were also exploring new platforms made possible by emerging technology, such as the webcasts, or new circumstances, such as the American movie.

*From 1989 the development of Doctor Who as a brand at the BBC can be understood to function within the context of a broader corporate strategy to exploit the series' longevity, transferability and multiplicity in order to increase the BBC's commercial activities and extend its digital provision (C. Johnson, 2013, p. 2191 of 5338)*

If anything, the BBC used the hiatus period to as an opportunity to find new **unique positions** for *Doctor Who* in the market.

## Appendix 4.8 Analysis of Competitive Advantage Through Transmedia Implementation in Contemporary Doctor Who

### Additional Television Spin-offs (Torchwood, Sarah-Jane and K9)

#### *Multiplicity within the same story mode*

While spin-off content in the same story mode is not part of transmedia strategy<sup>99</sup>, it does represent examples of continuity and multiplicity<sup>100</sup> within the *Doctor Who* story world. These additional television shows were created in continuity with *Doctor Who*. What happens in one show often had ripple effects onto the others. They multiplied the amount of content for specific audience groups within the larger audience for *Doctor Who*. *The Sarah-Jane Chronicles* and the failed *K-9 and Company* television shows both target children and young adults, while *Torchwood* targets an older audience with more adult content within the *Doctor Who* universe. Their canonicity with each other and specific audiences proves to be a **trade off** in potential popularity for the spin-off content. For example, the *Torchwood* television series has intersecting content with the *Doctor Who* television series, pointing audiences who have not encountered *Doctor Who* towards the main series. However, the character of the Doctor is never able to make appearances in the *Torchwood* television series because, in the words of Russel T. Davies,

*"The Doctor's never gone into Torchwood... It's always been the other way around. Torchwood's gone into 'Doctor Who,' which I think is correct because there's a big child audience for 'Doctor Who,' and I think that would demand if we took The Doctor into Torchwood, it would be a clash of styles"* (Davies in Hinman, 2011).

These segmented audiences mean that the *Doctor Who* world is able to have multiple **unique** offerings that each provides different points of view in the *Doctor Who* world<sup>101</sup>. However, in the case of the *Torchwood* spin-off, it provides a one-way path of immersion for audiences, solidifying the potential hypothesis that a transmedia franchise structure of the world is centralised and reliant upon on one particular text, the *Doctor Who* television series.

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<sup>99</sup> As they do not represent additional story modes. Rather this is more of a sort of narrative franchising.

<sup>100</sup> Core considerations in Jenkins' model of transmedia storytelling's operation (Jenkins 2010).

<sup>101</sup> An example of Jenkins' idea of subjectivity in transmedia, the idea that story extensions can provide genuine unique experiences by exploring unseen perspectives in the main narrative (Jenkins 2009).

While the *Doctor Who* series does take primacy in the universe, *Torchwood* and *The Sarah Jane Adventures* receive transmedia extensions in the manner of the core series. They both have games, novels and audio books, web series and making of content. Similarly to *Doctor Who*, after a ratings decline in its fourth season, *Torchwood* has been rested from 2011, pending show-runner Davies' ability to commit to writing new series, and continues on in radio dramas at present (Doctor Who TV, 2015). This reveals a **trade-off** of resources by the BBC, choosing to take on risk and invest more in both of these series to make them stand alone content with their own supporting narrative extensions.

### **Continuations and Revivals of Past Methods (Books, Comics, Annuals)**

#### *Transmedia Storytelling*

Transitioning from the Hiatus period to Contemporary Who, the *Doctor Who* world has continued to be extended by several enduring story modes. These include the books, comics and annuals. Often these have been updated as technology has evolved so that the same strategic benefits their story modes provided in the past can be applied to today. For example, writer Neil Gaiman's short story called *Nothing O'Clock* in 2013 has been released solely as an eBook and online audio book (Penguin Books, 2013).

### **The Doctor Who Experience (Theme Park)**

#### *Franchise Transmedia Storytelling*

A small attraction in Cardiff run by the BBC, *The Doctor Who Experience* includes new content in an interactive adventure, updated for each new regeneration, and behind the scenes exhibitions for customers (BBC, 2015). The use of transmedia strategy to include a unique story experience at the attraction shows an attempt at coordinating resources to generate **fit** by providing a reason beyond nostalgia for audiences to visit. The **trade-off** with this particular story mode is that the cast members of the show as well as the resources needed to construct the interactive adventure have to be used to create this additional pull for audiences to experience this story mode.

### **Gaming and Interactive Episodes**

#### *Transmedia Storytelling*

Using key actors and writing staff across narrative platforms is a common **trade-off** among the BBC's approach to providing a holistic entertainment experience for *Doctor Who* to compete in the converged contemporary environment. "The way we really tried to make the characters and sets come alive for the gaming audience was, we really tried to make sure we delivered the authenticity... (Doctor Who Online, 2012)". The interactive game episodes (*Attack of the Graske* (2005), *Doctor Who: The Adventure Games* (2010,2011) and *Doctor Who: The Eternity Clock* (2012)) were made with the voices of the actors from the main series or the actors themselves<sup>102</sup>. *Attack of the Graske* was built on the same mechanics as a similar interactive game for PC developed in the Hiatus period called *Destiny of the Doctors*. Both it and *Doctor Who: The Adventure Games* were both initially free to play and received positive receptions<sup>103</sup>. On the other hand, *Doctor Who: The Eternity Clock* was an attempt at a more in depth, higher budget style of game and wasn't successful. It received terrible reviews due to technical and gameplay issues but was applauded for the attention to story and character in relation to the television series (IGN, 2013). The BBC acknowledged it as a narrative success but that they would not be making more as the investment required to compete with other similar games was not a **trade-off** they were willing to make (Reynolds & Nichols, 2013). Showing their willingness to test new content that balances their possible expenditure and offers interactive immersion as a unique position for the *Doctor Who* world, the BBC has recently released *The Doctor and the Dalek*, a tablet game for children to help them learn to code and solve puzzles through a stand-alone adventure (The Doctor Who Team, 2015).

### **Cross-Platform Behind the Scenes Content**

#### *Multi-platform Engagement through transmedia story mode extensions*

While dependent upon a love for and understanding of *Doctor Who*, and therefore not transmedia, the supporting behind the scenes content produced for Contemporary Who follows a platform agnostic strategy in reaching audiences. Television shows are surrounded by interlinked interviews with writers, editors, directors etc. in various forms from short video (YouTube content and *Doctor Who Confidential* for example) to full length documentary and dramatized history (*An Adventure in Space and Time* (2013)). This is done across multiple

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<sup>102</sup> This included motion capture suits and a replica set for the motion capture (in the case of the *Eternity Clock*).

<sup>103</sup> Half a million people downloaded the *Adventure Games* in the first two weeks, with the BBC blown away by the success, and *Attack of the Graske* also reached over half a million people (BBC 2015).

platforms as best suits the content, with many stories being distributed for free on YouTube after their television appearances. Given the multiplatform nature of the series and the control of the various production outlets that the BBC has as a result, it makes sense to use their resources in this way to create a multiplatform network of supporting content that stems from the making of the story world.



## Appendix 5.1 Did Sofia's Diary use transmedia storytelling strategy?

Earlier in this thesis it was established that for transmedia strategy to be in action a project would have to include three things:

1. Multiple unique story modes
2. Separately enjoyably story modes
3. Unique contributions by those story modes

Applying these criteria to *Sofia's Diary*, it is clear that this project is an example of transmedia storytelling strategy in action.

1. Multiple story modes as well as platforms were employed by beActive. Often their information overlapped causing them to be interlinked story modes but it is clear from even a cursory analysis of the project that it satisfies this part of the analytical lens.
2. This thesis also finds that these story modes were separately enjoyable. An audience member could just watch the television show, just read the books or just follow the radio updates and SMS alerts. However, the story modes were also interlinked. If an audience member interacted with more than one story mode, they received more information about Sofia's day, whether this was through different perspectives (such as the books that told things from her sister's point of view) or through additional story (such as those told via radio or on television). This in turn reflects the fundamental principle for transmedia storytelling strategy discussed in the literature review; that a strategy is developed so the audience can enjoy a whole that is greater than the sum of its parts.
3. As the previous point iterated, each story mode had something unique to add to the experience; the books provided different perspectives on events, the SMS service provided new information throughout the day and opportunities for participation and interaction, the TV series provided a brief passive moment of interaction for the audience in which they could sit back and watch a recap of the day's events. While not all of these story modes were making unique narrative contributions all of the time (for instance, the books would sometimes have unique content and other times

would not), this thesis finds *Sofia's Diary* to have had sufficient unique contributions by each story mode to fit within the umbrella of a transmedia strategy. Validating this finding is the fact that the project is routinely referred to (albeit very briefly) as an example of successful transmedia storytelling in academic literature (Falzon, 2012; Gambarato, 2012a; Miller, 2014).

The application of this framework demonstrates that *Sofia's Diary* is an example of transmedia storytelling strategy in action. It satisfies all three components established within the literature review (Chapter Two) for something to be considered an implementation of transmedia storytelling strategy. Striving to create the feeling of a digital friendship between their audiences and Sofia, beActive engineered an experience that used these techniques to follow transmedia storytelling strategy definitions.

## Appendix 5.2 De Wit and Meyer's Strategic Context

Figure 1.4 from DeWit et al. 2005 p. 12



This figure demonstrates the varying contexts one must consider when analysing a strategy. These range from the experience and influence of those in charge of developing the strategy to the organisation that is implementing it and that organisations goals, the context in which that organisation operates in comparison to others in its industry and, finally, the broader international context, if any, for the projects that the organisation is developing.

## Appendix 6.1 Alternate Adaptations of *Pride and Prejudice*

Date	Title	Description	Methods of Engagement
1938	<b>Pride and Prejudice</b> Feature Film	The first feature film adaptation of <i>Pride and Prejudice</i> .	Single story mode, passive spectatorship.
1940	<b>Pride and Prejudice</b> Feature Film	This feature film starring Greer Garson and Laurence Olivier was long considered the most faithful adaptation of <i>Pride and Prejudice</i> (Briscoe, 2005)	Single story mode, passive spectatorship.
1959	<b>First Impressions</b>	A Broadway musical version of <i>Pride and Prejudice</i> .	Single story mode, passive spectatorship.
1995	<b>Pride and Prejudice</b> Television Miniseries	Perhaps the most famous television adaptation starring Colin Firth and Jennifer Ehle. It is considered by The Times as "so dominant, so universally adored, [that] it has lingered in the public consciousness as a cinematic standard" (Briscoe, 2005).	Single serialised story mode with passive spectatorship.
2001	<b>Bridget Jones's Diary</b>	A popular film that borrowed its basic plot from <i>Pride and Prejudice</i> , even naming the male lead Mark Darcy.	Single story mode, passive spectatorship.
2003-2010	<b>Fitzwilliam Darcy, Gentleman</b> Books	Four historical romance novels written by Pamela Aidan that reimagine the events of <i>Pride and Prejudice</i> through the eyes of Austen's central male character, William Darcy.	Single serialised story mode with passive spectatorship.
2005	<b>Pride and Prejudice</b> Feature Film	A popular recent and faithful retelling of <i>Pride and Prejudice</i> . Starring Kiera Knightley and Matthew Macfayden it was produced by Focus Features.	Single story mode with passive spectatorship.
2008	<b>Lost in Austen</b> Television Series	A four-part miniseries produced by ITV in which a devoted Jane Austen fan trades places with Elizabeth Bennet.	Single story mode, passive spectatorship.
2009-Present	<b>Pride and Prejudice and Zombies</b> Alternate universe franchise based on a novel adaptation.	A franchise style adaptation of <i>Pride and Prejudice</i> based on a book by Seth Grahame-Smith that reimagines the narrative of <i>Pride and Prejudice</i> in an alternate world where the Bennet sisters are trained zombie killers. It represents an almost antithesis like franchise style adaptation to that of LBD. This "franchise" includes two books, a comic, a video game and a feature film.	Every story mode in this adaptation represents a primarily passive form of spectatorship, inviting little discussion between fans and leaving social connection and identity to be driven by fan initiated interactions. It is also not transmedia storytelling as most story modes in this adaptations are replications of each other or direct sequels in the same story mode.
2013	<b>Death Comes to Pemberley</b> Book and Television Series	A three-part drama and murder mystery based on a novel of the same name it is set after the events of <i>Pride and Prejudice</i> and was produced by Origin Pictures.	A "what if" narrative extension that then became a direct adaptation of one story mode to another (book to television series). Passive spectatorship

			for both the book and television series.
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