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The Best Seat in the House: Investigating the Emergence of Livestreaming in the UK

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Abstract

The purpose of this dissertation is to investigate how livecasting - the use of cinemas to display a variety of live and recorded entertainment such as opera, theatre and ballet - has emerged in the UK between the years 2003-2016. In research approach, it draws on the development of primary case studies and secondary analyses of existing industry reports and literature regarding livecasting.

This dissertation builds upon discussions surrounding livecasting through a media industries approach as defined by Timothy Havens and Amanda D. Lotz, and makes use of John T. Caldwell's cultural-industrial study to explore how livecasting is being shaped and discussed as an industry. It makes use of case studies - the Royal Opera House, National Theatre Live and the Event Cinema Association, as well as exhibitors Odeon, Showcase, Empire Cinemas and Cineworld- in order to understand how livecasting is being marketed.

Its findings show mediated live content within cinemas began over fifty years ago, and underlines the necessary development of digital technology to allow for the growth of livecasting as it is discussed in this dissertation. It charts how processes of standardisation have been employed as a means of reducing technological risks as well as legitimising a developing industry. It investigates the varied approach to the marketing of livecasting.

The value of this dissertation is the alternate view of the development of livecasting. It diverges away from an audience-centred approach on research into livecasting, and looks instead at how livecasting has developed as an industry. As such, this dissertation is relevant in its contribution to the wider understanding of livecasting, with a focus on the development of livecasting in the UK.

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Introduction

In December 2006, the Metropolitan Opera (Met) in New York began transmitting a series of live events to cinemas around the world. By 2019 it is anticipated that the industry that has formed around the streaming of content into cinemas will reach revenues of \$1 billion (Tuck and Abrahams, 2015). The practice is described as livecasting throughout this dissertation, and is defined as the use of cinemas to screen live or recorded events such as theatre, opera, sports, and concerts. Livecasting has grown from an individual series of broadcasts by the Met to a media industry that is altering the practices around the theatrical exhibition of mediated live content.

At this point, scholarly debates surrounding the process of livecasting have largely centred on liveness in cinemas, audience demographics, and their responses to livecasting. Research has found that audiences of livecasting are more heavily involved in the arts than those that do not engage with livecast screenings (Atkinson and Kennedy, 2016). Those aged between sixty-five and sixty-nine are most likely to have seen a livecast performance (Tuck and Abrahams, 2015), and willingly sacrifice the experience of attending a live performance for the benefits of easier accessibility of productions, surround sound, and multiple camera angles (Barker, 2012). These topics are covered in detail by Paul Heyer in his article *Live from the Met: Digital Broadcast Cinema, Medium Theory, and Opera for the Masses* (2008), Martin Barker in his book *Live to your Local Cinema: The Remarkable Rise of Livecasting* (2012), Sarah Atkinson and Helen Kennedy in the report *Live Cinema in the UK* (2016)¹, supported by Arts Council England, and AEA Consulting in the report *From Live-To-Digital* (2016), supported by Arts Council England, UK Theatre, and Society of London Theatre.

¹ Whilst this dissertation recognises the Live Cinema in the UK report as inclusive of Livecasting as it is discussed in this dissertation, it also appreciates that the report is not exclusively focused on this meaning.

Both reports mentioned, alongside *Understanding the Impact of Event Cinema, An Evidence Review* (2015), commissioned by the British Film Institute and Arts Council England, indicate how this media industry is beginning to self-reflectively discuss itself. Indeed, self-reflection aids self-improvement, and signifies an industry that is growing and attempting to establish its position within the world of cinema.

These are perhaps the necessary first steps in researching a new industry practice. This self-reflection enables an insight into the typical audiences for livecasting, and allows the industry to better understand who it is they are marketing their content to, and the reasons why these audiences are attracted to the process of livecasting. By building a foundation of knowledge regarding audience opinion and demographics, content producers, exhibitors and marketers are able to understand this emerging media industry through the eyes of their consumers.

Whilst these elements do allow for a better understanding of livecasting, there appears to be less of a focus on how it has emerged as a media industry. As such, this dissertation looks to contribute to growing discussions surrounding livecasting as an emerging media industry, through a media industries approach as outlined by Timothy Havens and Amanda D. Lotz in *Understanding Media Industries* (2011). It looks to understand “the interaction between commercial industry realities (regulations, profit-maximisation strategies, pricing, and so on) and the products of media industries (films, TV shows, music, video games, magazines)” (Havens and Lotz, 2012, ppXIV). This approach is utilised in order to provide context as to the growing prominence of livecasting within the world of cinema. As such, this dissertation provides an alternate view on this emerging media industry, and allows for a greater understanding of a sector that is challenging perceptions of cinema, and altering the practice of exhibiting mediated live content in cinemas.

Specifically, this dissertation will investigate how livecasting has emerged in the UK between the years 2003-2016. This period has been chosen because 2003 was the point at which livecasting initially appeared in the UK, with David Bowie's one-off 'Live By Satellite' concert screened live to cinemas around the world. In order to investigate the emergence of livecasting in the UK, three questions will be addressed: How is livecasting emerging as a hybrid media industry? How has livecasting as an industry been shaped by the Event Cinema Association, the trade body that has formed around livecasting? And, how is livecasting being marketed to audiences? These questions will be broken down and answered throughout three chapters.

Chapter one discusses the conflicting terminology that has evolved as differing stakeholders attempt to mould perceptions of livecasting. An overview of historical instances of live mediated content in cinemas is outlined, and the development of the digital camera and the subsequent infrastructure of digital equipment, is described. Various stakeholders and the cross-industry relationships that have developed are identified, giving insight into which industries and businesses are involved in shaping livecasting. These individual elements allow for a wider understanding of how livecasting is emerging as a hybrid media industry as distinct from but linked to cinema.

Chapter two investigates the role trade association's play in developing industry sectors, making use of the Event Cinema Association (ECA) to highlight this. An analysis of efforts at standardisation illustrates how the ECA is working to organise the livecasting sector. The role of the ECA in shaping debates and encouraging networking opportunities is discussed. John T. Caldwell's framework for examining trade conferences and award ceremonies is employed, reflecting how these sites operate as industry legitimisers, facilitate intra-group relations, and enable the sharing of knowledge.

Chapter three discusses how livecasting is being marketed. It makes use of primary case studies, the Royal Opera House, National Theatre Live, and the ECA, alongside marketing by exhibitors, to highlight the variation in approach. These case studies represent stakeholders with different needs, and differing benefits to gain from the success of livecasting as an industry. They reveal much about how these varying needs shape the marketing of livecasting. Chapter three builds upon chapter two and its focus on the ECA as influential in shaping the emergence of livecasting as an industry, and investigates how other stakeholders are also shaping livecasting in a way that suits their individual needs. It addresses the tone of the marketing and branding of livecasting, and what these reveal about the motivations of stakeholders.

Taking an industry-minded approach, this dissertation looks less at what audiences think and expect of livecast performances, and more to how these audiences are being targeted by content producers and exhibitors. It looks at how the industry is being shaped and organised, and how it has developed in the UK since its emergence in 2003.

Livecasting as an industry has grown significantly since the Met began annually transmitting performances around the world in 2006. As it stands in 2017, the industry harbours aspirations to grow and integrate other elements into the broad category of cultural events that it currently defines, such as anime and gaming. It is beyond the scope of this dissertation to anticipate what the future holds for livecasting. However, the rate at which it has grown, and the potential for diversifying audiences and altering attendance and indeed behaviour at cinemas, indicates an industry that is set on continuing to challenge both audience and industry perceptions of cinema.

Chapter One: Livecasting as an Emerging Media Industry

In order to understand livecasting it is necessary to analyse *how* it is that this industry is emerging. Livecasting is developing as an emerging media industry and is doing so as distinct from cinema. In order to develop this point, however, it is important to first clarify what cinema is.

Cinema is both a specific site of exhibition for mediated content, and, according to Professor Sir Christopher Frayling, “an art form which had its origins as an end-of-pier sort of entertainment but which through a mixture of technological change, fashion, industrial organisation, and human creativity [has] long since matured into the seventh art” (Frayling, 2011 cited in Kemp, 2011, pp7). Put simply, it is a visual medium structured around a number of codes and conventions. Symbolic codes such as colour and setting convey meaning. All colours have meaning based on their context, whilst setting creates a sense of time and place. Audio codes such as music and dialogue create atmosphere and convey narrative. Technical codes such as camera angles demonstrate different aspects of a film’s location or themes. Codes are strictly followed in order to allow audiences to assign a convention. The codes and conventions of cinema have come to be accepted as understandable creators of meaning. As such, livecasting is developing as distinct from cinema as a visual medium, within cinema as a site of exhibition.

Through the use of these exhibition spaces and digital cinema projection, both livecasting and cinema are intrinsically linked. With livecasting, the development of codes and conventions generally depends on the format. However in *Live to Your Local Cinema*, Martin Barker found there were general constraints and issues that applied to the production and filming of all livecast events directly affecting the development of codes and conventions.

In order to record livecast content without disrupting the live event, cameras must not obstruct the view of any present audience members. For the same reason, camera locations produce low-angle shots and eye-level shots with occasional high-angle shots, the latter emphasising the privileged access of cinema audiences. Additionally, microphones are usually attached to actors. This method of sound recording may result in drops in sound-capture as characters turn their head away from the microphone's favourable position. There are additional microphones for the capture of audience responses, and stage lighting can result in characters drowned in light, causing both stage and sets to fall out of vision. Finally, non-diegetic sound is prevalent, but the volume and sense of proximity varies (Barker, 2012, pp14). These aesthetics are generally distinct to livecasting, however issues that are applicable to opera may not necessarily translate to live sport or gaming events. What is occurring with the growth of livecasting, then, is the formation of a hybrid media industry that is challenging established perceptions of cinema and the codes and conventions that define it.

In order to better understand this emerging industry, this chapter will investigate livecasting from a number of perspectives. It analyses the different terminology that has developed to describe livecasting, the meanings these terms create, what purposes they serve for individual stakeholders, and how this reflects the hybrid nature of livecasting. Instances of liveness throughout the history of cinema are traced in order to underpin the appetite for and development of livecasting, and the ways in which new technologies of representation often come about through the remedying or remediation of old technologies. It investigates how livecasting practices and discourse are altering how cinemas function as exhibition venues.

Additionally, the chapter analyses the necessary rise of digital technology in the UK in order for livecasting as a process to be realised. It highlights the importance of understanding

livecasting's history and industry, providing context for the growth of livecasting. Indeed, understanding the link between the past and present is fundamental for a full understanding of the current status of livecasting, as technology is always a product of its time. It discusses the divergent stakeholder relationships that have formed as a result of both livecasting as a process and the digital technology that has enabled it, alongside the importance of such relationships in forming a new media industry. By focusing on these aspects, it is possible to understand how livecasting is emerging as a hybrid media industry.

Issues of Terminology

This dissertation refers to the process of streaming content into cinemas as livecasting. Martin Barker, author of *Live to Your Local Cinema*, the formative academic work on this phenomenon, initially describes livecasting as “The success story with no name,” (Barker, 2012, pp1) and rationalises his use of the term livecasting, as “it is short, and sort of descriptive” (Barker, 2012, pp11). Indeed, whilst there are on-going debates surrounding the terminology used to describe livecasting, as detailed in the following section, I have chosen to continue with Barker's use of this term as it descriptive of the technical process of livecasting, and aligns with the historical use of the term ‘casting’ within film and television. As such, the term is suited to academic discussions surrounding the process of livecasting.

Barker defines livecasting as, “The idea of beaming live performance events into cinemas” (Barker, 2012, pp1). These events, which span theatre, opera, ballet, as well as concerts and sports, have formed an emerging, hybrid media industry under a myriad of names. Livecasting, alternative content, live cinema and event cinema have all come to define the process, and the existence of multiple terms has come to cause confusion. Each term attempts to capture the practice semantically and cater to the varying aims of those discussing or promoting livecasting, as they inflect the process and how it is understood. These terms will be discussed throughout the following section.

Livcasting as a term functions not just as a more technical definition, but reinforces the link to film and television through the use of the term 'casting'. The language here draws a connection between the terms broadcasting and narrowcasting, both used in discussions of the nature of television and radio, past and present. Broadcast was originally a term used to describe the process of sowing or planting handfuls of seeds over prepared ground. To distribute over a wide area, or to cast broadly, was then used in reference to the distribution of audio content to a large audience through mass communication, beginning with the radio (Douglas, 1987). Coined by either radio station KDKA manager Frank Conrad or Radio Corporation of America historian George Clark (Greb and Adams, 2003), the term was initially developed to distinguish between the one-to-one methods of communication used previously throughout history, such as the telephone or telegraph, and to emphasise the one-to-many form of communication of one single radio station transmitting to many listeners.

From this, the term livcasting signifies the technological process of streaming one event to many exhibitors, whilst emphasising the liveness of such events. That Barker makes use of this term suggests an attempt to focus on the introduction of this technological change to cinema theatres, as opposed to a focus on the content, or the exhibition practices, as connoted by alternative content and event cinema. Here, Barker is separating the technology from the event itself, and is able to retain a focus on how the process of streaming content differs from the process of showcasing feature films, whilst simultaneously linking the process to other instances throughout film history in which the way messages being transmitted changed.

Furthermore, the term also follows the general trend of using descriptive terminology to present the claimed benefits of new technological systems. Barker discusses how terms such as Widescreen, Technicolor, Surround Sound and 3D, "do more than group and

point[...]they] can sum up experiences and make promises” (Barker, 2012, pp10). Livecasting sums up the liveness of the experience, differentiating the event from screenings of pre-recorded feature films, and promises an experience similar to that of attending the streamed event live. The semantics of this term highlight the difference between the exhibition practices of screened and streamed events.

Aside from Barker’s use, livecasting as a term is generally not used in industry or public discussions surrounding the process of beaming live content into cinemas. Alternative content is a term commonly used, more so in the United States than anywhere else. This is due in part to the fact that it is where the streaming of live events on a long term basis, as opposed to one-off performances, began. The Met was the first to do this in 2006, and as such the term alternative content was used to describe the alternative nature of the screenings. The terminology here works to highlight the differences between classic cinema content, feature films, and this new alternative to traditional content, namely live theatre, opera and ballet. Barker argues the term alternative content works less as an actual description, and more of a “what it isn’t” label (Barker, 2012, pp10). This puts the term in direct contrast with the language mentioned above, such as Surround Sound and Widescreen, as the focus is more on what the process is not, than what the process is.

However, introducing the idea of an alternative to traditional cinema fare invites questions as to the nature of these alternatives. Because the term is so broad, the possibilities of alternative content serve to rouse the interest of a wider audience base. There is no mention as to the nature of this different content, and as such, more research is necessary in order to find out exactly what these alternatives are. Alternative content works to engage with consumers on a more inquisitive basis rather than an inherently negative one, as suggested by Barker.

Another widely used term, live cinema, initially appears to invoke concepts of liveness within cinemas in the way event cinema suggests a form of event in the same space. Liveness as a term can be defined in a number of ways. Peggy Phelan links liveness to performance, and claims performances exist only in the present, as they “cannot be saved, recorded [...] [or] documented,” (1993, pp146) whilst Philip Auslander contends that, “the live can only exist in a context where there is recording. It is a category of the not-recorded” (1999, pp51). These definitions are but a few of many, and the issue that the definition of liveness in itself is not cemented muddies the understanding of the term live cinema. However, in the *Live Cinema in the UK* report, live cinema is defined as, “a film screening utilising additional performance or interactivity inspired by the content of the film” (Atkinson and Kennedy, 2016, pp4).

At the Live Cinema Conference in May 2016, an inaugural event marking the launch of a number of landmark initiatives including the Live Cinema Network and the *Live Cinema in the UK* report, the very question of how to define live cinema was raised. As there have been a number of competing experience cinema businesses emerging over recent years, such as Secret Cinema, Rooftop Cinema and Edible Cinema, there comes into question the place of the term event cinema within this industry.

The overwhelming consensus at the Live Cinema Conference was that the definition of event cinema differs significantly from these other experience based cinema ventures. Live cinema encapsulates the experience based cinema more thoroughly than event cinema, however a lack of consensus in the public eye is placing the two terms in direct competition when it comes to attracting audiences. Research undertaken in the *Live Cinema in the UK* report found that, “consumers do not recognise a difference between event, live, and outdoor cinema, seeing the brands as types of cinema, rather than a unique product” (Atkinson and Kennedy, 2016, pp16). This is particularly concerning for the ECA, the trade body that has

formed around livecasting in the UK, which has worked since 2012 to create a brand surrounding the term event cinema.

Event cinema, then, represents perhaps the most troubled definition of livecasting. The term came about as a result of the emergence of the ECA. The ECA has strong foundations in the UK and Western Europe, and is currently pushing towards growing its membership to include more businesses within the United States. However the lack of uptake may be in part due to the difference in terminology used in the USA and by the ECA. The ECA is keen to encourage the use of the term event cinema, and as such a rebranding of the term alternative content.

Event in itself describes an occurrence of note, something worthy of attendance. Event cinema as a term functions to instil a sense of event at a cinema. Whilst this describes livecasting as discussed in this dissertation, it also implies event-based cinema as related to experience cinema, as referenced previously. 'Cinema at events,' 'events surrounding cinema screenings,' or 'cinema as an event' are all possible interpretations of the term event cinema. These definitions are more in line with the event-based cinema of Rooftop Film Club, or Secret Cinema. Rooftop Film Club, as the name would suggest, is a business that stages film screenings on established roof venues across London, New York, Los Angeles and Chicago. These screenings are often described as events, or experiences. Because the two terms are so loosely interchangeable, public discussions surrounding each experience often make use of the term event without direct correlation to event cinema itself.

The *Live Cinema in the UK* report found that in discussions surrounding outdoor and live cinema on Twitter, the term event was used to describe both. Additionally, logistical questions such as, "What time does the event start?" also added to the lack of differentiation between different cinema formats (Atkinson and Kennedy, 2016). As a result, the relatively vague term event cinema leaves itself open to assimilation into other live

cinema events. That each individual business emerging within the live cinema industry is attempting to create an event challenges the brand power created by the ECA.

Furthermore, as the term event connotes a sense of occasion, the question arises as to how much of an event these livecast screenings are if they are regularly attended. Indeed, occasional attendance at livecast screenings may feel like an event because it is out of the ordinary - it is not part of a usual routine. Audiences may get dressed-up, arrange to meet friends at the screening, and have dinner afterwards, making the entire evening an event. However, how much of the experience can be seen as an event to those who frequently attend livecast screenings? The language here suggests one-off attendance, which would limit the number of people frequenting livecast screenings on a regular basis.

Livecasting as an emerging media industry must now contend with issues that arise as a result of differing terminology, which is reflective of its hybrid nature. Indeed, issues of terminology have arisen as a result of misunderstandings surrounding the concept of terms such as live cinema and event cinema. The notion of cinema is firm in the minds of audiences, and as such, introducing the terms live and event into the fray suggests a divergence from how cinema is traditionally positioned.

The confusing nature of the terminology surrounding livecasting is highlighted by a public survey, which found that 27% of respondents identified the term live cinema as event cinema (Atkinson and Kennedy, 2016). With over a quarter of respondents identifying event cinema as assimilated under the banner of live cinema, the ECA and businesses involved in event cinema will struggle to build a profile or brand independent of other live cinema ventures. Because new businesses are developing, the landscape of cinema is changing constantly to the point that ideas and the discourse surrounding these ideas are difficult to settle. As the livecasting industry grows and attempts to penetrate new territories, the issue of terminology will become increasingly prevalent.

Despite the apparent conflicts that form as a result of these issues, debates and struggles over terminology come about as a result of different media industries converging. This tumultuous period for the livecasting sector is indicative of the realisation of a new, hybrid media industry, as distinct from but connected to cinema.

Instances of Livecasting throughout the History of Cinema

Although livecasting is something of a modern phenomenon, there are instances of liveness in cinemas throughout the history of cinema. In order to understand how livecasting has emerged as a phenomenon of both technology and exhibition, it is important to understand how these practices have developed. Whilst this dissertation focuses on livecasting as it is recently emerging as a hybrid media industry in the UK, liveness throughout the history of cinema was undeniably shaped by instances initiated by the studio system in the United States. As such, this section will address these instances of liveness, as they provide a background as to both the appetite for liveness in cinemas, and how these instances were remediated by the rise of digital technology. Indeed, this remediation allowed for the emergence of livecasting as a hybrid media industry in the UK.

What becomes apparent when looking into instances of liveness throughout the history of cinema is the emergence of live content very similar to what is included under the banner of livecasting as this dissertation discusses. Sports, theatre and opera were all shown live in theatres in both the US and UK throughout the mid-twentieth century, highlighting a strong desire on behalf of both studios and the public for a more diverse range of content in theatres, as documented throughout the following section.

It also becomes apparent that when attempting to trace instances of liveness in early cinema, definitions are blurred by audience unfamiliarity with the process of screening moving images. As such, while it is nearly impossible to construct an image of nineteenth

century liveness in cinema, it is possible to acquire a sense of the aspects that were considered live, and the instances that confuse between live and recorded entertainment. As a result of this, simultaneity emerges as the best representation of liveness in early cinema.

Simultaneity, a concept that was realised through the advent of the telephone, is described as the, “live transmission of voice, the opportunity to direct simultaneous point-to-point communications” (Uricchio, 1998, pp119). This concept took hold in the public imagination as something that could be reworked to suit images too. In reality, liveness in cinemas was not realised until the mid-twentieth century. The predominance of non-fiction films in early cinema, and such descriptors of the medium as “a window on the world,” or “the mirror of nature” suggested simultaneity in such a way that led Newspapers, cartoons and film subjects to assert that some patrons did indeed confuse screenings with real, live events (ibid. pp125).

Although early efforts at simultaneity proved to be little more than aspirations, there were more concerted attempts at exhibiting live content in cinemas. Pre-war efforts to introduce live events into cinemas were stunted by indecision over the best way to make use of television technology. It was not until the end of the 1930’s that livecasting as it is discussed in this dissertation started to truly emerge, as five theatres across London showed live broadcasts of horse races and prize fights (McCoy and Warner, 1949).

In the U.S, the first public screening of live content took place at the New York Theatre in New York City in January 1941. The live content consisted of opera, ballet, and vaudeville performances, alongside a one-act play. Later that year, a second demonstration featured a myriad of live events, including a sketch staged in the studios of NBC and a prize fight in Madison Square Garden. These demonstrations were facilitated by the Radio Corporation of America, or RCA, and worked to attract the attention of Hollywood distributors to theatre

television (as liveness within cinemas was then described) as a method of creating revenue streams and reducing distribution costs. Twentieth Century Fox and Paramount worked closely with the RCA and were the first to invest in this new technology towards the end of the 1930s (Kitsopanidou, 2012).

As post-war affluence spread across the U.S and consumer tastes and practices changed, studios began developing cinema-specific technologies such as 3D and Widescreen in order to redefine motion pictures as specialised, participatory forms of entertainment, and bring audiences back to cinemas. It was, however, theatrical television and the possibilities of this new medium that studios turned to in response to declining theatre attendance (Gomery, 1984). Theatrical television was the process of installing television systems in theatres to enable the viewing of live television events outside of the home. Theatres and studios hoped to draw audiences back to theatres by creating a one-stop shop of centralised entertainment. Demand from the film exhibition market increased the research and development of theatre television, to the point that in 1945, a survey found 60% of exhibitors intended to install theatre television systems (Steen, 1946).

It was not until 1948 that Paramount, Fox, RKO and Warner were working on theatrical television systems with the purpose of furthering the concept of theatrical television. In April of 1948, Paramount first made use of the intermediate film system, a method of processing motion picture film almost immediately after it is exposed in a camera, and then forcibly developing it ready for use in under a minute (Abramson, 1995). It was used to screen a live boxing match to an audience of 3000 people at the Paramount Theatre in New York. Definition of the images was, however, poor, and installation costs of roughly \$35,000 rendered the system ineffective in relation to cost (Kitsopanidou, 2012).

Between 1948 and 1949, Paramount equipped theatres in New York, Chicago and Los Angeles with theatre television systems which enabled the showcasing of Broadway plays

and live sports events such as the World Series and Big Ten football². From 1949 and 1951, Paramount screened 49 individual events. However, after failing to attract investors for its own individual film intermediate system, in 1951 Paramount abandoned its process and instead ordered theatrical television systems from the RCA. After sudden cancellations of theatrical television equipment by Balaban and Katz theatre houses in Chicago, and a reported investment of \$235,000 in television equipment in theatres, Paramount ended all involvement in this field (Kitsopanidou, 2012). The RCA, however, continued with its development of theatrical television systems and by the end of 1952, controlled 75% of the market, as over one hundred theatres had or were in the process of installing theatrical television systems (ibid.).

The challenge facing theatrical television system providers and exhibitors was matching the standards of Hollywood feature films. Studios and theatre chains were looking for cost effective solutions for delivering live content to theatres, and the reluctance of the Federal Communications Commission (FCC) to grant ultra-high frequency (UHF) frequencies on a commercial base for the purpose of theatrical television left exhibitors and studios with two options: establishing privately owned video distribution facilities, or making use of licensed common carriers such as telephone wires (Gomery, 1984). As telephone wires were often unsuitable and expensive, establishing private video distribution facilities became the only viable solution. As such, the limitations of technology came to define mediated live content within cinemas at this time.

Theatres petitioned the FCC to allow for the use of UHF frequencies, however, following the 1952-1953 hearings, the FCC denied theatre television providers the allocation of special frequencies, insisting instead that they make use of telephone lines which, in turn, had a

² Big Ten Football is intercollegiate American football, in which different teams from different Universities come together for championships and tournaments.

detrimental effect on the overall quality of the live images theatres were able to supply (Kitsopanidou, 2012).

Early instances of live content largely comprised of live sporting events such as boxing or football. In 1949 the Baseball World Series was shown to audiences in theatres across Chicago, Brooklyn, Boston and Scranton. In 1951, Paramount Theatres obtained exclusive rights to the University of Michigan and University of Illinois football games, showing them to near sell-out audiences in Chicago and Detroit (Kitsopanidou, 2012). Theatre Network Television Inc. (TNT), an event-driven theatrical television company, showcased the Louis-Savold heavyweight fight from Madison Square Garden live to audiences across eight theatres in Cleveland, Albany, Pittsburgh, Chicago, Baltimore, and Washington to an overall audience of 22,000. TNT then went on to link 29 theatres in 31 cities for the Walcott-Marciano heavyweight championship in 1952, grossing an estimated \$400,000. As is the case with modern livecasting, ticket prices were increased³ despite reservations that audiences would choose to watch the event for free in their own homes (ibid.). In 1955 TNT secured exclusive rights to showcase the Marciano-Moore fight on theatre television, linking 133 theatres and drive-ins in 92 cities for 350,000 people. This single event grossed \$1.2 million as ticket prices rose in some places as high as \$7.20 (ibid.), in comparison to the average ticket price of \$0.49 (NATO, 2013).

TNT was also the first to showcase live performances from the Metropolitan Opera in December 1952 to 21 theatres in 27 cities to approximately 67,000 people, grossing over \$100,000 (Kitsopanidou, 2012). Critic Rose Heylbut noted of the performance that, “even before the performance began, there was a buzz and excitement of being there which is so

³ As of 2015, standard adult ticket prices range from £6-£10 outside of London, whilst standard adult livecast ticket prices range from £10-£20 outside of London, with variances depending on the content provider and exhibitor (Tuck and Abrahams, 2015).

great a part of theatre enjoyment,” (1955 cited in Kitsopanidou, 2012, pp19) a feature that has also become part of modern livecasts.

In 1954, TNT showcased the Met’s opening-night gala to 322 theatres in 27 cities with an estimated box office gross of \$180,000 (Kitsopanidou, 2012). Such was the success and appetite for mediated live content in 1954 that, S.H.Fabian, President of the Stanley Warner Theatre Chain, claimed that, “Everything in entertainment will be shown in motion picture theatres. This is the exhibition policy of tomorrow” (cited in Kitsopanidou, 2012. pp22).

During its period of operation, TNT had capitalised on the FCC’s ban on issuing licences for new television stations. TNT was successful in delivering live content to theatres and businesses across the United States. However, once the freeze was over, new television stations were formed and, thanks to post-war affluence felt by a growing middle class, the public opted to watch these events in the comfort of their own homes.

Hollywood was looking forward to Widescreen and large-scale, big-budget productions to combat declining theatre attendance, alongside 3D and Cinemascope. Theatre Television Associates, formed by a sales consultancy agency, abandoned plans of a number of weekly boxing events, whilst the Stadium Network Television dropped its project to showcase the orchestras of Philadelphia or New York to cities without such a strong musical pedigree.

Theatrical television’s eventual demise came about in part due to the expense of equipment installation, its inability to truly combat free home television events, and the indecision of big studios on how best to integrate these live performances into their repertoire in a way that was financially viable. Ray A. Klune, executive production manager at 20th Century-Fox highlighted this issue:

This, of course, brings up the question concerning to what degree we, as non-theatre owning motion picture producers, will benefit by this kind of a device other

than the revenue that we might derive from licensing theatres for its use unless, of course, we as distributors of pictures acquire the rights to the special events and sell them to theatres as we now sell our pictures (1951 cited in Kitsopanidou, 2012 pp.25).

The necessary development of digital technology, thanks to the Digital Cinema Initiative, the Digital Screen Network and subsequent VPF's that allowed for the uptake of digital equipment by so many cinemas paved the way for the exhibition of mediated live content as it is discussed in this dissertation. From this point, it is widely accepted that the first instance that popularised the use of digital technology to stream content into cinemas occurred in 2006. The Metropolitan Opera in New York began a series of live transmissions with Mozart's *Magic Flute*, streaming live into select cinema theatres around the United States. Subsequent performances, including five more during the 2006-07 season, eight the next, and eleven in the 2008-09 season also included Europe, whilst recorded versions were sent to other countries, as different time zones made live broadcasts unsuitable. In 2008, live broadcasts began to include cruise ships at sea. The 2008-09 Gala was streamed to screens in New York's Times Square, the biggest event to be held there aside from New Year's Eve celebrations.

From early instances of apparent liveness, to the desire for spontaneity, there has been a clear appetite for the showcasing of live moving images to members of the public on a large scale. Efforts had been made to turn these one off performances – such as the State of the Union address – into events for large audiences to experience together. The desire of distributors and exhibitors to include live streamed events throughout the middle of the twentieth century reflects the cyclical nature of cinema. That audience attendance had fallen, and that it became increasingly necessary to draw audiences back to theatres, mirrors issues faced by theatres today. The comments made by critics at the time are reiterated by

contemporary critics of livecasting. Spyros Skouras, President of 20th Century Fox said in 1951 that live content in theatres gave audiences, “seats at performances of the best entertainment that the stage, opera, ballet and concerts worlds have to offer,” a statement often mirrored by contemporary comments regarding the benefits of livecasting, such as, “Seeing live opera with the leading and up and coming international singers without having to travel around the world and pay high prices is a great opportunity” (411, cited in in Barker, 2012 pp78). That audiences were thrilled by the apparent ability of live events in cinemas to transport them the world over suggests audience tastes have been separated only by time.

Although theatre television was never hugely successful, the rich history of instances of mediated live content within cinemas illustrates a lack of technology to support such concepts rather than a lack of excitement surrounding live content. As noted by Bolter and Grusin, “new technologies of representation proceed by reforming or remediating earlier ones” (1996, pp339). As such, it wasn’t until the mid-2000s when digital technology developed that livecasting as a new technology of representation was realised.

One-off live screenings occurred on several different occasions before The Met began streaming in 2006. Bon Jovi, David Bowie and Robbie Williams had concerts streamed into cinemas in 2001, 2003 and 2005 respectively, but it was not until 2006 that The Met’s search for bigger, younger audiences through high quality live streaming allowed for the concept of livecasting to truly take off (Stewart, 2015).

Context of Development through Digital Cinema

The late uptake of livecasting in relation to the history of cinema has so far been credited to a lack in the technology available to make this process financially viable. Until the early 2000s, cinemas worked largely with celluloid and did not have the technology to stream live

events from content producers. That livecasting is emerging as a hybrid media industry reflects the advances made in both digital cinema technology, and the speed and quality with which events may be streamed. Without the rise of digital cinema, the remediation of theatre television systems would have been impossible. As such, it is necessary to understand how the foundation of digital cinema has developed.

The rise of livecasting coincided with the uptake of digital cinema in the early 2000s. Although early livecasts, including the streaming of rock concerts by Bon Jovi in 2001 and David Bowie in 2003, made use of newly installed digital equipment, it was not until the Digital Cinema Initiative took hold that livecasting truly spread. The Digital Cinema Initiative, or DCI, was formed in 2002 and was a joint initiative formed by the six major Hollywood studios to establish a standard design for digital cinema systems.

The main purpose of the formation was to establish specification standards for digital cinema that ensures a, “uniform and high level of technical performance, reliability, and quality control” (Anon, 2016). The cost of printing feature films went from \$2500 to \$50 for digital copies, thereby saving distributors billions of dollars. In order to encourage uptake of digital projectors by exhibitors, the Virtual Print Fee, or VPF, model was created to pass on savings made by distributors to exhibitors. VPF’s are structured to cover the costs of conversions, as distributors pay a fee per film booking as a method of matching the savings incurred by not shipping a film print. As of March 2015, 93,147, or 93% of screens worldwide have been converted to digital (Corcoran, 2013). Additionally, the case for digital cinema was made as a way of protecting intellectual property and fighting against piracy (Barker, 2012, pp4).

In the UK in 2005, however, the Digital Screen Network was established by the UK Film Council to supply 240 screens with free installation of digital equipment on the basis that these screens would agree to show a more varied range of content, with a focus on British

films, foreign language films and documentaries (Anon, 2005a). This enabled a larger variety of content across the UK, as opposed to only being offered in specialist locations. This move again tied in with reduced distribution costs and protection against piracy; however it also worked to promote output of British film makers, and serves as a contrast to high concept blockbusters produced by the big six behind the DCI. This move has therefore allowed for the introduction of live streaming into older, independent exhibition venues that would not otherwise have been able to afford the cost of digital equipment. This serves to benefit smaller communities outside of big cities, and allows for the diversification of venues that do not focus solely on the display of feature films to attract audiences. As a result of this, 74% of UK independent film exhibitors host content other than feature films (Atkinson and Kennedy, 2016). This will include, but is not limited to, livecasting as this dissertation discusses it.

The initiative taken by the Digital Screen Network allowed for the installation of digital equipment across the UK and served to benefit not only smaller venues with limited audiences, but entire communities. This initiative expected those applying for funding to ensure that the equipment would in some way benefit the local community by showcasing films made by local filmmakers, film clubs, or schools (Anon, 2005b). Digital cinema allowed for the projection of subtitles and descriptive audio tracks to enable visually-impaired consumers to enjoy films too. These initiatives not only allowed for a differentiation in what can be showcased at exhibition venues, but also made the UK film industry more inclusive, and more diverse. Outside of the commercial interests of those within film production, such as reduced distribution costs, the Digital Cinema Initiative in the UK has altered the landscape of film in a way that works to build audience interest and loyalty, especially in national output, during times of declining theatre attendance.

At the Live Cinema Conference in May 2016, the Digital Screen Network was widely credited as the point at which livecasting and the introduction of alternative screening methods became possible. It was asserted that, without this initiative, the UK would not have had such a strong foundation upon which to diversify content for audiences across the country. This goes some way to explaining why the UK does have a stronger presence of diversified content for audiences in comparison to other countries, largely across Europe. It also illustrates why the trade association formed around livecasting in the UK, the ECA, was able to form and thrive in the UK as it has. This background contextualises the importance of digital technology in shaping emerging media industries, and also serves to illuminate the necessity of digital technology for the remediation of theatre television.

From this, then, it is possible to suggest that without the Digital Screen Network, the possible impact of digital cinema in the UK may not have been realised. That this initiative has not been adopted worldwide goes some way to explaining why the initial spread of livecasting was largely limited to Western Europe. The UK had the infrastructure in place when the ECA came into being in 2012. When the ECA was formed 93% of cinema screens in the UK were digital. This was the highest number of digital screens in Europe (Anon, 2013).

Aside from the Digital Screen Network, however, the VPF model has also been at work in the UK. Both Odeon and UCI Cinemas Group signed long term deals with all six major studios, while Cineworld signed an agreement with Arts Alliance Media to digitise its remaining 540 screens for a cost of \$44 million. Vue signed an “agreement in principle” with Sony Europe to install its 4K projections systems throughout its cinemas.

This has, however, had a detrimental impact on independent venues. Distributors were keen to make these deals with larger exhibitors, as they represent a bigger share of the market. Independent distributors, which often cater to individual exhibitors, are expected to comply with the same VPF agreements as the bigger distributors despite the significant difference in

financial resources available. This then means that independent venues that did not benefit from the Digital Screen Network are less likely to be able to afford digital projection equipment, and as such, benefit from the diversification of content available.

That digital cinema has been pushed for by larger distributors highlights the impetus behind this change in technology. The reduced financial burden of distribution, the safety and control over what films are shown when and where, all contributed directly to the change and adaptation in technology. Livecasting is but another embodiment of this change, and, as Barker highlighted, was, “a device to persuade investors to bite the digital bullet” (Barker, 2012, pp5). From this comes the suggestion that livecasting was always seen as a remedy for declining cinema attendance. With the uptake of digital cinema, theatres would therefore be more able to attract different, wider audiences through the streaming of content that is currently unavailable. Initially, it was to the Super Bowl, international football, and concerts that providers were expected to turn (Barker, 2012, pp4). This desire to screen events that draw large live audiences was unable to come to fruition until the industry agreed on digital technical standards.

What has become apparent as livecasting develops, however, is the direct impact the practices and discourse of livecasting are having on small-scale and independent touring companies and venues, and how they function as exhibitors. Despite findings from both the Live-To-Digital and BFI reports that livecasting is not seen as a replacement for live theatre (AEA Consulting, 2016 and Tuck and Abrahams, 2015), small, independent venues and touring companies have noted that livecasting is indeed changing how they function and operate. At this point much evidence regarding the impact of livecasting on the function of existing venues is anecdotal; however there are signs that, without collaboration and cooperation, there is the risk that large-scale content producers will directly impact smaller

content producers and exhibitors through their use of livecasting. One particular small touring company stated:

We still have lots of amateur shows, and one-man shows like speakers but theatre/dance/classical music have all gone now and been replaced with the live screenings from National Theatre, Royal Opera House, etc. I realise that's not the answer, that we will just end up with London and cinemas, but we have done it in order to stay open and, so far, that has worked (Anonymous, cited in Gardner, 2015).

This point was corroborated by Elizabeth Freestone, Artistic Director of Pentabus, a small-scale touring company. Freestone highlighted that the infrastructure surrounding livecasting pitches live screenings against live performances, and that if forced into competition with each other, venues will choose the cheaper option – livecasting. Further to this, large-scale content producers such as NT Live often offer their screenings as packages, forcing venues to commit to screening multiple shows over the course of the year. As more and more large-scale content producers develop these kinds of packages, small-scale producers that do not have the luxury of planning a year or two in advance find that venues have fewer dates available to showcase their productions. Whilst large-scale producers work to develop regular audiences for their productions, small-scale producers are finding themselves having to either plan around large-scale producers or face limited exhibition options (Freestone, 2014). In the case of small-scale exhibitors, the move from live theatre to livecasting forces smaller, independent venues to function more as cinemas, accommodating live or recorded livecast entertainment from large-scale content producers at the cost of small-scale or live performances.

Further to this, and as found by the Live-To-Digital report, livecasting is saturated by large-scale production companies offering 'liveness', rarity, exclusivity, and quality that leaves

little room for smaller content producers to engage with the livecasting industry (AEA Consulting, 2016, pp84). Whilst large-scale producers occupy bookings at smaller independent venues, there are also barriers to access that prevent small-scale content producers from recording their productions with intent to livecast. Lack of technical expertise, lack of understanding about whom audiences and partners are, and financial restrictions, are but a few of these barriers (AEA Consulting, 2016, pp15).

Despite these barriers, however, the Live-To-Digital report found that stakeholders spoke of the possibility of creating digital tours. These tours would be presented to live and online audiences, and would likely include post-show discussions across multiple venues as cinemas, producers, and local venues work together to combat the current saturation of large-scale brands. For these co-productions to work, stakeholders would need something of a shared diary through which livecast programmers and presenters could gain a sense of what is taking place on all screens throughout their community. The sharing of information in this way would enable exhibitors to function more collaboratively, altering the ways in which exhibitors interact with one another with the potential to change marketing initiatives, data sharing practices and audience development (AEA Consulting, 2016, pp88). Whilst these discussions are currently on-going, the intent of collaboration underlines another way in which livecasting alters the functions of existing exhibition venues.

Identifying Key Stakeholders

Alongside the rise of digital technology comes the issue as to how stakeholders have become a part of and affect the way livecasting has emerged. That divergent stakeholder relationships are developing across industries highlights just how livecasting is emerging as a hybrid media industry. In identifying stakeholders and the relationships that have formed throughout the emergence of this industry, it is possible to fully understand the hybrid

nature of livecasting as separate but intrinsically linked with cinema, and its development in a digital era.

The obvious key stakeholders of livecasting are those that are members of the ECA. A large number of the members of the ECA are those actively involved in businesses that produce, distribute, or exhibit livecast content. These stakeholders have a direct interest in the success of livecasting and actively contribute to the output and exhibition which subsequently shapes the formalities of behaviour at these sites of exhibition, alongside the success of the output. These include Pathé Live, Royal Opera House, Odeon, Showcase, Pinewood Live, and Vue, highlighting the interest large, multi-national businesses have in the success of livecasting.

Alongside those members directly involved in the output of livecasting, Dolby, Philips and Sony also fall under the banner of stakeholders who are also members. Dolby, Philips and Sony are all involved in the production of technology used in the screening of films and livecast content at cinemas. That they are members of a trade body that is attempting to grow an industry which draws audiences back to cinemas is unsurprising. They each have a vested interest in audiences continuing to frequent cinemas and sites of exhibition that make use of their technology, and are in a position to shape and influence the technology that is used in the future, whether that be technology specifically catered to the streaming of live events.

Although Dolby and Philips are key technological stakeholders, it is important to note that only four manufacturers make Digital Cinema Initiative-approved digital cinema projectors, whilst three manufacturers have licensed the Digital Light Processing, a display device that is used in nearly 85% of digital cinema projection (Anon, 2014). Those manufacturing digital cinema projectors are Sony, Barco, Christie and NEC, whilst all excluding Sony have licensed

the DLP technology mentioned above. These digital manufacturers are stakeholders in the livecasting industry as they have a vested interest in the continued uptake of digital cinema.

Alongside these key stakeholders are those directly involved in the day to day management of the ECA, and subsequently those that make decisions that shape the way in which livecasting develops. Those shaping the ECA influence the direction in which it pushes the industry and the respective methods through which livecasting is marketed. Furthermore, their interest is twofold, as their decisions as board members and President of the ECA will directly impact upon the businesses for which they otherwise work. It is in their interest to ensure the ECA works towards goals that not only promote the work of livecasting, but their own personal business interests.

Other key stakeholders are those directly involved in the funding of projects that benefit or shape livecasting. Whilst members pay a fee to be part of the ECA, a fee which allows for access to box office data which is not otherwise available, other stakeholders such as the British Film Institute (BFI), Creative Skillset, and Arts Council England directly fund initiatives that impact upon the success of livecasting. Arts Council England and Creative Skillset distribute public money, making the British Government a key stakeholder in the success of livecasting. The BFI funded the Digital Screen Network which allowed for the uptake of digital projectors across the country and subsequently enabled the rise of livecasting as an emerging media industry. Both the BFI and Arts Council funded research into the nature of livecasting and live cinema in the UK, allowing for insights into the audiences and the subsequent behaviour of said audiences at livecasting and live cinema events. The research underlines how the industry is managed and what areas need to be more fully researched and developed

Having identified key stakeholders and illustrated both a national and international interest in livecasting, it is important now to understand the types of hybrid relationships that have

formed as a result of stakeholders working together. Entirely different sectors and interests are present and invested in the success of livecasting, as these new relationships transcend industry boundaries in order to develop a hybrid industry in a digital age. Not only are these stakeholders different in structure, but they provide entirely different services. Indeed, it is a hybrid, cross-industry, collaborative relationship that unites digital giants such as Sony and Dolby, with cultural producers such as the Royal Opera House, and publicly funded bodies such as the BFI and Arts Council England. As such, the success of livecasting as an industry is reliant on a number of different kinds of relationships.

Firstly, the groundwork upon which livecasting develops has been based on hybrid relationships of frequent and rich information exchange. Indeed, these exchanges of information dictate, for example, the best position for a camera in an opera house, how best to record sound in a way that does not detract from the live experience of those in attendance, and how these efforts will translate to the big screen, as outlined at the start of this chapter. Indeed, there are still issues to be ironed out⁴. Information-exchange relationships form the basis of any hybrid, cross-industry, collaborative effort, and as such, strong ties between the different industries involved in livecasting solidifies ideas surrounding how best to create, record, and broadcast livecast content (Jaspers and van den Ende, 2013).

Furthermore, these hybrid relationships also challenge decision-making hierarchies. Cross-industry, hybrid relationships unite industry partners with different backgrounds, different priorities, and different ways of working. An established relationship between Sony and Vue Cinemas regarding digital cameras will operate differently than a relationship in which the Royal Opera House makes use of similar digital equipment. Whilst Vue signed an “agreement in principle” for Sony to install its 4K projection systems throughout its cinemas, the Royal

⁴ Drops in sound-capture as a result of characters moving away from their microphones ideal position, as mentioned (Barker, 2012, pp14) is but one of these issues, as outlined at the start of chapter one.

Opera House rents Sony camera equipment from a third party (Ashford, 2015), signifying a change in where the decision-making authority lies, and how stakeholders interact.

As such, challenges to decision-making hierarchies are reliant on clear conflict-resolution. Indeed, these hybrid relationships are that of a combination of different specialist expertise creating decision procedures, and forming the basis of effective co-ordination between first-time partners. These hybrid relationships are shaping the way that livecasting, as both a technological innovation and media industry, functions and develops (Jaspers and van den Ende, 2013).

This point is underlined by earlier discussions of exhibitor functions. As large-scale cultural producers offer their screenings to exhibitors in packages, small-scale producers find themselves having to adapt to and work around these packages in ways that are not necessarily beneficial to the prosperity of small-scale producers and exhibitors. Elizabeth Freestone underlined the need of those involved in the livecasting industry “to sit down – with the Arts Council, with distributors, with the major screening bodies – and have a national dialogue about strategy,” and work towards a hybrid relationship of conflict-resolution that suits all industry members (Romer, 2015).

What becomes apparent from these issues is that currently, the myriad of stakeholders involved in livecasting are still working to formulate hybrid relationships that are mutually beneficial. Information exchange, challenges to decision making hierarchies and efforts at conflict resolution as yet do not work across the different levels of the livecasting industry. Currently these hybrid relationships seem to work in favour of larger institutions. However a national strategy may lay the groundwork to change this.

Currently, the industry is at odds as to whether a strategy would be beneficial. Some, including the National Theatre and the ECA feel a national strategy would be limiting.

Melissa Cogavin of the ECA stated, “I can see why the theatre industry would be interested in a national, strategic framework, but I think that it would be hugely contentious and would go against the interests of free enterprise” (Romer, 2015). A spokesperson from The Globe, however, stated, “with the increasing competition in the marketplace it may be worthwhile looking for opportunities to align our strategies more co-operatively” whilst the Royal Shakespeare Company echoed this, stating, “It would be brilliant to have a national discussion about a framework for screening with other major screeners” (ibid.). Whilst this indecision may continue to have a detrimental effect for small-scale companies moving forward, it is indicative of the period of development in which these relationships are forming, and serves to emphasise the growing-pains that accompany the formation of cross-industry relationships.

Conclusion

What this chapter has illustrated is the means through which livecasting is developing as an emerging, hybrid media industry. Struggles and debates surrounding the terminology of this industry highlight the fact that media industries are coming together in new ways, and describing the process in a way that best suits their individual needs. As livecasting as an industry grows, it continues to challenge established perceptions of what cinema actually is and how it functions.

Instances of liveness throughout the history of cinema and the prominence of theatre television throughout the twentieth century highlighted a desire for mediated live content within cinemas that was only fully realised with the development of digital technology. The strong foundation of digital projectors in the UK, in thanks to both the Digital Screen Network and Virtual Print Fee models, allowed for the rise of livecasting in the UK, and the formation of the only trade body that has emerged as a result of the practice.

These individual elements allow for a wider understanding of how livecasting is emerging as a hybrid media industry as distinct from but linked to cinema. This understanding provides the foundation upon which the next chapter sits. With an understanding of how the industry has developed, it is possible to investigate how the ECA is working to shape and organise livecasting as an industry.

Chapter Two: Examining the Role of the Event Cinema Association in Building an Industry Sector

In order to fully understand how industries emerge and develop, it is necessary to address the function of trade associations in facilitating this. This chapter outlines how trade associations work to bring structure to emerging markets, making use of the Event Cinema Association (ECA), the sole trade association built around livecasting, as a case study to understand how this emerging media industry is being shaped. Additionally, the chapter makes use of John T. Caldwell's framework of deep text rituals to further understand how the ECA is framing the concerns of the industry, and whose interests the ECA serves.

Trade associations offer numerous benefits to members. Free advice, interest representation at all levels, networking opportunities, up-to-date information on technical standards, policy changes and news, and the enhancement of industry reputation are but a few of these benefits. For small and medium sized businesses attempting to penetrate an emerging market, membership to these associations is especially pertinent, as these opportunities may not otherwise be readily available.

Trade associations also work as the most effective way of establishing lines of communication between the Government and their represented sector. They are viewed as the voice of their sector, and as such provide the Government or other authorities with a well-rounded view as to what is necessary for growth and success within the sector. For an emerging media industry and businesses within an industry, each benefit serves to grow and structure a sector, carefully generating a narrative surrounding this practice that can then be relayed to potential business partners, the public, and the Government.

Due to the relatively emergent status of livecasting as a media industry, the ECA is, more than anything, working to shape an industry that is still attempting to identify the path on

which it is travelling. In order to do this, the ECA has produced a best practice handbook that works to ensure technical standards. Additionally, the ECA holds annual conferences and delivers newsletters to members in order to provide information that will help shape decision making across the industry.

The ECA is a non-profit organisation that works on behalf of UK and European livecasting content providers, distributors and exhibitors. It is funded through the subscription of its 101 members, accurate as of 2017, and offers selective benefits in return. Membership is split into four different categories; exhibitors, distributors, content providers, and affiliates. Exhibitors, distributors, and content providers receive access to comScore⁵, formerly known as Rentrak, a release calendar for all cinema releases, discounted tickets to ECA networking events, seminars, and annual award shows, a monthly newsletter detailing news, offers, updates and industry and technical developments, and the ECA's own online directory of other members. Affiliates receive additional benefits, and are able to contribute to and shape the conversation and community of the livecasting industry through the development of a best practice handbook. The handbook covers all aspects of the livecasting industry, including technical delivery, marketing practices, and digital platforms.

The ECA is run by a Managing Director, and an Administrator, overseen by a President, and supported by a board of 8 Directors, each of whom are already established figureheads from the distribution, exhibition, services and marketing industries. Each of the Board members, as well as the President, work for organisations that are members of the ECA, largely as Owners, CEOs and Directors of their respective organisations. The ECA also has a membership team working in the UK and USA respectively, to expand the membership and influence of the ECA into new territories.

⁵ comScore is a global media measurement and research company serving the entertainment industry.

As such, the ECA is operating as a means of organising the different independent businesses involved within livecasting, enticing membership through various benefit systems. Efforts to move into new territories and determine the ways in which livecasting grows underlines the ECA's attempts to solidify its position as the advocacy group for the livecasting industry.

From this comes the question as to how this continued growth and success of livecasting was influenced by the formation of the ECA, and how the ECA has facilitated the expansion into more countries and more markets, shaping the growth and marketing of livecasting. The following section briefly addresses the various ways in which the ECA has instigated these developments and helped to structure the formation of this new industry. Initially it will analyse the use of best practices as a means of improving quality and reliability, as well the standardisation and normalisation of the term event cinema, and will look into the impact this processes has had on the industry.

The Event Cinema Association and Standardisation

The concept of standardisation has come to shape manufacturing and industrial processes of various kinds, including every aspect of the film production chain (Bordwell, 2010). In order to understand the importance of standardisation, it is necessary to first define what it means.

Standardisation is the process of developing and administering technical standards. It can help to maximise safety, repeatability, quality, compatibility, and interoperability (Leotsakos et al., 2014). Standardisation itself has affected nearly every industry. It has saved global industries millions of dollars, and allowed for the progression of societies through industrialisation. According to Dominic Strinati, author of *An Introduction to Studying Popular Culture* (1995), cultural production on an industrial scale "is a process of standardisation...whereby the products acquire the form common to all commodities" (Strinati, 1995 pp57). Standardisation and cultural production, then, are interwoven on a

most basic level, not only for the financial benefit of the cultural producers, but as a means of producing and reproducing cultural output on an industrial scale. From this it is clear that to look into attempts made by the ECA to standardise livecasting is important in aiding understanding of how trade association shape industries.

To understand the shaping of livecasting, then, it is important to understand what aspect of this industry is being standardised, how it is being achieved, and to what end. With the release in early 2015 of *The ECA Technical Delivery Handbook: A Complete Industry Guide*, the ECA has looked to bridge the gap in knowledge that had led to some viewers suffering from “poor sound quality, incorrect aspect ratios and black screens” (ECA, 2015b). This signifies the introduction of a set of industry standards. The handbook covers all areas of membership of the ECA, from content providers, to exhibitors, and works as a step-by-step guide to the live delivery of livecasting.

It is through a best practice handbook and efforts at standardisation that the industry is working to create and distribute a certain level of knowledge to act as a foundation upon which the sector may grow (Caldwell, 2009). Trade associations outline these standards and then encourage the industry to take up the mantle of continuing to shape itself, whilst facilitating industry discussions and networking opportunities. The handbook delivers how-to information regarding every aspect of the streaming process, as well as outlining potential risks and problems for all members to take into consideration. For example, in regards to live delivery via satellite, the handbook poses such questions as whether to receive the broadcast via satellite or the internet, as well as whether the hardware owned by exhibitors can handle subtitling and encryption. The handbook also includes images to anchor the points being made, as seen in Figure 1.

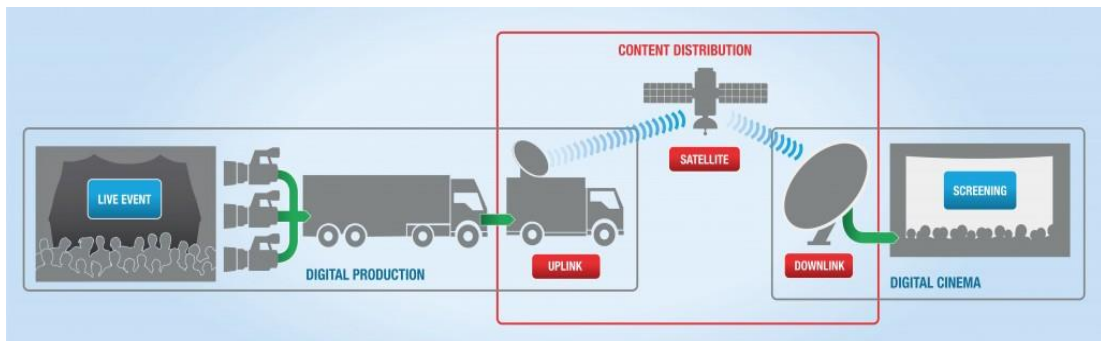


Figure 1. Technical Delivery Handbook (Source: Celluloidjunkie.com, 2015)

In the case of Figure 1, the handbook is detailing the ways in which both audio and picture must be synced when sent to the uplink truck, so as to avoid interruption or delay when streamed into cinemas. Images such as Figure 1 work to anchor the text and break down this new process into something that is more easily digestible. This then allows for the maintenance of a certain standard across membership of the ECA, thereby improving the quality of streamed performances, and the reputation of the industry overall.

The handbook also raises questions as to the future of the technology for livecasting. Again, the handbook states in reference to live delivery via satellite that, “4K delivered events are at the time of writing rare, but this is unlikely to remain so for long” (Sychowski, 2015). That the best practice handbook is illustrating these issues suggests that the industry is very much aware of the point of transition in which it is developing. Advances in technology within this area are happening extremely quickly (ibid.), and it is crucial to the longevity of the sector that exhibitors are beginning their relationship with livecasting with technology best suited to changes in both hardware and software. This will ensure that members can grow alongside the technology so as to reduce the growing pains often felt by new media industries, and instead allow for a more seamless transition into maturity. That these issues are being put forward not only allows for a more seamless uptake of streaming services by livecasting exhibitors, but works to shape the discussions around the kind of technology that is best suited to livecasting.

The shaping of technical standards and the subsequent display of quality and professionalism works to entice membership and give prestige to an emerging industry seeking to align itself with more established cultural industries such as theatre and opera. The introduction of conventions is one of the methods through which the ECA is attempting to standardise livecasting and shape the ways in which the industry grows and progresses. This shaping not only creates an image of professionalism and quality, but also works to reduce the risk of poor quality productions, thereby improving the overall reputation of the livecasting industry.

Through its efforts to standardise livecasting, the ECA is changing the ways in which audiences interact with both the arts and sport. With standardisation comes commoditisation, the process of rendering a good, product, or service that is widely available as interchangeable with one provided by another company. When products become more similar in the consumers eyes, they tend to buy the cheapest option (Appadurai, 1986). This raises questions as to the relationship between content providers and exhibitors. As standardisation allows for the more efficient streaming of the arts and sports into cinemas, would the gap in experience between live and streamed then be bridged? The increased efficiency and continual movement towards technical perfection in an attempt to reduce the risk of poor quality productions and therefore, flaws in the process, would then put the streaming of both the arts, sports and music on par with live viewings.

Furthermore, as standardisation allows for commoditisation, the pricing power of the venues and producers of the events being streamed goes down. This places the cheaper and more immediate means of consuming this culture, livecasting, in direct competition with the content producers. If the current growth rate of the livecasting industry continues unimpeded, it could become a de facto standard and therefore the dominant avenue

through which people enjoy the arts and sport. Currently, there is no evidence to suggest that this is the case, but as highlighted by a report commissioned by the BFI, this could be down to a lack of data, “rather than there being clear evidence of no displacement effect” (Tuck and Abrahams, 2015, pp2).

Standardisation of Discourse

Alongside the standardisation of technical processes, there too is the fact that the term event cinema is consumed by a more sociological concept of standardisation. In the United States, where the term alternative content is more prevalent, livecasting is yet to take off. Melissa Cogavin, MD of the ECA states:

We’re still researching this but the consensus seems to be that as a whole, the US has a way to go and yes, it’s still being referred to as alternative content. There are lots of economic and social reasons why it’s not taken off – and let’s not forget they aren’t called the United States for nothing. The USA is enormous and complex and growth in event cinema won’t happen overnight. The ECA will be working with our US members to build the awareness and support the industry there as time goes on (Cogavin, 2015 cited in Pahle, 2015).

Indeed, as described by Michel Foucault, “discourse is the power which is to be seized” (Foucault, 1981, pp53). Controlling discourse allows for the control of brand power as effective control of terminology and its usage enables consistency of brand voice and tone, clear delivery of information, and higher translation efficiency (Meinertz, 2016). The importance of a strong brand was echoed by market research firm Millward Brown Optimor, when they concluded that, “strong brands continue to outperform weak ones” (Broache, 2008). This underlines why it is that the ECA is intent on controlling terminology and discourse as it solidifies the event cinema brand, furthering its reach in a competitive live cinema environment, as discussed in chapter one. The ECA is keen to manage terminology

and discourse effectively, as it is paramount to maintaining brand consistency (Meinertz, 2016).

In attempting to control and manage the discourse of livecasting through consistent use of terminology, the ECA is looking to further its reach and therefore its sway over what constitutes livecasting, and how to produce, distribute or exhibit this correctly, across territories. In order for the ECA's standards to be accepted in territories such as the United States, it must first ensure that the name of event cinema is accepted and recognised as the flagship term for livecasting. The standardisation and normalisation of a name of a particular industry sector maximises brand power, and brand power allows for a number of different benefits: collective perception, a relationship with consumers, a definition, an intention, and a financial value.

Furthermore, Martin Barker states, "When there is an agreed name for a phenomenon, meanings and expectations can sediment around it" (Barker, 2012, pp10). If livecasting were to be successfully branded as event cinema, the ECA would then become the first port of call for those seeking to penetrate the industry. Those looking to gain access to the industry through the ECA would then conform to the industry best practices set out in the technical delivery handbook, and would further standardisation and spread those conventions as the dominant ideology, allowing for a larger number of members and more sway over the shaping of livecasting.

It is clear then, that the process of standardisation is being attempted through not only the implementation of technical standards, but through the measures being taken to ensure the event cinema brand is seen as the standard for the streaming of live content. Alongside the implementation of best practices, the ECA is working towards ensuring that event cinema, and the Event Cinema Association, are synonymous, not only as a means of ensuring quality but as a way of spreading the norms of the organisation.

Having outlined the methods through which the ECA is standardising livecasting, it is possible to understand the impact a trade association can have on the development of a media industry. The ECA is working to spread the impact of standardisation from technical practices to the commercial branding of a name. Working in tangent with this trade association would provide free technical advice through the handbook, whilst ensuring that the sector within which a business is attempting to thrive and grow, was working towards ensuring a level of quality that promotes business and spreads awareness.

It is important to note, however, that up until now these methods of standardisation are largely aspirations. It is necessary to first develop the rhetoric behind these concepts of standardisation and then promote their uptake. At this stage, the ECA is attempting to generate conversations about livecasting and solidify the brand power of event cinema.

Industry Discussions – Fully Embedded Deep Texts

From discussions of standardisation comes the question as to how the ECA as a trade association is shaping debates and encouraging networking opportunities to further conversations surrounding the future of livecasting. The following section will analyse the use of different forms of fully embedded deep texts and rituals, and semi-embedded deep texts and rituals (Caldwell, 2009). Although there is another element of industrial sense-making and theorizing, in the form of publicly disclosed deep texts and rituals, this dissertation will not address it because it is primarily interested in how the industry is addressing itself, how these discussions are shaped by the ECA, and what can be learned as a result.

Fully embedded deep texts and rituals, coined by John T. Caldwell, describes professional exchanges which facilitate intra-group relations, or, relations between those specifically working within the industry. Examples of fully embedded deep texts and rituals include, demo tapes, pitch sessions, machine interface design, how-to manuals for production

technologies, member newsletters, trade and craft narratives and anecdotes, and corporate retreats (Caldwell, 2009). They are examples of industries discussing themselves in its most pure form. These texts and rituals allow for a glimpse into how the sector considers itself, and how it is attempting to form, maintain, and grow.

As discussed previously, the ECA has produced and distributed a best-practice handbook for its members, written by its members. Other than solidifying best practices, the handbook works to build a system of assisting and mentoring, a benefit of trade association membership, and something that has long been a part of film and television. As with film and television, the act of assisting and mentoring allows for the creation of a “collective knowledge database” (Caldwell, 2009, pp202) that ensures standards are maintained across the board, whilst placing the shaping of practices back into the remit of association members.

Alongside the best practice handbook, ECA newsletters inform of upcoming networking events such as CineEurope, the official convention of the International Union of Cinemas, and allow for discounted registration to encourage attendance amongst members and increase networking opportunities. Furthermore, the ECA prepares show reels, which comprise of different short clips produced by various ECA members to inform, highlight and promote the events that have been produced, and the means through which they are distributed. These methods work to shape how the industry is perceived. The promotional output of the ECA is building a narrative that is then projected to the public, raising awareness of the business of its members, and structuring the way in which livecasting is marketed. Inclusion in a trade association is seen as a badge of quality, and to be linked with a trade association that is providing this output ensures a certain degree of quality is bestowed upon associated businesses.

As the ECA itself is barely four years old, it is not surprising that the majority of the fully embedded deep texts produced are encouraging growth, membership, and the maintenance of standards. Since the emergence of the ECA, box office revenue increased from just under \$10 million in 2012 to over \$35 million in 2014, something that an increase in membership and awareness undoubtedly played a part in (Tuck and Abrahams, 2015). The sector is working towards continued expansion and is mirroring the fully embedded deep texts and rituals used by the film and television industries in an attempt to emulate their multi-billion dollar longevity and success. From this, it becomes apparent that these fully embedded deep texts and rituals are working primarily as a way of promoting and growing the livecasting industry.

Industry Discussions – Semi-Embedded Deep Texts

In order to achieve this longevity and success livecasting must also compete with the challenges of its time. As seen within film and television, challenges posed by VoD, or video on demand, and the myriad of ways through which audiences engage with media has forced the livecasting industry to become increasingly more professionalised in a much shorter period of time in order to compete. Attracting audiences to a developing media industry at a time of increased digital competition faced not only by livecasting, but by film and television as a whole, requires the assertion that the new media industry in question is worth the time and attention it is attempting to garner. The ways in which this has been achieved by other trade associations is through the creation of trade conferences and awards ceremonies, as:

Work worlds are important cultural expressions and sociological activities in their own right. They are composed of professional communities and subcultures that undertake many of the activities that other social groups do: 1) to forge and remake their identities; 2) to legitimate their significance and value to neighbouring

industrial communities; and 3) to interact ritualistically in ways that allow them to survive and prosper (Caldwell, 2009, pp200).

Trade conferences and award ceremonies are semi-embedded deep texts, forms of symbolic communications between media professionals that create “inter-group” relations (Caldwell, 2009 pp203). Inter-group relations function as go-betweens, “that facilitate institutional dialogue and (sometimes) contracting between media corporations and trade associations” (ibid.). They mark points at which the industry gets together to discuss itself within earshot of the public, and are designed to stimulate awareness and discussion in the public sphere as well as within the sector. Of course it is important to remember that despite this, even a casual look at these spaces and behaviours should not be taken as the industry, but rather as sites of “cultural negotiation, marketing and economic give-and-take” (ibid.).

Although the goal of promoting livecasting to the public comes about as a result of these conferences and award ceremonies, this only happens if they are initially successful in forging and maintaining relationships with content providers and media journalists. These gatherings, in particular the annual conference held by the ECA, not only allow for the legitimisation of livecasting, but provide opportunities for networking amongst members and those in attendance. This networking opportunity is a key part of what trade associations provide for members, and are a large part of why emerging businesses are keen to become members of trade associations.

Alongside the legitimisation of the industry, trade gatherings “not only keep members informed about new developments, but also become a means of bestowing career capital – teaching success stories – and of transmitting industrial lore” (Grainge and Johnson, 2015 pp127). Trade conferences and associations help those attending learn how to interact with others in the industry, as well as how to do the job itself (ibid.), and allow for an insight into the ways in which the industry is talking about itself.

The ECA has for the past three years held annual conferences that bring together those within the industry from across the globe. The conferences consist of event speakers delivering how-to content with regards to their specialist industry knowledge, as well as Q&A's, and networking opportunities. An awards ceremony takes place in order to recognise excellence within livecasting, and raise the profile and understanding of the sector. According to Caldwell, "the volatile post-fordist world of film and television production depends on successful relationships and consensus-building...trade shows and markets are the charged sites in which these tasks are broached and bartered" (Caldwell, 2009, pp206). Annual conferences held by the ECA are working to legitimise the industry not only in the eyes of the public, but amongst those invested in its growth and success. These networking and legitimisation opportunities are fundamental to the structure and growth of emerging media industries. Here, the ECA is facilitating an environment in which business owners within the livecasting industry can generate interest and discussions surrounding their work.

The ECA has begun producing videos documenting its annual conferences and features discussions with members surrounding industry challenges, the role of the ECA, and the future of livecasting. These videos feature representatives from prominent members of the ECA and industry leaders discussing each topic, and how they feel the ECA has benefitted them and their businesses. Although, as mentioned previously, these sites operate as an insight into the cultural negotiations of livecasting, and occur within earshot of the public, they are valuable nonetheless in as they provide a glimpse into how these negotiations take place, and what is seen as the most important issue to those within these inner circles. Having analysed their responses, and those of earlier conferences, a pattern emerges depicting the issues those involved with livecasting feel are the most pressing, the ways in which the industry is discussing itself, and offers an opportunity to further understand whose interests the ECA represents.

The most pressing - and perhaps the most telling - issue being discussed was the lack of popular culture events throughout the livecasting calendar. Popular culture as a term almost defies definition. As outlined by John Storey, definitions of popular culture are dependent not only on the context within which they are used, but the country and the language too. Storey outlines six potential definitions of what popular culture can be.

Firstly, popular culture can be described as widespread and populous, it is simply culture that is favoured by many people. A second definition is that popular culture is culture that has been excluded from what is considered to be high culture, defined as cultural products held in the highest regard by society. Traditionally, high culture is inclusive of opera, theatre, ballet, and fine art (Tuchman and Fortin, 1989). As such, popular culture is residual; it is there to accommodate texts and practices which do not qualify as high culture. The third definition is that popular culture is a product of capitalism, the commercial output of companies distributed to the masses to generate money. The fourth is in opposition to the third, in which popular culture derives from the people and is then transferred to companies for commercial reasons. The fifth definition is a combination of the third and fourth, stating that the materials for the generation of popular culture are supplied by commercial companies for the masses, who then create popular culture with the resources provided. The sixth definition suggests there is no such distinction between high and popular culture, and that all past definitions are part of a postmodern culture (Storey, 1998). Making use of Storey's first and second proposed definitions, it can be said that within the context of livecasting, sports, gaming, and anime fall under the umbrella of popular culture.

It is, of course, important to note that the videos mentioned previously were produced by the ECA, and as a result, were edited in such a way that aligns with the narrative the ECA is working to present to the public and potential members. That the topic of popular culture, including sports and gaming, featured so prominently throughout these videos suggests the

ECA is attempting to generate discussions surrounding the inclusion of these events into the livecasting calendar. This would again work to shape livecasting in such a way so as to be more inclusive of different audiences. However, James Dobbin, Director of Event Cinema UK and International National Amusements US, highlights an important figure in relation to popular culture within livecasting:

Cinépolis in Mexico just showed the Mexican games as part of the Brazilian World Cup. They did 745,000 people in their cinemas in 1000 screens, and when you look at some of the arts content which is getting 10,000 people it's not difficult to do the maths and go, "this is what is working" (ECA, 2015a).

Sports have for a long time been included within descriptions of livecasting. However, up until, this point, screenings have targeted more niche audiences, such as those interested in motocross, and Q&A sessions with professional athletes. Clearly, based on the inclusion of the football matches by Cinépolis, the varying degrees with which sport is streamed by ECA members changes from region to region. However Dobbin goes on to suggest this is down to the culture of individual territories:

I think[...]the key is for distributors to look at individual markets and work out what works in those spaces. Developing markets, they don't have the arts culture that we have over here they have a much more popular culture so when you look at things like football games and gaming and anime that works much[...]better (ECA, 2015a).

Although Dobbins is clearly referencing the strong history of arts and culture within the UK, he is also highlighting the fact that the ECA, an organisation based largely within the UK and tailoring to the UK market, must be prepared to adjust the discussions and best practices to those territories with a focus on popular culture events like sports and gaming. Up until this point, the ECA has worked on a seemingly insular basis, focusing on the needs of members

within the UK and Western Europe. As the ECA grows, however, and as members are attracted from across the globe, it is becoming increasingly important to recognise that the arts culture within the UK and Europe are not necessarily as popular elsewhere in the world. This also aligns with the issue of expanding membership in the US. Although the US can boast of its own critically acclaimed arts and culture, it is also undoubtedly a nation of sport and video game consumers.

Drawing on the points mentioned by Dobbins in relation to the need to look at individual markets, there is a clear audience for sports across the US. In the US, the 2016 Super Bowl attracted 111.9 million domestic viewers (Statista, 2016), The 2015 NBA finals averaged 19.94 million domestic viewers across six games (Baron, 2015) and the 2015 Major League Baseball World Series attracted 14.7 million domestic viewers (O'Connell, 2015). As livecasting works to take hold across the US, it becomes clear that the need to push for more diversified kinds of content within livecasting is the means through which this industry may continue to grow and thrive. This point is supported by the fact that popular culture was mentioned so frequently. The ECA as a trade association is shaping discussions as to the future of livecasting around the inclusion of sport and the continued push for expansion into the US.

Alongside the inclusion of sports culture within the livecasting calendar, gaming was a topic that was most frequently raised throughout the conference video. E-Sports, known also as professional gaming, are defined as a form of sports facilitated by electronic systems. Human-computer interfaces mediate the input of players and teams as well as the output of the e-Sports system itself (Hamari, J., & Sjöblom, M. 2015). The most common types of game genres associated with e-Sports are first-person shooter (FPS) and multi-player online battle arena (MOBA), both of which include international tournaments streamed both live and recorded onto websites such as Twitch, a live streaming platform and community for

gamers, and provide prize money and salaries to competitors. In less than five years, Twitch has amassed an audience of 100 million viewers per month (Hern, 2015).

The 2014 world finals of DOTA 2 and League of Legends, both MOBA style games that are hugely popular within Asia, attracted audiences of 20 million and 27 million respectively (Hern, 2015). E-Sports offer the best of both worlds when it comes to expanding livecasting across the globe with tailored content for individual territories. Whilst FPS dominates the American market and MOBA is more popular in Asia, Europe straddles both markets and offers a means through which livecasting may expand into both areas simultaneously, given the strong European presence amongst ECA members.

Aside from this, however, it is worth noting that other organisations have their eyes on the growing success and popularity of e-Sports. BBC3 announced in 2015 that it was going to broadcast the quarter finals of the League of Legends world championship live from Wembley Arena via iPlayer. American cable channel TBS is also showcasing ELeague, the competitive video gaming league for Counter Strike: Global Offensive (CS:GO), a FPS game that is popular in the US and Europe, every Friday night, whilst Sky and ITV are taking a stake in a new 24 hour e-Sports channel called Ginx eSports TV. Although these events will also have been streamed live via Twitch, the fact that the BBC, TBS, Sky and ITV are now involved means that the mainstream media is now streaming this content to a wider audience. This allows for e-Sports to become more readily available to the average viewer generally interested in content produced or broadcast by BBC3, TBS, Sky or ITV as opposed to those with a wider gaming interest and general knowledge of Twitch and the world of competitive gaming.

The streaming of e-Sports on the BBC, TBS, Sky and ITV raises general concerns as to how beneficial the inclusion of e-Sports within the livecasting calendar would be for the industry. These producers and broadcasters could act as the mainstream media through which casual

viewers consume e-Sports, thereby detracting from potential audiences at exhibition venues. From this, the BBC, TBS, Sky and ITV could continue to expand their streaming of e-Sports off the back of the success seen at these live events, coming into direct competition with livecasting. Although livecasting seems to hold a slight edge in the fact that e-Sports attract large live audiences to their events - the 2014 DOTA world finals sold 10,000 tickets within an hour whilst the 2015 Electronic Super League CS:GO event in Cologne attracted 11,000 visitors daily (Williams, 2014) – it appears the BBC and TBS are ahead of the game in terms of tapping into this valuable market. There are moves being made towards the inclusion of gaming within the livecasting calendar, however. Tim Richards, chief executive of Vue, is experimenting with new formats that would allow for the turning of cinemas into video game platforms. Richards stated, “if you ever want to see kids have their minds blown,” allow them to play Fifa with a 70ft screen (Cookson, 2013). The seemingly slow uptake, however, may dampen any attempts made by ECA members to fully build upon this popularity.

From these figures it becomes apparent that both traditional sport and e-Sports offer livecasting the chance to diversify the kind of content and live event that it sells as an experience. This issue also ties into another concern: the need for an effective growth strategy that would work across global markets. As mentioned previously, in order to grow effectively it is important for members to tailor to individual markets. What works in the UK will not necessarily work in South America. However, the prominence of sports and e-Sports worldwide, and the established nature of these events allow for members to create growth strategies that will penetrate different markets more easily. These issues were consciously raised by the ECA in its conference video in order to draw attention to the possibilities surrounding potential growth and diversification, and shape the future of livecasting.

The conference video also highlighted other concerns. The monetising of empty cinema seats and the creation of enjoyable collective experiences were both discussed as challenges faced by livecasting. Scott Glosserman, Founder of Gathr, noted that, “In the United States, across the 40,000 some odds seats 99% of them are empty Monday through Thursday. This is the largest amount of access capacity basically of any industry in the free world” (ECA, 2015a). The very real prospect of attracting audiences in their hundreds of thousands towards either sports or e-Sports at their local theatre allows for the opportunity to maximise this access capacity and draw audiences back to the cinema.

Kymerli Frueh, Vice President of Programming at Fathom Events, describes her interest in attending the ECA conference: “we’re excited[...]it’s really inspirational to be in a room with everyone who’s really passionate about what we do and who is[...]really concerned with bringing consumers back to movie theatres” (ECA, 2015a). Again, that this issue featured in the conference video suggests the ECA is attempting to shape livecasting as an industry by highlighting its potential to monetise empty cinema seats.

These concerns emphasise the underlying motivation for the growth of livecasting, and the subsequent support garnered by those that are heavily invested in the continued success of theatre attendance as a past time. The ECA has attracted the membership of key stakeholders within the film industry, such as Sony, Philips and Dolby, for the precise reason that livecasting offers an opportunity to monetise empty theatre seats across the globe in a way that traditional feature films cannot. It offers these companies an opportunity to invest in entertainment that has a proven global fan base, within an industry they already support. It has become pivotal for these companies to allow for and support the changing face of cinema in order to draw audiences back to the theatres that make use of their products. These businesses will also be aware of how the ECA emphasises the diversification of content and awareness surrounding the potential of livecasting.

Furthermore, it was noted that livecasting has the potential to offer communities collective experiences in a way that feature films seem to be unable to replicate. Brian Keating, founder and chairman of The Tower Digital Arts Centre, highlighted the importance of these collective experiences within his local community:

Live events are changing people's lives in our community, we've got older people who actually say to us "this has changed our life, I now see an event every week, you know, I'm retired I never thought I'd be able to be in Berlin one day and be watching the Bolshoi the next day"[...]it really has made a huge difference to our community (ECA, 2015a).

Whilst the norms of cinema attendance dictates that consumers sit quietly and enjoy the film, live events encourage the response and sense of community that is so much a part of live theatre or sport. These events bring together members of communities that may have otherwise not had the chance to experience events from across the world. They differ from the feature films showcased at cinemas in their attempts to replicate the experience of live attendance, and include interludes and programmes. Whilst cinema audiences wait for the show to begin, the stream shows a shot of the stage and audience in the stalls in front, as though you were seated at the very front of the upper circle. Sitting in the cinema, looking down on the stage, audiences can hear discussions and chatter from those at the live event as a background noise before the performance begins, encapsulating the notion of collective experience.

Plans are also being drawn up by theatre owners to further collective experiences. Stephen Wiener, chief executive of Cineworld, is supposedly planning to allow for smaller auditoriums of about 50-75 seats in order to create an intimate, collective experience (Cookson, 2013). All of these individual elements work to generate a collective experience in

keeping with actual theatre attendance. The desire is to allow for these collective experiences to reach much wider audiences through a myriad of events.

The issues of popular culture, attracting audiences, and community experiences were the most prominent issues raised throughout the ECA conference. The positive attitudes towards growth and drawing audiences back to cinemas suggests that there is a general belief of those working within in livecasting as to the continued growth and success of the industry. This confidence again works to legitimise livecasting as an emerging media industry.

Whose Interests Does the ECA Best Serve?

Again making use of Caldwell's deep textual practices and rituals, analyses of conference videos, conference attendance, and the website of the ECA make it possible to understand the narrative the ECA is producing and whose interests the ECA best serves. The ECA describes its role as, "to support and promote event cinema on behalf of exhibitors and distributors and raise awareness with the general public... [to work] on behalf of UK and European event cinema...providers, distributors and cinema exhibitors to promote this niche market and make it more accessible to the general public through a variety of marketing initiatives" (ECA, 2016a). This self-representation highlights what the ECA sees its role to be: to promote and market event cinema. The ECA's focus on marketing and the narrative it has created regarding its role as a promoter of the livecasting industry is present in all discourse generated by the ECA.

As such, an analysis of all the conference videos the ECA has made available online underlines the prominence of discussions surrounding the marketing of livecasting. MD of the ECA Melissa Cogavin states, "you need to understand the craft of distributing and marketing event cinema because it's unlike anything else," whilst Kymberli Frueh Vice President of Programming Fathom Events states, "the way we market this is not like

marketing a film, and so we all have a collective interest in making sure event cinema survives and thrives across the globe.” Further to these comments, Jamie Woglom, Vice President of Marketing Fathom Events states, “whereas feature films are working a year or two out and they can really build the marketing and advertising and audiences over a long course of time for us it’s such a short period of time” (ECA, 2015a). Whilst these videos offer an insight into the thoughts of industry insiders, and operate as semi-embedded deep texts and rituals that enable further understanding of the industry focus regarding marketing, it is also important to again note that these videos were created and edited by the ECA. The inclusion of these comments within the videos contributes to the overall narrative the ECA is generating. This narrative focuses on the important and specialised nature of livecasting marketing, and the ECA’s role in both shaping the marketing of livecasting and actively contributing to wider marketing efforts.

Further to the conference videos, the narrative regarding the importance of marketing is underlined on the ECA website. The ECA states that “the marketing of event cinema is unlike traditional theatrical marketing. What works for conventional content doesn’t usually apply to the event cinema audience. Getting it right is something of an art form in itself” (ECA, 2017). The narrative is clear. Marketing is the focus of the ECA, and the ECA facilitates understanding of this specialist marketing. The ECA is apparently central to the growth of the livecasting industry. Given this, and in tangent with the Live-To-Digital report it is possible to understand whose interests a focus on marketing best serves.

The Live-To-Digital report focuses solely on theatre in England as opposed to livecasting in the UK as this dissertation discusses. However, it does offer an insight into the ways in which the livecasting industry impacts theatre, the most popular genre of livecasting in the UK (Tuck and Abrahams, 2015). The report underlines that livecasting is seen not as a replacement for live performances, but as a distinct experience that opens up “new ways of

seeing theatre,” (AEA Consulting, 2016, pp13). It found that the digital experience is not viewed as a substitute for attending in person and that livecasting reportedly does not impact or detract from live audience attendance at theatres (ibid.).

Additionally, the Live-To-Digital report found that cost is the main barrier to adoption for content producers who have not yet entered the market of livecasting (66% of respondents). As such, livecasting does not necessarily have a negative impact on live audience attendance at theatres, but it is also not as accessible for content producers because of both the expense of entering the market, and the uncertainty regarding whether any efforts to enter the market have or ever will contribute to an organisations financial stability (64% of respondents agreed with this statement). Alongside these barriers, the report found that organisations are not utilising livecasting primarily to generate revenue, as only 22% of respondents surveyed agreed it very strongly motivated content production (AEA Consulting, 2016).

As such, the financial barriers to entry and the lack of financial reward for producing livecast as outlined by content producer indicates the need for a focus on reducing barriers to entry. A drive for the continued growth of livecasting that will reportedly create an industry generating gross revenues of \$1 billion by 2019 is a drive that does not represent the best interests of content producers. Indeed, content producers and stakeholders surveyed emphasised a need for content development, tailored marketing initiatives, and distribution via online platforms, rather than solely via event cinema, as of greatest concern (AEA Consulting, 2016).

What this underlines is a feeling that event cinema, and by association, the ECA, is currently at odds with the interests of a majority of theatre organisation owners, and does not fully represent the best interests of content producers. A focus on marketing, growth, and increased revenue serves to benefit exhibitors and distributors. Exhibitors experience the re-

engagement of audiences that fall outside the desired demographic of 14-34 year olds with content that occupies normally quiet mid-week show times, and distributors gain stronger returns on their investments. This point further corroborates discussions in chapter one that small-scale content producers are not fully represented by the ECA.

Understanding the narrative and discourse of the ECA underlines how the sole trade body for the livecasting industry is impacting and shaping the emergence of livecasting in the UK. On the surface the ECA seems to be representative of all aspects of the livecasting industry. However, a focus on the discourse produced by the ECA allows for greater insight as to whose interests the trade association best serves. Whilst the ECA is keen to grow and promote livecasting, it appears to not recognise that different stakeholders are at different points in their relationship with the livecasting industry. Content producers, especially those that are small-scale, require further support, advice, and guidance to make the initial break into the livecasting industry, as well as the recognition that cinemas may not suit all content producers as the best site of exhibition. That the ECA is not able to fully represent the interests of all stakeholders highlights the downside of one trade body purportedly representing such a variety of interests in a growing sector.

Conclusion

Through an analysis of the processes of standardisation through which the ECA has led livecasting, and the fully embedded and semi-embedded deep texts, a more fully formed picture of how the ECA has shaped livecasting begins to emerge. It becomes apparent that through attempts to standardise practices, the ECA is trying to reduce risk, and solidify event cinema as a brand.

Additionally, confidence is being built by those within the industry at annual conferences as to the future of livecasting, and as a whole, growth strategies seem to be moving in a direction that would be more inclusive of a larger segment of the global population. Both

sports and e-Sports offer livecasting as an industry the opportunity to grow in both the United States and Asia, whilst the growing awareness of livecasting within already established territories such as the UK and Europe continues.

Annual conferences offered further opportunities for the ECA to shape discussions surrounding livecasting and push for more conversations about livecasting as an industry that is distinct but intrinsically linked to cinema. However, through further analyses of discourse produced by the ECA it became apparent that the association is not necessarily representative of the entire sector. An emphasis on marketing and promotion serves to benefit exhibitors and distributors more than content producers.

Having briefly examined the potential audiences to be gained through the inclusion of events such as sport and gaming within the livecasting calendar, and further to the ECA self-proclaimed position of promoter of livecasting, the issue of how livecasting is being marketed is raised. Chapter three makes use of a number of case studies to understand how different stakeholders with different interests target audiences. From this, more can be understood as to how these stakeholders create meanings that suit their needs.

Chapter Three: How Has Livecasting Been Marketed?

Livecasting as a media industry and the case studies that will be used throughout this chapter - the Event Cinema Association (ECA), Royal Opera House (ROH) and National Theatre Live (NT Live) - produce a range of promotional texts that frame and supplement the deliverance of live mediated content into cinemas. Each organisation has its own website, with the ROH and NT Live offering behind the scenes videos, podcasts and information regarding the latest screenings available. They provide in-theatre adverts, whilst YouTube channels allow twenty-four hour access to these ads at the convenience of viewers. The ROH offers DVDs and box-sets, books, gift bags and CDs whilst the National Theatre offers books, mugs, bags and theatre prints to supplement both the live and livecast performances they display.

This chapter will address these different 'paratextual' layers (Gray, 2010, pp2) as a means of analysing the marketing texts and materials that shape the meaning and experience of livecasting in the UK. The marketing of livecasting provides layers through which audiences must pass in order to reach the livecast itself, potentially constructing different frames of reference before audiences have even reached their seats (Gray, 2010, pp3). Informed by Jonathan Gray's suggestion that media paratexts help constitute the meaning of films and television shows, this chapter focuses on the promotional materials produced by three different bodies with a stake in the success of livecasting, alongside materials produced by exhibitors, to consider how livecasting is being marketed, and on what terms.

The ECA, ROH and NT Live exist in the same market space but are not synonymous as bodies and cultural organizations. As the trade body formed to represent and organise livecasting as an industry in the UK and Western Europe, the ECA has a representative role in the marketing materials it produces for, and on behalf of, the livecasting industry. The ROH is a

member of the ECA, however as an established cultural institution it has a brand that does not require the marketing efforts of the ECA to reach audiences, but is still represented by the ECA through its membership subscription. NT Live is also an established cultural institution, however it is not a member of the ECA. By looking at these three separate case studies, it is possible to understand how livecasting as a media industry has sought to market itself to prospective audiences.

Trailers, in particular, are a distinct form of marketing used by each body that provide insight into the ways in which these institutions view themselves, their audiences, and how best to reach audiences through a public persona (Johnston, 2009). As such this chapter will engage with trailers alongside other marketing material by the cultural bodies, as well as cinema exhibitors, to form an understanding of how livecasting is being marketed and how different businesses are attempting to position livecasting as an event.

The Event Cinema Association

As referenced previously, the ECA is committed to “promoting the sector as a whole, via online and in-cinema promotions” (ECA, 2016a). As such, it is necessary to understand the particular means by which the ECA strives through marketing materials to “give the industry a voice, an identity, direction and support as it flourishes in cinemas, complementing mainstream cinema content,” (ibid.). Trailers are a key promotional form in this respect. Indeed, the ECA has produced a range of cinema trailers to sell the event and experience of livecasting to its prospective audience. In analysing the trailers of the ECA, it is possible to understand what the self-proclaimed trade representative of the industry considers as key to the promotion of livecasting, and to which target audience(s) this message is intended. What becomes apparent from trailers produced by the ECA is an attempt to expand the audience base of livecasting through the tone and tempo of its trailers.

The ECA has produced eleven compilation trailers highlighting seasonal content since its conception in 2012, seven in 2013 and four in 2014. Ten of the eleven trailers follow the same format. These trailers are available online, and are shown quarterly in cinemas. They are not exclusively limited to the programme of adverts before livecasting screenings, instead, they occur before feature films too.

The eleventh trailer features Terry Gilliam, who was at the time directing the English National Opera Company's production of *Benvenuto Cellini* by Hector Berlioz. The trailer begins with Gilliam announcing his involvement with the production, whilst highlighting the fact that the performance will be streamed directly to "your doorstep" encouraging audiences to bring not only themselves, but their children too. Gilliam goes on to praise the ECA, encouraging support for the organisation whilst essentially pleading with audiences:

The work the Event Cinema Association is doing to raise awareness of this new art form is actually wonderful so please, please, please support the ECA, and even more importantly, please come and enjoy the show (ECA, 2014).

Gilliam then fades to black, and the trailer begins. This trailer stands alone because of its celebrity endorsement. Gilliam's membership of Monty Python plays a part in attracting audiences that grew up with or are familiar their work, alongside separate followers who became fans of one of his other features, such as *Fear and Loathing in Las Vegas* (1998), and *12 Monkeys* (1995). Gilliam's endorsement is valuable to the ECA and it is unsurprising that the organisation was keen to include that within a trailer that reaches 2500 screens across Europe, and 25 million people per year (ECA, 2012). This was, it appears, a one-off and since then trailers for the ECA have followed a similar formula.

Each of the 10 other trailers are approximately 1 minute 35 seconds long and comprise of a compilation of screenings produced or distributed by ECA members as available in cinemas

over the course of the coming months. They are accompanied by a song specifically produced for the ECA. The song, titled ECA by Yann McCullough, encompasses pop, rock and electronic elements throughout, with but a few references to the operatic or classical features that comprise many livecasting screenings. From this, and as the images match the beat of the music, the trailers work to create an atmosphere of excitement and anticipation.

Each trailer begins with the words, “Think you know cinema? Think again. Now see more than films,” before launching into clips of the various different screenings available. Each clip is anchored by text describing the types of screenings on offer, such as opera and ballet, live music, theatre, and finally sport, before fading to black with the words “Up close and personal in full surround sound. Watch amazing events from around the world in your local cinema.” The trailers then continue with clips and images as to the screenings available, including the title of the performance and the businesses involved in the production and distribution. Each clip makes good use of the star power within their screenings, including shots of Liam Neeson, from his time in Jeff Wayne’s *The War of the Worlds* (2012), as well as Ennio Morricone and Andrea Bocelli. From this, the trailers fade to black once more, with the words, “Your cinema. Event cinema” before the ECA logo fades in, followed closely by the logos of ECA members, such as the Royal Opera House, CinemaLive, and Cineworld. Cinema-goers are then encouraged to “See your local cinema for event details” (ECA, 2013).

The trailers illustrate the existence of livecasting as a process. The narrative is simple, and its information is clear. The music reiterates the impact of surround sound, emphasising the immersion possible during livecast screenings. It challenges established conceptions of cinema, with the line “Think you know cinema? Think again” (ECA, 2013), highlighting the emergence of livecasting as a new media industry, and as separate from cinema as it is currently known. From these trailers, audiences will have been made aware of livecasting, what it is, and the type of differentiated content it is making available in cinemas.

Each trailer follows this basic format, however some involve different colour schemes and utilise the text and images differently. Aside from these basic changes, the consistent use of the McCullough music and the linking of this song with the images of livecast performances creates a clear cohesion amongst the trailers that ensures they are memorable and distinct, and recognisable as content produced by the ECA.

There is, however, arguably a distinction between the audiences the ECA wishes to reach through its trailers, and the realised audience of livecasting. As illustrated in a report by the BFI and Arts Council England, those aged between fifty and seventy are more likely to have seen either a live or recorded screening of a livecasting event. In contrast, those aged between sixteen and twenty-four are least likely to have seen either a recorded or live performance. Despite a slight rise with those aged between those aged twenty-five and twenty-nine, young cinema-goers are more than 50% less likely to have seen a live or recorded livecasting event than older patrons (Tuck and Abrahams, 2015).

Despite this, the format for trailers produced by the ECA works to attract younger audiences. The music itself encompasses some classical elements, including brief snippets of a string orchestra, however these elements feature less prominently than the heavy, techno-like foundation of the McCullough song. String elements are anchored over the top of images from opera and ballet productions, and dissipate as the clips change to live music, theatre and sport. The heavy, electronic beat continues and builds as each form of screening is introduced before fading to black, reaching a climax with an imposing brass section tone that again mirrors the orchestral reference made earlier in the trailer, and the very nature of some screened performances. However, it is the techno-like foundation that provides a means through which young people may relate to the content. In the UK, the most popular music genres for those aged between twenty and twenty-four are urban and dance. The least popular is classical (Statista, 2016a). As such, the trailer blends the realities of livecast

performances of what is considered high culture with elements of popular culture that works to attract a wider, and younger, audience.

What becomes clear, then, is the desired audience of livecasting as viewed by the ECA. As observed by Judith Williamson, every aspect of an advertisement works as a condensation of the product or service being sold. If the ad appears to be attractive, engaging, edgy, and exciting, livecasting is by association, attractive, engaging, edgy and exciting (Williamson, 1978). The music by McCullough is electronic and fast-paced, it is loud and imposing. It works immediately to hold its audience, suggesting the same of livecast productions. The use of clips featuring renowned actors and composers attaches the ECA, its members, and livecasting as an industry to the public images of these stars, evoking both their aura and success in the process (Gray, 2010, pp28). As Gillian Dyer notes, “the meaning of one *thing* is transferred to or made interchangeable with another *quality*, whose value attaches itself to the *product*” (Dyer, 1982, pp116-117). In the case of the ECA and livecasting, the clips (one thing) are interchangeable with edginess and attractiveness (a quality), which attaches itself to livecasting as an exhibition practice (the product). Through these adverts, and the semiotic chain they create, the ECA is able to give livecasting meaning and value. Over a quarter of cinema attendees are aged between fifteen and twenty-four, and it is through these trailers, and the meanings they create, that the ECA is attempting to draw their attention to livecasting (Statista, 2014).

These trailers sit alone as the high-point in marketing by the ECA. The ECA website states that members will receive promotion through trailers and showreels, and their logo will feature prominently on the ECA website. They will also be promoted in trade shows and on social media worldwide. Whilst this is all true, the ECA has made available online one showreel from 2013, which has garnered 206 online views. Although this showreel was intended for an industry audience, and was displayed at CineEurope in 2013, it remains the

only showreel available online and is now out-dated. Members logos are displayed prominently on the ECA website, however, according to the data available, the expected number of users to visit the site in September 2016 is only 344 (Semrush.com, 2016). From this, it seems little is being done by the ECA to promote members and the process of livecasting to audiences that are currently unfamiliar with the process. There is little marketing material available, and the ECA has a very limited online presence with online social media accounts limited to Twitter, YouTube and LinkedIn.

The trailers produced by the ECA seem to make up the extent of its marketing efforts, and thus the meaning generated by the trailers operate as the sole means through which its desired audiences may be understood. From this it is apparent that the ECA believes its audiences are comprised of younger people that would be attracted by a fast-paced, high-tempo trailer. By associating these traits with livecasting through the use of images throughout its trailers, the ECA is using the promotional address of its trailers to widen the audience-base for livecasting through the tone and tempo of its marketing. This responds to attempts to grow the industry and diversify the sense and meaning of what livecasting really is.

The Royal Opera House

The Royal Opera House has been livecasting performances since 2012. What becomes apparent through its use of trailers and advertisements is a hybridity of meanings, as the ROH works to attract new audiences, without detracting from the aura of cultural exclusivity and elitism that is so often associated with both opera and ballet (Ritzer, 2007). As highlighted by John Storey in *Culture and Power in Cultural Studies: The Politics of Signification* (2010), “opera was transformed from *entertainment* enjoyed by the many into *Culture* to be appreciated by the few” (Storey, 2010, pp92, italics in original). With the introduction of livecasting, venues associated with film exhibition are able to traverse the

line between entertainment and culture, whilst opera retains the barriers to consumption that enabled such a transformation. This becomes clear through both trailers and posters created by the ROH.

The ROH has so far produced four compilation trailers documenting their 2012/2013, 2014/2015, 2015/2016, and 2016/2017 seasons. The trailers are available both online, through the ROH's YouTube channel and in cinemas. Again, as with the ECA trailers, there are similar elements that run throughout each trailer which serves to create a cohesive, recognisable message.

The Royal Opera House logo on a black screen appears almost immediately in each trailer. The audience is being made aware of what it can expect over the course of the next minute. All but one of the trailers then move quickly into a stirring score from the opera house's orchestra, undoubtedly familiar to well-versed opera-goers, whilst simultaneously creating a sense of occasion for unfamiliar listeners. Each trailer is between forty seconds and a minute long, and makes use of a similar outline.

The grand orchestral score is introduced, images and clips from performances are shown, before fading to black with the words "For One Night Only," followed by further clips and either the phrases "In a Cinema near you," "Live from the Royal Opera House," or "Live in Cinema." Again, the score causes the trailers to swirl with excitement and, as with the ECA trailers, pair perfectly the clips and music. A clear, defined, rhythm works throughout each trailer to draw audiences in, anchoring image and sound clearly to recreate the harmony around which each performance is centred. The trailers then go on to illustrate "The World's Finest Artists" or in one case, "The World's Finest Stars," with images of performers such as Bryn Terfel, Jonas Kaufmann, Carlos Acosta and Natalia Osipova. The trailers each stress performances are live from the Royal Opera House, in a cinema near you, and that tickets

are on sale now. The trailers all then fade to black, with the text “Live Cinema Season⁶” and a link to or address of the Royal Opera House website (Royal Opera House, 2015).

The advertisement of the ROH stands in contrast to that of the ECA. Whilst the ECA is keen to align livecasting with ideas of youth, edginess and fast-paced entertainment, the ROH strikes a different tone. Making use of Dyer’s theory once again, “the meaning of one *thing* is transferred to or made interchangeable with another *quality*, whose value attaches itself to the *product*” (Dyer, 1982, pp116-117). In the case of the ROH, the quality here is *exclusivity*.

Indeed, to the unfamiliar eye, trailers for the Royal Opera House shed no light on the actual productions featured in the advertisement. There are several clips of performers and performances; however the exact features showcased are never made clear. There are musical signifiers and those that are more popular are instantly recognisable, such as Dance of the Knights by Prokofiev which is used throughout *Romeo and Juliet*. However it is this exclusivity and the barrier to consumption that alludes to who the ROH understands its audience to be, and the way in which it is addressing them.

This relates again to the transformation of opera from entertainment to culture, and the way in which this introduced a specific way of viewing opera. As highlighted by Jeremy Tambling in *Opera, Ideology and Film* (1987), the redefining of opera as art, from entertainment to culture, “is tantamount to saying that a certain education is necessary to understand it at all: which is a convenient way of policing culture, and making sure it is kept as the property of an elite” (Tambling, 1987, pp108).

This quality of exclusivity underlines the way in which the ROH has a pre-developed relationship with its desired audiences. Whilst the ECA highlights that opera and ballet are now available to view in cinemas, detailing the performance, the ROH counts on audiences

⁶ “Live Cinema Season” is the term used by ROH to describe the time frame during which events available in cinemas around the world. These seasons usually run from September – June.

recognising either certain elements from individual performances or the stars featured in them. The trailers are advertising performances for those already familiar with opera and ballet, and as Williamson highlights, audiences know this because a system of meaning between the ROH and its established audiences already exists. The ROH is making use of these pre-developed relationships, and is significant of the referent systems in place throughout advertisements. Coined by Williamson, referent systems provide ads with the basic meaning material from which they are structured (Williamson, 1978). This system is exterior to the trailer itself, merely referring to it instead of addressing it directly (ibid.). Star names are attached to the ROH through use in these trailers, much to the same effect as discussed with the ECA, however they are largely anonymous to those unfamiliar or uninterested in opera or ballet. As a result of this, these methods of value and attachment operate differently than they do with the ECA, and works to exclude rather than include audiences.

These referent systems and signifiers of value and attachment are present throughout other forms of advertising produced by the ROH. In appealing to an already established audience base, the ROH is able to make use of referent systems that do have basic meaning to that specific audience, as seen in Figure 2. Both Figure 2 and Figure 3 are available online⁷, and as promotional posters in cinemas produced by the ROH. Those unfamiliar with the ROH, its productions and its stars, will struggle to acquire any meaning from Figure 2. unless they are aware of the male star in the poster, Carlos Acosta, and the female star, Marianela Núñez. From here it is possible to research the production advertised, which is *Don Quixote*, a tale of two lovers kept apart by a meddling father.

⁷ Figure 2 was sourced from classicfm.com, home of the classical music radio station as available in the UK. The site was promoting livecast events, and did not directly reference the performance with the poster. Figure 3 is used as the face of the ROH 2016/17 season, as seen in Figure 7, and as such is available in multiple locations online and in cinemas. The image used in this dissertation was sourced from xcsape.co.uk, and was used as the picture to accompany all ROH detailed productions. All posters discussed throughout this section were produced by the brand in question.



Figure 2. ROH Live Cinema Season 2013/14 (Source: ClassicFM.com 2013)



Figure 3. ROH Live Cinema Season 2016/17 (Source: kavanaghcinema.com: 2016)

These referent meanings are again present in Figure 3. Figure 3 contains clear signifiers as to the themes and setting of the production. Again, those familiar with opera will recognise it as *Così fan tutte*, a comedic tale of fiancée swapping set in Naples, however, as with Figure 2, for those unfamiliar with opera and ballet, more research is required in order to understand the ad. However, that the advertisements are not immediately accessible may come to dissuade audiences without a pre-established relationship with opera and ballet.

The quality of exclusivity that runs throughout ROH ads is indicative of what is often seen as the exclusivity of arts described as high culture, a term inclusive of opera and ballet. Value judgements have long been placed on popular culture and high culture, and as explained by John Storey in *Cultural Theory and Popular Culture: An Introduction* (1998), high culture is often viewed as Real Culture. Real Culture has formal complexities, requiring a degree of knowledge in order to understand. As such, Real Culture has to be difficult, as “being difficult thus ensures its exclusive status as high culture” (Storey, 1998, pp6).

Despite livecasting making these forms of art more accessible monetarily and by location, these formal complexities extend into advertisements in a way that retains the barriers to consumption associated with high culture. The very notion that these barriers to understanding have been removed because of the increased availability of performances is challenged by the fact that these exact barriers remain and indeed prevail throughout posters and trailers produced by the ROH.

Regardless, the ROH is still able to attract new audiences through the visual language of film marketing. It is through the language of film marketing, and indeed the language of film, that audiences are able to create meaning in these posters. Since its conception as an industry, cinema has worked to establish a system of meanings through which audiences are able to draw significance from signifiers. This is inclusive of elements such as lighting, lens perspective, depth of field, and the placement of objects within the frame. As a result of this, despite the barriers to understanding that prevail throughout trailers and posters produced by the ROH, audiences are still able to acquire a sense of genre and narrative. Indeed, this is the case with both Figure 2 and 3.

In Figure 2, the physical closeness between the two performers signifies a romantic genre. Their embrace connotes a romantic connection, whilst their expressions are pained, suggesting the narrative that their relationship is either experiencing or causing turmoil.

They are the sole focus of the poster. From this, audiences are able to infer that this is also the case in the production.

The use of black and white elaborates on this, drawing attention to the performers. A recent study found that black and white advertising causes viewers to focus on the essential, defining aspects of a product (Lee et al., 2014). It forces viewers to focus on the basics. In the case of *Don Quixote*, these basics are the relationship between the performers. Audiences unfamiliar with the production are able to infer narrative and genre through the styling and language of the poster alone.

The contrast between the black and white of the image and the harsh red of the term live draws the attention of audiences away from the couple, and towards the concept of livecasting. It engages them with the theme and genre, and then invites them to further investigate the liveness of such a performance. The ROH is engaging with audiences through the visual language of film, whilst introducing a new means through which their performances may be consumed.

With Figure 3, there are connotations of romantic relationships between the four performers. There is a sense of mystery as to the nature of these relationships, and how the couples relate to each other. Indeed, as with Figure 2, the poster works to highlight the romantic narrative of the production through the visual language of film marketing. It is through the styling and visual signifiers present in both Figure 2 and 3 that the ROH is able to create meaning for unfamiliar audiences.

Alongside the connotations of narrative and genre are strong references to both live attendance at an opera house, and the demographics of these audiences in attendance. Indeed, at first glance Figure 3 could be mistaken for a young audience viewing a performance. The background of the image features the regal red and gold of the décor and

curtains often found in opera houses. The people in the poster are seated, facing what looks like a stage with a scenic back drop. What becomes apparent, then, is that without the foundation of knowledge that allows for a better understanding of the signifiers that allude to the exact performance, the poster simply works to imply the average profile of those in attendance at live performance.

As such, the ROH is able to align its brand with younger audiences in an attempt to attract them to performances. Through the suggestion that younger audiences already frequent opera houses and performances, the ROH is able to imply to a breakdown in barriers to consumption without directly referencing performances that would actually further understanding for new audiences. The adverts produced by the ROH allude to opera and ballet as already having acquired a younger audience base that would associate the art with youth and modernity. A focus on this target market would suggest a concerted attempt by the ROH to broaden its audience base, and associate itself with a young market. The ROH is assimilating the attributes usually assigned to this age group, such as: relevance, popularity, experimentation, freshness, digital nativity, connectivity, and innovation. Through these connotations, there is an implication that the ROH is intrinsically linked to these qualities too, furthering the idea of such audience demographics.

From this comes the message that the ROH is treading the line between attracting new audiences without alienating those already familiar with and attracted to the exclusivity of opera and ballet. It is retaining an aura of exclusivity that attracts audiences familiar with opera, whilst appealing to unfamiliar audiences by highlighting the genre and message of productions, alongside the relatable profile of its audiences, all of which are inherently more accessible as concepts. The hybridity of meaning created by the ROH throughout its marketing is illustrative of the hybridity of livecasting as an industry that is linked to but separate from cinema.

Throughout *Culture and Power in Cultural Studies: The Politics of Signification* (2010), John Storey analyses introductory textbooks published to educate readers as to the basic requirements needed to understand and enjoy opera. In *Opera for Dummies* (1997), attempts are made to secure readers against intimidation and insecurity that many of those unfamiliar with opera experience. It recognises the barriers to consumption, and exclusivity this brings to the art and the role this plays in attracting audiences. “In fact, plenty of opera snobs are perfectly *happy* that you don’t understand. They’d love opera to be an exclusive club, an elite corps, a sacred order” (1997 cited in Storey 2010, pp94, italics in original). Although these comments are somewhat tongue-in-cheek, there is a clear play on these beliefs that, in turn, reinforces them as concepts. Indeed, whilst the book hopes to play-down these barriers to consumption, without them, the book would not exist.

It is this attitude of exclusivity that the ROH is simultaneously alluding to and breaking down. It is through a lack of descriptors, and signifiers such as music and performers, that the ROH addresses audiences already familiar with the world of opera and ballet. It is through the promotion of genre, narrative, and audience depiction that the ROH is able to attract new audiences. As such, there are clear attempts by the ROH to make use of livecasting as a means through which opera and ballet may straddle the worlds of both culture and entertainment. Livecasting is being used as a means through which the ROH brand may reach new audiences, whilst simultaneously reinforcing barriers to consumption that attract and retain old audiences.

Despite attempts at attracting new audiences, as noted by Gray, trailers mark an initial point of contact between audiences and product, and promise genre and meaning (Gray, 2010). If this initial point of contact retains barriers to understanding, the number of people able to interact with the ad will be reduced. This may go some way to explaining why opera, the dominant genre of livecasting in the UK and Ireland with more than twice the number of

productions than theatre, generates only half of the box-office revenue of theatre (Tuck and Abrahams, 2015). Whilst the posters allow for a greater sense of meaning, the exclusivity of adverts produced by the ROH prevails.

Having outlined the marketing methods of the ROH, Pierre Bourdieu's theories of cultural capital, habitus and field help enable an understanding of the power structures, power relations, and social practices that guide these methods. For Bourdieu, culture dictates social practices by aligning both people and groups to institutionalised hierarchies. The dictation of social practices is perpetuated by cultural capital; the skills, mannerisms, and credentials one gains through membership of a certain social class. Bourdieu articulated how cultural capital relates to the acquisition of power and the notion that cultural capital works to maintain institutionalised hierarchies. This idea of power aligns with concepts further developed by Bourdieu, specifically that of both habitus and field (Bourdieu, 1986).

Habitus refers to the physical incarnation of cultural capital, and the deeply entrenched skills, habits, and dispositions that have developed as a result of life experiences. It also refers to "tastes" relating to certain cultural objects such as art, fashion, and food. Bourdieu noted that habitus was often so deeply engrained that people mistook it as occurring naturally, as opposed to having been culturally developed. This therefore perpetuates social inequality and exclusivity as some believe themselves to be predisposed to high culture pursuits (Bourdieu, 1984). Furthermore, Bourdieu interpreted the social world as divided into separate fields, such as art, sport, or education. Fields are distinct areas or arenas with their own rules, forms of capital, and knowledge, and are fairly autonomous from one another. As such, habitus operates within a specific field, with the amount of cultural capital held by an individual dictating their position within the social hierarchy (Bourdieu, 1980).

With this interpretation it is possible to understand the factors that dictate notions of exclusivity relating to the marketing of the ROH. The notion of habitus underlines the

intrinsic link between taste and exclusivity. Indeed, the marketing of the ROH is targeted directly to an audience of a certain social class with a certain amount of cultural capital. In Bourdieu's 1986 work *Distinction*, he directly related French citizens' taste in art to their social position, arguing that culturally ingrained habitus shaped aesthetic sensibilities (Bourdieu, 1986). Having been exposed to fine art since an early age, upper-class individuals had developed the habitus necessary to appreciate it. Working-class individuals may not necessarily have had such opportunities, and as such had not developed the habitus appropriate for such an understanding. As has been underlined in this chapter, the ROH plays on this necessary habitus with its marketing of livecast content, further perpetuating barriers to consumption. The concepts of cultural capital, habitus and field are present throughout the marketing of the ROH, accentuating the fact that the deeply entrenched exclusivity of the ROH prevails despite attempts to appear more accessible through the use of livecasting.

National Theatre Live

In the UK and Ireland, theatre is the most popular of livecast screenings, with 45% of the market share (Tuck and Abrahams, 2015). NT Live performances have been viewed by over 5.5 million people in over 2,000 venues across the world, including 650 in the UK (National Theatre Live, 2016). NT Live is a prominent non-member of the ECA, and represents the leading independent producer and distributor of livecasting entertainment.

Both the ROH and ECA produced compilation trailers detailing the upcoming features of their seasons. NT Live produces both individual and compilation trailers for its performances and as such, seemingly follows no set format. From this it becomes difficult to build a picture of a clear, cohesive message NT Live is attempting to convey. What can be taken, however, is how the language and tone of each trailer works to attract audiences.

The trailers differ in length, ranging from thirty seconds to a minute and a half. Each trailer highlights popular and prominent aspects of each performance, appealing directly to a wider audience as opposed to focusing on more niche aspects. Each trailer matches images and clips of performances with music that matches the overall tone of the performance. As with *Frankenstein*, the trailer opens with a violin bow scratching across the strings, with a drum mimicking the beat of a heart. Anticipation builds, as Frankenstein's Creature can be seen clawing at a screen seemingly made of human skin. The music intensifies until the Creature bursts from behind the screen before a heavy, electronic base line carries the trailer forward (National Theatre Live, 2014).

With *War Horse*, clips of the production are accompanied by light trumpet, violin and flute notes that build with hope and dip with nostalgia as the trailer charts Albert's relationship with his horse Joey, and the subsequent hardships that fall upon them both during the War. The music effectively matched with scenes of a marching band which works to create a sense of unity and cohesion between the trailer and the production itself. This in turn creates the sense that what is shown live is comprehensively recreated for audiences in cinemas (National Theatre Live, 2016b).

The trailers are embellished with four and five star reviews from various prestigious news outlets, and often begin with a voiceover calling productions "The Best of British Theatre." The quality of both the acting talent and production is made clear with "Academy Award winner Helen Mirren," "The Tony Award winning Comedy *One Man, Two Guvnors*," and "*Hamlet*, starring Benedict Cumberbatch in an award winning production" (National Theatre Live, 2016a).

What becomes clear, then, is the message NT Live is attempting to convey to audiences through its trailers. The National Theatre is an established cultural institution, and as such, works less to promote its brand in individual trailers than showcase its ability to stage

effective performances of the highest calibre. From this, and again making use of Dyer's theory, the quality relayed throughout these trailers and the message relayed to audiences is in fact, the quality of the productions. Again, as with the ROH, this is something that is present across the paratexts used by NT Live, as seen in Figures 4 and 5 below.

These posters mirror the message conveyed by the trailers. The simple showcasing of talent and quality available on screen works as the National Theatre, like the Royal Opera House, had a global presence before it began livecasting performances. This undeniably eases the burden of marketing and audience engagement, and instead works to highlight the accessibility of quality NT Live productions. Much in the same way that the ROH is aware of its established audience base, NT Live works to make audiences aware that its cultural output transfers well into cinemas, as opposed to making audiences aware of livecasting as a process as the ECA does. From this it becomes clear that NT Live sees itself as the home of "The Best of British Theatre" as it attempts to reach audiences across the country with its reworking of classical and contemporary performances.

The trailers analysed above provide audiences with an idea as to how these performances will translate onto the big screen. As with trailers for feature films, they give a sense as to the tone of the production, alongside camera angles and shots that can be expected in the livecast performance, indicating just how the view from "Best Seat in the House" looks.

In understanding these different perspectives it is possible to understand how meaning is created in the livecasting industry, and how these individual producers see themselves, imagine their products, and build their public persona (Johnston, 2009). The ECA is attempting to attract audiences and convey a sense of edginess in association with livecasting. It is working to attract younger audiences and align this process of beaming content into cinemas with concepts of innovation and ingenuity that capitalises on digital

technology. The ECA generates meaning surrounding livecasting as separate of cinema feature films and looks to brand the process as event cinema.



Figure 4. *The Audience* (Source: CelebrationCinema.com, 2015), Figure 5. *Frankenstein* (Source: Cineplex.com, 2016)

The ROH is using the meaning surrounding both its opera and ballet performances to appeal to a more targeted audience, relying on these referent systems to attract those already interested in opera and ballet, but perhaps unable to attend live performances, or unwilling to queue to get tickets. It is making use of the language of cinema to attract those unfamiliar with both opera and ballet.

NT Live is spreading awareness of the rich pedigree of actors it attracts to star in its performances, and the quality with which it deals with traditional and contemporary pieces. Both the ROH and NT Live are recognised as established cultural institutions and as such, make use of marketing material to target audiences familiar with its work and convey livecasting as a means through which their productions may reach larger audiences. The ECA

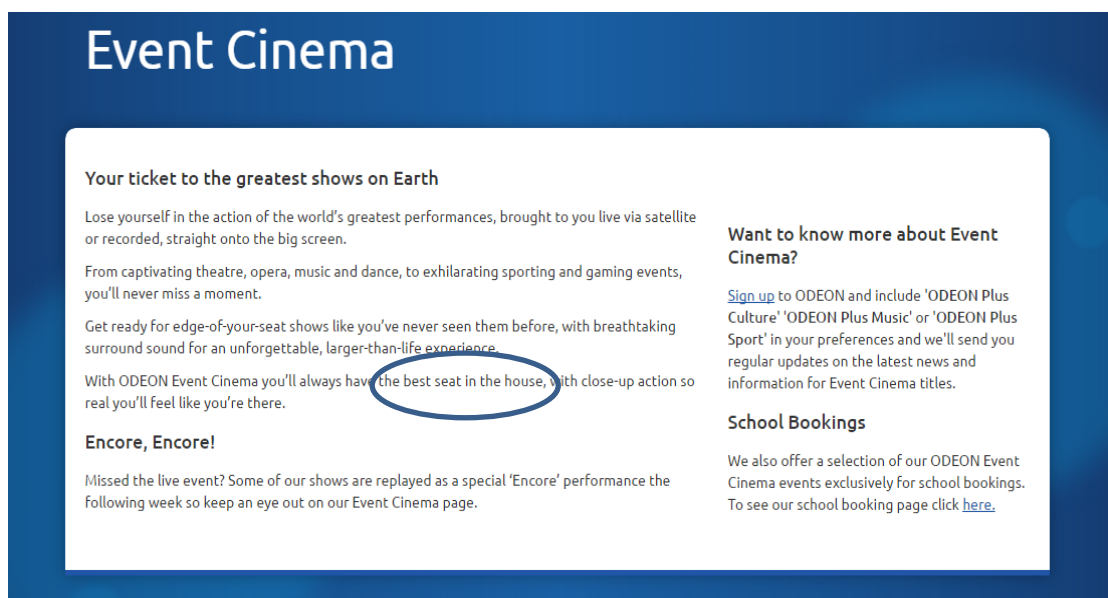
creates a sense of wonder surrounding the process of livecasting itself, engineering meaning in a way that aligns this intrigue with the entire industry.

Each case study has illustrated how divergent players are creating meaning in the livecasting industry in different ways, what it means to beam content into cinemas, and the benefits this provides to audiences around the world.

How is Livecasting Marketed by Exhibitors?

In the UK, the largest cinema chains are Odeon, Cineworld, Vue, National Amusements, and Empire Cinemas, comprising nearly 80% of the exhibition market (Statista, 2016b). Of these chains, all showcase livecast screenings but only Odeon, National Amusements and Vue are members of the ECA. Having looked into the ways in which NT Live, the ROH and the ECA have constructed meaning for livecasting within marketing, addressing the ways in which individual exhibitors also do this allows for a more comprehensive sense of the overall marketing of livecasting in the UK.

Of these cinema chains, Odeon is the largest with nearly a quarter of the market share (Statista, 2016b). Across its marketing, Odeon refers to livecasting exclusively as event cinema, as seen in Figure 6 taken from the Odeon website.



Event Cinema

Your ticket to the greatest shows on Earth

Lose yourself in the action of the world's greatest performances, brought to you live via satellite or recorded, straight onto the big screen.

From captivating theatre, opera, music and dance, to exhilarating sporting and gaming events, you'll never miss a moment.

Get ready for edge-of-your-seat shows like you've never seen them before, with breathtaking surround sound for an unforgettable, larger-than-life experience.

With ODEON Event Cinema you'll always have the best seat in the house, with close-up action so real you'll feel like you're there.

Encore, Encore!

Missed the live event? Some of our shows are replayed as a special 'Encore' performance the following week so keep an eye out on our Event Cinema page.

Want to know more about Event Cinema?

[Sign up](#) to ODEON and include 'ODEON Plus Culture' 'ODEON Plus Music' or 'ODEON Plus Sport' in your preferences and we'll send you regular updates on the latest news and information for Event Cinema titles.

School Bookings

We also offer a selection of our ODEON Event Cinema events exclusively for school bookings. To see our school booking page click [here](#).

Figure 6: Odeon Website Event Cinema Page (Source: Odeon.co.uk/eventcinema, 2016)

As a member of the ECA, the use of the term event cinema is in line with the branding efforts made by the ECA. The ECA is looking to create a cohesive brand for use by all members so as to grow the industry and present a united front for the industry moving forward. However, as addressed in the first chapter, issues of terminology have been of prime concern for the ECA. Melissa Cogavin, Managing Director of the ECA stated:

We [the ECA] branded it event cinema but before then it was branded alternative content. The hardest thing was trying to get the message out there. Part of what we did at the ECA was to give it a brand and to help it on its way (Grater, 2016).

Indeed, the term event cinema is used by another of the theatre chains and ECA member, National Amusements, or Showcase Cinema, as seen in Figure 7.



Figure 7. Showcase Cinema Event Cinema Poster (Source: Author, 2016)

The ECA has 25 members that are exhibitors, accurate as of July 2016. Of those 25 exhibitors, 32% refer to the process of livecasting as event cinema, including Odeon and Showcase as mentioned above. 60% of members refer to the process by making use of the word 'event(s)' without directly calling it event cinema. For example, a large number refer to livecasting as 'special events' or 'live events'. Only 8% refer to livecasting as either alternative content or alternative programming.

As discussed in Chapter One, the term event cinema creates expectations for audiences. It signifies an occasion and as such, creates a sense of anticipation surrounding these events. Indeed, how exhibitors choose to market livecasting outside of the meanings decided upon by content producers, forms much of the initial point of contact for audiences with livecasting. These advertisements have the power to intrigue or attract audiences before they have taken their seats in the auditoriums. They have the potential to reach a wider audience than in-auditorium trailers, as they often occupy the wall space of the lobby or foyer, whilst livecasting trailers are shown in relation to particular films being screened, and the proximity of live performances to the date of cinema attendance.

Whilst this is the case, and as discussed throughout this chapter, the ROH makes use of the term live cinema to market its performances. Indeed, whilst this terminology is used across its marketing material and online presence, it can contrast with the language used by exhibitors. Figure 7 and Figure 8 were found in the same cinema on the same day. Although from the posters it is clear what is being advertised, the difference in language may cause confusion amongst audiences. These kinds of issues come to signify the state of development livecasting as an industry is in. That meaning is being constructed differently by various stakeholders in the livecasting industry signifies how they are motivated by different factors. Exhibitors are keen to attract audiences and draw them back to the cinema. Event

cinema as a term creates a sense of occasion that is more descriptive than live cinema, as observed in chapter one.



Figure 8. ROH poster in Showcase Cinema (Source: Author, 2016)

Although these issues have been discussed in chapter one in relation to the emergence of livecasting as a media industry, it is important to analyse how this terminology is shaping and impacting the ways in which livecasting is being marketed. This differing terminology amongst members again highlights the period of development the livecasting Industry finds itself in. Indeed, non-members of the ECA, such as the exhibitor Event Cinemas, still refer to the process of livecasting as event cinema, whilst some members of the ECA, such as the ROH do not. This period of development and the nature of differing terminology reflects the way in which individual exhibitors are attempting to create meaning for their audiences. Despite these differences in terminology, however, there appears to be a coherent strategy across exhibitors in the language used to promote livecasting.

The Best Seat in the House

As seen with Showcase in Figure 7 and Odeon as circled in Figures 6, this strategy is the notion that cinemas have the ability to offer audiences The Best Seat in the House. Indeed, this exact phrasing is present with Empire Cinemas, as circled in Figure 9, and Vue and Cineworld as described in press releases below:

[Vue] live and event cinema showings are continuing to be hugely popular. We take pride in providing our customers with *the best seat in the house* for a host of sought-after shows bringing the best of the West End to all corners of the UK (Styles, 2016, my italics).

Event cinema can transport you to the Royal Opera House in London's Covent Garden from the comfort of your local Cineworld seat. The greatest stars of ballet and opera are coming to a cinema near you, filmed with multiple cameras so that you get *the best seat in the house* (Cineworld.co.uk, 2014, my italics).

From this it becomes apparent that at least 80% of exhibitors in the UK are marketing livecasting on the basis of its ability to give audiences The Best Seats in the House. Indeed, the term House in relation to theatre directly refers to either the auditorium or audience itself (Lathan, 1999), and indicates an advertising focus on the livecasting of theatre, opera and ballet. Exhibitors are playing on this terminology to connote their ability to not only provide The Best Seat in the House, but essentially transport viewers from their local cinema to the location of the performance. It is this meaning that links the advertisements of livecasting with not only early cinema, but theatre television as it was discussed in chapter one, as Spyros Skouras, President of 20th Century Fox from 1942 to 1962 claimed theatre television gave, "audiences seats at performances of the best entertainment that the stage, opera, ballet and concerts worlds have to offer" (Skouras cited in Kitsopanidou, 2012 pp41).



Figure 9. Empire Cinema Event Cinema Page (Source: empirecinemas.co.uk/extra_synopsis, 2016)

This rhetoric relies on the belief that livecasting has the potential to transport viewers. Again, this is reinforced with statements such as, “event cinema can transport you to the Royal Opera House in London’s Covent Garden” and, “Let us take you there.” This use of this language mirrors techniques used throughout Hollywood, highlighted by an emphasis on the ability of CGI and digital technology to transport viewers and immerse them in different experiences. Within the past eight years, films such as *Gravity* (2013) and *Avatar* (2009), both of which make use of innovative digital technology, have been marketed based on their ability to take viewers to Pandora, “a spectacular new world beyond our imagination” (Scifiscoop.com, 2009), as well as experience space travel and, “the emotion of what it’s like to be there in a time of crisis” (WarnerBros, 2013).

This immersion and potential to transport viewers is present within the marketing of livecasting and the digital context of its emergence, illuminating the ways in which, as noted by Tom Gunning, “every change in film history implies a change in its address to the spectator, and each period constructs its spectator in a new way” (Gunning, 1986). With livecasting, this address is continuing with the concept of transporting viewers with digital technology, and pushing for cinemas to be seen as immersive environments in which

transportation to another world, beyond our planet, or simply to a different theatre, is possible. It is indeed this promise to transport audiences that draws them back to the familiar comfort of their local cinema.

Moreover, the connotations of *The Best Seat in the House* are that of actual superiority to viewing performances live. There is an emphasis on multiple camera angles, surround sound and high definition, all elements unavailable to those in attendance at the live performance. What is being marketed is an immersive experience better than the live event. For those unable to afford, or simply those that have missed out purchasing what is considered to be the actual best seat in the house, there are often obstructed views to contend with. The promise of unobstructed views and multiple camera angles offers audiences of livecast performances an opportunity to experience more than they would otherwise have been able to. This emphasis on the additional benefits to livecast performances over live attendance paints the picture of a superior experience.

It is this superior experience that is being sold to audiences. Martin Barker did, however, find through his research that some audiences felt strongly about the authenticity of the live experience with statements such as, “naturally the experience of actually being in the opera house with all the buzz and excitement cannot be reproduced,” “obviously not the atmosphere of being at the theatre,” “obviously lacks the every night an event feel,” and, “of course a streamed performance cannot compare with a live performance” (483, 581, 357, 479 cited in Barker, 2012, pp62-63). What is signified by these comments, and the frequent use of the word “obviously,” is that livecast audiences do not expect the exact reproduction of experience from live event to screenings. What becomes clear, then, is that audiences willingly sacrifice this atmosphere or buzz for the heightened experience of multiple camera angles and surround sound. This willingness is being capitalised upon by exhibitors.

Indeed, the willingness to sacrifice atmosphere and buzz was emphasised by some of those questioned by Barker. "It was better than a live performance in two respects. Having close-ups of the singers was better than using opera glasses. Secondly having cameras behind the stage in the interval was fascinating," "the directed camera adds to the emotional impact," "you actually get a better view of the performance than in the actual theatre" and, "unless you have paid the earth you don't always have an uninterrupted view of the stage" (483, 357, 344, 479 cited in Barker, 2012, pp62-63).

What becomes apparent is the way in which the marketing of livecasting by exhibitors is playing upon its strengths. The promise to transport audiences suggests an experience that captures every aspect of a live viewing. If viewers allow themselves to be transported and immersed, alongside the inclusion of the live post-show chatter projected onto cinema screens, an occasion is created that challenges the live performance itself. As livecasting grows and as the norms of livecasting attendance are settled, there lies potential for livecast screenings to effectively mirror, or in turn, surpass the experience of live performance attendance, as discussed throughout this dissertation.

Emphasised too in these adverts are the financial benefits of livecasting. "No air fares, no hotel costs," "the world's greatest performances" and, "the best music, film and arts events from around the world" all contribute to the impression of gaining great, worldly experiences at a reduced cost. That it is the *world's* greatest performances connotes images of far-flung performances that many viewers would realistically never see. The expense of travelling across the world for a performance is attainable for very few, and as such, largely out of reach for much of the audience. The expense of such a trip is not hard to imagine and the undefined nature of the term The World signifies locations limited only by the audiences' imagination.

Whilst screenings do come from locations around the world such as Australia and the United States, there are also a large number of UK-based livecasts that comprise much of the remaining 2016/2017 calendar year in the UK. Nearly 70% of screenings from September 2016 until July 2017 will be screened from performances in the UK. This is of course a testament to the strong cultural heritage of the UK, however the emphasis of the marketing that livecasting provides the opportunity to see “the world’s greatest performances” implies a much more diverse array of screenings. This is again indicative of the growing nature of livecasting and, as mentioned in chapter two, as different regions work out what content better suits them, it is likely more diversified content will become available.

Alongside these perceived financial benefits are connotations of exclusivity. Of course there can only be a limited number of actual best seats in the house. Often at live performances, these seats are reserved for family members of the cast, or people who donate to the theatre that houses the performance. In order to get the best seats in the house it often comes down to who you know. The marketing of livecasting in this way suggests an opportunity to break down barriers to consumption and engage with performances in a way that is often reserved for a select few. The collapsing of barriers to consumption suggests a blurring of class boundaries. As livecasting makes different forms of cultural output more widely accessible, the exclusivity of such output is breaking down. As such, the marketing of livecasting in this way suggests the barriers between high-art and low-art are blurred. The connotation that high-art is being made more accessible and therefore less exclusive plays upon desires to break through class boundaries and become part of an exclusive elite.

As such, the marketing of *The Best Seats in the House* plays upon audiences recognising these barriers. The phrasing is reliant on audience knowledge as to the exclusivity of these seats. The transference of meaning between “best” and “exclusive” does not exist as completed in the ad, but requires the audience to make this connection. The very nature of

opera, ballet and theatre as high-art and their inclusion within the Western Canon alludes to this exclusivity.

Despite efforts such as reduced ticket pricing and targeted schemes by cultural institutions such as the ROH to make its performances more accessible, a 2015 survey found that both going to the theatre and ballet featured in the top five signifiers of “being cultured” (Mitchell, 2015). It is this kind of attitude and prevailing ideas of culture and value that assign meaning to the marketing of livecasting. Despite efforts to make theatre, opera and ballet audiences more diverse, there remains a concept of exclusivity and elitism surrounding these art forms. It is this concept that is perpetuated by the marketers of livecasting that allows for the creation of a sense of opportunity. The Best Seat in the House, and the world’s best performances and stars, tap into cultural and financial divides to paint livecasting as a breaker of these barriers, and the means through which audiences may experience what it is like to be part of an affluent elite. That each of the major theatre chains makes use of this language implies that there is significance to *be* transferred in the references to the Best Seat in the House. The ad does not create this meaning, but invites audiences to make a connection whereby the significance of one point is transferred to another (Williamson, 1978). This foundation of viewing opera, theatre and ballet as exclusive is still very much a part of the ways in which value is assessed.

How Does Livecasting Discourse Construct Exhibition Spaces?

Having investigated how the marketing of livecasting presents live mediated content in cinema spaces, it is important now to examine how livecasting discourse constructs these spaces, and frames the norms and transformations of activity that occur within them.

Cinema and its position as a physical venue that houses auditoriums in which films are screened is still very much a part of the marketing of livecasting. Indeed, trailers for the ROH live cinema seasons include recognisable shots that signify cinematic spaces, including light

from a projector flooding a dark room, and audiences eating popcorn and drinking soft drinks in a darkened auditorium (Royal Opera House, 2015). The traditional cinema setting, and the norms and activities that occur within them, are highlighted and played upon, setting the scene in which livecast screenings take place. Further to this, the use of the term 'cinema' as part of the ROH 'Live Cinema Season' situates content within a cinematic space.

In addition to the ROH, livecasting is framed within a traditional cinema setting throughout the marketing and promotional discourse produced by the ECA. Again, as with the ROH, the term 'cinema' plays a key role for the ECA, featuring in both the name of the organisation and its self-declared term for livecasting. Indeed, the words, "Think you know cinema? Think again. Now see more than films. Your cinema. Event cinema" are found in every trailer produced by the ECA.

The discourse produced by the ECA indicates how constructions of the norms and activities that occur within cinematic spaces are framed. The initial challenge of, "think you know cinema?" immediately frames this introduction to livecasting as an event occurring within a familiar physical space. Its direct use of the word 'you' immediately engages with audiences and asks them to consider what cinema means to them. You know cinema as a space in which you can consume feature films. You know the norms and activities that occur within these spaces. You purchase your ticket, you buy your food, and you sit quietly and watch your chosen film. Indeed, these norms are so well established that any display of incorrect etiquette has the potential to spark outrage in fellow audience members, with some going as far as to create a code of conduct (Kermode and Mayo, 2016).

Furthermore, this introduction is a challenge to what cinema can be. Cinema can be theatre, live sports and live music. However the physical space of the cinema, the space in which these screenings are consumed, remains the same. Whilst the ECA advertising represents a challenge to perceptions of what cinema can be, it does not invite audiences to challenge

how you consume different forms of cinema within the physical cinema space. Audiences are reminded that this occurs at “your cinema,” something they will be familiar with: where it is, how to behave at these sites, and the type of content available. The following line, “event cinema” links with the previous line, underlining the connection between what you know cinema to be, and what is available on screen (ECA, 2014). As such, the message underpinning these advertisements is that livecasting is an opportunity to see something different on screen, but not necessarily an invitation to behave differently whilst you do so.

This message supports anecdotal evidence of confused behaviour at livecast screenings. Viewers are unsure whether or not to clap at the end of an opera or theatre performance, or whether or not they can eat during the performance. Barker found there were mixed ideas amongst audiences as to norms and activities occurring within cinematic spaces whilst showcasing livecast content. One particular audience member interviewed by Barker stated:

The audience in the cinema had lots of popcorn etc which hasn't yet hit the theatre. Also chattering etc. I find both of these off-putting and on the whole theatre audiences don't eat or talk and I prefer this (Barker, 2012, pp78).

Another corroborated this, stating, “Audiences sometimes act like cinema is telly in their own sitting rooms: chatting eating etc” (Barker, 2012, pp77). Indeed, the lack of clarity and confirmed norms of behaviour can sometimes be perpetuated by exhibitors. One audience member stated:

Last night the audience were not only permitted to take drinks but actual bottles of wine into the auditorium – there was even a sales promotion at the bar encouraging this. I had to move seats last night and was lucky to find two seats spare. Had that not happened I would have left the performance and believe me I would not be returning. Nobody is questioning the right of the cinema to maximise profit which

can subsidise great cinema to considerably sparse audiences but taking a bottle in is too much and I cannot tolerate that (Barker, 2012, pp78).

The lack of clarity and the focus on cinematic spaces found in the promotional and marketing discourse of livecasting leaves it to the audience to decide how to behave, with occasional encouragement from exhibitors. As such, whilst cinemas are being framed as sites in which livecast content should be seen as the norm, audience behaviour and the differentiation between what is expected in cinematic spaces and what is expected in theatres or opera houses is yet to be shaped.

Currently whilst the marketing of livecasting promotes the difference between the content available in comparison to feature films, it does not suggest or encourage different kinds of behaviour. Until these norms and the transformation of activities that occur in cinematic spaces are defined and outlined, there remains a level of confusion as to how the hybrid nature of livecasting, and its bringing together of cinematic spaces with other forms of non-feature film content, may introduce a type of hybrid response amongst audiences.

Further to this, advertisements and promotions focus on the cinema as a centre of exhibition, perpetuating the types of behaviour expected at these sites. What these promotions do not highlight is the potential to stream livecast content online, in to schools⁸ and private venues⁹, and the types of norms and activities that occur within these spaces. Currently, then, the marketing and promotional discourse of livecasting produced by the

⁸ NT Live offers National Theatre On Demand, a streaming service specific to schools showcasing live performances of plays studied in both Primary and Secondary Schools (National Theatre Live, 2017).

⁹ Royal Court, a non-commercial theatre in London, hosted a live stream on its website of a play from a small theatre in Herefordshire that was accessible to anyone in the world. Viewers logged in to the website and watched from wherever in the world they were located (Freestone, 2014).

case studies outlined does not centre on framing norms and activities that occur within cinema spaces that showcase livecast content. Indeed, it appears as though any attempt to frame and shape how activities occur within these spaces would be welcomed, as both audiences and exhibitors remain unsure as to how best to react to this multi-dimensional phenomenon.

The Branding of Livecasting

As the marketing of livecasting allows for the generation of meaning outside of the livecast performances themselves, the branding of livecasting also plays a role as a proliferation of livecasting and subsequent meaning maker. Although terminology was discussed in chapter one in relation to the context of livecasting emerging, and briefly above in relation to marketing by exhibitors, it is equally important in discussions regarding branding. There are differing approaches across the case studies mentioned, highlighting again how livecasting is emerging as a media industry, and how different organisations are contributing to the shaping of this industry in divergent ways.

As discussed earlier in this chapter, the ROH describes its performances as part of a Live Cinema Season. This is seen in Figures 2 and 3, as detailed above, and in Figure 10 detailing the continuation of this across its website. The Royal Opera House has referred to the process as live cinema since 2012, and includes the term in marketing within cinemas as highlighted throughout this chapter, indicating an attempt at creating a cohesive brand within its own organisation. Although the ROH is a member of the ECA, the company has been using the term live cinema since the ECA came to fruition. This indicates not a desire to stray from the brand of event cinema, but an attempt at consistency across all marketing material aimed at audiences. To move now from live cinema to event cinema would only serve to confuse audiences, and perhaps dilute the power of their marketing material. This terminology is used across the Royal Opera House's online presence. The ROH makes use of

one Facebook, Twitter, YouTube, and Instagram account to promote both traditional performances and livecast screenings, with each social media account accessible from the individual Facebook account.

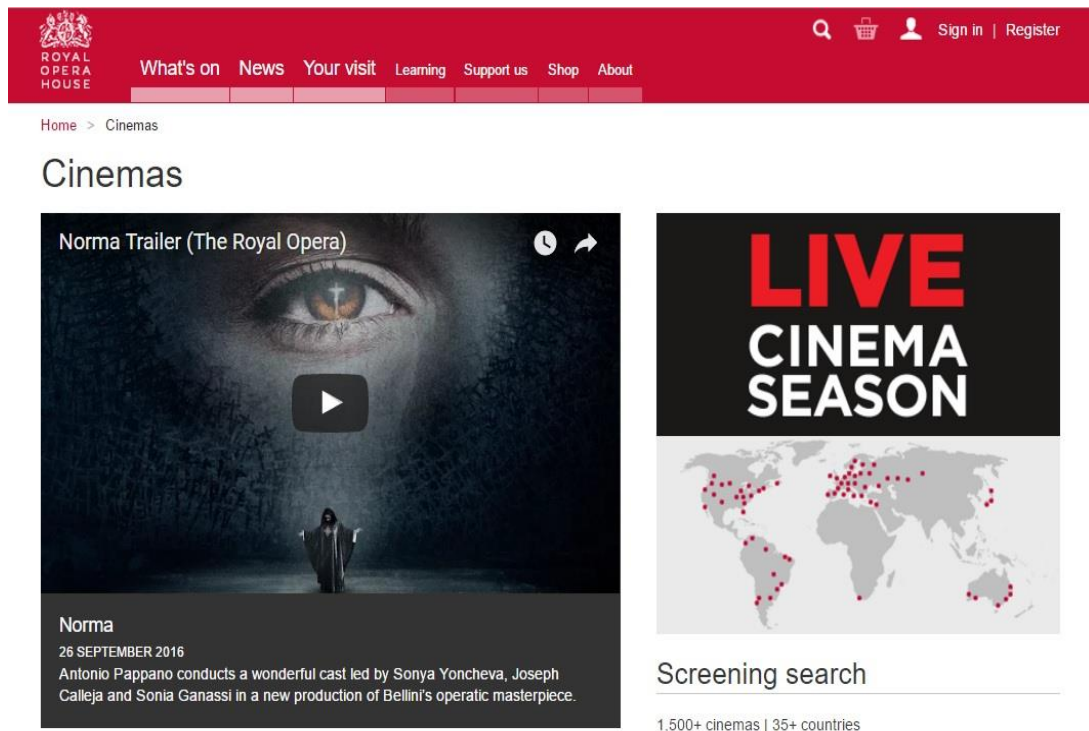


Figure 10. ROH Live Cinema Season Page (Source roh.org.uk/cinemas, 2016)

NT Live refers to livecasting as simply, “Broadcasts,” as seen in Figures 11 and 12. As with the ROH, NT Live makes use of this term across all of its marketing and online platforms. In use since NT Live’s inaugural broadcast in 2009, the term outdates concepts of event cinema and live cinema. As such, there are no references to live cinema, event cinema or alternative content within any marketing material produced by NT Live. NT Live’s branding relates more to the traditional use of the term broadcasting as discussed in chapter one, connoting a more familiar form of transmission from source to exhibitor. This form of branding removes completely any reference to the technology or innovation of livecasting, and in turn, a focus on the process. This term suggests a concept more in keeping with theatre television as discussed in chapter one

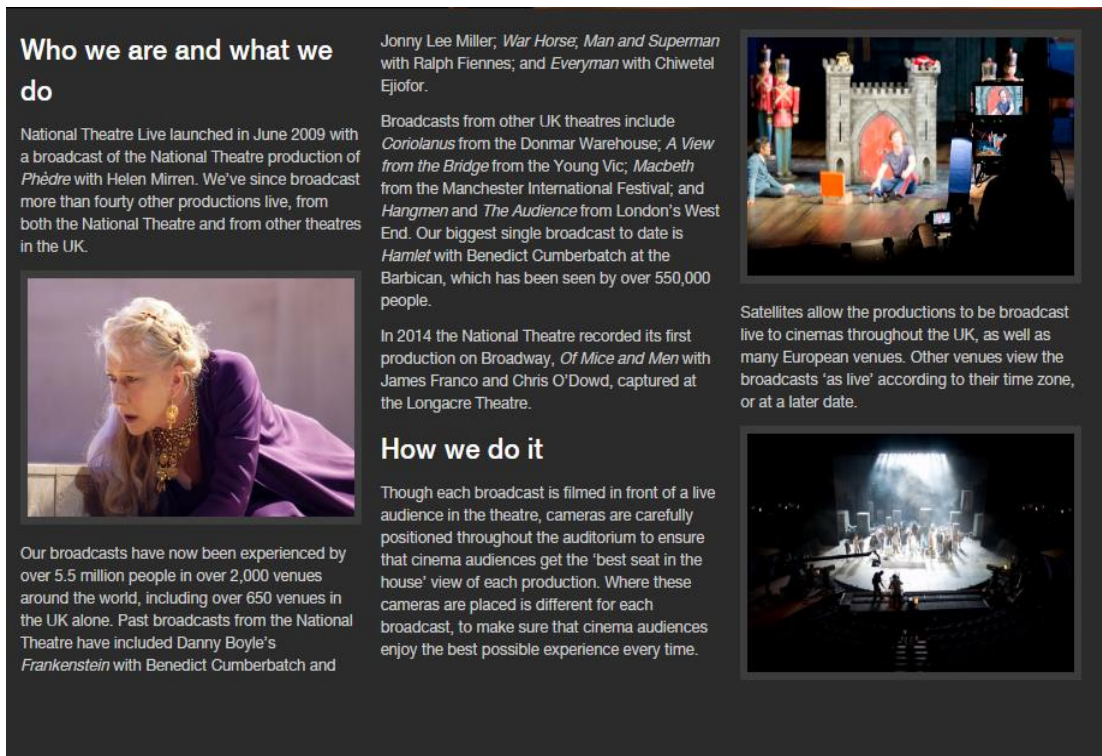


Figure 11. NT Live Who We Are (Source: ntlive.nationaltheatre.org.uk/about-us, 2016)

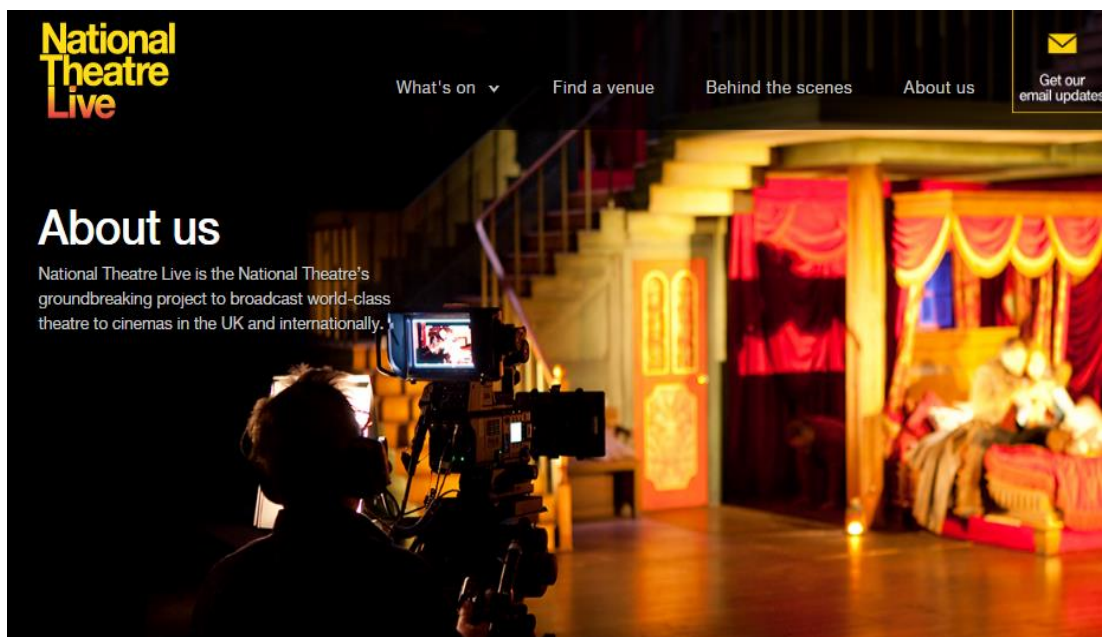


Figure 12. NT Live About Us (Source: ntlive.nationaltheatre.org.uk/about-us, 2016)

Unsurprisingly, the ECA makes use of the term event cinema to describe the process of livecasting in its marketing material and across its online presence, as seen in Figure 13. As the trade industry that has formed around the process, the ECA is attempting to brand livecasting in order to promote and support the industry. The ECA is looking to create a cohesive brand for use by all members so as to grow the industry and present a united front

for the industry moving forward. The industry is still forming and developing, and this is clear through the differentiation between terms used to describe livecasting in marketing and branding by individual organisations. Although these issues were discussed in chapter one, highlighting the variations in terminology as branding in relation to marketing underlines the ways in which branding creates meaning, and reinforces that these meanings are individual to specific stakeholders.



Figure 13. ECA Homepage (Source eventcinemaassociation.org, 2016)

As livecasting as an industry develops there may be a point at which these meanings converge, or that the use of one particular term becomes so prevalent that the industry comes to be recognised through this term. Currently though, this section illustrates the current period of flux in which livecasting finds itself.

Conclusion

This chapter illustrates that there are coherent strategies across stakeholders that are emerging to market livecasting. Livecasting is portrayed as a new technology, as an opportunity, or simply an extension of the live event and as such, appeals to audiences in different ways.

The ECA has sought to align livecasting with the edginess of the Yann McCullough song, and the marketability of the stars that feature in its trailers. It is working to attract young audiences in an attempt to monetise their frequent cinema attendance.

The ROH is marketing its livecast screenings as extensions of its very exclusive nature as an Opera House. Referent meanings in place work to engage with pre-formed audiences, as underlined through Bourdieu's concepts of cultural capital, habitus and field. Indeed, the exclusivity that almost defines opera and ballet as high-culture work to attract audiences that expect and accept these valuations. However, through the language of cinema marketing, and the depiction of younger people on ROH posters, attempts are being made to make opera less demographically exclusive. As such, the ROH appears to engage with and attract younger audiences, thereby aligning its brand with qualities associated with this demographic. Barriers to understanding remain, however attempts at engaging with diversified audiences through the language of cinema marketing highlights efforts by the ROH to ensure its productions seem more accessible, without removing the barriers to understanding that define opera as high culture.

NT Live markets its productions as an extension of its live performances. Audiences are made aware of the quality of their productions and how this effectively translates on screen. Livecasting works less as a method through which the National Theatre may attract new audiences, and more as technology through which it is able to make audiences aware of its performances, whilst offering them opportunities to see the pedigree of acting talent that the National Theatre attracts.

Exhibitor marketing has varied in the terminology used to describe livecasting, however there is a clear cohesion in the message of livecasting as a means of transporting and immersing audiences. Of the exhibitors referenced in this dissertation, all made use of the phrase The Best Seat in the House as a means of enticing viewers. The language promises to

transport viewers to opera houses and concert halls across the world, and references the exclusivity of attending these performances live. Exhibitors capitalise on the positioning of livecasting as a breaker of barriers to consumption by relying on audience understanding of opera ballet, and other high-culture performances as exclusive. It is the perceived ability of exhibitors to transport viewers to performances around the world that highlights the cyclical nature of cinema and the long promised ability of cinemas to truly *show* something (Gunning, 1986).

The marketing of livecasting, however, does not indicate or outline the type of behaviours expected at sites of exhibition. In fact, in some cases, often the opposite occurs. NT Live, the ROH and ECA position livecasting as an event that takes place within a cinema, and reinforce the types of behaviour that have been established at these sites of exhibition. As such, the discourse of livecasting has yet to shape the norms, behaviours, and activities that occur within exhibition spaces, on occasion leading to confusion and discontent amongst audience members.

Although it is outside the scope of this dissertation to analyse every form of marketing, advertisements and online presence of the three case studies mentioned, it has been possible to form an understanding of their intentions and how these messages have been formed. As such, these case studies highlight the different ways stakeholders create meanings in the ways that suit their status. Whether that is as a content producer working to reach distant audiences, or as an exhibitor offering promises of immersion and transportation that increases attendance on quiet Thursday evenings. As livecasting develops as an industry these marketing methods will undoubtedly grow with it, however the variation and differentiation in methods at this current period accurately reflects livecasting's status as an emerging media industry.

Conclusion

Over the course of three chapters, this dissertation has investigated the emergence of livecasting in the UK from 2003-2016. It has addressed three particular questions: How is livecasting emerging as a hybrid media Industry? How has livecasting as an Industry been shaped by the Event Cinema Association, the trade body that has formed around livecasting? And, how is livecasting being marketed to audiences? In answering these questions, this dissertation has provided a more comprehensive understanding of livecasting from an industry perspective. From this, audiences and researchers are in better stead to understand how this industry has developed, sought to establish conventions of practice, and diversify and extend its audiences whilst playing upon ideas of hybridity.

Chapter one provided a background as to the digital and historical context of liveness in cinemas. It found an appetite for live content within cinemas, as liveness within cinema was experimented with throughout the twentieth century with the emergence of theatre television systems that showcased live sport, opera, and theatre to large audiences. Despite this, it was not until the rise and ubiquity of digital technology that livecasting as it is discussed in this dissertation became possible. The Digital Cinema Initiative formed by the big six Hollywood Studios and the Digital Screen Network in the UK instigated this uptake of digital cinema technology.

The chapter underlined the formation of divergent stakeholders with an interest in livecasting, all working to shape the industry in a way that best suits their needs. It illustrated the coming together of such stakeholders as distributors and technology producers, including Sony and Dolby with publicly funded organisations such as Creative Skillset and Arts Council England. This emphasised the hybridity of livecasting, initiating cross-media cooperation that transcends industry boundaries. Additionally, the infancy of this industry was underlined by on-going discussions surrounding terminology, how best to

describe and brand the process of livecasting, and the difficulty in establishing cross-industry relationships that benefit stakeholders across the different levels of the livecasting industry.

As the Event Cinema Association works towards branding livecasting as 'event cinema', alternative content remains in use largely in the US, and live cinema describes an augmented, sensory enhancing experience. Chapter one outlined the benefits and disadvantages of each term, discussing how they relate to and describe livecasting from the perspective of different stakeholders. This outline revealed much about the uncertainty surrounding the terminology of livecasting, an issue that embodies the period of flux that livecasting is currently in.

Chapter two focused on the trade body that has formed around the practice of livecasting, the Event Cinema Association (ECA). It found that through a best practice handbook, the ECA has attempted to standardise and reduce risk throughout every aspect of the creative process of livecasting, from the equipment used in cinemas to showcase screenings, to the branding of the term event cinema. This underpinned the role of trade bodies in shaping media industries and the ways in which they work to legitimise practices through methods that have been seen throughout the history of cinema.

The chapter made use of John T. Caldwell's approach to understanding trade conferences and awards ceremonies. These occasions are important in forging identities, legitimising significance and value, and provide opportunities for interactions that allow for survival and prosperity. In analysing and attending conferences in which the ECA was involved it became apparent that these practices were all on display. Award ceremonies hosted by the ECA legitimised and supported the work of ECA members, whilst an emphasis on the branding of event cinema at conferences attempted to solidify the identity of the livecasting industry as it competes with variants of live cinema. Furthermore, following interactions and discussions at conference panels, it became apparent the key concern for the ECA was the inclusion of

more varied content within the livecasting calendar. The desire to include more sports, gaming, and anime is indicative of attempts to grow the industry in territories where cultural industries often thought of as high culture, such as opera and ballet, are less prevalent.

Additionally, through analyses of discourse produced by the ECA it became possible to further understand whose interests the ECA truly serves. A focus on marketing and promotion in the long run better serves exhibitors and distributors, and large-scale content producers. Indeed, small-scale content producers can often neither afford to enter the livecasting market, nor have the expertise to know who to target or how to do so. What has become apparent is the lack of representation small-scale content producers are offered by the ECA, underlining the potential need for separate industry bodies representing more specific aspects of the livecasting industry as it continues to grow and develop.

Chapter three addressed the how livecasting has developed from a promotional perspective. This research has enabled further understanding of the motivating factors behind content producers and exhibitors that create and showcase livecast content. Whilst the ECA worked to promote the industry and technological aspects of livecasting that makes it individual and unique from feature films, the case studies of content producers highlighted efforts to utilise the technology to broaden their current audience bases. This research has revealed how the industry seeks to diversify its audience base, as well as how the practice is sold by accentuating its apparent ability to transport audiences. The chapter identified a coherent strategy across individual exhibitors of promises to transport viewers to The Best Seat in The House in theatres across the world. This strategy reveals much about livecasting and concepts of liveness within cinemas. It relates back to early instances of simultaneity that inspired wonder and in some cases, confusion within cinema audiences. The ability to take audiences somewhere and the promise to deliver content from across the world aligns

livecasting with early cinematic desires to show audiences something of value (Gunning, 1986).

Additionally, the chapter revealed much about the value system that pervades discussions of culture and cultural institutions. Whilst livecasting offers content producers the opportunity to expand audience bases and attract those that are otherwise unfamiliar with their content, in the case of the Royal Opera House, there remain elements of exclusivity that perpetuate barriers to consumption. There are aspects of trailers and posters that are reliant on a foundation of knowledge, or cultural capital, in audiences, as advertisements showcase clips from particular screenings without directly addressing specific performances. Despite this, there are also elements that are reliant on audience familiarity with feature-film advertisements. Certain features play on attracting cinema audiences well versed in feature-film advertising, with posters and images that make use of the language of cinema marketing, and how audiences interpret meaning through lighting, lens perspective, depth of field, and the placement of objects within the frame. This is significant of attempts to attract new audiences without doing too much to detract from the prevailing exclusivity of the Royal Opera House that in many cases works as the attracting quality of opera, and is indicative of the hybridity of livecasting as a media industry.

The chapter has underlined how stakeholders with different interests shape how the industry identifies and addresses audiences, and how these methods then shape the marketing efforts of the industry as a whole. The chapter also investigated how the marketing of livecasting shapes the practices and norms that occur within sites of exhibition. It found that both audiences and exhibitors as of yet remain unsure as to how best to behave, and that acceptable norms had yet to be established. The variations of marketing efforts, and the lack of established norms at sites of exhibition, are representative of an

industry in flux that is yet to determine how best to discuss livecasting, produce, deliver, exhibit content, and attract audiences.

This dissertation has investigated how livecasting has emerged in the UK from 2003-2016 in order to provide fresh insight into the representational practices of this developing industry and its evolution and growth since its emergence. It has provided an industry view on livecasting – when it emerged, how it is discussed, how it is organised and how it is marketed – to enable further understanding of a practice that is challenging the way content producers, distributors, exhibitors and audiences perceive cinema.

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