THE DYNAMIC STORY MOSAIC:

DEFINING NARRATIVE STRATEGIES IN TRANSMEDIA ENVIRONMENTS

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Abstract

Transmedia storytelling became one of the most prevalent buzzwords in the mid-2000s used to describe a wide array of storytelling forms ranging from entertainment franchises to alternate reality games to any project that told stories across more than one medium. Over time, the term had been diluted so significantly that it has lost most of its meaning, and the opaque discourse has left practitioners, scholars, and audiences alike confused about its true meaning. *The Dynamic Story Mosaic: Defining Narrative Strategies in Transmedia Environments* charts this development and offers a typology to identify and explain narrative strategies in multi-platform environments. The typology anchors on the two dimensions of narrative deviation and the number of release events over time; these dimensions are constitutive for the production, reception and marketing and branding of transmedia projects, and provide a stable basis for analysis and interpretation. Through a blend of analytic, comparative, and descriptive approaches, paired with a number of case studies, this dissertation is a historical analysis of the emergence of transmedia storytelling and transmedia discourse, and provides a direction in the analysis of transmedia projects by providing a typology that remains stable regardless of the future of storytelling in this area.

Dedication

To Mary

Acknowledgments

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Preface

I will tell you something about stories,

he said.

They aren't just for entertainment.

Don't be fooled

They are all we have, you see,

all we have to fight off illness and death.

You don't have anything

if you don't have stories.

–Leslie Marmon Silko 26

The Velip

Vithai Zaraunkar is a member of the Velip tribe in Gaval Khola, a small village in Cabo de Rama in the southernmost Taluka in Canacona, India, and a masters student in Sociology at Goa University. She is also the first from her family to pursue higher education. The Velip tribe has a long, persisting tradition of oral storytelling. Zaraunkar recalls that "since people in our community weren't formally educated, these stories were told to children to educate them. They threw light on moral values and spoke of how relationships between people

should be" (Monteiro, 2014). The stories, which also tell the tales of mythology and gods, are often sung to children rather than recited, which leads to a much more intense body experience, argues Vithai's project mentor, Professor Alito Siqueira. "Myths and stories organize society," he suggests, "and in this sense myths and stories are foundational" (Wise, 2014). Zaraunkar has made it the goal of her project to document the oral stories of her tribe, which she heard so frequently during her childhood, before they are lost forever. She is audio recording the stories, transcribing them in Konkani, the Indo-Aryan language spoken in the Indian states of Goa, in the Devangari script—the Abugida alphabet of India and Nepal—and translating them to English. The Goan Ministry of Culture is funding the project, titled "Old Songs New Stories: Tales from the Velips of Goa," under the program of "Safeguarding the Intangible Cultural Heritage and Diverse Cultural Traditions of India" (Monteiro, 2014). The project will become part of the collection of the Sangeet Natak Academy, New Delhi, India's national academy for music, dance and drama and an autonomous body of the Ministry of Culture. For Zaraunkar the project means more than just preserving and sharing the stories that define her tribe; it means valuing her own culture, finding her identity, and giving back to her community (D'Zousa, 2014).

The Martu

Nyarri Nyarri Morgan is a member of the Martu (Mardu), an Australian Aboriginal people of the remote Western Australian Pilbara desert, and one of the oldest cultures of the world, existing in an isolated life largely untouched by Western culture until the 1960s. Morgan and his tribe members likewise have stories to tell as they witnessed the British nuclear tests at Maralinga, a region in the Western Australian desert, in the 1950s. In 2016, the indigenous elder shared this story with the world after being approached by Australian VR filmmaker Lynette Wallworth. Wallworth, experienced in VR filmmaking believed this medium to be best suited to capture Morgan's story of his first contact with Western culture. Equipped with a Jaunt VR 360-degree camera, which consisted of a 16 GoPro rig and four microphones, as well as a number of drones, Wallworth's production team created the revealing film about Morgan's devastating experience in the 1950s. In the film, narrated by Wallworth and Nyarri's grandson Curtis Taylor who translates for Morgan, the elder recounts the event he witnessed in the 1950s and "shares his perspective on the Martu way to care for the planet" (Collisions, 2016). Even though Morgan is featured prominently in the 15-minute film, the work also contains an animated sequence in which kangaroos desperately "try to flee the aftershock and are ploughed to the ground, ash covers the boiling water sources and in which Nyarri searches for meaning to an event that he cannot explain" (Collision, 2016). "It appears," is stated in the press kit for the film, "that God has poisoned the country."

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Wallworth's goal with the film, which premiered at the World Economic Forum in Davos, is not only to encourage contemplation about the consequences of our actions and our relationship with nature and people, but also to illustrate the capabilities of a new medium. Through virtual technology, the use of VR headsets and earphones, the audience experiences immersion into the Western Australian Pilbara desert and the life of the Martu. Wallworth emphasizes repeatedly in interviews and press material for the project that the story she shows to the audience is what Nyarri Nyarri Morgan wants to show; indeed, that it is the story that he has waited his entire life to share.

The desire to share the story of their respective communities unites Nyarri Nyarri Morgan and Vithai Zaraunker. Zaraunkar uses the more traditional approach of audio recording and transcribing to preserve and share the stories of the Velip tribe with a wider audience. Virtual reality filmmaker Lynette Wallworth invites the audience to a virtual reality journey into Morgan's memory and life and places the audience participants within this experience, made possible by the "world's most immersive technology" (Wallworth, 2016). It is not only the wide technological gap that distinguishes these two storytelling examples but also the purpose, the production, the reception and the marketing surrounding them. Zaraunker's public exposure, and thus the exposure of her tribe, is limited to an article in the Goa Herald, a short clip about the project on YouTube, and a short

film about the project by video journalist Gasper D'Sousa. Wallworth's film received a large amount of media attention, particularly in Australia and as part of the Sundance Film Festival, and it was funded by the Australian Council for the Arts, and the Adelaide International Film Festival. The film has a website and a Facebook page that is filled with images depicting Morgan at the the World Economic Forum in Davos. These two very different storytelling experiences and the documentation of them illustrate the wide scale of storytelling, from the earliest tradition of oral storytelling to storytelling utilizing the state-of-the art technology of virtual reality. What struck me most about the two stories that I am presenting in this preface is that the elder Nyarri Nyarri Morgan welcomed the filmmaker with a song rather than the spoken word. Storytelling is as much tradition as it is progress, a thought that is reflected in this dissertation.

Chapter 1: Introduction

1.1 Storytelling: A Fundamental Human Experience

Air, food, and water are the items most commonly deemed necessary for survival, at least when it comes to physical requirements. Psychologists such as Abraham Maslow add the need for safety, love, belonging, and self-esteem to the survival list (1970). As the most common form of communication (Baskin, 2005), storytelling directly ties to these needs. Humans could not survive without telling stories, story creation "is the human survival tool, equivalent to a porcupine's quills or the tiger's speed, claws, and teeth" (Baskin, 33). A world without stories would be void of content, and a life without stories would be void of meaning. Storytelling is a fundamental part of existence; it is the mechanism to satisfy the need for affiliation, expression, and the understanding of human existence (Ryan, 2014). Storytelling, as a part of any culture, can be the strategy for coping with life's challenges; it is a means of education, identity creation, and entertainment. Humans were always defined and defined themselves through stories, learned through stories, and survived through storytelling.

Storytelling is one of the mechanisms to satisfy human needs because humans "have to learn how to gather, grow, or hunt our food; how to bring up our children; how to built shelters. Stories enable people to perform all these activities essential for survival by distinguishing noise from information into knowledge they need to survive in a continually changing world" (Baskin, 2005, 34).

The terms "story" and "narration," however, often connote fictional content; thus a storyteller might be perceived as someone who entertains through fiction. This perspective, manifested in the term itself, leads to the devaluation of stories as "just" entertainment or fiction. A more useful interpretation of the term puts the storyteller in the position of the "homo narrans" (Fisher, 1984, 6), who recounts events—real or fictional— in order to convince, reason *or* entertain. The terms "story" and "narration" will be used in this dissertation following Fisher's definition of narration: "(a) theory of symbolic actions—words and/or deeds that have sequence and meaning for those who live, create or interpret them. The narrative perspective, therefore, has relevance to real as well as fictive worlds, to stories of living and to stories of the imagination" (1984, 2). Fisher includes two crucial elements in his definition: a sequence of symbolic actions (the story) and the process of narration that has meaning to the narrator and those who interpret the symbolic actions. Since the story is embedded in the narration, and the narrative and the narration is implied in the storytelling process, and since the concept of the storyworld, which is closely tied to multi-platform storytelling, "requires narrative content" (Ryan, 2014, 32) with a few exceptions, I will use the terms interchangeably, which is common practice in the discourse of post-classical narratology.

Fictional stories or narratives composed of chains of events occurring in space and time, (Chatman, 1999; Genette, 1980; Prince 1982; Rimmon-Kenan 1983; Bordwell, 2000) predominantly discussed in this dissertation, from my perspective, offer the same value proposition as fact-based stories. The process

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of sharing or engaging with similar fictional stories creates a sense of belonging and affiliation (Ryan, 2014). As a mode of expression, stories present events and social and environmental relationships and facilitate an understanding of human interaction and the relational space occupied by humans. Fictional accounts of events (stories) present simulations or models of real-life situations, often taking place in secondary worlds more or less distant from the real world, that "allow for prediction and explanation while revealing the underlying process of what is being modelled" (Mar, Oatley, 2008, 173). Storytellers translate their real-life experiences or imaginations into narratives as a form of "communication of complex social interactions in a manner that offers personal enactments of experience, rendering it more comprehensible than usual. Narrative fiction models life, comments on life, and helps us understand life in terms of how human intensions bear upon it" (Mar, Oatley, 2008, 173).

Although a detailed account of the historic development of storytelling is well beyond the scope of this dissertation, a brief overview of historical examples is warranted in order to explore storytelling's diverse purposes. Historically, storytellers spread their tales in every culture across all continents. Storytelling practices trace back millions of years; biology and anthropology scholars theorize that storytelling provided important information about the environment, behaviour of wildlife, and availability of food (Handler Miller, 2008). The mode of expression in storytelling, however, changed significantly with history. Primitive forms of early human communication have recently been found in El Castillo cave in Spain, where red hand stencils have been claimed as the world's oldest cave art. Dating

back over 40,000 years, these hand stencils have been linked to the Neanderthals (Pike et al., 2012) and are an example of the widespread and still extremely popular "I was here" story. Other cave paintings depict animals or geometric figures or patterns, but also more elaborate hunting scenes or images of rituals and dances.

The Gold Lyre of Ur is among the earliest examples of storytelling through artifacts. The Gold Lyre of Ur dates back to 2,550 BC and stems from one of the oldest human civilizations, Sumer in Mesopotamia. The Lyre tells a story mainly through its inlay depicting animals acting like humans (see Appendix A). Early forms of written storytelling can be found in papyri from Egypt, for example the *Westcar Papyrus* (2000-1300 B.C.E) or Sanskrit scriptures, such as the *Kaushitaki Brahamana Upanishad* (c. 500 B.C.E) (Pellowski, 1990). Religious teaching and conversion often took and still takes the form of storytelling. The *Bible*, the *Tripikata*, and the *Quran* are some examples that demonstrate storytelling for religious reasons. While these are forms of written or visual communication, these stories were simultaneously spread through prophets and orators. Images or sequence of images on a scroll or a cloth often accompanied oral recitals.

The writer and poet Aristophanes popularized storytelling in form of plays as early as 411 B.C.E., and early Greek literature points to storytelling in songs performed by bards, minstrels and rhapsodes. The introduction of the alphabet and movable type allowed the easy recording and wide distribution of stories. Cultures in Europe, propelled by Gutenberg's invention of the printing press

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around 1440, engaged in the mass distribution of printed stories in the late fifteenth century (Pellowski, 1990). Written stories remained consistent, whereas their oral counterparts always changed through the individual interpretation of the storyteller. From the oral to the written, and in the process of translation from one language to another, stories altered depending on the scrivener and the translator. When the novel developed into an accepted literary form in the 18th century, readers became increasingly comfortable with written and purely fictional stories (Saler, 2012). Some of these stories diverted from literary realism and took place in completely imaginary worlds that differed significantly from real life in terms of their settings and characters. Imaginary worlds and fantasy in stories became a celebrated part of everyday life by the end of the 19th century, and continued throughout the following century, providing a firm cultural foundation for the changes about to occur. Bakker argues that "in the era of the second industrial revolution at the end of the 19th century, falling work hours, rising disposable income, increasing urbanization, rapidly exploding transport networks, and strong population growth resulted in a sharp increase in the demand for entertainment" (2008, 579). In the wake of these changes in demand, "formalized, nationally integrated and standardized live entertainment, such as theatre, music hall and vaudeville, partially replaced existing forms of entertainment, such as non-commercial amusements, fairs, and entertainment provided by roadside entertainers or travelling bands of artists" (14), before the invention of cinema technology pushed the process of industrialized entertainment into the next century. Film, radio, and, in the second half of the

century, television changed the media landscape drastically and satisfied the rising demand for entertainment throughout the century.

1.2 The Digital Age and Fundamental Change in Storytelling

Early technologies such as film, radio, and television widened the creative opportunities for storytellers, but storytelling reached a new dimension in the digital age, especially with the introduction of the Internet. Digitalization made the storytelling process faster, more accessible for a wider audience, and more interactive, allowing the user (the audience) to turn into a producer, or "produser" (Bruns, 2006, 2), and moved the narrative practice from single medium storytelling to "transmedia storytelling" (Jenkins, 2006, 92).

Pinpointing the exact beginning of the digital age is difficult, but theorists focus on the late 1970s and early 1980s (Alexander, 2012; Miller, 2008). During this time, a mix of different technologies and practices emerged, such as personal computers, text-based storytelling engines for games that fostered digital gaming,and TCP/IP, (Transmission Control Protocols/Internet Protocols) that led to the first virtual communities (Alexander, 2012; Handler Miller, 2008). Audiences witnessed the profound impact of digital media on the process of storytelling through new content, driven and delivered through the Internet, which served as an early vehicle for the production and consumption of stories. Digitalization eased the way into new narrative structures; which led to an increasing number of non-linear storytelling projects, along with eclectic mixes of visual styles combining animation with live action, multiple screens, and

interactivity. Note that these forms of storytelling did exist before the digital age, however, digitalization facilitated these practices on a larger scale and led to much greater audience involvement. As a simple narrative example will demonstrate, digitalization made the recording of events easier and more accurate. Consider the story of a day in the life of a young woman walking around Paris in 1952, and the story of a man wandering through New York City in 2010. In 1952, the young political science student kept a diary recording her various paths through Paris from her apartment to the university, her piano teacher, and so forth, in order to document her daily life. Her movements were later traced based on her diary and manually illustrated on a physical map of Paris and could be shared visually only with those who saw the map. In 2010, Foursquare, an Internet site that digitally tracks "check-ins" at public places whenever the user activates it, generated a digital "heat map" tracking the paths of a man exploring Manhattan, producing a quick, instantaneous, real-life approach to the same story as in 1952, shareable at any time with anyone around the world (Zuckerman, 2013).

Both examples emphasize the understanding of the human use of space in a major city, and a story that reveals interests, habits, and routines (if applied over a longer time frame) of both people based on their various routes. The data points emphasize how the digital changed the recording of story events, made it quicker, easier and made the final work more accessible since the digital heat map can be shared via social media with a much wider audience. These data points also convey the storytelling power of data visualization that some

storytellers leverage in different ways. Segel and Heer suggest that "tours through visualized data can be organized in a linear sequence, inviting verification, new questions, and alternative explanations" (2010, 1139). Through their work, the authors expand the traditional notion of what comprises a story as they argue that data is story. Viewed critically, while data does not equal story, it can become story through interpretation, or in other words it requires interpretation to become story.

In the wake of digitalization, the user interacts with stories on several levels, and new technologies grant agency to the the new hybrid of user and producer. Video games, one of the most obvious examples of digital interaction, allow the player to influence the storytelling process and some of the narrative outcome depends on player decisions. In Sony's game *Heavy Rain (*2010), the player's decisions influence the narrative flow, alternating the scenarios and the ending. The player generates the story in the life simulation game *The Sims* by creating a family setting and controlling the behaviour of its members in a fictional environment. The interactive, participatory characteristics that unite these games into dynamic, bilateral texts, a process encouraged by digitization. However, the digital age propelled an additional form of storytelling that has gained significant attention that is also wrought with confusion: transmedia storytelling.

1.3 The Transmedia Storytelling Quagmire

In response to these fundamental changes in storytelling and technology, Henry Jenkins coined the term "transmedia storytelling" in 2006. He defines a transmedia story as "a story that unfolds across multiple transmedia platforms, with each new text making a distinctive and valuable contribution to the whole" (2006, 96). Jenkins ascribes this storytelling practice to a cultural, economic, and technological convergence that permits and fosters the merging of media, different texts, and marketing/consumption activities for the purpose of storytelling with the participation and interaction of audiences and fans. Under this premise, narratives are told across media, rather than in a single medium, interactivity and participation are paramount, and the boundaries between media and between producer and user are softened or eliminated. In 2014, Jenkins critically reflected on his own concept, suggesting that "our transmedia aspirations may be blocked by the silo-ing of production decisions within contemporary media conglomerates, co-production and co-licensing agreements with outside parties, and contradictory expectations of producers and audiences," (244), revealing the complex issues pertaining transmedia production, engagement, and marketing/branding.

Transmedia is not a new concept; Marsha Kinder alluded to the storytelling practice in her 1991 book, *Playing with Power in Movies, Television, and Video Games*.[1] Jenkins' article, however, frequently cited in the context of transmedia practices and theories, re-ignited and fuelled the existing discourse,

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[1] I will return to her work later in the dissertation.

turning the term transmedia storytelling into a buzzword used under multiple circumstances and in various contexts. Practitioners and theorists alike took an interest in this form of storytelling and introduced numerous terms, theories, and ideas that are often inconsistent or contradictory. Dena coined the term "cross-platform entertainment"(2009); Davidson focuses on "cross-media communications" (2010), and other scholars refer to this form of storytelling as "hybrid media" (Boumans 2004), "intertextual commodity" (Marshall, 2004), "transmedial interactions" (Bardzell, S., Wu, V. Bardzell, J., & Quagliara, N., 2007), or "deep media" (Rose, 2011). Despite the different terminology, the general storytelling practice associated with these theories is the same: telling a story across media.

One of the problems, apart from this quagmire of terms is, however, that transmedia storytelling is a very precise term that defines a very specific type of storytelling project. Recently, the term has been used for almost all projects that use more than one medium or platform; many of these projects do not resemble the original definition of transmedia storytelling. Consequently, the concept of transmedia has become ambiguous, the discourse fragmented, the terminology diluted, and some scholars and producers are now rightfully arguing that the term has outlived its purpose and needs to be re-evaluated[2]. To be clear, the problem is not the term itself; used in the correct context, it is useful for investigating the cultural and economic properties of a class of projects. The problem is situated in its abundant and incorrect use that makes identifying and understanding the

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[2] A detailed discussion of the current debate follows on Chapter 2.

fundamental changes in storytelling difficult. The various theories and concepts linked to transmedia storytelling complicate the analysis and the comparison of existing and future projects. The lack of a solid structure to understand the practices associated with transmedia stunts the discourse; the field cannot move forward and build more knowledge based on well-founded research. On a more broad level, if we fail to understand the changes and new practices of transmedia storytelling (itself a dynamic and constantly changing phenomenon) we lose the ability to understand contemporary storytelling and a fundamental aspect of the human experience.

1.4 Contributions to the Field and Structure of the Dissertation

In my dissertation, I argue that due to diluted terminology—the "semantic galaxy" (Scolari, 2010) of terms—the concept of transmedia storytelling should be re-framed and included in a larger theoretical framework that draws from transmedial narratology, cognitive narratology, and marketing/branding. Transmedial concepts focus on production aspects such as imaginary world building theory, immersion theory, cognitive rupture theory, and medium specificity. Cognitive narratology focuses mainly on the engagement with the transmedia project on a cognitive level, the relationship between narrative and mind, and includes theories such as optional thinking and knowledge creation through fictional narratives. In order to fully evaluate a transmedia or multi-platform storytelling project, marketing and branding strategies must be considered. These strategies comprise an important element of storytelling, as in

many cases the story becomes the brand, and story extension is brand extension.

In what follows, I seek to contribute a typology that will aid in the process of leveraging these theories to provide the clarity necessary for the investigation and comparison of individual cases and projects. This typology, as the core research objective, is comprised of four quadrants containing narrative strategy types in multi-platform or transmedia environments: constrained, expansive, connective, and native narrative strategy. The typology reflects the amalgamation of transmedia theory, cognitive narratology, and marketing/branding, addressing production, engagement, and branding strategies. The typology is based on two dimensions: narrative deviation and the number of release events over time. Narrative deviation is defined as the degree to which the story deviates from the story anchor across different media expansions; narrative deviation is only applied across media, not within the same medium in sequels or prequels, for example. The number of release events over time is defined as the pattern of points in time at which narrative content is released across media to the audience. In general, a typology such as the one described above is a classification that represents dimension-based concepts rather than empirical data. These dimensions "are based on the notion of the ideal type, a mental construct that deliberately accentuates certain characteristics. As such, typologies create useful heuristics and provide a systematic basis for comparison" (Smith, 2002, 380). Often, the categories that appear in typologies are based on arbitrary and ad hoc criteria (Baily, 1994); however, the two

dimensions of narrative deviation and the number of release events over time pertain to any story told across two or more media. This foundation facilitates analysis, explanation, and prediction in terms of multi-platform projects. As Scolari, considering Greimas' (1991) work contends, "(t)he definition of concepts and the creation of taxonomies/typologies are the foundational components of any theoretical discourse. In other words, if we want to develop a solid theory of transmedia storytelling, we must begin by clearly defining the concepts and proposing basic taxonomies/typologies to develop a scientific discourse" (2012, 8).

This typology, to my knowledge, does currently not exist in the field, but could become a solid foundation for research addressing complex questions regarding narrative strategies in transmedia/multi-platform environments. It will provide producers with a tool to understand the implications of the different narrative as well as marketing and branding strategies, outlined by scholars such as Johnson (2012), Santo (2015), Zeiser (2015)[3]. It will aid the audience member in comparing projects in order to determine which of the considered projects best meets his or her needs and is worth his or her time and financial investment. Lastly, it will help scholars continue efforts to understand the fundamental and dynamic concept of storytelling.

The following chapter serves as a literature review and looks at the history of convergence culture, influences from Asia that inspired transmedia storytelling, and the heated debate that followed one of the most complex

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[3] *Chapters 2-4 provide detailed insights into these concepts.*

transmedia storytelling projects, *The Matrix* (1999)*.* In Chapter 3, I introduce the four narrative strategies in more detail. In Chapter 4, I elaborate on the implementation of the strategies through the production, engagement and marketing/branding processes. Four case studies guide the analysis and synthesis of these core theories and strategies. The dissertation ends with implications and conclusions, as well as areas for future research. Since narrative deviation and the number of release events over time are consistent components of any narrative (fictional or factual) that is told across at least two media, the suggested typology will remain applicable for the foreseeable future. My research is exploratory in nature due to the dynamic characteristics of the field. It is my hope that this dissertation will foster more interdisciplinary dialogue across film and media studies, cognitive sciences, and marketing/branding.

Chapter 2: Convergence Culture and the Transmedia Debate

The purpose of this chapter is to delineate some of the antecedents of transmedia storytelling; additionally, in order to provide a transnational picture, this chapter will examine similar developments in Japan, as the country's media mix has been influential for so many producers in the West. As this chapter will illustrate, fans of the Japanese media mix show very similar behaviour patterns compared to fans of transmedia franchises in the West. Japanese entertainment franchises have penetrated North America just as much as Japanese creators of these franchises were influenced by the West. Highlighting fan culture in Japan might deepen the understanding of the often denigrated fan culture in other parts of the world, particularly North America. Fan culture in general, East or West, still must overcome criticism and stereotypical approaches from the popular press condemning the extreme affection that some fans show for their franchises. Multi-platform projects extrapolate fan culture as they offer deep engagement levels for fans who spend large amounts of time and money to absorb every aspect of these projects across a number of media.

Since the starting point for my discussion is *The Matrix*, a project heavily influenced by the Japanese media mix, a brief investigation of some Japanese multi-platform projects seems beneficial. Even though this chapter mainly serves as a literature review covering the era of convergence culture, the Japanese media mix, and the convoluted discourse surrounding transmedia storytelling, it also drives forward the argument of medium specificity and foreshadows the core

element of my dissertation, namely the globally-applicable typology created to investigate multi-platform narratives.

2.1. The Era of Convergence Culture

As mentioned in Chapter 1, storytellers have a core desire to share and distribute their stories to an audience, often as a means of survival. Alexander posits that "in the era of globalization, mass migration, and financial instability, for those who have lost their cultural or economic ground, sharing experiences by telling their stories may be a lifeline. Storytelling thus is a mode of survival, as it has always been" (2013, iii). Some might hold a rather romantic, nostalgic notion of campfire storytelling as revealing the human soul by sharing experiences through stories in front of a roaring fire; this notion co-exists with the more sober realization that stories are also told to persuade, convince, and control as part of an economic, political, or religious agenda. Storytelling drives everything; it drives technological change, big budget businesses, and the formation of community, but it might also still provide comfort for the heart and soul. Scientists, lawyers, and organizational leaders of every description, well aware of the power of storytelling, might communicate stories with a clear agenda in mind. Zipes puts it more bluntly and writes,

> The swindlers, the con men, the phony celebrities, the hypocritical politicians, the double-speak newscasters, the medicine men and women of television hawking their wares, the commercial designers of misleading advertisement, the untrustworthy journalists, and so on have become our cultural heroes of storytelling. We admire or disdain them because they flout the law and every conceivable norm as they use story to

communicate untruths that we have to come to buy with relish, a shrug of shoulders, or a helpless smile (15, 2006).

While I don't share his extreme views on storytelling, it is important to keep in mind that storytelling has indeed become institutionalized and commodified and that many storytellers are indeed driven by agendas of profit, politics, and religion. Conveying these agendas through a single communication channel might often suffice to convince an audience, but communicating them across media makes the impact much more potent. It is also evident that the goal of storytelling is not simply to convey or share information, but rather "to lodge that information into the mind and memory of the listener and to convince them to believe and use the content information" (Schank, 1990). Research has shown that stories facilitate memory and long-term recall of key content much more than pure facts (Haven, 2007), making storytelling a powerful tool to wield over the human mind in order to teach, entertain, and inform, but also to convince and control.

Not surprisingly, Bible stories are often cited as the first widespread narratives told across media. The contents of the Bible were originally told orally in gatherings through sermons and hymns (Pellowski, 1990). The earliest biblical storytellers had little choice; if they wanted their stories to be accessed by others, they had to tell them orally. Language barriers limited their approaches. Eventually, they wrote their stories on parchment and papyrus, and visualized them in artifacts or stained glass windows in the Middle Ages (Long, 2007). In the age of digital media and convergence culture, Bible stories have become

accessible across multiple media, including film, graphic novels, music, and video games such as *Bible Adventures* or *Bible Man* (wisdomtree.com) that combine the gaming experience with Bible themes as a way to reach young audiences. Kackman defines convergence culture as an "umbrella term that refers to the new textual practices, branding and marketing strategies, industrial arrangements, technological synergies, and audience behaviours enabled and propelled by the emergence of digital media" (2010,1).

Convergence is an ongoing process rather than a final destination; new platforms and media surface constantly. Returning to pre-convergence times would seem impossible; there is no returning to a narrative strategy that utilizes one medium only. One must question, however, if such a strategy ever actually existed. When Auguste and Louis Lumiere introduced their camera/projection device, the Cinematograph, in 1895 in Paris, the poster that introduced the films of the event depicted the story image of an excited crowd in a cafe eagerly anticipating the unveiling of one of the greatest inventions of all time. Posters as storytelling tools accompanied early films, and the first film trailers premiered at Rye Beach, an amusement park in New York, in 1912 (Jerrik, 2013). A film trailer tells as much of a story as the entire film. As such, the film trailer is not a story extension, but rather a story condensation and it might lead to a different thought process as the story citizen tries to fill in the large story gaps left by the trailer. The viewing of the film might correct these gaps by telling the entire story, but the film trailer takes on an important role as it creates anticipation for the film; it becomes part of the storytelling process. However, the film trailer is first and

foremost "a unique narrative of film exhibition, wherein promotional discourse and narrative pleasure are conjoined" (Kernan, 2004, 1). The trailer ideally creates the desire in the story citizen to view the entire film, and is often revealed months in advance. The new *Star Wars* trailer *Rogue One* that premiered on April 7th, 2016 has, within five days, been viewed over 30 million times on YouTube, and has created early interest in the eighth instalment of the franchise; the film will be released in December 2016.

Other promotional efforts to create early interest can be found historically in other contexts and have sometimes blurred the lines between reality and fiction. For example, American author Washington Irving used a clever scheme to promote his first book. Prior to the book's publication, he placed a series of missing person advertisements in New York newspapers seeking information on Diedrich Knickerbocker, a Dutch historian who had allegedly gone missing. He also announced that in case Knickerbocker failed to return, he would publish a manuscript left behind in order to cover the Knickerbocker's hotel bill. The advertisements caused great concern for Knickerbocker in the public, some even considering a reward for his safe return. Irving's clever hoax worked; once he finally published his book under the pseudonym Diedrich Knickerbocker, he had raised enough interest to make the book an immediate success, and Irving became a successful author (www.knickerbocker-orchestra.org). In a more conservative approach, a story written by an author on an old Underwood Standard or even by hand, when printed and sold in a bookstore, could generate promotional support through a public reading by the author who told an amazed

audience the often unpublished background story of her protagonist. Books might now be written on laptops and published as ebooks, but book readings are still part of the marketing campaign and part of the storytelling effort.

During the golden age of radio drama in the 1940s and 1950s, traces of cross promotion between radio and film were found across genres, most prominently in the mystery genre. *Mr. District Attorney*, one of the most popular radio crime dramas in the U.S., produced by Samuel Bischoff, which aired on NBC and ABC from April 1939 to June 1952, led to four feature films between 1941 and 1947; credit to the radio drama was given in all of the films (Baker, 2010), which provided a promotional synergy for both media. These examples suffice to make the point: the single medium strategy might have never dominated the storytelling process, given that the narrative and promotion often condense into a form of narrative unity executed on different platforms and media. The examples even challenge the existence of the single medium strategy unless one separates the promotional narratives from the project as a whole—a limited approach that defines narratives only as textual rather than as the economic and social forces they often become.

Although the more limited number of platforms and media of the past put some constraints on earlier storytelling processes, contemporary platforms and media allow for virtually timeless and effortless narrative and technological convergence; thus convergence today happens almost instantaneously. Fans of televisions shows such as *Breaking Bad*, for example, can watch the show, simultaneously discuss it on Twitter, and find more information and extra story

bits on the show's website. The website, created by producer AMC, provides narrative content such as games and interactive experiences with the goal of creating and fostering viewer loyalty that ties him or her closely to the show.

Convergence encourages the "migratory behaviour of media audiences who will go almost anywhere in search of the kinds of entertainment experiences they want" (Jenkins, 2006, 10). The Wachowskis recognized the growing audience consciousness that encouraged audiences to travel with the story across multiple media. In 1999, they believed that the audience was ready for *The Matrix* franchise.

2.2. Inspiration from the Japanese Media Mix

Conceptualized from its genesis as a transmedia franchise, *The Matrix (*1999*)* is probably the most cited example of transmedia storytelling. A film trilogy and numerous graphic novels and video games as well as animation films contributed to the telling of the story of Neo, who finds himself in an alternate reality called "The Matrix" where humans fight an infinite fight against machines. The Wachowskis scored an initial success with the first feature film that provided a self-contained story to a certain degree, but the entire franchise, with multiple narrative branches across various media, was too convoluted for many fans. The directors claim that only those who engage with all the narrative elements across all media can fully understand the story (Jenkins, 2006).

The graphic novels and the animation series inform the audience about the causes of the war between humans and machines, which some deem crucial to the understanding of the story. The popularity of the franchise in the

transmedia discourse stems from the fact that a long and careful planning process of all the story elements took place after the first feature film was released. An orchestrated collaboration process that united graphic and video game designers as well as animation and anime filmmakers drew attention to a concept that had not been previously introduced in Hollywood in this particular form. It is key to note that most commercial existing franchises such as *The Lord of the Rings*, for example, turned into franchises through adaptation and expansions after initial release in a single medium. These franchises were not designed as transmedia franchises, but transformed into them. From a design perspective, *The Matrix* is an intriguing project because the Wachowskis, who were also involved in the design process of the animation series and video games that were integral components of the narrative rather than spin-off products, conceived it as transmedia. The animation films, four of the eight of which were written by the Wachowskis, provide a bridge between the first and the second film. The video game served as a distinct and self-supporting narrative, not an adaptation of the films, and was part of *The Matrix* universe from the beginning, and decidedly not an afterthought or a sub-product of licensing (Askwith, 2003). Not surprisingly, the franchise gained attention through its narrative design and triggered an ongoing discussion in the field of transmedia storytelling.

For this dissertation, *The Matrix* also holds particular interest due to the source that inspired the Wachowskis: the Japanese media mix. One of many franchise examples of the Japanese media mix is *Ghost in the Shell,* which I

reference in this dissertation largely because the Wachowskis drew inspiration from the franchise, which originated as a manga series in 1989 and was published by Japanese publishing giant Kodansha. *Ghost in the Shell* tells the story of the fictional counter-cyberterrorist organization Public Security Section 9. The team, led by heroine Motoko Kusanagi, deals with political intrigue, corruption and cyber criminals in the mid-21st century Japan. Mamoru Oshii's 1995 manga-based animated film was followed by the television series *Ghost in the Shell: Stand Alone Complex* in 2002, and the franchise also spawned a number of novels and video games. As the franchise remains popular in the East and the West even decades after the initial release, a live action film based on the franchise realized by Steven Spielberg's DreamWorks Pictures, starring Scarlett Johannson in the role of Motoko Kusangani, is scheduled for 2017. Some see the decision to cast non-Asian Scarlett Johannson in the title role as controversial, triggering a heated debate about Hollywood's whitewashing on social media, particularly Facebook. The move to cast Scarlett Johannson is interesting as it might indicate that the actress, who is a renown star in the Western world and beyond, might propel the franchise further than an Asian star, for example, Rinko Kikuchi, who starred in *Pacific Rim* (2013) .

The original franchise strongly influenced the design of *The Matrix* as it too visualizes a dystopian 21st century where humanity and technology have become inextricably intertwined. *The Matrix* franchise reflects its Japanese counterpart aesthetically, thematically and in terms of the inclusion of a variety of media forms that all expand and enhance the story experience.

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Ghost in the Shell is but one of many examples of the Japanese media mix that originated in the 1960's but came to full fruition in the 1980's. The term media mix refers to the

> phenomenon of transmedia communication, specifically the development of a particular media franchise across multiple media types, over a particular period of time. In a word, it is the Japanese term for what is known in North America as media convergence (Steinberg, 2012, 135).

The starting point for the development of such a franchise is the image of a character that travels across platforms and media. Shiraishi asserts that "once an image proves to be popular enough to generate profit, the image alliance is there, ready to share the image and multiply the profit. Alliances are machines that multiply, maximize, and squeeze profit out of any image" (1997, 255). These efforts parallel similar developments in the West, where the entertainment industry, in an effort to build and maintain entertainment franchises, multiplies superhero images such as *Batman* or *Superman* across media on a large scale in order to gain the highest profit possible.

In Japan, Tezuka Osamu pioneered the concept of the image alliance in Japan by transforming his manga into anime. He translated hand-drawn manga, with a strong emphasis on narrative, into animation films and introduced them to a broader audience through the first TV anime series *Astro Boy* in 1963. In his animation films, Osamu "employed cinematic techniques—the close up, the long shot, montage and dynamic camera angles—in irregular frames to create the impression of movement and tension" (Shiraishi, 1997, 24); this style resonated

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with entire generations in Japan and later in the West. Tezuka's visual style was, however, also driven by the practical and economical constraints of a weekly cycle of television (Steinberg, 2012). Due to weekly deadlines, short story lines that had to fit into 30-minutes slots, audience members experienced extensive use of still images (Hu, 2010), which were quicker and easier to produce. This approach drew attention to the shortcomings of the medium while allowing the comparison to the familiar and extremely popular medium of manga. Thematically, stories in Japanese manga and animation capture the imagination of children and adults on a global scale. *Astro Boy* conquered worldwide markets and other platforms such as video games, a live action film and a variety of toys and other merchandise. In his often dystopian films, Tezuka's protagonists must overcome the challenges imposed by nature and artifice; thus the artist evokes a critical debate about our relationship to nature, technology, and ourselves that has universal relevance. *Astro Boy's* story is characterized by the cleft relationship between science and humans in a world in which the goals of science conflict with the goals of humanity (Koyama-Richard, 2010, 177).

These themes continue in later works of animators such as Katsuhiro Otomo and Mamoru Oshii. Otomo's *Akira (1988),* another multi-platform franchise, centres around a young anti-hero, Tetsuo, who struggles against government scientists trying to take advantage of his telekinetic energies in Neo Tokyo. Akira's resistance to the government and his embrace of the metamorphosis of his body point to issues of identity against a dystopian background of chaos, revivalism and government oppression (Napier, 2005).

These themes of humanity versus science, identity versus morality, which can also be found in Mamoru Oshii's *Ghost in the Shell (1995),* open a philosophical dialogue among viewers because the fictional context extends into reality. This dialogue, however, takes place under the veil of an animation process that mitigates the messages that "collapse fantasy into ideology" (Allison, 2006, 95) in films such as *Akira, Ghost in the Shell* and *Astro Boy*.

These anime projects span across media and countries, popularized through their open critique of deficits or grievances in humanity, science and politics that become more bearable because the utopian settings are animated. Japanese anime uses strong language and highly stylized art that differentiates it from Western animation. The worldwide audience perceives Japanese anime as edgier, and sometimes even psychotic; it is often aimed at adults as it includes genres such as pornography and horror. These multi-platform projects include a wide range of works from mass entertainment such as *Pokemon* and *Naruto* to art-house franchises that include *Ghost in the Shell*.

The convergence of popular culture and commerce in Japan, so deeply engrained in the nation, is more than mere entertainment; it embodies Japan, and gives it the image of a "soft power" (Shiraishi, 1997, 234). In an effort to support the Iraqi rehabilitation process in 2004, for example, the Japanese government sent water-tank trucks to Iraq, displaying the flags of Iraq and Japan side by side. The Iraqis noted that the local citizens might not notice the flag, hence every truck received an additional sticker of *Captain Tsubasa*, the protagonist of a soccer manga and anime, who is very popular and easily

recognizable in the Middle East as *Captain Majid* (Condry, 18). The reference to the Japanese manga "helped to make the Self Defense Force (SDF) in US-occupied Iraq appear non-threatening and friendly to the local, Tsubasa became the symbol for our goodwill" (Lam, 2007, 234). From a narrative perspective, Tsubasa's image on water trucks in Iraq does not extend the story of the anime and cannot be seen as a narrative extension. This striking example finds its place in this dissertation, however, as it demonstrates the power of Japan's popular culture across nations and Japan's effort of cultural diplomacy. For some scholars this case might illustrate an example of cultural imperialism, as an attempt to "influence other nations through the attractiveness of a nation's culture and ideals" (Nye, 2004), or to gloss over the negative images that Japan's foreign policies might trigger in some countries. My preference is not to dismiss these concerns but rather to examine this phenomenon from two sides. Hayden states that "the case of pop culture usage in Iraq is revealing of pop culture's perceived efficacy as an immediate public diplomacy tool, as well as a general sense of what such products can accomplish as an enduring point between cultures" (2012, 93,). It is key to note, however, that Japanese cultural products are part of the soft power concept, but maybe more importantly, serve as a means to economic growth.

The cultural and economic politics *within* the country point to the open dialogue between producers and consumers of these franchises with content that "is becoming organized into a dual structure where there are mainstream, mass distribution channels which market and sell to run-of-the-mill consumers, and an

intermediary zone which blurs the distinction between production and consumption, fuelled by the internet and otaku groups" (Ito, 2004, 10). Ito rightfully connects the Japanese media mix to *otaku*, a term originally used to describe fans with an obsessive interest in manga, anime, and games. Producers, marketers, and researchers of non-Asian franchises can observe exactly the same phenomenon in the rest of the world. Fans of franchises such as *Star Wars* or *Dr. Who,* often labelled as nerds or geeks, are extremely dedicated and knowledgeable about their respective franchises. Fan conventions such as Comic-Con or PAX, attended by hundreds of thousands of fans, similarly contradict the stereotype that being a *Star Trek* or a *Star Wars* aficionado is a solitary, simple-minded occupation during which fans ensconce themselves in the dungeon-like basements of their parents. Since the Japanese media mix and the era of convergence and multi-platform storytelling and the relationship between producers and fans in the West and the East point to so many similarities, a closer look at Japanese fandom might broaden the horizon of our understanding of the developments in the West.

The definitions for the Japanese otaku, equivalent of the Western term "fandom", vary significantly depending on the scholar. The oscillating connotation of the term in Japan ranges from obsession with cult anime, computer games, and military trivia often associated with anti-social and "potentially dangerous behaviour" to "positive portrayals of future-oriented, postindustrial sensibilities that contribute to the global strength of Japanese products in popular culture" (Condri, 2013, 188). For some, the term evokes "images of sociopathic

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shut-ins out of touch with reality," whereas others see otaku as a "postmodern sensibility expressed through arcane knowledge of pop culture and striking technological fluency" (Ito, introduction, 2012). The term itself was first mentioned in English and introduced to American fans on October 10, 1990, in the *rec. games.video newsgroup* and immediately perceived as negative. Fans who wanted to find out which portable gaming device was right for them could fill out a questionnaire with one of the questions referring to otaku as "someone who stays indoors all the time, for example playing video games." The reaction of one of the fans: "Otaku sounds kind of perverted. I hate that word" (Eng, 89, 2012). The negative connotation stems from general stereotypes associated with most forms of popular entertainment such as video games or television, and, in the case of the Japanese media mix, also from bizarre stories related to anime and manga.

In 2008, for instance, Taichi Takashita called for the legal recognition to marry an anime character named Miku Asahina, due to his lack of interest in the three dimensional (real) world. Needless to say, this endeavour failed despite more then three thousand signatures from serious—or not so serious—supporters (Condry, 2013). A much more concerning instance occurred earlier in 1989 when Tsutomu Miyazaki abducted, killed, and mutilated four girls. Manga and videotapes containing anime of pornographic variety filled his bedroom, and the popular press quickly made the link to otaku (Ito, 2012). Rather than deliberating the "good" versus "bad" otaku, it seems beneficial here to focus on the practice associated with the term—the sharing of cultural products,

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information, theories, and ideas—and on the phenomenology of watching and the cultural global exchange that resulted in worldwide anime conventions.

Even though anime made its debut in the U.S. in the 1960s, driven by Osamu Tezuka's shows *Astro Boy* and *Simba the White Lion* and by Tatsuo Yoshida's *Speed Racer,* the exchange of shows started in the late 1970s, coinciding with the invention of the video-cassette recorder in 1975 and the foundation of the Cartoon/Fantasy Organization in 1977 in Los Angeles by Fred Patten (Eng, 2013). In an tireless effort to share the passion for their favourite Japanese media mix projects, fans would mail hard copy documents of synopses, reviews, translations, and other information to each other. More anime fan clubs formed on campuses, networks grew, and more conventions were held. Fansubbing as a core practice allowed fan-to-fan traffic (Ito, 2013, 179) between East and West as substitute for missing commercial overseas distribution. Otaku took matters into their own hands by subtitling the shows and sending them to their friends overseas and showing their pride for their popular culture.

This enormous energy of the 1980s has multiplied over the years, catalyzed through the file sharing possibilities of the Internet. The digital age energized peer-to-peer file sharing, and manga and anime today have a massive international audience that connects on myriad platforms and defies the stereotype of the "socially deficient, unhealthily obsessive, concerned with childish things" (Eng, 2013, 92). Otaku share not only a significant aspect of their culture with other nations, they also gain reputation and new knowledge and

understanding in the process, and they investigate these cultural products to an extent that even the producers did not anticipate.

Otaku become masters of their franchises across all platforms and dissect them long after "retirement" of the franchise. The attention to detail, and the persistence and scrutiny that otaku dedicate towards their franchises is mind-boggling and a more than noteworthy phenomenon for producers, marketers, and researchers. Fandom or otaku creates a sense of belonging as well as an understanding of practices and human experiences across cultures. Deeply immersed in these franchises, fans become part of the story world and part of the cultural setting in which these stories are consumed, and any investigation of such franchises and projects must include this context. The cognitive, interactive, and participatory audience activities that are connected with the reception/ consumption of transmedia narratives will be further explored in future chapters. This short journey into the Japanese media mix does not do justice to this rich and fascinating topic but the full development of this area is beyond the scope of my dissertation. I found it important, however, to bring attention to these cross-cultural inspirations and similarities that re-ignited the discourse surrounding multi-platform storytelling through Jenkins' work, and *The Matrix* provides the necessary link as a project that was so deeply inspired by the Japanese media mix.

In the beginning of this chapter, I mentioned *The Matrix* franchise as a narrative product shaped by carefully orchestrated deployment across many media types. I referred to the collaborative efforts of the audience to dissect the

stories that are adapted and expanded across media, but what is the role of the medium? The discourse in transmedia theory re-ignited and informed the medium specificity debate, which I discuss below.

2.3 The Medium Matters, Period.

As previously mentioned, the proliferation and convergence of new media and technologies has resulted in a plethora of narrative approaches worldwide spreading in different directions such as database narratives, interactive storytelling, alternate reality games, transmedia stories, and intermedial narratives (Klein, 2009; Philips, 2011; Dena, 2009; Jenkins, 2006; Wolf, 2005). The relationship between medium and narrative comprises a major theme in the discourse of transmedia theory, thus fuelling the discussion on medium specificity. One of the core issues of transmedia theory relates to the narrative practices that are shaped by the specificity of the medium (Alber, Fludernik 2010). Some scholars argue that the medium matters because each medium possesses significant and unique properties, and ideally each medium is appropriated dependent on its strength and weaknesses (Jenkins, 2006). This view is not without controversy, especially when considering the structuralist approach. Structuralists claim that any message or core narrative that will be transferred from one media to another will keep its essential properties; media dependency is thus not a given fact (Chatman, 1978). Other scholars follow the same thesis by claiming that the story as a mental construct is independent of any medium (Bremond, 1964; Barthes, 1966; Prince, 1980). The major claim in

this argument is that the structure, the form, and the theme of the narrative remain stable across media.

Proponents of the story-medium dependency notion claim that every re-telling of the story alters the story told (Herman, 2004). The spoken dialogue, for example, offers more possibilities than the written word, because a narrator can fully exploit prosody; written language is impoverished in this regard. In contrast to structural narratology's medium independency, postclassical narratologists argue that storytelling acts are tailored to the specific medium that conveys them (Hernstein, 1980; Long, 2007; Dena, 2009; Phillips, 2011). Herman argues for a synthesis of both approaches. He states that "differences between narrative media are gradient (more or less) rather than binary, synthesis suggests that stories are shaped but not determined by their presentational formats" (2004, 54).

The media dependency debate is a crucial starting point in the work of past and present practitioners and theorists alike, and as such one of the major differences between classical and postclassical narratology. The synthesis or amalgamation of the two arguments, as suggested by Herman, while most appropriate in the postclassical stream of research, simplifies the issue. I agree that the substance of the story, however, is recognizable across media and is media-independent; to develop this thought even further for the multi-platform context, the main themes (narrative and visual) of the story need to be present in all included media in order for the franchise to form a narratological symbiosis—a criteria that is not always met. For the purpose of this dissertation, however, I

would like to take a clear stand: the medium matters, period. Important for the investigation of medium specificity and transmedia is the difference between a platform and a medium. Lisa Gitelman provides a starting point:

> I define media as socially realized structures of communication, where structures include both technological forms and their associated protocols, and where communication is a cultural practice, a ritualized collocation of different people on the same mental map, sharing or engaged with popular ontologies of representation (2008, 7).

Gitelman combines platform (technological forms and their associated protocols) and media (structures of communications) and rightfully so. Media, as a mode of producing and distributing expressive communication (the message), often need a carrier (platform), but sometimes are the carrier. Modes are semiotic channels (language and gesture) that can be viewed as a resource for designing expressions within a particular type of discourse (Herman, 2013). The discourse on the definition of media has a long history, and is still "muddy" (Gitelman, 2008,7). Transmedia narratives live through a symbiosis of several platforms, with one platform often carrying several media, for example, the internet provides a platform for film and social media.[4]

Every medium possesses medium specific characteristics that alter and impact the narrative, and influences the production. Marshall McLuhan, in his seminal work *Understanding Media*, differentiates media through the metaphor of "temperature," distinguishing hot media such as film or radio, from cool media

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[4] I am avoiding the term multi-media because it has a very different connotation.

such as cartoons of television. According to McLuhan, "(a) hot medium is one the extends one single sense in 'high definition'" (1964, 22), whereas a cool medium provides less information. This distinction is interesting, as it points to the technical affordances of the medium that impacts the audience's participation. The more information that is provided by the medium, the less information the listener or viewer needs to fill in. Yet there are limitations to the amount of information that certain media can convey.

Telling a story is different from drawing a story and different from showing a story. A short story, for example, obviously has a limited number of words compared to a full length novel. If the same short story is being adapted into a feature film, the source material needs to be expanded considerably. Drawing a manga and adapting the same manga for television poses significant challenges, even though they are both considered cool media under McLuhan's hot and cool theme. When Osamu Tezuka transferred his manga to television in the 1960's he had to overcome hurdles and adapt to the specificities of the television medium without estranging his fans. As previously mentioned, Tezuka's visual style was driven by the practical and economical constraints of a weekly cycle of television (Steinberg, 2012). The challenge for Tezuka and his team was to create intra-frame and inter-frame-movement on a small budget and a limited amount of time (Azuma, 2009).Three-frame shooting, or the reduction to two frames or even one frame per second, counteracted the viewer's sense of realism and produced a different sense of realism, fit for television. A crowd scene, a close up of a character, or a scene dominated by voice only required no movement at all

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(Steinberg, 2012), which served as a perfect transition between the obvious stillness of the manga and the "new"movement of the anime. This is just one of many examples how different media require different work processes, skills, aesthetics, and approaches. An audience perceives a written, a visual, or an aural medium, or a combination of these, differently.

Consequently, a narrative must be tailored for each of these media, the media specificities must be taken into consideration, and the affordances of the medium matter. Every medium can tell a story, but not in the same capacity. The medium matters, not only aesthetically but especially in terms of the narrative strategy that depends on production times, collaboration necessities and practices, times and modes of consumption, and the target audience; all of these factors will be discussed in the forthcoming chapters.

2.4. Convergence Culture and The Transmedia Debate

In the age of media and technical convergence, contemporary storytellers have ample narrative strategies to tell their story. Jenkins points to MIT's political scientist De Sola Pool who predicted the blurring lines between media in 1983: "a single physical means - be it wires, cables or airwaves - may carry services that in the past were provided in separate ways. Conversely, a service that was provided in the past by any one medium can now be provided in several different physical ways. So the one-to-one relationship that used to exist between a medium and its use is eroding" (De Sola Pool qtd. in Jenkins, 2006, 10).

A shift in the producer/user relationship accompanies this technological process. As means of production and distribution become easily available, users turn into producers and grassroots and independent media production becomes the norm. Since the user actively spreads and distributes media elements, the audience determines which media elements are worth spreading, because "their choices, investments, agendas and actions determine what gets valued" (Jenkins et al, 2013, 21). If culture is "the name we give to the infinite web of meaning that human beings have been weaving for millennia," (Murray, 2012, 1), then *participatory culture* relates to the active production and distribution of meaningful artifacts. Such artifacts take all physical and virtual shapes and forms, but the digital dominates by the virtue of ease of use. In the process, the user takes on the role of the producer or in a hybrid version "produser," (a combination of the terms producer and user), simultaneously producing (to some extend) and consuming content (Bruns, 2005). The storyteller "amateurs" use a variety of media to tell their story, such as Facebook, YouTube, or Instagram, as do industry professionals albeit on a larger scale. The film industry recognized the increased multi-platform activity and institutionalized the role of the transmedia producer in 2010. The Producers Guild of America defines a transmedia narrative as a project or franchise that

> must consist of three (or more) narrative storylines existing within the same fictional universe on any of the following platforms: Film, Television, Short Film, Broadband, Publishing, Comics, Animation, Mobile, Special Venues, DVD/Blu-ray/CD-ROM, Narrative Commercial and Marketing rollouts, and other technologies that may or may not currently exist. These narrative extensions are NOT the same as repurposing material from one

platform to be cut or repurposed to different platforms (2010).

The term transmedia producer relates to Jenkins' definition of "transmedia storytelling." Jenkins, one of many academics who took an early interest in multi-platform storytelling, describes a transmedia story as "a story that unfolds across multiple transmedia platforms, with each new text making a distinctive and valuable contribution to the whole" (2006, 96). The value of the definition as a starting point into the investigation of transmedia stories is undeniable. A storyteller who sets out to tell a story across media might introduce it in a video game, add more content through a film, and add even more depth on a website or in a graphic novel. Each medium contributes value for the user; narrative overlap is kept at a minimum. It is safe to say that contemporary producers, fans, and scholars predominantly use this definition when they discuss multi-platform projects. The term transmedia storytelling, however, has lost its precision; it is used for a variety of projects that do not comply with the original definition. The *Harry Potter* franchise, often labelled as a transmedia storytelling example is, by Jenkins' definition, not a transmedia story. The films and video games are adaptations of the introductory medium—the books written by J.K. Rowling. While these adaptations arguably add value to the franchise, no significant new story elements are introduced in the adaptations. Admittedly, Rowling constantly and persistently added and still adds new content to the franchise; thus the *Harry Potter* franchise remains viable. However, Rowling did not conceptualize *Harry Potter* as a transmedia project; the franchise moved into transmedia through

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adaptations and story extensions. This is a crucial distinction that needs to be, but often is not made in the transmedia discourse.

To be clear, the problem with the term exists not in the definition; the problem is the appropriation of the concept in circumstances that dilute its original meaning. Many projects might transition into transmedia but were not *designed* as transmedia. Many scholars have recognized the issue with the terminology and suggested new or different terms. Rose distinguishes between mass media as the industrially-manufactured narrative brought upon and consumed by an mass audience, versus "deep media", the predominantly digital narrative that allows active participation. Rose's emphasis on the correlation between narrative depth and audience immersion is not exhaustive, but he advances the concept to storytelling in advertising and autobiographical storytelling (2012, 98). As such, deep media remains a rather broad concept.

Long suggests distinctions among "hard," "soft," and "chewy" transmedia narratives (2009, 20). Hard transmedia narrative describe stories designed as transmedia (transmedia storytelling) whereas soft transmedia are crafted only after a successful launch of the initial story in one medium. While this distinction is traceable, his third term "chewy" combines hard and soft, and remains somewhat ambiguous. A chewy project was designed as transmedia, but all elements of the integrated media are only released after the initial success of the launching medium.

"Cross-Media Communication" refers rather vaguely to a narrative journey across media such as film, Internet, mobile devices, and so forth, that goes

beyond pure consumption into "some level of interactivity" (Davidson, 2010). A scholarly investigation of cross-media communication seems difficult as Davidson does not provide narrower parameters for the concept. Nicoletta Iacobacci, the Head of Interactive TV/Eurovision at the European Broadcasting Union, specifically describes cross-media entertainment as follows: " In a cross-media environment, content is repurposed, diversified and spread across multiple devices to enhance, engage and reach as many users/viewers as possible" (2008). Contrary to transmedia storytelling, cross-media entertainment allows the repurposing of the same material, thus putting an emphasis on branding and the strength of the franchise as a revenue model. Iacobacci, however, underlines the marketing strategies embedded in transmedia projects, and both approaches encourage audience participation. Similarly, Ibrus and Scolari seem to suggest that the cross-media strategy bases its merits mostly on financial reasons. They argue that "crossmedia[5] is an intellectual property, service, story or experience that is distributed across multiple media platforms using a variety of media forms. Such distribution is mostly a strategic endeavour…in order to either obtain a higher margin from the property, or strengthen it via cross-promotion across platforms" (7, 2012). This definition foregrounds the financial and marketing aspects of the project; the narrative takes the back seat. Their suggested formula "crossmedia + narrative = transmedia storytelling" further emphasizes this notion. Even though they admit that under this formula, all transmedia storytelling experiences are cross-media,

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[5] Please note that the hyphen-less notation of cross-media stems from the original text. In the discourse "cross-media, cross media and crossmedia" are frequently used.

they seem to indicate that not all cross-media properties are transmedia. In this approach, the distinction between cross-media and transmedia entertainment remains somewhat blurry.

This literature review demonstrates the problem that producers, scholars, and users are facing: the confusing terminology, and the many questions surrounding transmedia storytelling. Andrea Philips, a successful transmedia producer, expresses the difficulties with defining transmedia openly:

> Before we can talk about how to make great transmedia projects,
> we have to clarify what we mean when we say 'transmedia storytelling.'
> This is shockingly difficult to do. For all the excitement surrounding the
> word and its crackling aura of innovation, it's flat out impossible to nail
> down a single definition that everyone can happily agree on (2012, 13).

The investigation of existing and the planning of future multi-platform projects could benefit form more clarity because it will facilitate a more meaningful discourse and a better understanding of the implication of different narrative strategies. In my dissertation, I will not introduce yet another term for transmedia storytelling but will instead suggest a different approach to examining contemporary storytelling forms, an approach based on *narrative strategies.*

2.5. Narrative Strategies in Transmedia Environments

Narrative strategies are the deliberate plans to manage the communication and distribution of narratives, and range from linear storytelling appropriating a singular medium to strategies that use fragmented, non-linear storytelling across multiple media. Narrative strategies foreground the story

rather than the medium, consider the relationship between producer and the audience, and include marketing and branding as elementary components. The implementation of narrative strategies in the analysis of existing transmedia projects and in the planning of future projects facilitates a categorization system that will help us understand the many factors at work in the production and reception of these types of narratives.

I am well aware that multi-platform storytelling is a dynamic process; stories grow and shift, and a classification of transmedia stories is both difficult to achieve and deemed unnecessary by many producers and scholars alike. However, if we want to examine the implications of transmedia for popular culture, the changing producer/user relationship, and the understanding of storytelling across media in general, we need a more nuanced and precise approach that allows a more refined categorization of transmedia projects. Expanding beyond the original platform or medium and increasing interactivity and audience participation are some of the characteristics of convergence culture. The audience now possesses the ability to interact, and contribute in form of fan fiction of fan art, for example, and is often encouraged to do so. Narrative and production strategies have changed in the digital age and the number of platforms and media have increased significantly. Multi-platform narratives are offering exciting narrative possibilities for storytellers that aim to develop rich, deep and diverse storytelling experiences for a wide audience with a successful artistic and financial outcome. The challenges for the investigation and analysis of transmedia projects are terminology, murky concepts and ideas,

and a general lack of categorization. I am well aware of the criticism that some producers and scholars bring to categorization but others deem categorization a necessity for a meaningful discourse. Scolari advances Greimas' argument that "the definition of concepts and the creation of taxonomies are the foundational components of any theoretical discourse" and contends that "if we want to develop a theory of transmedia storytelling, we must begin by clearly defining the concepts and proposing basic taxonomies to develop a scientific discourse" (2012, 59).

I argue that a meaningful analysis and comparison of a variety of projects is only possible when a structure is in place that provides stable dimensions and factors that allows a cross-examination of similar projects with the result of detailing the properties, strength and weaknesses, and the emerging relationship between producer and consumer. I argue that the suggested typology to follow in Chapter 3 provides such a structure and will facilitate both the examination of transmedia projects and the related discourse.

Chapter 3: Narrative Strategies in Transmedia Environments

3.1 The Typology - A Re-Conceptualization of the Transmedia Paradigm

The term *transmedia* has proven useful when employed as a technical term without further connotation, describing the process of using multiple platforms for the purpose of storytelling. The term indicates that, in its most basic form, story A exists on more than one platform, the prefix 'trans' meaning 'across.' Under this premise, the terms transmedia and multi-platform can and will be used interchangeably in this dissertation. The purpose of this dissertation is to (1) enable classification and thus comparison across transmedia projects to (2) move the field past discourse centred mainly on terminology by providing a typology and framework that describes the reality of transmedia projects as they currently exist, and to (3) suggest directions for future research as well as provide normative advice for choosing appropriate narrative strategies given certain conditions, characteristics, or factors. The implementation of these strategies are based on production, engagement, and branding/marketing, and the unit of the typological analysis of all projects is the narrative.

The dissertation touches upon a number of disciplines such as adaptation studies, fandom and fan fiction (the focus of the dissertation will be mostly canonical material), and animation studies. Elements of these disciplines will be included but a full investigation into these fields is beyond the scope of this dissertation. Categorizations of transmedia or multi-platform narratives are not new, and different scholars have implemented different approaches (Dena, 2011; Harvey, 2014, Long, 2006), but the novelty of this dissertation is the development

and inclusion of two dimensions that are and will always be inherent to any story that is told across at least two media: (1) the *narrative deviation* and (2) the *number of release events over time*. Narrative deviation is defined as the degree to which the story deviates from the story anchor (the medium in which the story originates) across different media expansions. Narrative deviation is not applied within the same medium, for example, in prequels and sequels. Narrative deviation relates directly to the recognition value for the audience; if not anchored on familiar characters or settings, for example, the more the narrative deviates from the original, the less recognizable it becomes. The audience might perceive transmedia projects as coherent storyworlds more easily when certain elements of the project are repeated across media. Second, the number of release events over time is defined as the frequency and pattern of points in time at which narrative content is released across media to the audience.

Before I elaborate on the narrative strategies, I would like to point to one of the complexities of this dissertation that pertains particularly to multi-platform narratives, namely the conceptualization of the audience. Due to different platforms/media that address readers, viewers, players, listeners or participants, an umbrella term is needed that encompasses these different engagement positions. Consequently, for the purpose of this dissertation and beyond, I conceptualize the audience, the viewer, the reader, the listener, the player, and so forth, as story citizens. The Cambridge dictionary defines a citizen as "a person who is a member of a particular country and who has rights because of being born there or because of being given rights, or a person who lives in a

particular town or city" (http://dictionary.cambridge.org/). The two core aspects

that I would like to convey and emphasize with the term story citizen are the story

citizen's active engagement with and participation in the storyworld. The story

citizen inhabits and consumes the storyworld, but, as this dissertation will

demonstrate, in many cases also interacts with or contributes to it in varying

degrees, or in other cases rejects and resists it. Some marketing campaigns

reflect the idea of storyworld inhabitation. Game developer Turbine's slogan

"Pack your bags and move to Middle Earth," encourages the story citizen to

move in and play the massively multiplayer online role playing game "Lord of the

Rings Online" that, launched in 2007, and is still active nine years later. Clearly, I

do not claim that all story citizens interact or engage with a storyworld in the

same way; the "homogenous story citizen" does not exist. Kennedy asserts, for

example, that "audiences are not homogenous and psychological groups, their

experiences are not uniform and are impossible to standardize" (2009, 3). I

argue, however, that the key element uniting many story citizens is their active

interpretation of the storyworld. The exact level of story citizen participation and

engagement, however, varies within the four different narrative strategies

suggested in this dissertation.

In this typology, depicted in Appendix B, I suggest four different narrative

strategies that cover most approaches to multi-platform storytelling: (1)

constrained narrative strategy, (2) *expansive narrative strategy,* (3) *connective*

narrative strategy, and (4) *native narrative strategy*. Narrative strategies are the

deliberate plans to manage the communication and distribution of narratives, and

range from linear storytelling appropriating a singular medium to strategies that use fragmented, non-linear storytelling across multiple media. I first argue that the strategy of transferring *the same* narrative from one platform/medium to another platform/medium, is constrained in comparison to the other strategies. Most often, this constrained narrative strategy takes the form of adaptation. All stories have adaptive potential, though not in equal measures; not all stories can successfully be adapted into video games, for example, but virtually all written stories can be visualized. Adaptations cannot endlessly be performed and are thus constrained within a few number of media.

Second and third, I contend that producers put the expansive and connective narrative strategies into effect after the successful launch of the initial story in the introductory medium or platform. The expansive narrative strategy is appropriate *if* the original narrative proves successful; if successful it is often expanded across media and platforms. Many major franchises set out in one particular medium and upon success are expanded across a variety of media and platforms. *Batman* started his journey in 1939 as a comic superhero, but the character was so popular with fans that he soon fought his foes across platforms and still enjoys great worldwide popularity as protagonist in films, graphic novels, video games and other media. The expansive potential increases with large story worlds, strong characters that transfer across media, and an elaborate narrative development that creates a rich and deep story arc.

This is also true for the connective narrative strategy, which involves a new instalment of a dormant narrative that connects with its revived successor. It

is key to note that the dormancy of the project in this category is on of the most crucial distinctions from the expansive narrative strategy, in combination with the lower number of release events. Significant changes to the original narrative may be required in the course of the connective narrative strategy; the concept of *retroactive continuity* allows for these changes in the narrative development. Retroactive continuity "refers to after-the-fact alteration of previously established continuity, usually to revise history to allow additional story elements, or to fix or explain what would otherwise be a continuity error" (Dowd et. al, 2013, 72). Retroactive continuity serves as a useful tool for connective narrative strategies, but requires creativity and a forgiving audience.

Finally, the native narrative strategy aims at creating a project that systematically spreads the narrative across different media and platforms from the moment of inception. A careful planning process and an elaborate pre-production phase characterize this narrative strategy, as all narrative threads must build a homogenous unity. Before I introduce these strategies in detail in the following sub-chapters, I further elaborate on the foundation and methodology of the typology, beginning with the narrative deviation and the number of release events over time—the two dimensions central for transmedia projects.

3.1.1. Narrative Deviation

The first dimension introduced in this dissertation is *narrative deviation* (see Appendix C). It involves textual elements such as the plot and relates to

story elements such as the characters as well as elements of the story world—the settings (landscapes, flora and fauna), iconography, technology, history, language, and so forth—and the recognition value associated with these narrative characteristics. The degree of narrative deviation might serve as a first indicator of the narrative strategy employed by the producers. Low narrative deviation, for example, points to an adaptation with low *narrative dependency.* Narrative dependency describes the degree of narrative nexus between two given media texts and thus the knowledge necessary to understand all the elements of the story. Low narrative dependency indicates that the two media can be consumed independently; the audience does not need to know the book in order to understand the film adaptation.

A story told across two platforms with low narrative deviation and low narrative dependency gives the story citizen the freedom of choosing between two media or platforms because either one delivers the same or very similar narrative content. In practical terms, a story citizen can enter the storyworld as the reader of the book or as the viewer of the film adaptation and experience more or less the same narrative. Narrative dependency varies significantly with different narrative strategies and poses cognitive challenges of varying degree for the story citizen. The higher the narrative dependency, the higher the cognitive challenge for the story citizen, since he or she must engage with a number of media and remember portions in order to understand the entire narrative.

Since narrative deviation links directly to the recognition value of the narrative entity, it is a key factor of any narrative strategy in a multi-platform environment. The connective narrative strategy, which involves a narrative entity that has been dormant for some time and will be revived, for example, initially has some narrative overlap in order to increase the recognition value, but will deviate overall in order to present fresh, renewed and contemporary material. The story citizen of the original narrative recognizes the franchise through characters or settings and experiences an amalgam of nostalgia and contemporary aesthetic. For example, *The Ghostbusters* franchise will be revived through a third film instalment in 2016. The narrative connectivity between the original and the sequel will be achieved through the same narrative premise that the original held: a group of parapsychologists will save New York City with the help of advanced technology. Fans of the original franchise might recognize the settings and the core narrative idea, but the film will be rejuvenated aesthetically to achieve a contemporary look and feature a female lead cast, which presents a complete gender change from the all-male lead cast of the first two films (Yukarba, 2014). Even though director Paul Feig promises a "hilarious female cast," fans of original work are often unforgiving of major changes, and the franchise might see a gender shift (or reduction) in its audience as well.

Audiences of adaptations generally expect low narrative deviation; they usually envisage the original work and expect it to be closely translated into a different medium. Consequently they often show their disappointment with textual and visual changes that do not meet their expectations. The mere depiction of

the same character names, locations, and similar plot points does not suffice. Fans of video games, for example, when watching film adaptations of their favourite games "are not expecting literal translations of the game to the screen, but they are expecting more faithful and more respectful translations of the original material" (Dowd et al, 2013, 153). Textual and aesthetic narrative deviation poses one of the major challenges for producers as the story citizen reflects on it critically in multi-platform projects.

3.1.2. The Number of Release Events Over Time

The second dimension introduced in this dissertation is the *number of release events over time* (see Appendix D). It describes the pattern of points in time at which narrative content is released across media to the story citizen. The number of release events and their timing aids in identifying the project and often the purpose of the individual medium. Even with a single platform project, the time of release depends, among other factors, on production realities and market demands; it is thus medium specific and decisions regarding the timeline of release must be made media-consciously. This proves particularly true for multi-platform narratives, as each narrative release event effects the narrative entity. The number of release events and the timeline of release are naturally a "package deal" and need to be reviewed together. Native narrative strategy projects have a high density of release events because the content of the narrative entity is, in many cases, released almost simultaneously over a short period of time. I define the density of release events as the intensity of media

releases, for example, the release of a video game, a film and the publication of a video game within a short period of time. Lance Weiler's multi-platform/ transmedia project *Pandemic,* for example, took place over five days during the Sundance Film Festival in Utah. Weiler released the entire content across a number of platforms (short film, website, artifacts, etc.) in a time span of a few days as an ephemeral project that the audience could engage with on location or remotely from all over the world via the internet. The number of release events was high over a short time. This project is thus categorizable as native from a production point of view and, since the narrative dependency was high (the story citizen had to have knowledge of all the components of the narrative), it required a high cognitive load to be placed on the story citizen. Tracing multi-platform narratives with the aid of the narrative strategies suggested in this dissertation allows for a more nuanced assessment of the historical, institutional, and cultural practices of storytelling. All the narrative strategies suggested in this typology are tied into the narrative deviation and the number of release events over time, but differ significantly in terms of structure. In the next section, I will describe the four strategies in more detail, beginning with the constrained narrative strategy. The discussion of the four strategies, however, will not follow the order of the typology as I will discuss the strategies in the order of the level of audience engagement, from lowest to highest, beginning with the constrained narrative strategy, followed by the expansive narrative strategy, the connective narrative strategy and the native narrative strategy, because the first three strategies build on each other

with increasing audience engagement. The native narrative strategy is the most unique of all strategies and will be discussed last.

3.2. Strategy #1: Constrained Narrative Strategy (CNS)

3.2.1 CNS Characteristics

Transferring the narrative of an intellectual property (a creation of mind such as a literary work), to a finite number of other media—the process of adaptation—is the key characteristic of the *constrained narrative strategy* (see Appendix E). The audience usually engages only with a limited number of adaptations, consequently the strategy is constrained to a smaller number of media. In the multi-platform discourse, adaptations often have no significance, since some researchers argue that adapters engage mainly in retelling the same story in a different medium (Jenkins, 2006; Long, 2007). Even though Henry Jenkins revised his earlier writings in 2011, stating that "any adaptation represents an interpretation of the work in question and not simply a reproduction, so all adaptations are to some degree add to the meaning attached to the story," adaptations are usually excluded from the transmedia storytelling discourse. Christy Dena, a transmedia practitioner and researcher, observes that:

> the transmedia phenomenon is not best understood as and end-product trait such as expansion, but by the knowledge and skills necessary to create (and experience)a transmedia project. Those knowledge and skills involve the employment of a variety of distinct media (and environments), in a variety of ways. One of those ways is adaptation (2009,163).

Narrative strategies vary in terms of the skills and knowledge to strategize them, but are also completely different in the way they are experienced, understood, and marketed; adaptations are no exception. No matter how we regard them, adaptations belong in the transmedia conversation since more than one medium or platform is involved. Contrary to those who see adaptations merely as a reproduction of the adapted text, this stance is in line with the belief that "the act of adaptation always involves re-imagination and then re-creation" (Hutcheon, 2006, 8). The adapter redefines the text in conjunction with medium-specific characteristics and in the process often addresses a new audience.

For example, graphic novel adaptations of classic literature are common, but publisher *Classical Comics* takes the adaptation process a step further by offering three different reading levels for their Shakespeare series. Since the original Shakespearan English language as reading level number one can deter first-time readers, the offering includes the same text in contemporary English and as a quick text. These different levels target younger readers and non-native speakers alike. Adaptations usually offer a safe revenue model; in many cases, the success of the original text transfers to the adapted text. Writer and producer Stephen Follows investigated the 100 highest grossing films for each of the last 20 years[6], and found that across all films, 52% were adaptations. Literature-to-film comprised the highest percentage, followed by comic/graphic-novel-to film

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[6] He used the Opus data base and focused on the domestic box office numbers.

adaptations (2014).

3.2.2. CNS Challenges

The line between true adaptation and narrative extension can be indistinct, however; regardless of where that line is drawn, I contend that an adaptation always adds value to an existing project—one of the premises of the transmedia discourse. In order to delineate the boundaries of the adaptation versus story extension debate, mentioned earlier in the dissertation, two different examples are both situated on opposite sites of the constrained narrative strategy category: *Shutter Island,* a narrative that originated in the novel by Dennis Lehane, and *Snowpiercer,* a story conceived in a graphic novel by Jacques Lobs and Jean-Marc Rochelle, both examples of micro narratives. Leanne's novel *Shutter Island* tells the story of U.S. Marshall Teddy Daniels and his partner Chuck Aule, who investigate the disappearance of a mass murderer being held in a mental institution for the criminally insane. Reminiscent of the work of detective novel writers Graham Green or Raymond Chandler, the novel turns and twists in a film noir fashion with an ending that defies happiness and leaves the audience wondering, re-reading, and challenging their own understanding of the convoluted plot. The cinematic visualization by Martin Scorcese, starring Leonardo DiCaprio and Mark Ruffalo, follows the same pattern, holding back when necessary in highly restricted narration and building up to the climax that very closely follows the events in the book. Similarly, the graphic novel, designed by Christian de Metter, within the restricted boundaries of the medium "is

religiously (and gruesomely) faithful to Lehane's novel and with good reason — it would be hard to tamper with the circuitry of such a meticulously crafted mystery" (Boucher, 2010).

I argue that the film and graphic novel adaptation expand the narrative through the visualization of the written text; the story citizen can now see and hear in addition to read and imagine, while simultaneously compressing it due to the limitations of these visual media. In the narrative design process, both Scorsese and de Metter, "had to decide what information from the story present visually and what information to leave in verbal form, and also how to coordinate these two information tracks in moving from the source narrative to their own target text" (Herman, 2013, 68). Some of the narrative elements need to be omitted completely as neither a film nor a graphic novel holds the narrative capacity of a novel. Scorsese's film adaptation of *Shutter Island,* originally scheduled for a 2009, release lined up with publication of the graphic novel in the same year. Paramount pushed the release date to 2010, but both media benefitted from the marketing buzz that preceded the film release[7]. These cross-promotion efforts address a wide range of target audiences, often converting their preferences from book to film and vice versa. As Simone Murray contends, "in the contemporary world, a film is increasingly 'made'[8] in terms of its popular perception as much by its marketing campaign and distribution pattern as it is by the images and the sound recorded upon its negative" (2012, 158).

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[7] Paramount released three trailers for the film over the course of a year.

[8] Author's emphasis

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As a well rounded adaptation experience, however, *Shutter Island* contains little narrative deviation from the original novel and classifies the film and graphic novel as adaptations not story extensions. The story citizen, if familiar with the original text, perceives the adaptation as intertextuality, unavoidably comparing the two approaches, investigating the shortcomings and enrichments. Comments such as "the film does not live up to the novel," or "the video game faithfully follows the movie plot line," frequently appear on audience and critics review sites. Thus the familiarity with the original source can be both delightful and frustrating for audience and critics.

In contrast to *Shutter Island*, *Snowpiercer* situates itself on the other side of the constrained category. Originally published under the title "*Le Transperceneige*," the graphic novel tells the post-apocalyptic story of the survivors of an environmental catastrophe that causes an ice age. Narrative deviation between graphic novel and film is high; the commonalities relate only to the general premise of the source text: A high-tech train that runs for years on a looping track provides the only means of survival for human kind; a class struggle erupts that results in an escape and revolt respectively and causes a conflict between the impoverished inhabitants of the tail section and the decadent bourgeoisie dwelling in the trains front.

The film plot differs significantly from the graphic novel, yet the project belongs to the constrained category as an adaptation because, despite deviation from original, there are similar visual themes such as the design of the train and its compartments and the socio-political theme of class struggle that unite both

projects. The marketing for the film makes no specific reference to the graphic novel; in interviews, director Bong Joon-hu distances himself from the graphic novel insofar as he insists that he had only been inspired by the most basic idea of the train, the end of the world scenario, and the class struggle. The English translation of the French graphic novel original, however, published in 2014 in advancement of the film, proudly states "the graphic novel that inspired the film." These two examples—*Shutter Island and Snowpiercer*—demonstrate a variety of adaptations; one follows the source text very closely, while the other strays away rather far and almost turns into story extension rather than adaptation.

3.2.3. CNS Narrative Deviation and Number of Release Events over Time

The projects included under "constrained narrative strategy" are exemplified through low narrative deviation and a low number of release events over time in comparison to other categories in the typology. The timeline of release is dynamic and depends on the technological affordances of the medium as well; producers still adapt classic literature pieces today, and discover adaptable sources from any time at any given time. The constrained narrative strategy most often results in projects with a few number of release events over time, some clustered together to take advantage of the narrative momentum and success of the work. Cognitively, the constrained narrative strategy presents the least cognitive challenge for the audience of all narrative strategies discussed in this dissertation; the narrative is contained in one and then transferred to another medium. The adaption might even foster higher understanding of the original

source. It is also key to note that the story citizen often encounters a text through an adaptation first and not the original source; thus the audience contact does not necessarily (and does not have to) follow the timeline of release.

3.2.4. CNS Conclusion

The constrained narrative strategy leads to low narrative deviation and and a low number of release events over time. The timeline of release depends on the technical affordances of the medium, as the release of a film or a video games depends on the production process, which can be years for films and video games. In the dynamic process of storytelling, adaptations may vary significantly from their source and consequently need to be placed in a different category. Through the constrained narrative strategy approach, adaptation theory enters the constructive dialogue with other narrative strategies in transmedia environments. Adaptations also feature prominently in the next narrative strategy discussed in this dissertation: the expansive narrative strategy.

3.3. Strategy # 2: Expansive Narrative Strategy (ENS)

3.3.1. ENS Characteristics

Expanding the narrative of an existing intellectual property across multiple media over time is the key characteristic of the *expansive narrative strategy* (see Appendix F). Adaptations often provide a path into the much denser and more lucrative narrative and economic environment—the media franchise. A franchise is a "deliberate economic strategy aimed at maximizing the monetary worth of a

studio's intellectual property" (Thompson, 2007, 331). In other words, the producer engages in a diversification strategy that either leads to higher profit margins or strengthens the brand name. Entertainment franchises serve as economic synergies and, in equal measure, as narrative synergies. In this strategy, the narrative thread usually begins in a single medium but, upon initial success, weaves an entire net of narrative threads and spreads across numerous media. Risk averse companies prefer this path since an investment across more media opens wider revenue streams, and both pre-awareness and a fan base of the original intellectual property are already in place.

Media franchises are not to be confused with literary cycles that centre around a particular character or event and are explored by a great number of authors. The story of Joan of Arc, for example, has inspired artists and creators for ages; poems about her were written as early as 1429, Schiller's drama from 1801 inspired an opera by Pyotr Tchaikovsky, and Twain, Brecht, and Shaw were all equally fascinated by the heroine. Carl Dreyer's 1928 silent film is landmark in film history but only one of many films about the woman. The Joan of Arc character has also starred on television, in video games, and in graphic novels. Most of the works function independently but are highly intertextual as they all focus on the events surrounding the life of Joan of Arc.

In contrast to literary cycles, media franchises are highly orchestrated, economically driven projects that tie all the extensions together in a large story universe that leaves room for numerous narrative threads. The superhero genre, fantasy/adventure, and science fiction genres specifically lend themselves well to

the expansive narrative strategy because these stories often take place in a story world or story universe. Despite these preferred genres, transmedia franchises permeate all genres. Story universes and story worlds offer an array of possibilities for producers, investors, and storytellers of different talents such as film directors, video game designers, animators, toy manufacturers, and theme park designers because the narrative can be expanded and spread almost infinitely. The hero or heroine, the protagonist of these narratives (often signalling the brand), travels across media with ease and often make a first appearance in books and graphic novels before fighting foes in film, television shows, video games and theme parks, and appearing on merchandises of all sorts. *Superman*, *Batman*, *Spiderman*, *Wonder Woman,* and *Harry Potter* all started their journeys in a rather low cost medium such as a comic book or a novel before they conquered other high cost media such as films.

Controlled by multinational corporations and indulged by devoted fans who follow their franchise and heroes and heroines across platforms, the expansive narrative strategy facilitates the establishment of "transmedia super systems" (Kinder, 1991, 38). Media franchising is not a new phenomenon. The adventures of Anne Shirly, heroine of the Canadian children's story *Anne of Green Gables*, began in 1908 with the first book written by Lucy Maud Montgomery, and has fascinated a wide audience ever since. The orphan Anne endured the life on a farm on Prince Edward Island in books, feature films, television series, musicals, and stage plays. Anne even conquered Japan, where she appeared in a Japanese anime and just recently inspired *Ana of California*, a

Latin American book version of the character, published in June 2015. Ana of California illustrates an interesting phenomenon that many scholars grapple with: the fact that many stories that franchises are built upon are derivates of other, often mythological, sources. In his seminal book, *The Hero With a Thousand Faces* (1968), Joseph Campell describes "The Heroe's Journey" during which the hero crosses the threshold from the ordinary world to the road of trial where he finds his allies, fights his foes, and returns a changed man to the ordinary world.

The description of this journey that inspired filmmakers such as George Lucas and serves for analyses of franchises such as Harry Potter (Black, 2003;) can easily be applied to a number of other stories across a variety of media. Joseph Campbell believed that one pure story structure, which he labeled the "monomyth" (and what others might refer to as the "ur-text") was the basis for most other stories. Based on this belief, contemporary stories are simply imperfect variations of one, age-old story structure. Indeed, contemporary screenwriters such as Christopher Vogler emphasize and teach the value of "The Hero's Journey" almost as a template for storytelling in books such as *The Writer's Journey, Mythic Structure For Writers* (2007). It is not surprising, then, that "The Hero's Journey" can be seen as reflected in a large number of historical and contemporary stories. One might indeed argue that contemporary stories are simply rehashing earlier stories based on well known characters but, as Zeiser contends, these new stories' "exquisite expression of nuance and compelling packaging makes them feel as fresh as if we'd never heard them before" (2015,

34). Other examples of long lasting franchises are *The Lone Ranger*, *Winnie the Pooh, Planet of the Apes*, and *Buck Rogers.*

Even though media franchising is an established business and storytelling strategy, a significant shift occurred in the digital age when digital technology changed the media landscape, adding ample new channels for production and distribution that are now easily accessible for producers and consumers.

3.3.2. ENS Challenges

A vast narrative that expands across a great number of platforms and media over a long period of time will eventually experience problems with canonicity. The term canon, often used in religious contexts, refers to works of an author or an artist that are recognized as genuine; in the franchise context, canon describes all the material authorized by the producer to be part of the official storyline. Drawing the distinction between canon and and non-canonical material, which is often created by the fan base or third parties who jump on the story/ money train by publishing unauthorized material, is fairly easy in smaller franchises, but can become unwieldy in transmedia super systems such as *Star Wars*. Observing the integrity or fidelity of a franchise is important for a number of reasons. Under the aegis of the producer, large development teams collaborate to create a vast story experience for the story citizen across platforms but within one story universe. These development teams walk a fine line between authorial direction given by the original author/producer and the desire to express their own vision; tensions between artistic integrity and artistic freedom arise naturally

even within the realm of authorized material. The tighter the relationship between the producer and the development teams, the easier these conflicts can be resolved, but big franchises often employ freelancers who work conceptually far from the core project. The more collaborators, the more inconsistencies slip into the franchise; inconsistencies that the casual story citizen might not notice, but dedicated fans will discover and try to resolve through discussions in forums and fan communities.

A story bible supports the clarity of the canon. The *Star Wars* franchise maintained a continuity database (the Holocron) with over 30,000 entries that informed characters, places, weapons, and so on, and gave at least some sense of what belonged to the canon (Wolf, 2012). *Star Wars'* new ownership (bought by Disney in 2013) challenges the canon significantly since Disney may be taking more liberty with consistencies in the franchise. Marvel Comics, acquired by the Walt Disney Company in 2009, for example, released a graphic novel in May 2015 that introduced San Solo, Han Solo's secret wife on Tatooine who meets her rival, Princess Leia, in the graphic novel. San Solo does not appear in any other medium or publication, and Marvel leaves the narrative thread open in the graphic novel. San Solo did also not appear in the film *The Force Awakens,* a film that comprises the continuation of the *Star Wars* franchise which Disney released with extreme success in 2015.

If narrative threads remain loose, fans often continue the story on their own in fan fiction or visual media such as *machinima*—video game-based video compilations created by fans. In the digital age, fan-created works have reached

enormous dimensions. The ease of this production and distribution leads to a plethora of creative art in various media originated by fans. The *Harry Potter* fan fiction site, for example, has over 80,000 stories and grows continually to this day (www.harrypotterfanfiction.com). Long lasting franchises involve the story citizens creatively, cognitively, and financially. On the creative level, story citizens take the liberty of extending or even altering the narrative threads so severely that they create a significant distance between their work and the original. In doing so, story citizens not only take on authorship but challenge the existing producer-audience dichotomy by dissolving the boundaries between production and reception. Fan-created works have an incredibly wide spectrum since fans appropriate and remediate on all platforms, but one genre attracts particular attention because it directly opposes canonical work: slash fiction.

Slash fiction defines the works of a fan community that exerts resistance against mainstream commercialization of cultural products by challenging the status quo that depicts most characters in "happy", heterosexual relationships. The negotiation of gender norms and character relationships, condemned by some and applauded by others, demonstrates the self-awareness of a generation of fans that appropriates a variety of media for self-expression. Mazar contends that "while corporations are often uncomfortable and sometimes litigious over what they consider to be copyright infringement and misuse of intellectual property, fan fiction communities are possibly some of the richest learning environments online" (2006, 1141). Further, Mazar reviews the fan fiction/slash fiction scene positively, arguing that "fans will spot metaphors and interpret

scenes and dialogue with wit and skill far beyond that of typical television critic" (1147). Jenkins, who has written extensively about fan fiction, remarks that "one of the most exciting things about slash is that it teaches us how to recognize the signs of emotional caring beneath all the mask by which traditional male culture seeks to repress those feelings" (In Booth, 2015, 133). Fans of the *Harry Potter* franchise, for example, speculated about Dumbledore's sexuality for a long time, some expressing their desire for Hogwart's headmaster to be homosexual and depicting him as such in fan fiction. When J.K. Rowling announced in 2007 that Dumbledore, even though never explicitly expressed in the books, is indeed gay, the LGBT community applauded the author for this rather bold move. Resistance formed just as quickly, but Rowling has defended her decision, stating that the *Harry Potter* books are a"prolonged argument for tolerance"(BBC, 2007). Entertainment franchises create creative spaces that producers and story citizens enter because "the world in play in franchise production offers a shared creative context in which many different individuals and communities can draw resources and contribute in kind" (Johnson, 2013, 109).

I perceive fan/slash fiction as creative spaces that allow the negotiation of values and believe systems in cultural commodities. For producers or storytellers, these fan creations might present real challenges as they can take narratives into unwanted territories. Franchises that facilitate this kind of discourse leave the realm of pure entertainment and open the door for political and sociocultural debates that support a critical reading of these texts. For a

meaningful discourse, however, it is essential to keep in mind the distinction between canonical and non-canonical work, as well as the question of authorship, as these franchises are long living, highly dynamic entities that, due to their longevity, constantly shift and morph. With the aid of technological progress, producers adjust and modify the aesthetic of transmedia story worlds and their characters on a continuous basis and in the process reveal cultural and political developments as well as assumptions about the human condition. Consequently, a franchise as a cultural category "must be understood not just as a function of textuality, but as an industrially and socially contextual dynamic constituted by historical processes and discourses" (Johnson, 2013, 29). The digital age doubtlessly caused a significant shift in existing production structures and relations; new models of analysis are needed to make sense of these developments and their cultural contexts that define us as humans.

From the production perspective, the typology presented here takes only canonical material into account; it regretfully disregards fan fiction, machinima, and other unauthorized works, as a full description of fan fiction is beyond the scope of this dissertation. An internet search of the term *Star Wars*, for example, results in over 250,000,000 hits. Investigating all aspects of this franchise, canon and otherwise, is simply not feasible. In the reception discourse, however, non-canonical material found on fan sites, might be included as they offer valuable clues about the reception and engagement with the text. Branding and marketing material is a key element of the typology because as demonstrated earlier, branding and storytelling build a valuable symbiosis for producers and often for

the audience. The two dimensions used in the typology facilitate a solid structure of transmedia franchises that allows a meaningful first analysis of canonical material. Future research might then extend the analysis beyond the canon.

3.3.3. ENS Narrative Deviation and Number of Release Events Over Time

The expansive narrative strategy results in medium to high narrative deviation, especially in macro franchises. Producers constantly fuel the narrative fire in these franchises with new adventures, new characters, or new aspects of the story world in order to keep the story citizen as a resident in the world. A certain amount of repetition is inevitable as some stories experience reproduction with slight changes but an audience can be quite unforgiving if too much content is repeated. The story citizen can enter the story world from many entrance points—the graphic novels, the video games, or the films—because the expansive narrative strategy foregrounds stand-alone works; narrative dependency across media is low, the story citizen will understand the video game narrative without having read the book. However the story citizen experiences high narrative dependency within the same medium, for example film, in form of prequel and sequels that he or she needs to engage with in order to make sense of time and space in the narrative.

For example, *The Hunger Games* franchise, consisting of the books, the films, various video games, and marketing campaigns, might be understood by only watching the films or reading the books. However, since book and films are trilogies (the last book was actually divided in two film parts, which is an

increasingly common Hollywood practice), the reader or viewer must have consumed parts one and two of book or film respectively in order to understand part three. The engagement with all media and narrative threads of the same franchise might deepen the story experience, making it richer and more satisfying for the story citizen. Following the narrative threads in a large franchise often proves difficult and leads back to the question of continuity and consistency. Dedicated story citizens, however, will take the time and solve the narrative entanglement, exposing inconsistencies and continuity mistakes.

The number of release events in the expansive narrative strategy is high with a long timeline of release; some of the oldest, still active franchises have fascinated their audiences for more than one hundred years. Viewed strategically, the timeline of release proves to be one of the most crucial strategies in multi-platform environments. As mentioned earlier, the timeline of release depends on production cycles, market demands and other circumstances, and is media specific. "When one story world is mediated in different sign systems, every given system models it within its modal affordances" (Saldre, Torop, 2012, 32). The release events, strategically positioned, often serve as promotional tools for other media. A video game might be released shortly before a film in order to promote the film release. From the audience perspective, franchises offer ample opportunities for financial and temporal investment. In the digital age, story citizens can easily communicate and discuss story events; Wikipedia fan sites, for example, are a common occurrence in popular entertainment.

3.3.4. ENS Conclusion

In conclusion, the expansive narrative strategy provides a conceptual tool that can be used to determine the effects of different bundles of assets and activities on the development of the franchise and its relationship to the audience. As Johnson notes that "Jenkins' exemplars of "transmedia storytelling" feature serialized narratives in which each piece of the dispersed story plays a unique, integral role, franchises like *Star Trek*, *Batman*, and *X-Men* have also been extended in narratively episodic, redundant, even clumsy ways that do not fit this more coherent, unified aesthetic" (2013, 31). The expansive narrative strategy as defined in this dissertation, based on narrative deviation and number of release events over time, serves as a framework and a starting point for a more meaningful discussion for the study of transmedia franchises.

3.4. Strategy #3: Connective Narrative Strategy (CONS)

3.4.1 CONS Characteristics

The revival of the narrative of a dormant intellectual property either in the same or a different medium is the key characteristic of the *connective narrative strategy* (see Appendix G). The connective narrative strategy mostly concerns franchises that became dormant at some point with only small ancillary texts released occasionally to keep the franchise in the mind of the audience. This dormancy is one of the key differences between the connective and the expansive narrative strategy. The connective narrative strategy revives dormant franchises usually in the story anchor medium (film to film, for example), or a

medium with similar characteristics, for example from film to television or film to webisodes. The *Alien* franchise, as an example of the connective narrative strategy, that initiated with the Ridley Scott's *Alien* in 1979, continued with James Cameron's *Aliens* in 1986 and two other rather unsuccessful sequels in 1992 and 1997, and will be revived again with a new film by director Neill Blomkamp in 2016. Ridley Scott's film *Prometheus* (2012), often linked to the franchise, takes place in the *Aliens* universe and is remotely evocative of the original film, but explores its own mythology and ideas. The *Aliens* franchise also entails a number of novels, comics, and video games, but after 1997, producers neglected the franchise and all turned quiet in the *Alien* universe. Blomkamp, who will officially revive the franchise with this film in 2016, announced that his storyline will ignore the less celebrated sequels of 1992 and 1997 and pick up the story where James Cameron left it in 1986. If Blomkamp indeed realizes this idea, he disrupts the continuity of the franchise by ignoring the events depicted in the sequels, a bold move that might upset some fans of the franchise. Other franchises continue the story in a different medium, not the story anchor.

Buffy The Vampire Slayer, for example, terminated in 2003, was revived with a graphic novel series in 2007 that is still ongoing. The revived version of any dormant franchise connects in some way to the original, and the execution of the connective narrative strategy requires a much sensitiveness because "critics, audiences, and creators alike have privileged notions of continuity, legitimacy, integrality and especially centralized authorship in assessing use of creative

resources" (Johnson, 2013, 140).

3.4.2. CONS Challenges

Most often the delicate process of reviving aims at rebooting and re-interpreting an existing narrative for a contemporary audience, not simply remaking or recreating it. Negotiating the boundaries and parameters of reviving a franchise demands artistic collaboration as well as the implementation of legal teams that constantly monitor the project in terms of licensing and legitimacy. The connective narrative strategy targets the existing fan base as well as a new audience that via the revival might find interest in the original. The target audience includes different generations but those with deep knowledge of the franchise who have embraced it for many years and who care about its continuity review a revival very critically. For others, the issue of continuity and canon might seem trivial and hyperbolized, but not for the real "Trekkie" or the real *Star Wars* fan. One fan expresses why canon and continuity are so important:

> When we love a world, we want to exist and revel in it. We want it to be true. And that truth is disrupted by inconsistency and contradiction. We need the integrity—our beliefs require it. Canon is about neatness and appreciation, and the urge to know and absorb everything about something you love. It's about ownership and protectiveness (Ditum, 2015).

The emotional investment in these franchises by fans leads to a deep loyalty that can last for decades. The connective narrative strategy combines the past, present age, and the future of the franchise, which is a difficult endeavour.

Producers may resort to retroactive continuity in order to connect the past to the present age in dormant franchises. Retroactive continuity (retcon) either corrects narrative inconsistencies in the past or changes past events in order to make them more suitable for future storytelling (Dowd et al, 2013). The most famous instance of retroactive continuity is the miraculous resurrection of Sherlock Holmes, who initially died in Arthur Conan Doyle's novel *The Final Problem* (1893). Doyle later resurrected the famous detective in the short story *The Adventure of the Empty House* (1903) with the explanation that Holmes' death was only a ruse (Dowd, 2013). If the producer corrects inconsistencies, retroactive continuity impacts the canon and often triggers negative reactions from the fans because the adjusted narrative changes their understanding of and faith in the story. The production practice is inevitable in reviving a dormant franchise as the new narrative very rarely connects seamlessly to the existing narrative. Feelings of loyalty connect with feelings of nostalgia since many of franchises go back for decades. Holbrook defines nostalgia as "a longing for the past, a yearning for yesterday, or a fondness of possessions and activities associated with the days of yore" (1993, 245). Media producers realized the power of this nostalgic emotion long ago and evoke the past even in contemporary works. A fan describes the feeling of nostalgia:

> Like, for example: cleaning your room and coming across your old
> Pokemon Red Gameboy cartridge. You stare at it and spend ages thinking
> about when times were more innocent and you were rosy cheeked and
> untainted by the current generation console wars, the word recession had
> yet to pass your ears and all that mattered was that big 8-bit rectangle

playing box....... yeah that's nostalgia, that and others along those lines (IGN, 2013).

For fans, nostalgia presents a way to satisfy the longing for the "good old days" that manifest themselves in films, television series, or a video game from the past. This emotion carries on into the present and contemporary instalments of childhood franchises evoke this feeling again. Nostalgia comes with fear of the new. What if the new does not do justice to the original? This is particularly important for the connective narrative strategy as usually some time has passed since the last film or game, and older works have turned into classics. On the one hand, fans long for reliving their entertainment childhood experiences in new instalments; on the other hand, they fear the new manifestations of the familiar. Fans met the announcement of Warner Bros' acquisition and planned revival of the *Blade Runner* franchise, announced in 2015, with criticism. Fan comments include: "Dude, leave it alone already. Damn Hollywood," or "*Blade Runner* is my favourite movie and hearing this fills me with happiness and terror at the same time"(2015). Fans are wary of these revivals because the classics might be reminiscent of nostalgic family ties, childhood fantasies, and special events, and they are treasured as such. Any meddling with these classics also affects these memories, and destabilizes or at least imperils the romantic notion of a golden age when times were seemingly more innocent and carefree.

3.4.3. CONS Narrative Deviation and Number of Release Events Over Time

Narrative deviation in the connective narrative strategy is medium to high, as a revival usually introduces new storylines even though within existing characters, story worlds, sometimes the same actors. The connective narrative strategy requires some narrative overlap in the beginning in order to give the existing story citizen the feeling of being "at home" in the storyworld, but the revivals deviate from the original after the reintroduction. The connective narrative strategy has a lower number of release events due to the dormancy of the project, and the "after-revival-period" usually lasts only for a limited time and experiences fewer release events overall. Previously successful franchises that fell out of favour with producers mainly due to lacking revenue streams often remain dormant for years before another producer revives them. Most of these franchises keep a smaller fan base even during their dormancy.

3.4.4. CONS Conclusion

To conclude, the connective narrative strategy relates strongly to the expansive narrative strategy as both mainly deal with major franchises, but concerns projects that became dormant and were revived after some time of dormancy. Even though some scholars argue that franchise revivals "can be seen as relatively safe bets for producers" (Dowd et.al, 2013, 26), this practice requires enormous finesse with story citizens and carries some risk as story citizens are very sensitive to changes affecting established franchises. Narrative deviation at the time of the revival is lower to give the story citizen a sense of

familiarity, but increases quickly as new story lines are introduced. The number of release events over time remains lower over time compared to the expansive narrative strategy.

3.5. Strategy # 4: Native Narrative Strategy (NNS)

3.5.1. NNS Characteristics

Creating the narrative of an intellectual property and systematically spreading it across media from the moment of inception is key characteristic of the *native narrative strategy* (see Appendix H). Content production and reception often takes place on a number of platforms, and is ubiquitous, social, and participatory; the audience engages and interacts with the project and possibly co-creates it. Complex in its nature, the native narrative strategy demands coordination and collaboration from different producers and artists as the creation team drafts the project as transmedia from its beginning. The different narrative threads spread across media and must weave together into a harmonious and homogenous storytelling experience. Scolari's describes the process as "a sense production and interpretation practice based on narratives expressed through a coordinated combination of languages and media or platforms" (2009, 588). The native narrative strategy seeks to invite the audience to wander from platform to platform, medium to medium, in order to increase touch points with the project. Native narratives are often ephemeral, existing over a limited amount of time and are sometimes related to a specific event such as Lance Weiler's project *Pandemic* (2011) mentioned earlier in this dissertation.

Many examples for the native narrative strategy stem from education or activism, and investigate historical, political, or social issues. An example of an arthouse native narrative is John Greyson's ambitious *Murder in Passing,* which fulfills all the characteristics of a native narrative strategy. The story unfolded over a predetermined time frame (January 6 - March 1, 2013) on the Toronto Transit Commission (TTC)[9] subway screens, targeting millions of commuters who use Toronto's public transport system every day. The story citizen was invited to solve a murder mystery in the fictitious city of Passing, and received information about the crime in 30-second films on TTC screens, as well as additional clues in the daily commuter newspaper METRO, on YouTube, on the project website, and on Facebook. As a native narrative strategy, the story unfolded across media and required audience participation in order to be resolved. Even though the project was a murder mystery, it also engaged the story citizen in gender and environmental issues as the victim was a transgender bicycle courier. The producers measured reception through the online and social media contacts as well as by in-person interviews. The viewing environment—the setting of this project in Toronto's underground screen network—made this a unique and riveting native narrative.

In entertainment, native narrative projects centre often on television. Big blockbuster native narrative projects are rather rare. That is not to say that big franchises never coordinate their narrative efforts across media. Often film releases play alongside other narrative and branding extensions in a concerted

[9] TTC - Toronto Transit Commission, the public transport agency that operates transit bus, streetcar, paratransit, and rapid transit services in Toronto

effort to attract the widest audience possible to the film. This practice will become clearer in the case studies following later in this dissertation. The native narrative strategy, however, is a coherent plan that defines the narrative and the relationship with the audience as transmedia *from the moment of inception.* Economically, native narrative producers take a risk as most content must be pre-produced without a guarantee for success; thus, native narratives often serve a niche audience. Philips' transmedia engagement pyramid illustrates that only 5% of the audience can be considered superfans, engaging with the narrative on all levels, joining forums, trying to solve puzzles, even traveling to participate in live events, and are thus the potential target audience of the native narrative strategy. Fifteen percent of the audience might be engaged on some level, but 80% of the audience still prefer to watch passively (2012, 104).

3.5.2 NNS Challenges

The creative forces that come together during project creation coalesce around the general theme and direction that the narrative takes across media. Given that artists from different fields, for example film makers, video game designers, and writers, seek to represent their medium of expertise and its technical affordances, tensions might arise in terms of the narrative content, direction, and the choice of media. As mentioned in chapter two, the Producers Guild of America has acknowledged this problem and established the role of the Transmedia Producer.

As an integral part of the production team, the Transmedia Producer

analyzes the project, creates content, and facilitates the collaboration between affiliated artists. The audience demands narrative, aesthetic, and qualitative consistency and homogeneity, and yet the audience itself is not homogenous. The audience for a native narrative project might consist of story citizens with a preference for comic books or video games; others might be avid readers. Satisfying these different needs and markets adequately requires a careful planning process. The native narrative strategy usually leads into the story with a story anchor, but one that blends and merges almost seamlessly with the other media; often the story anchor is not even clearly defined. The interplay of all platforms and media, which could be defined as the *narrative flow,* turns the project into a Gesamtkunstwerk, an emergent, holistic narrative entity.

The native narrative strategy diverges from transmedia storytelling insofar as Jenkins suggests that each medium needs to stand on its own, and when making this point he specifically refers to *The Matrix* franchise: "each franchise entry needs to be self-contained so you don't need to have seen all the films in order to enjoy the video game, and vice versa (2006, 96). From a business perspective, this makes sense as marketers examine all revenue streams and are eager to sell at least the video game or a film ticket, even if the consumer is not willing to engage with all media. The uniqueness of the native narrative strategy, however, rests within the tight fusion and strong integration of all story elements across platforms. Omitting one of the story elements by ignoring one of the platforms or media makes the story experience incomplete. In this characteristic, however, rests the challenge and the strength of this strategy, and

it differentiates the native narrative strategy from all other strategies. Engaging with all narrative instances across all media might seem like a tedious process, but the native narrative strategy also encourages fan collaboration on all levels. A scenario is possible in which the avid video game player, instead of engaging with all media, collaborates with the graphic novel aficionado so much so that enough information is exchanged; the video game player does not have to read the graphic novel, and the graphic novel reader spares himself or herself playing the game, but both end up with enough information to be able to follow the narrative thread. Similarly, as some native narratives release ephemeral content over time, one story citizen might share a narrative piece with another who missed it.

The collective mind builds a symbiosis across media that circumvents the necessity to engage with all the platforms and media involved, even though many story citizens will deeply involve themselves with all narrative threads. Levy charts this development in 1997, indicating a "new humanism that incorporates and enlarges the scope of self knowledge into a form or group knowledge and collective thought. The old adage 'I think, therefore, I am'[10] is generalized as a process of collective intelligence leading the the creation of a distinct sense of community. We pass from the Cartesian *cogito* to *cogitamus*" (Levy, 1997, 17). The native narrative strategy relies on this sense of community as each single member becomes stronger with the group. Before I elaborate on the typologically

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[10] Author's quotation marks

specific characteristics of the native narrative strategy, I would like to consider two hybrid instances of this strategy: television and alternate reality games.

3.5.3. NNS Hybrid Forms: Television and Alternate Reality Games

Alternate reality games and some television productions present hybrid forms of the native narrative strategy and the connective or expansive narrative strategy. Scholars, industry experts, and the popular press prophesied the death of Television years ago (Clarke, 213), but digitalization has given new impetus to the television landscape by introducing new production, distribution, and reception models. Television has become mobile, as viewers now watch their favourite show on their tablet or even mobile phones, via streaming services such as Netflix, Google, or Hulu. Influenced by these streaming services, viewing practices have changed as these providers stream entire seasons at once instead of single episodes. Competition in this sector is fierce, and the future of television is uncertain as new providers create new offers for an audience that determines where and when to watch. Television networks, streaming services, and video services such as YouTube or Vimeo all court the audience with an overwhelming amount of content.

Pulling the audience into the story universe is as difficult as keeping them engaged between episodes or between seasons. Television producers engage more and more in transmedia practices in order to keep the viewer loyal and engaged with their network and shows. Since television develops in such a competitive space, many producers create ancillary content in advance in order

to keep the viewer engaged. Other visual media such as graphic novels or comics connect well with television; the strong ties between manga and anime but also television adaptations of Marvel or DC comics serve as examples. Using a transmedia strategy, television networks offer additional content on their websites in form of webisodes, graphic novels, or contests to keep the audience engaged.

NBC initially employed the native narrative strategy with *Heroes*. The franchise anchored in the TV series but much more content spread in web comics and on websites, mobile devices, and other ancillaries that all deepened the understanding of the story and its characters. Characters had blogs and Facebook pages; fans could apply for positions in fictional companies that made them part of the *Heroes* universe. NBC's in-house transmedia team exerted great effort to make the story citizens active participants, contributors, and emotional stakeholders from the show's inception. Networks control the narrative flow of such shows, planing and calculating every move in order to turn each story extension into a brand extension. *Heroes* had all the characteristics of a successful transmedia show: a potent story universe, and an ensemble cast with a number of primary and secondary characters interesting and flexible enough to move from television to web to comic book to alternate reality game. The web comics in particular added to the story universe as they traced the paths of secondary characters, provided their back stories, and filled in missing pieces of the narrative. The comics deepened and enhanced the story experiences, and yet the story citizen could understand the main plot (A-plot) without engaging with

the comics (Jenkins, 2007). In some cases, however, the story citizen needed to engage with all the media in order to understand the B-plots and some of the secondary characters. The character Hana Gitelman, for example, appeared first in the online comics, was briefly introduced in only one TV episode but was featured as the main character in the *Heroes* alternate reality game (Dowd et al, 2013).

Heroes was cancelled in 2010 as viewer numbers fell continuously, and the network could no longer sustain and justify the production costs. *Heroes'* native narrative strategy, content production across numerous platforms, and media tying fans to the show between episodes and seasons all worked during the first two seasons. During the remaining seasons, however, fans complained about lack of character development and unmotivated plots. The show could not hold the interest of the fans for more than four seasons; the homogenization of writers, freelancers, designers, and the production affordances of the different platforms and media proved too challenging for NBC. Some hardcore fans were devastated as the show ended with a cliffhanger. In 2015, NBC showed mercy and announced a 13-episode miniseries that will connect to the basic elements from the first season. The miniseries will be preceded by an online prequel prior to the show's premiere, available on NBC's digital platforms and other services such as Hulu, and will also feature a comic book series that provides background information about some of the new characters (NBC, 2015). The new *Heroes* production strategy comprises the native and connective narrative strategy and thus can only be seen as a hybrid strategy rather than pure native narrative

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strategy. Many contemporary networks apply this hybrid strategy, engaging the fans on all levels for a wider revenue stream, increasing ratings and thus stronger ties with stakeholders and advertisers.

Another storytelling strategy equally difficult to classify is alternate reality games. As an integrated storytelling experience, designed for a multi-platform environment, alternate reality games are in some cases examples of the native narrative strategy. They are live, fictional narratives, told in real time across media with an actual audience participating by using a number of media in the "real" world. Philips describes an alternate reality game as a "social media narrative that plays out in real time, using real communications media to make it seem as though the story were really happening" (2012, 19). She cautions the reader that, at most, ARGs are a subset of transmedia storytelling because they include elements that are not necessarily present in a transmedia project—for example, direct communication with characters or puzzles that the player needs to solve. Her reasoning indicates that ARGs are sort of but not quite transmedia storytelling.

I classify ARGs as hybrid projects because they are often part of a bigger franchise; a marketing campaign, for example, might be played out as an alternate reality game as was the case with the famous *"Why So Serious?"* campaign that preceded the release of *The Dark Knight* in 2008. The unprecedented campaign offered over 11 million fans in more than 75 countries an immersive alternate reality experience over the course of 15 months. Participants became "real" citizens of Gotham City or henchmen of the Joker and

played through the experience via mobile phones, websites, and other media; story elements or clues could be found in cakes, written in the sky, and other unexpected places. The line between fiction and reality blurred in this alternate reality game (Rose, 2011). As an intriguing example of an extremely successful alternate reality game, "*Why So Serious?*" could be seen as a native narrative strategy if studied as a stand-alone entity, but since it was tied to the *Batman* franchise, it is categorized here in the expansive narrative strategy category. Similar projects can be found for *Tron Legacy*, *The Girl With the Dragon Tattoo*, or *The Pirates of the Caribbean* franchises. Alternate reality games have also piqued the interest of car companies such as Ford and Toyota, which have rolled out ARGs as marketing campaigns. There are, however, stand-alone ARGs that are not associated with any company or marketing campaigns.

The Black Watchmen is an ARG developed by Alice & Smith, an entertainment company located in Montreal, which describes the game on its website: "The Black Watchmen is a paramilitary group dedicated to protecting the public from dangerous phenomena beyond human understanding: ritualistic murder, occult secret societies, and the paranormal, to name but a few" (2015). The player turns into an agent, collaborates with other players in order to solve puzzles, and complete missions via coded websites, newspaper ads, phone calls, and text messages in real world locations. The producers emphasize that the community of players needs to work together in order to accomplish their goals. As the game moves along, the developers simultaneously create a graphic novel that reflects the characters and the events from the gameplay. Based on

these characteristics, *The Black Watchmen* can be classified as a native narrative strategy, and Alice & Smith announce it as an ARG/Transmedia project on the Kickstarter website. *The Black Watchmen* is an ARG in progress and illustrates a very promising type of project for future research. Other genres of ARGs offer help with every day situations in real life; *Chore Wars*, for example, in which players choose a "World-of-Warcraft-like" avatar and gain experience points through engaging in household chores. Others support education, such as *Quest to Learn*, an ARG designed for public schools (McGonigal, 2011). Alternate reality games are very dynamic; they have few rules, no parameters, are slippery and are difficult to classify, but they are an example of multi-platform storytelling experiences, either in the expansive or native narrative strategy category.

3.5.4. NNS: Narrative Deviation and Number of Release Events

The narrative deviation in native narratives is practically null as the entire story is dispersed across media; a core medium often does not feature prominently thus a reference of deviation does not exist. The producer might direct the narrative on a certain path, but storytelling is dynamic and requires a participatory audience. The narrative dependency is high as the story citizen must engage with most, if not all, media in order to understand the story. A high number of release events characterize the native narrative. Content is being released in short intervals or even simultaneously, and the timeline of release is often finite, meaning that the narrative thread comes to an end within a particular time frame. This strategy requires active story citizens who often collaborate

through websites or in person, weaving the story together by gathering and hunting story elements across all media and platforms. It requires a story citizen fully immersed in the story universe. Immersion comprises one of the key issues in transmedia projects as the story citizen moves into the story world and becomes part of it, completely immersed. I argue, however, that in transmedia projects, each narrative thread needs to contain moments of *cognitive rupture.* I define cognitive rupture as the disruption of cognitive continuity that summons the story citizen to fill narrative gaps by engaging with other media; the story citizen recognizes that information is missing, so much so that he or she ventures to other media in order find the missing piece, all while still immersed in the story universe. Story gaps are a common occurrence in all storytelling, as they add mystery and suspense to the narrative. Moments of cognitive rupture, however, deliberately lead the story citizen to other instances of the narrative; they can be explicit or implicit and are an important component of the native narrative. It is key to note that the cognitive rupture takes place within the immersive story experience in the space of the story world as this form of rupture will not interfere with the experience as a whole but lead the story citizen to different narrative instances within the narrative web. Due to the nature of these projects, the content dispersion across media simultaneously or with short time delays, native narrative projects offer a learning experience for the producer as well as for the story citizen. Frequent cognitive rupture is a key component, which makes collaboration among story citizens essential. The native narrative strategy often invites the story citizen to co-create in some form, tell the story, drive the story

forward and thus the story citizen may claim at least emotional ownership. Projects in this category vary from purely fictional to amalgams of the fictional and the real, and projects that are completely void of the fictional but share real assets only and create content for distribution across multiple forms of media to influence social action.

3.5.5. NNS Conclusion

The greatest challenge for producers employing the native narrative strategy is bringing the project together as one homogenous entity, one world, and one story experience without inconsistencies or contradictions. Native narrative projects still address a niche audience as they require an immense time investment, active participation, and often co-creation on the part of the story citizen. Narrative strategies in multi-platform or transmedia environments also pose incredible challenges for the researcher, as the various discourses pertaining to the different media complicate scholarly investigation. The television discourse is different from the film discourse, and this varies from the video game discourse; the transmedia scholar needs to be well-versed in most of these fields in order to conduct a meaningful analysis of these projects. Chapter four will provide an analysis of the implementation of the narrative strategies and contextualize them with production, engagement, and, branding.

Chapter 4: Implementing the Narrative Strategies: Production, Marketing/Branding and Engagement

Narrative deviation and the number of release events over time, the two dimensions central for my dissertation, are constructed around three elements of strategic implementation: production, marketing/branding, and engagement with the multi-platform project. Narrative deviation concerns the content of the project; thus, the section on production will mainly focus on the process of content creation. As mentioned in Chapter 3, narrative expansions serve as brand expansions and vice versa; consequently the discussion includes branding and all efforts of both production and branding are aimed at the story citizen. The story citizen's engagement with the project plays a major role on all levels of the implementation process; very often, the story citizen turns into a co-producer and actively engages with the the project rather than passively consuming it. In the era of convergence culture and transmedia, marketing and branding prove to be a "conversation" between, rather than simply a message from, brands and story citizens. As Tenderich and William describe, "transmedia storytelling is a system for packaging a brand into a narrative, which communicates mostly across participatory channels, with the story and the media content morphing and developing as consumers and others enter the discussion" (2015, 26).

Even though Chapter 3 contained a few examples that demonstrate to some extent the implementation of the four narrative strategies, a deeper theoretical approach here will delineate how the four strategies introduced in my

dissertation inform the production and branding of, and the engagement with, multi-platform projects. In what follows, I will provide a definition of the processes of production, engagement, and branding, as well as relevant concepts related to these processes. I will then delineate the different implementations of the four strategies.

4.1. Production

A producer who moves from the planning of a narrative strategy to the creation and production phase will soon find herself confronted with the consequences of the decisions she made in the planning phase, as all narrative strategies inform the implementation process. By now, decisions such as the choice of the media, the target audience, the number of release events and the time frame of those release events have been made as part of the narrative strategy. Production is defined as the process of content creation, the creation of the actual story or storyworld, and the manifestation of that storyworld into a medium such as a film, a graphic novel, or a virtual reality environment. For the element of production, this chapter will focus on the narrative creation of the story and the storyworld, how this process informs and is informed by the medium, and its impact on the branding of and the story citizen's engagement with the project. The actual production—for example, the shooting of the film or the design of the virtual reality environment—even though part of the production process, will not be discussed as this would be beyond the scope of the dissertation. It is important to note that transmedia storytelling as a practice resulted in a number of new storytelling platforms such as Conducttr and Ractonr that can be utilized

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in a number of contexts to steer and automatize the storytelling process to a certain extent. Conducttr describes its product as "an audience engagement tool that integrates storytelling, gaming, and marketing automation. Use it to build immersive, personalized experiences anywhere: online, in real life, and in between" (www.conductrr.com). Ractontr attracts its potential clients with similar promises. Conducttr has been implemented in the storytelling process of *Game of Thrones* during the broadcast of Season 4 in Spain where "each week during the hour prior the show fans fought in a massive Twitter battle to become King or Queen of a Great House and ruler of a realm!" (www.conducttr.com), integrating the social platform Twitter and websites.

Waller and colleagues (2014), however, used Conducttr in an educational context, engaging students of a Crisis Management course at York University (Toronto) in a simulation that depicted the scenario of a bomb threat in a fictitious mining organization headquartered in Toronto and operating in northern Ontario. During the two-hour simulation, students had to collect information and communicate reactively and proactively with different parties, as well as make decisions at pivotal points in the story (Waller et. al, 2014). SMS texts, emails, and tweets were delivered directly and automatically to the students devices via Conducttr, and videos, websites, and pre-recorded telephone messages additionally enhanced the realism of the experience. In this scenario, Waller and colleagues enacted the native narrative strategy, dispersing content across media in order to allow students to experience crisis dynamics in an educational environment. Storytelling tools such as Conducttr and Racontr thus might provide

support for fictional and non-fictional transmedia storytellers. In general, narrative strategies influence the creation of the storyworld and vice versa, as the storyworld "helps determine the world's potential for growth and adaptation" (Wolf, 2012, 248) through the parameters of invention and completeness, described in the next section of this chapter.

4.1.1. Storyworld Production - Invention and Completeness

Decisions regarding the invention and completeness of the storyworld depend on the medium, the genre, and the narrative strategy. Invention refers to the "deepest level of the ontological realm, determining the parameters of the world's existence, the materiality and laws of physics, space, and time that constitute the world" (Wolf, 36). These parameters may have a wide scale, either resembling earthly specifications closely or introduce various levels of invention. Storyworlds might combine the primary (the real world) and the secondary world (the fictional world), a term originally introduced by J.R.R. Tolkien, as is the case, for example, in the *Wizard of Oz* franchise; Dorothy leaves Kansas to find friends and battle foes in the secondary world of Oz, returning to Kansas in the end. Since the story citizen is familiar with the parameters of the real world, its growth potential is limited; the producer cannot simply add a new state or continent, for example. A secondary world, usually prevalent in science fiction and fantasy, has more growth potential as it is unknown to the story citizen, which allows the producer to expand it within and across platforms. It is key to note that secondary worlds may function under different rules and contain creatures, fauna and flora

not found in the primary world, but still resemble the primary world to some degree. Tolkien once argued that the successful storyteller "makes a secondary world that the mind can enter. Inside it, what he relates is true: it accords with the laws of the world. You therefore believe it, while you are, as it were, inside" (qt. in Saler, 2011, 31). Storyworld consistency relates directly to the believability of the depicted world.

The creation of the storyworld is medium-specific, as the technicalities of the medium impact the composition and "the choice of medium makes a difference as to what stories can be told, how they are told, and why they are told. By shaping narrative, media shape nothing less than human experience" (Ryan, 2014, 25). Ryan furthermore asserts that stories are told to make a difference, a difference for art, or a difference for communication, yet she fails to elaborate on her reasoning and she also fails to provide a definition of the term medium in this context. The medium specificity debate continues as an underlying theme through this dissertation and becomes part of the creation of the storyworld as medium specificity impacts the completeness of the storyworld, or "the degree to which the world contains explanations and details covering all the various aspects of its characters' experiences as well as background details which together suggest a feasible, practical world" (Wolf, 38).

I share Ryan's notion that the medium influences 'how' stories are told. A film has a finite running time and needs to introduce and explain the storyworld within the time of duration. A video game has almost no limits in terms of duration as the story citizen determines how much time she will spend on the exploration

of the world itself. Consequently, video game storyworlds contain vast and detailed environments and allow for many hours of play time. Graphic novels, for example, bound by framed panels, leave some imagination of the storyworld to the story citizen, as in graphic novels the storyworld might not be fully explicated. The space between the panels, the so-called "gutter," becomes part of the storytelling process as the story citizen bridges the gutter imaginatively with her own images in order to fill in the holes. In other words, the gutter is the space in which the reader places the juxtaposed pictures together and generates meaning (Berlatzki, 2009). The storyworld in graphic novels is never quite complete as page real estate is quite limited. Single medium worlds are more afflicted with the limitations of the storyworld creation process than transmedia worlds, as the storyworld in multi-platform projects can grow across media, and the storyworld production and development possibilities expand with the number of media involved.

4.1.2. Storyworld Production - Immersion

In a fiercely competitive entertainment market, producers aim to create immersive environments that the story citizen inhabits for a long time. Witmer and Singer define immersion as "a psychological state characterized by perceiving oneself to be enveloped by, included in, and interacting with an environment that provides a continuous stream of stimuli and experiences" (1998, 12). Some scholars conceptualize immersion as transportation (Lu et. al, 2012; Brock and Green, 2000), based on Gerrig's

description that the reader in a narrative is being transported to another world quite distant from the world of origin and is being changed by that journey (1983). On the basis of this description, Brock and Green define immersion as "a distinct mental process, an integrative melding of attention, imagery, and feelings" (701). They continue on to argue that during the immersive process, the story citizen's mental capacities focus so much on the activities in the narrative that he or she loses access to the real world either on a physical level—not noticing that someone is entering the room—or on a psychological level—losing awareness of real-world facts—favouring fictional assertions made in the narrative (2000). Parts of the argumentation above are consistent with research by Holland, who claims that "humans have only a finite amount of attention or psychic energy. If we use more energy and excitation in one prefrontal function, following play or story, we have less energy available for other prefrontal functions, like paying attention to our bodies or the the world around play or story" (2009, 48), which would indeed explain why story citizens sometimes "forget" their surroundings while being immersed in a story.

It is key to note, however, that quite often simple enjoyment leads to a deep level of immersion as well. Part of this enjoyment is a willing suspension of disbelief and the withholding of counterarguments for the fictional events presented in the story. Highly immersed story citizens might want to believe what they see in order to keep the sense of immersion alive; thus, some story citizens tend to suspend the search for truth versus falsity of the information presented in

the narrative in favour of enjoying the story (Green and Brock, 2000). Murray contends that

> (t)he pleasurable surrender of the mind to an imaginative world is often described, in Coleridge's phrase, as "the willing suspension of disbelief." But this is too passive a formulation even for traditional media. When we enter a fictional world, we do not merely "suspend" a critical faculty; we also exercise a creative faculty. We do not suspend disbelief so much as we actively create belief. Because of our desire to experience immersion, we focus our attention on the enveloping world and use our intelligence to reinforce rather than question the reality of the experience" (1997, 110).

Some research links the concept of immersion/transportation to presence in the narrative world or virtual environment (Witmer and Singer, 1998; Kim and Biocca, 1997; Lombard and Ditton, 1997). The concept of presence has been extensively discussed in the context of virtual reality, as presence in this environment might give the illusion that the presented world is unmediated. Lombard and Ditton, for example, contend that "a number of emerging technologies including virtual reality, simulation rides, video conferencing, home theater, and high definition television are designed to provide media users with an illusion that a mediated experience is not mediated" (1997, 1). The authors further the argument that the story citizens forgets his or her physical environment in favour of the illusion of being part of the experience.

Regardless of how immersion is conceptualized, it remains a subjective, unstable, and individual feeling, as story citizens experience it differently with

varying degrees, often depending on the medium. In video games, for example, the level of immersion changes based on perspective and game type; immersion is not a quality equally inherent to all video games. A number of studies have shown, for example, that first person perspective in video games leads to greater immersion than third person perspective (Denisova, Cairns, 2015; McMahan, 2003; Taylor, 2002); thus, the production/design process plays a crucial role in the level of immersion. Other factors determining the level of immersion might be the richness of the narrative environment, the meaningfulness of the experience for the story citizen, or the consistency of the information presented in the world (Witmer, Singer, 1998). Contemporary storytellers may appropriate new technologies to create more immersive environments, with virtual reality certainly being the current trendsetter in this regard.

In transmedia environments, the immersive feeling might be presented within each single medium of this environment, but might also be interrupted when this engagement has ended. One of the goals of transmedia projects might then be to create "trans-mersive" environments — environments that provide immersion across (trans) media and that allow for seamless re-immersion in the same storyworld. A story citizen, for example, might be immersed in watching a film and then read a graphic novel with the sense of never having left the storyworld — a true sense of "transmersion." The critical mind might wonder, though, if immersion is an obsolete concept, given that contemporary story citizens engage with other activities or platforms such as tablets or cellphones while watching TV programs or online videos on Netflix or Hulu, for example. The

Nielsen Advertising Audiences Report from Spring 2012 found that even during prime time, the majority of story citizens checked their emails or sports scores, visited social media or checked for information related to what they were watching on TV (www.nielsen.com). Keeping the story citizen immersed might become increasingly difficult in the future of entertainment.

4.1.3. Storyworld Production - Cognitive Rupture

Producers of multi-platform projects aim to allow the story citizens to traverse across media to engage with all narrative and brand extensions without losing the feeling of immersion that ties them to the story. One of the keys to successful multi-platform storytelling might be a consolidation of immersion and cognitive rupture. Previously, I defined cognitive rupture as the deliberate disruption of cognitive continuity that signals to the story citizen to fill the narrative gaps by engaging with other media. These moments of cognitive rupture manifest themselves as plot holes or unresolved questions, deliberately planted by the producer, as signals or cues towards other media. All stories use these gaps, of course, as a motivation for the story citizen to follow the story to the end. No story is ever complete, and

> "it is only through inevitable omissions that a story will gain its dynamism. Thus whenever the flow is interrupted and we are led off on unexpected directions, the opportunity is given to us to bring into play our own faculty for establishing connections - for filling in gaps by the text itself (qtd. in Rimmon-Kenan, 2002, 128).

In many films or books, for example, these gaps are temporary, as they will be filled in at the end. Moments of cognitive rupture, however, are not closed within the same text, but invite the story citizen to fill them in through engagement with other media. Conceptualized by others as migratory cues (Ruppel, 2012) or negative capability (Long,[11]2007), cognitive rupture might be one of the factors that entice the story citizen to follow the story across media.

In the Toronto-produced web series *Guidestones*, for example, moments of cognitive rupture are skillfully planted to entice the story citizen to actively engage with the story across media. *Guidestones* tells the story of two students at Ryerson University in Toronto who investigate the mystery of the Georgian Guidestones—a granite monument erected in 1980 in Elbert County. In the first episode, the two students, who are on assignment in a church, experience the mysterious apparition of Harold X. Glenndenning; at the end of the episode the story citizen is left completely in the dark about the identity or the circumstances of Glenndenning. Story citizens taking the initiative and searching for the name on the Internet, however, are led to a news report video, featuring the well-known Toronto news anchor Gord Martineau (see Appendix I) reporting of the death of Ryerson University professor Harold X. Glenndenning. In the following episodes, story citizens learn more details about his death while simultaneously being again confronted with more moments of cognitive rupture motivating engagement with other media to solve the mystery. "Offering different levels of engagement, the casual viewer can watch the web series as it unfolds, while those hungry for

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[11] Long is borrowing the concept from poet John Keats, 1817.

more can follow clues embedded in the videos which lead on to further online assets, hidden storylines, and other in-game/in-story extras" (Anderson, 2012). There is, of course, never a guarantee that moments of cognitive rupture are subsequently acted upon by the story citizen. As Ruppel contends "while some links are stronger than others, all migratory cues require source-target completion in order to function connectively" (66). The delicate process of balancing the amount of cognitive rupture with the feeling of immersion/ transmersion is one of the most intriguing aspects of storytelling. Extremely high levels of cognitive rupture might frustrate and drive the story citizen away, but low levels of cognitive rupture might offer little incentive for the story citizen to seek answers in other media.

4.1.4. Implementation of Storyworld Production in Constrained Narrative Strategy

The constrained narrative strategy that adapts a storyworld from an existing source is constrained by the parameters of the original storyworld, but might also achieve greater depth through visualization (book to film adaptation), larger spatial capacities (film to book adaptation) or lead to a more immersive environment (film to video game adaptation). Since narrative deviation is low, the storyworld and narrative usually very closely resemble the storyworld and narrative of the original source. There exists no narrative dependency between the original source and the adaptation, thus the constrained narrative strategy relies less on cognitive rupture as the story citizen's motivation to traverse

between media is usually not driven by seeking answers to open questions, but rather by a desire to see a textual story visualized or experience a visualized story in more depth through a written text. If the story citizen is left with questions about the narrative in one medium, they might not be answered in the adaption. Immersion might or might not take place in these individual media; the story citizen might feel immersed in the book *The Danish Girl* (2000) by David Ebershoff but not in the film *The Danish Girl* (2015) by Tom Hooper, or vice versa. Experience of the narrative in one medium might, however, inhibit immersion in the other medium for various reasons; for example, perhaps the main character in the film does not resemble the character imagined by the story citizen while reading the book. Future research is needed to fully address this rather intriguing question. It is key to note that "adaptation for screen is not merely an add-on or after-thought, but is now forced in and avidly pursued from the earliest phases of book production" (Murray, 2012, 13). A development that might authors of novels might find themselves affiliated with film producers very early on.

4.1.5. Implementation of Storyworld Production in Expansive Narrative Strategy

Secondary worlds are popular environments for expansive narrative strategies, as the often unknown parameters of these settings pose almost no limits to the storytelling and expansion process. The introduction of new characters, objects, and territories is limited only by the imagination of the

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producer. In post-apocalyptic franchises such as *The Hunger Games, Terminator,* and *Fallout*, the story takes place in the familiar primary world but in the unknown distant future, where the geographical landscape has been altered significantly, and where values and belief systems, as well as sociological, political, and economical circumstances, have shifted. Time plays an important role in these franchises as the story citizen travels back in history or launches forward into the future. The story citizen, inhabiting these time-shifted worlds, might recognize places and environments but will find herself confronted with the strange uncertainty of an altered world.

Secondary worlds facilitate the expansive narrative strategy, as the exact boundaries of the storyworld are unknown, allowing it to be expanded endlessly by introducing new territories and storylines. Since narrative deviation is high, the expansive narrative strategy often tells stand-alone stories with a level of cognitive rupture that motivates the story citizen's curiosity and the desire to steep herself in the storyworld across media, and stay immersed over a long time period. Projects in this category would obviously benefit from a "transmersive" environment. Ideally, the storyworld is narratively and aesthetically so consistent across media that a story citizen moving from film to video game, for example, can re-immerse herself quickly even though (or maybe because) the video game presents new information, answering questions previously raised in the film. This might be facilitated by the design of visually similar storyworlds; for example, the Pandora of Cameron's film Avatar (2009) reflects the Pandora of the video game Avatar (2009).

4.1.6. Implementation of Storyworld Production in Connective Narrative Strategy

The connective narrative strategy usually continues an existing storyworld (either primary, secondary or an amalgam of both), with various degrees of faithfulness to the original project serving as the basis for the revitalization. In many cases, the revitalized project answers questions raised in the original source, thus reverses the process of cognitive rupture, an additional incentive for story citizens familiar with the original project to return to the storyworld. This process, however, poses a challenge for the producer, as she must create a storyworld that attracts and immerses both the former and new story citizens. Medium narrative deviation increases over time in order to offer new and contemporary material that attracts and holds a contemporary audience as well.

4.1.7. Implementation of Storyworld Production in Native Narrative Strategy

The native narrative strategy seeks to open the doors to the storyworld on a number of complex levels simultaneously or near-simultaneously, an aspect that complicates the design process. The sustainability of the storyworld created via the native narrative strategy over a longer period, is difficult as the storyworld itself reaches into different media. The story citizen needs to engage with all aspects of the storyworld across media and the parameters of the storyworld need to be in synchrony with and within all the media. Consequently, most native narrative strategy projects are created with shorter life spans than projects created through other strategies. Producers create native narrative strategy

projects as *Gesamtkunstwerk,* or compounds of story elements across media that work together symbiotically, and cannot function as stand-alone stories. Cognitive rupture is a strong component of the story experience; native narrative strategy projects require an active, fully-immersed, and collaborative story citizen who often propels the narrative as a co-producer and remains with the story very diligently. As native narrative projects spread the narrative across media, "transmersion" might become a key concept for the strategy. Drawing on Witner and Singer's definition of immersion again, it might be useful for producer's using this strategy to provide an "environment that provides a continuous stream of stimuli and experiences" (1998).

4.2. Engagement

Stories come to life with the story citizen's engagement. Engagement is defined as the story experience that "draws us in, attracts and holds our attention"(Chapman, 1997, 3); because engagement takes place on a physical, cognitive, and affective level, it also includes "playfulness and sensory integration, as well as a dimension of usability and enjoyment" (O'Brian, Toms, 2008, 2). I am using the term engagement in this dissertation as an active process, in contrast to the historical perception of the story citizen's passive consumption of popular entertainment. The digital age greatly influenced the debate about the story citizen's passivity, presenting a view in favour of the story citizen as an active agent engaging with stories on various levels in a

participatory culture. This view, however, is not without controversy as the notion of the passive story citizen still exists.

The concept of "passive spectator," originating from the age of Classical Hollywood Cinema (CHC) and the tradition of Screen theory on spectatorship, positions the story citizen as a subject exposed to the ideological force of the cultural text—in case of Screen theory, the film. According to Screen theory, film as a medium offers formulaic storytelling with close guidance in terms of cause and effect relationships and predictable narrative patterns that creates a passive audience, mindlessly consuming whatever ideologies is being offered (Mayne, 1993). Bordwell asserts, however, that despite these stable aesthetic and narrative conventions, the spectator (Bordwell writes in relation to film as well) cannot be seen "as passive material for a totalizing machine" as the spectator performs active cognitive operations (1985, 164). Stuart Hall suggests three different ideological positions: the dominant-hegemonic position, the preferred reading of the text through which the viewer[12] accepts and values the dominant system; the oppositional position, in which the viewer rejects the preferred reading; and the negotiated position, in which the viewer acknowledges the dominant discourse but modifies it accordingly, again based on personal experience (1980). I am not denying the ideological influence of the film industry, or the entertainment industry for that matter, imposed on the consumer, and I am well aware of the value that spectatorship theory or works concerning deception of the masses bring to this discourse. However, I argue that engaging with any cultural text, be it a film, a video game, or a graphic novel is a participatory

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[12] I am using the term "viewer" here because it is used in the original text.

process that requires cognitive, emotional, or physical activity, and that this activity may increase in a multi-platform context as more media provide more information that the story citizens needs to digest and process. Engagement takes place on a number of levels, and story citizens display different forms of engagement. Busse and Stein describe different forms of engagement as affirmational or transformational. Affirmational engagement is "analytical, interpreting the source text through 'shared meaning and characterization", transformational engagement "alters and transforms the source text, changing and manipulating it to the fans' own desires" (qtd. in Booth, 2015, 12).

Engagement with a text is obviously not a uniform experience but a rather diverse concept as story citizens engage with texts differently; however, I would still argue that it is an active process. Bordwell asserts, for example that "film viewing is already an active, participatory experience. It requires attention, a degree of concentration, memory, anticipation and a host of story-understanding skills. Ben Shaul contends that "spectators have always been active and aware when watching films" (2008, 10). Contemporary story citizens, however, may have even more cognitive agency, utilizing social media and technologies that allow them to engage in grassroots activities that counteract the top-to-bottom polemics hidden in mainstream media; these developments must be taken account when re-framing the discourse. One particular field that adds to the activity-versus-passivity debate and directly relates to the story citizen's engagement with multi-platform projects is cognitive narratology.

4.2.1. Engagement and the Cognitive Challenge for the Story Citizen

The field of cognitive narratology and the work of one its main proponents, David Herman, are of particular interest for the investigation of the story citizen's engagement with the narrative. Cognitive narratology, or the "study of mind-relevant aspects of storytelling practices" (Herman, 2013), concerns understanding how story citizens construct mental models of the worlds evoked by stories and how stories function as tools for thinking. One important concept in understanding fictional stories is optional thinking, or "the cognitive ability to generate, perceive or compare and assess alternate hypotheses" (Ben Shaul, 2012, 2). In this scenario, the story citizen takes control of her narrative destiny by denying immediate acceptance of any given story, cognitively assessing alternatives, different hypothesis, or ideas. This process is voluntary and an active, pleasurable seeking for more story elements and solutions, often in an collaborative effort with other story citizens.

Multi-platform narratives facilitate optional thinking because the storyworld and thus the story itself expands across platforms, granting agency for alternative perspectives and views. Many story citizens thrive in a multi-platform environment, building online fan communities on sites such as wikia.com in order to asses hypotheses and alternate perspectives together. In doing so, they engage in a knowledge-building and learning process that reflects and forms "part of the way we think and acquire and construct knowledge" (Ben Shaul, 2012, 2). This view reinforces my overall claim that storytelling aids us in making meaning of life in general.

Storyworlds are models that the story citizen engages with to make inferences about relationships, occurrences, and characters that might or might not resemble real world accounts. Regardless of the fictionality of these stories, story citizens construct mental models of storyworlds by (1) filling in the gaps in the narrative and (2) assuming the similarity of the fictional world (secondary world) to their own experiential reality (primary world), a process known as the principle of minimal departure (Ryan, 1980, 406). In other words, a story citizen confronted with a fictional event deploys his or her memory of the real world in order to make sense of the fictional world; he or she makes adjustments to this existing knowledge only if it cannot be avoided (Ryan, 1980). Consequently, fictional events simulate the real world and provide opportunities of understanding the human nature with all its complications and specificities in a safer, fictional environment. Through this process of sense making, the story citizen co-constructs the storyworld (Herman, 2013). Stories thus serve as an instrument for distributing intelligence as they are "disseminating knowledge about or ways of engaging with the world across space and time" (Herman, 2013, 248).

The engagement with storyworlds can enhance our understanding of the real world because "narrative fiction models life, comments on life, and helps us to understand life in terms of how human intentions bear upon it" (Mar, 173). These storyworlds are models of what could happen; they are imaginations of historical, current, and future lives, and they aid us in assessing what was, what is, and what will be. The collective engagement with these stories might provide

even greater value for the story citizens. French philosopher Pierre Levy states that

> Through our interaction with things, we develop skills. Through our relation to signs and information, we acquire knowledge. Through our relationship with others, mediated by the process of initiation and transmission, we bring knowledge to life. Skill, understanding, and knowledge are three elements of cognitive transaction and continuously interpret each other (1997, 11).

Stories, experienced through different technological devices (things), or simply by sharing them orally or visually (signs and information) with each other (relationships) might allow us to understand the past, assess the present, and make some predictions about the future.

4.2.2. Engagement and Nostalgia

Most people would probably agree with the argument that no other stories have shaken the contemporary entertainment world more fiercely than the stories embedded in the storyworld(s) of *Star Wars.* Although irrefutable proof supporting this statement is scarce, the fact that *The Force Awakens* (2015), the newest instalment in the *Star Wars* film series, demolished previous box office records and is Disney's highest grossing film ever, seems highly supportive. *Star Wars* also remains a popular franchise when it comes to the investigation of nostalgia. In earlier chapters, I alluded to the concept of nostalgia because it plays a major role in the maintenance and revival of entertainment franchises, such as *Star Wars*, *Lord of The Rings*, or *Transformers*; however, it also might be

a trigger for evoking the past for story citizens interacting with projects in the constrained narrative strategy — individuals, for example, who enjoyed a book in their childhoods that finally becomes a film adaptation and provides a mental link to earlier years.

What exactly defines nostalgia? "Nostalgia admits no remedy other than a return to the homeland, writes a young doctoral student in a medical dissertation of 1688, which gives birth to the modern name, nostalgia" (Illbruck, 2012, 45). Looking at the term's etymology reveals that it stems from the Greek work nostos (return home) and the Latin algia (pain or longing); the term seems appropriate for indicating a longing for a place. In a contemporary sense, place might still be part of the feeling, but time seems to be the more decisive factor, as in the longing for the past.

Nostalgia has since been harnessed in the context of advertising and marketing, particularly the retro branding of products including cars, clothing, and entertainment brands. During my research, no other entertainment franchise was mentioned more frequently in the context of nostalgia than Star Wars. As Brown and colleagues assert, "it is as if the brand has magical powers to transport consumers back in time, to thrill them in a way they have not been thrilled since they were children" (2003, 27). Indeed, for many *Star Wars* fans their journey began in their youth, when they were mesmerized by the saga in the first three films, TV specials and comic book spin-offs. Yet the engagement with the *Star Wars* universe was quite different back then. Now, *Star Wars* is ubiquitous; the story citizen can revisit each film instalment over and over again on DVD or on

streaming services, can play video games, read novels, comic books, watch *Star Wars* animation and much more. During the early film release years, content was more sparse. The time between instalments in 1977, 1980, and 1983 had to be filled somehow, as films could not easily be re-watched until 1982 when the first film was available on pay-per-view TV. Buerkle describes this youthful *Star Wars* fan experience,

> *Star Wars* (then) was reading novelizations of the films or listening to the expanded radio dramas on NPR. *Star Wars* was listening to the John Williams score on cassette tape. *Star Wars* was buying Marvel comic book tie-ins, watching the *Star Wars* Hollywood special, or reading the *Han Solo Adventures*. *Star Wars* was running around in your backyard with a cardboard tube while making lightsaber noises and imitating Darth Vader's sonorous dialogue. But more than anything else *Star Wars* was the toys (2014, 132).

Meaning and memories generated through these experience, according to Buerkle, and particularly regarding the toys that encouraged creative gameplay, seem to have been engrained into the minds and hearts of those fans who still carry them in form of nostalgia. Other storyworlds might trigger nostalgia for other story citizens, but *Star Wars* is certainly a prominent example. Nostalgia is an intriguing concept because it often leaves us with mixed feelings. We might feel initial joy when watching an old episode of *Star Trek*, for example, but this feeling might soon be overshadowed by a sense of loss, knowing that we cannot bring back the past and people or events associated with it. In case of entertainment, it

might also create a sense of anxiety in the story citizens about the future of their storyworld of choice.

4.2.3. Implementation of Engagement in Constrained Narrative Strategy

The constrained narrative strategy involves the lowest cognitive challenge for the story citizen as he or she engages with the story across media as much of the narrative information overlaps. With regard to the single medium, story citizens engage with different media involved in the adaptation process differently; a reader uses his or her imagination to visualize the storyworld, a viewer sees and hears the storyworld, a player in a video game interacts with the storyworld, while a visitor in a theme park experiences a physical, enacted dimension. Hutcheon argues, that "each mode of engagement involves what we might call a different 'mental act' for its audience that the adapter must take into account" (2006, 130). Because different abilities are required to make meaning of the text (conceptual vs. perceptual, for example), the adapter must decide how to present the information within the possibilities of the medium. Through reading the text, "we imagine and visualize a world from black marks on white pages" (Hutcheon, 130); however, by viewing the film, "our imaginations are preempted as we perceive and then give meaning to a world of images, sounds, and words seen and heard on stage or screen" (ibid). Even though different, both forms of engagement indicate an active process. Engaging with the original and the adaption might add to the understanding of the story; a video game adaptation of a film might add more depth to the experience as the storyworld

can be explored. However, adaptations can also create tension between narrative deviation and narrative overlap, as *s*ome story citizens of video game storyworlds are critical of film-to-video game adaptations with low narrative deviation, since closely "playing" through the films often adds little to the experience; as a result, sometimes story citizens feel cognitively and financially cheated by the experience. Other story citizens feel that a close adaptation of the original source satisfies all their needs. Elkington describes this "love-hate relationship" between the film, television, and video game industries in the age of convergence and posits that "licensed adaptations are commonly dismissed by critics and players as nothing more than cynical attempts to cash in on the hype"(2008, 214). The difficulties that arise with adaptations between these media stem from the different interests of the story citizens. Elkington advances the idea that some products appeal to some audiences while antagonizing others; as a consequence, no audience will ever be wholly satisfied (2008).

4.2.4. Implementation of Engagement in Expansive Narrative Strategy

Large franchises created with an expansive narrative strategy and high narrative deviation deal with mixed receptions of the expansions from story citizens regularly. The longevity of these franchises leads to a plethora of adaptations and expansions, and it seems virtually impossible that any story citizen could engage with and have knowledge of all the material included within one franchise. The cognitive load increases as the amount of narrative information increases, and yet, some fans of these franchises have knowledge of

almost every single detail. As Scott asserts "today there are hundreds of thousands, perhaps, millions of people whose grasp of the history, politics and mythological traditions of entirely imaginary places could surely qualify them for an advanced degree" (2002, 26). While entertainment franchises sometimes pose a significant cognitive challenge, the story citizen decides if he or she accepts it. Many story extensions are stand-alone stories that do not necessarily require the engagement with other media. The involvement with all or numerous story extensions might lead to deeper story satisfaction but also to the highest level of immersion: saturation. A story citizen fully immersed in a transmedia super system, such as *The Silmarillion* or *Pokemon*, for example, might experience moments of saturation in which the mind cannot attend to all presented information due to the detail that overburdens attention and memory. Wolf, in his seminal work *Building Imaginary Worlds*, defines saturation as "the pleasurable goal of conceptual immersion; the occupying of the audience's full attention and imagination, often with more detail than can be held in mind all at once" (2012, 49). This mental state might necessitate a temporary retreat from and return to the story in order to fully appreciate all the nuances and subtleties in the narrative. Wolf convincingly points to the work of Tolkien, which includes indexes of countless names with meanings, elaborate family trees, and relationships that are all important in the story (2012). While I personally have not engaged with Tolkien's work on such a deep level, I can certainly comprehend the concept of saturation based on *Game of Thrones,* a storyworld so vast, deep, and detailed that I had to read the books again without ever fully grasping all the

relations between all the characters and different houses. George R.R. Martin, aware of the conundrum and commercial opportunity, published a beautiful compendium — *The World of Ice and Fire, The Untold History of Westeros and The Game of Thrones* (2014) — that starts with the ancient history of the storyworld and reveals all the relationships between clans, and other, yet-unexplored lands. Large entertainment franchises benefit from saturation because their worlds offer too much content to be experienced in a single engagement event.

4.2.5. Implementation of Engagement in Connective Narrative Strategy

Story citizens engaging in projects with this strategy might either be returning to the storyworld they are familiar with, or encountering a storyworld that they have not previously experienced, which might lead to very different levels of involvement. A medium level of narrative deviation characterizes this strategy. Previous fans of the projects may be attentive to every detail and constantly compare the revival to its successor, which may lead to a much deeper and more critical level of engagement. Booth asserts, for example, that as a form of nostalgia, fans look for moments of the past in the current work as they allow for a more intimate relationship with the text, as something that is known already (2015). This familiarity might create a deeper connection to the revival for some story citizens, or might distance the story citizen from it. These loyal story citizens may, however, be less challenged cognitively, as they are familiar with the material and may be able to immerse themselves more quickly in

the project based on their past experience. Wolf argues, for example, that fans familiar with a franchise can draw on their past knowledge and might be able to react more quickly than others to moments of cognitive rupture (what he calls gap-filling), thus being rewarded for time and effort invested in the franchise (2012). This knowledge, however, might also create cognitive discomfort and mixed feelings if the new project does not meet the expectations of the existing fan base. The existing fan base, very important for the connective narrative strategy, is often one of the main reasons why these projects are revived at all. The most successful projects in this category engage the traditional and the contemporary story citizen through an amalgamation of familiar and new story elements.

4.2.6. Implementation of Engagement in Native Narrative Strategy

Native narratives rarely offer stand-alone stories, the lack of a story anchor leads to zero narrative deviation, meaning that there exists no reference of deviation. Thus, the native narrative strategy offers the highest cognitive challenge as the understanding of the narrative is only possible if the story citizen engages with all media. This move is often not optional as the single instance of the overall narrative offers inadequate closure, which may be frustrating for some story citizens who will abandon the story. Only the most active story citizens will engage with this level of narrative dependency, and only if the incentive is appealing enough. High engagement, high drive for investigation, and a high level of problem solving skills characterize the target audience for native

narrative strategies. As such, these projects take on game-like characteristics as the story citizen turns into player and uses the different elements spread across media as building blocks in order to ensemble the entire story. Scholarly exploration of native narrative strategy projects as a gaming experiences might reveal why the story citizen engages with this type of storytelling. The story citizen constructs the narrative of these projects by combining the different elements found across media, almost like pieces of a narrative puzzle. Ryan asserts that "the secret to the narrative success of games is their ability to exploit the most fundamental of the forces that move a plot forward: the solving of problems" (2012, 349). Ryan makes these assumptions with regard to computer games, but they also might support my argument of the game-like character of projects created with the native narrative strategy. In *World Without Oil* (2007), for example, an alternate reality game labelled as a "serious game for the public good" (www.worldwithoutoil.org), story citizens tried to find solutions for living with a global oil crisis. Story citizens could submit their stories and suggestions in form of videos, photos, emails and were rewarded with daily awards and recognition for the most authentic and intriguing stories. Evelyn Rodriguez reviewed the experience:

> WWO didn't only "raise awareness" about oil dependence. By creating a simple nonpartisan framework that focused thousands of people from all walks of life upon this common issue, WWO sparked peer learning and inquiry-based exploration of the roots, outcomes, and prevention of an oil crisis. By "rousing our democratic imagination," WWO fostered deep engagement and

changed people's lives. Via a game, players made themselves better citizens (www.worldwithoutoil.org).

World Without Oil is but one of many examples in which native narrative projects display a game-like character with a problem solving dimension as a core aspect. It is key to note, however, that story citizens also engage with the narrative or co-create the narrative because they are eager to explore the project or the storyworld, or for simple entertainment.

4.3. Marketing and Branding

4.3.1. Revelation to Revenue: Narrative Extension Versus Brand Extension

Regardless of how and when a story is told, without recipients, the storytelling process is in vain. Branding and marketing efforts support the producer in spreading the story. According to Holt,

> a brand emerges as various authors tell stories that involve the brand. Four primary types of authors are involved: companies, the culture industries, intermediaries (such as critics and retail salespeople), and customers (particularly when they form communities). Brand stories have plots and characters, and they rely heavily on metaphor to communicate and to spur our imaginations (2004, 3).

Holt's examples of iconic brands range from Disney to Jeep, and from Oprah Winfrey to Superman; he emphasizes the strong identification that people feel with these brands and the brand's impact on these people's every day lives. Brands develop over time and "their circulation has become a central economic

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activity" (Holt, 3, 2004). In entertainment branding, more than in any other form of branding, narrative and branding merge since, as mentioned before, narrative extensions are often brand extensions and vice versa. One interesting example of this amalgamation of branding and narrative is *The Courier*, a multi-platform micro-series launched by CBS in 2006 that premiered during the first act break of *CSI Miami*. The 60-second opening chapter was followed by 40-second episodes that were sponsored by advertisers, all aired during commercial breaks and telling the story of a man rescuing his kidnapped wife. After each instalment viewers were able to visit CBS' website to learn more about the protagonist through an interactive storyline with rich video and text components. The micro-series in this case functioned as a "shackle" to keep viewers tied to the main program and to draw them closer to the CBS brand by leading them to the website and the additional content (Baltruschat, 2010). In this section, I will elaborate on the implementation of branding and marketing efforts pertaining to the four narrative strategies.

4.3.2. Implementation of Marketing/Branding in Constrained Narrative Strategy

The adaptation business is a multi-million dollar industry and goes beyond the traditional book-film dyad by encompassing television, theatre, opera, music, computer gaming, and theme-park rides (Murray, 2012), to name a few. The typical marketing pattern resembles a marketing campaign for a single medium publication of release, setting in motion the marketing machine necessary for

such a publication, advertising, social media content, live appearance of authors, stars, and so on. For this dissertation, however, the marketing for multi-platform context is more relevant. A film released based on a book, for example, can lead to a tie-in re-publication of this book very close to the release of the film, marked with "now a major motion picture;" the image on the cover usually reflects the film poster, featuring the major stars of the film. The film poster and other advertising material will point to the original source, stating "based on the book by." Owen assert that a publisher "will require early warning of the film or television version, and will aim to reprint the paperback edition to coincide with release of the film or broadcast of the work on television, with a tie-in cover in order to maximize sales" (2006, 263).

Since narrative deviation is low in this category, these cross-promotional efforts make sense as they imply that the producing adapter stayed true to the original source. These marketing implementations are common for all forms of media combinations (book-to-film, film-to-graphic-novel, graphic-novel-to-film, etc). The cross-references usually appear on all advertisements, social media platforms, and other material related to the publication/release of the adaptation, which in many cases leads to an increase of sales of the original source. In the book-to-film adaptation market, for example, a number of film adaptation led to skyrocketing book sales. Films such as *The Martian* (2015), *Fifty Shades of Grey* (2015), or *Paper Towns* (2015), led to an increase of book sales two weeks prior to screen openings, peaking the week of the release, and slowly dropping two weeks after release (see Appendix J). Ridley Scott's film version of *The Martian*

propelled the book from about 18,000 copies three months before release to 62,000 copies during and after the release of the movie (Forbes, 2015). There are, of course, exceptions to this rule; book sales for *Insurgent*, the second book of the *The Divergent* series by Veronica Roth, dropped significantly before and during the release of the film. In general, the assumption is made that "the appearance of a book or television version of a book, can bring major benefits to the original publisher (Owen, 2006, 263).

4.3.3 Implementation of Marketing/Branding in Expansive and Connective Narrative Strategy

The implementation of marketing/branding efforts are in both the expansive and the connective narrative strategy are so closely related that I will combine them in order to avoid redundancy. Clearly, the marketing/branding efforts in this category are the most substantial of all categories; successful entertainment franchises such as *Transformer*, *Lord of the Rings*, or more recently *Game of Thrones* turn into very powerful brands that utilize the narrative extensions in various media and on numerous platforms as brand extensions to monetize the success of their storyworlds. Narrative deviation is high as is the number of release events over time, in order to keep the franchise viable for a long period of time. The branding anchor for such franchises might either be a single character—for example, *Batman*—or the entire storyworld such as Middle Earth or Pandora. Storytelling has entered the centre stage in the world of branding. Rose asserts that

> today, storytelling is colonizing realms of commerce, such as branding and retailing, that traditionally have had little to do with actual telling of stories. Marketers who understand the immersive potential of stories have a considerable edge over those who try to connect with their audience in a less sophisticated way (2011,115).

Brand management and cross-media marketing, as a substantial part of any franchise, however, were carefully executed long before the age of conglomeration and the modern notion of convergence. (Santo, 2015). Disney, for example, in an effort to generate advanced interest, released *Snow White* (1937) merchandise in 1935, two years before the release of the film. By one account, 2,183 different *Snow White* products existed, and by May 1938 $4 million worth of *Snow White* toys and merchandise had been sold (Gabler, 2006). Walt Disney himself was as much a storyteller as a businessman, progressive and strategic in his franchise visions. It was this recipe of ownership and licensing; a film asset gave value to and received support from related entertainment assets, helping Disney out of the depression (Zenger, 2013). Licensing, as one of the main features of most franchises, provides a substantial business model that allows the IP[13] owners to "extend a property's reach into almost every area of consumer life without having to invest in manufacturing infrastructure or distribution networks" (Santo, 2015, 8). As such

> licensing agreements typically involve a contract signed between a minimum of two parties, in which licensors give the licensee(s) permission to use the name and/or image of their intellectual property for a specified

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[13] IP - intellectual property

purpose, for a limited amount of time, and within agreed-upon geographic and product market boundaries (Santo, 2015, 7).

Licensing influences artistic freedom and creativity as it also "stipulates the type and degree of the adaptations and whether modifications can be made to the original concept" (Baltruschat, 2010, 150); thus; there are creative boundaries for those who are designing ancillary texts. In the entertainment market, however, licensing includes toys/games, clothing, food/beverage and more, and it can extend into almost any market. Such business practices are often met with criticism; for example, Ganes labels licensing as the "parasitic industry that traces its parentage to the sound motion picture and radio industry" (1991, 214). The Action for Children's Television foundation lobbied for decades for the regulation of television shows' toys. Some parents and educators characterized shows such as G.I. Joe and He-man as "30-minute commercials." Film critic Jay Weissberg asserts in his review of the first film of the *Transformers* franchise that "toy giant Hasbro will see its coffers full to overflowing after the July 4 release, perfectly timed for a consumer run on already popular *Transformers* figures, comic books, video games and cartoons. *Transformers* is the apotheosis of product placement, using tried-and-true formulas in the story department as a showcase for the toys" (2007). Merchandise sales numbers in the entertainment industry reach dizzying heights and make these critiques understandable, yet the question of the storytelling qualities of these merchandise and marketing/branding campaigns remains. Are toys storytelling tools? Where can we draw the distinction between narrative extensions and brand extensions?

Drawing these distinctions is a difficult, if not impossible undertaking. I argue that toys, while primarily merchandise, can tell stories as well, and all narrative extensions are also brand extensions. Susan Willis observes that "children learn and want to be consumers at an every earlier age. Today, two- and three-year olds request toys regularly. They know exactly what they want and the brand names as well" (qtd. in Kinder, 1992, 43). Even though the commercialization fuelling this development might be perceived negatively, a creative aspect can be drawn from this form of merchandise as well. Jenkins argues, for example, that toys are just a different storytelling medium because action figures embody part of the story, and children can continue and create their own stories and relationships while playing with them (MIT, 2010). Schell similarly asserts that *Star Wars* action figures provide a gateway into the *Star Wars* universe. He states,

> for if you observed children playing with them (*Star Wars* action figures)[14], you would notice something very strange. Seldom would they act out scenes from the movie, as an adult might expect. Instead, they would make up all kinds of stories featuring these characters with only a loose relationship to the plot line from the movie…often you would see children give these characters completely different names, and completely different relationships than they had in the film, as they enacted dramas and comedies starring this cast of characters in bedrooms and backyards everywhere in the world (2008, 300).

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[14] Author's insert

This argument does not need further explanation for those who once played with action figures themselves. Many fans of contemporary franchises willingly embrace marketing/branding campaigns, fully aware that action figures expand the brand more than the story. Evans notes that toys are produced "that allow viewers to imaginatively explore the fictional world of a television or cinematic super systems, but at the same time teach children to be consumers, to desire material objects" (2011, 21). The question that remains is, do the benefits of creative play outweigh the the risks of creating consumers at a young age, who might stay loyal to the franchise or product for a long time, *because* as mentioned earlier, some franchises have incredible longevity but why? Tenderich and William observe

> At its core, transmedia storytelling has the effect of expanding the reach, longevity, and intensity of the intended message. The reach is expanded when the message is broadcast across multiple channels and simultaneously staggered by time and distance. The longevity of a message is extended when it is split into self-sustainable outlier stories or subplots and pushed across multiple platforms. This increases the amount of time required to fully consume the entire story. The intensity of the message is strengthened when each portion of the story is tailored specifically to each audience and the platforms being used for distribution (2015, 26).

The central characters in these franchises present cultural icons that are deeply engrained in popular culture. The *Batman* franchise is certainly one of the best examples of a franchise that has persevered for decades. Omnipresent in the theatre, in graphic novels, video games, and a plethora of merchandise,

Batman embodies an American myth; he has no super powers yet he successfully fights evil. He is wealthy but uses his resources for the greater good. At some level, everyone can be *Batman*, metaphorically, or at least strive to be like him. *Batman* is a franchise in flux, and vast *Batman* incarnations are included in this flux; the introduction of new audiences to the everlasting superhero causes superhero revisionism as younger generations do not want to read about "their parent's" *Superman* or *Batman* (Wandtke, 7), and yet it is exactly the *cultural transmission* that constitutes the longevity of these franchises. The transmission of preferences, beliefs, and norms of behavior—the result of social interactions across and within generations, including trope from popular culture— gives established franchises new impetus (Bisin, Verdier, 2005). Through character modifications and alterations that give "old" franchises a fresh and contemporary look, parents and their children can enjoy the same franchises.

Clever rebranding campaigns feed into these feelings, offering the sense of the past with an updated and contemporary look, as oxymoronic "brand new, old-fashioned offerings" (Brown et al., 2003, 20). As much as the continuation and maintenance of these franchises is about the storytelling process, it is also about the revival or extension of the revenue stream, because in the end "the goal is to have the child watching a *Batman* video while wearing a *Batman* cape, eating a fast-food meal with a *Batman* promotional wrapper, and playing with a *Batman* toy" (Bolter, Grusin, 199). Conclusively, the general statement can be made that narrative extensions are also brand extensions.

4.3.4. Implementation of Marketing/Branding in Native Narrative Strategy

Projects in this category vary significantly, as a result there is no one formula for branding or marketing. As mentioned much earlier in this dissertation, big blockbuster native narrative strategy projects with high marketing budgets such as *The Matrix* are rare because this is still an unexplored, high-risk field. Consequently, smaller projects, such as Lance Weiler's *Pandemic*, John Greyson's *Murder in Passing*, or the multi-platform Horror story *Dark Detour* created by Alison Norrington and others, rely heavily on press coverage, advertisement, and social media. These campaigns often seem small compared to the high calibre million dollar marketing/branding crusades that Hollywood executes for their projects, but they also signal the authenticity that these smaller projects can offer. Consistency across all media involved, not only in terms of the narrative but also in terms of the marketing message is particularly important because these projects are very demanding for the story citizen. Native narrative strategy projects often do not take place without the story citizen's engagement; thus, he or she expects a high incentive for engaging with the story either in form of an extremely compelling story, a worthwhile purpose as is the case with many transmedia for social change or educational projects, or a financial or material reward. Finding the right target audience for these kinds of projects is paramount and one of the keys to success. The role of social media as the "fastest growing and perhaps the most influential media force today" (Zeiser, 2015, 328), can not be emphasized enough; social media is the nexus between the traditional and

the digital, and between producers and story citizens. It is the brand and it is the branding.

In this chapter, I have outlined how the four narrative strategies and the two dimensions suggested in this dissertation pertain to the principles of production, engagement, and marketing/branding. In chapter five, I will engage in four carefully selected case studies to demonstrate the applicability of these strategies.

Chapter 5: Narrative Strategies in Transmedia Environments: Case Studies

Before I discuss the different cases, I would briefly like to provide my rational for choosing them. The most important criteria was that they all present the ideal type in their respective category. Ideal types "can be used to represent holistic configurations of multiple unidimensional constructs" (Doty & Glick, 1994, 233). As such, an ideal type provides an abstract model that allows for comparison and contrast, as "deviation from the extreme or ideal type can be noted or explained" (Blalock, 1969, 32). All the case studies in this dissertation meet these criteria. It was also crucial that enough information about a project selected as a case was available to make inferences about the questions and issues raised in this dissertation. Since no "outsider" such as myself has access to all information pertaining to a project, I carefully considered whether the information accessible was sufficient for the analysis of a project, and I felt that this was indeed the situation for the projects chosen as cases to illustrate the different strategies. Lastly, I chose projects which I found personally intriguing and compelling, as I would be analyzing them for quite some time.

Sherlock Holmes and The Internet of Things, the case study for the native narrative strategy, is a unique project that I was eager to participate in as it offered narrative and educational potential for me as a researcher and lover of internet-based stories. *World of Warcraft*, the example for the expansive narrative strategy, is a MMORPG that I have been playing and observing for many years. It not only provides a very entertaining leisure activity, but even more so provides a

great source for studying human relationships and storytelling. Most MMORPGs offer this potential, but *World of Warcraft* is one of the most popular and most populated MMORPGs worldwide. Today's entertainment landscape is replete with examples of the constrained narrative strategy as a great number of adaptations are available to analyze. *The Motorcycle Diaries* presents a personal slice of history for me, as I grew up in Germany where the idealized image of Ernesto Che Guevara seemed to be everywhere (and I like motorcycles). Thus, when the Salles' film was released in 2004, I also read the book, because I was curious if Guevara himself described the events in the book the way they were displayed in the film. Lastly, I chose *The Man From U.N.C.L.E.* because I wanted to research a complex project that I was unfamiliar with to balance my deeper involvement with the other three projects, and since *The Man From U.N.C.L.E.* fulfilled all the other criteria and provides a uniquely interesting case, I choose it for my project for the connective narrative strategy. My partner also recounted stories — with a good bit of nostalgia — about watching the The Man from U.N.C.L.E. in the 1960s.

5.1. Constrained Narrative Strategy

***The Motorcycle Diaries* - Ernesto Che Guevara/Walter Salles, 2004.**

The constrained narrative strategy pertains to narratives with low narrative deviation and a low number of release events over time. The case of *The Motorcycle Diaries* is an exemplar of this strategy, given that Brazilian film director Walter Salles directly adapted Ernesto Che Guevara's book with low

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narrative deviation in his 2004 film. The entire project consisted of Guevara's

original book published in 1993 under the Spanish title *Notas di Viaje*, Salles' film

The Motorcycle Diaries released in 2004, and the tie-in novel re-published in the

same year under the film's title; thus, this project is also characterized by a low

number of release events over time. In this case study, I first provide some

background information about Cuba and the protagonist of book and film,

Ernesto Che Guevara; I then elaborate on narrative deviation and the number of

release events over time while considering the production, engagement, and

branding characteristics of the project. I conclude the case study with an analysis

of this constrained narrative strategy application.

5.1.2. Background: Cuba and Ernesto Che Guevara

In July 2015, Barack Obama strengthened his efforts to thaw the icy

relationship between the U.S. and Cuba; diplomatic relationships between the

two countries had ceased in 1961. Fidel Castro, Cuban leader for many years,

began building his regime in 1959, seizing power, and nationalizing all American

assets on the island. On February 3, 1962, U.S. President John F. Kennedy

proclaimed an embargo upon trade between the United States and Cuba after

Cuba signed a trade agreement with the Soviet Union (http://

www.presidency.ucsb.edu). The embargo officially remains in place, however, the

relationship between the two countries has improved under Obama's leadership.

President Obama's new political direction might serve to renew interest in

another political Cuban figure, who has polarized the world for decades and has

been featured in numerous films and media: Ernesto Che Guevara. The film *The Motorcycle Diaries* and the book of the same title by Guevara himself is the basis of this case study.

Guevara's friends affectionately called him "Che", a popular form of address in Argentina. Members of the Bolivian Army killed Ernesto "Che" Guevara de la Serna on October 9, 1967, in Bolivia's woods. His life and his early death made him an icon, and his image has been reproduced and publicized abundantly to this day. History associates his early years with his friendship with Cuban leader Fidel Castro, Guevara's position in the Cuban government, and his role in the Cuban Revolution. These years of Guevara's life might be dominated by his authoritarian and repressive leadership, yet the multi-platform project that provides this case for the constrained narrative strategy portrays a man who dedicated his life to a fight for change.

5.1.3. Constrained Narrative Strategy Implementation: Production

Brazilian director Walter Salles creates a detailed picture of Guevara's early years in the 2004 film *The Motorcycle Diaries* based on the homonymous book by Guevara; both film and book certainly also add to the myth surrounding the revolutionary leader. The storyworld is the primary world as, in book and film, Guevara reflects on the nine-month long journey that led him and his friend Alberto Granada from Argentina to Chile, from Colombia to Venezuela, and back to Argentina on an old motorcycle, a 1939 Norton 500, called "La Poderosa – The Mighty One." The young "Che," at the time of departure 23 years old, explains

early in the book that the trip changed his life. He writes: "The person who wrote these notes passed away the moment his feet touched Argentine soil again. The person who reorganizes and polishes them, me, is no longer, at least I am not the person I was. All this wandering around 'Our America with a capital A' has changed me more than I thought" (2004, 32). Book and film likewise divulge what changed Guevara's life during the journey through South America.

During the entire trip Guevara keeps a diary, written in prose form, and told in the first person. Guevara writes vibrantly, intelligently, and at times humorously. Director Walter Salles manages a close adaptation of the book, but despite the film being produced independently, adds the obligatory romanticizing components that characterize most Hollywood films. These few instances of narrative deviation, however, serve a particular purpose: to show Guevara in a positive light as a caring, altruistic, and honest man[15].

Guevara covers the last goodbye to his girlfriend Chicina in Miramar before the trip on two pages in the book—a very emotionally sober and rational encounter; Salles romantically and fictionally expands that story, showing Guevara and his girlfriend sneaking out of the house and hiding in a car in a moment of innocence and playfulness. In the film, Guevara receives fifteen US dollars from his girlfriend to buy her a bathing suit in case he made it to the U.S, an incident that is not mentioned in the book. The money plays an important role in the film; the young Che refuses to spend it for motorcycle repairs, urgently needed food, or to have Granada's carnal urges satisfied. Guevara does not buy

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[15] Salles himself states his desire to visualize Guevara's life before becoming "Che" in an interview on the DVD. (*The Motorcyle Diaries, 2004*).

a bathing suit for his girlfriend either, but instead gives the money to a Chilean couple, members of the Chilean Communist Party,[16] who had lost everything they owned. The couple exists in the book, and Guevara describes his concerns regarding their situation. "The couple, numb with cold, huddling against each other in the desert night, were a living presentation of the proletariat in any part of the world." Later in the text he elaborates, "It's a great pity that they repress people like this. Apart from whether collectivism, the 'communist vermin,' is a danger to decent life, the communism gnawing at this entrails was no more than a natural longing for something better" (2004, 78). Guevara sometimes engages in political, but rather tame thoughts in his book, and Salles attempts to faithfully reproduce them in the film, often using direct quotes from the book.

The film progresses as a blend of fiction and documentary. Salles inserts black and white shots and black and white tableauxs of people in South America, more specifically Peru, to emphasize the reality of the storyworld. The images depict a Peruvian farmer and his son, a group of mine workers, and an old woman sitting on the steps of a church. The development of the story is congruent with the development in the book, as Guevara provides a detailed account of the history and the situation of the people of Peru. The last part of book and film focuses on the leper colony in San Pablo, Peru, where Ernesto and Alberto work for a few days. Salles very closely adapts Guevara notes in the film, including Guevara's and Alberto's refusal to wear gloves when greeting and treating the sick, an emblematic gesture that humanizes Guevara even more.

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[16] According to Guevara's notes, "The Chilean Communist Party was banned and many members persecuted under the so-called Law for the Defense of Democracy"(1948-58). *The Motorcycle Diaries*. Melbourne, New York: Ocean Press, 2004, 77.

The two men play soccer with the patients, and treat them as "normal human beings instead of animals, as they are used to" (Guevara, 2004, 146). On his 24th birthday, Guevara gives a speech to the staff of the leper colony, and Salles incorporates Guevara's original words from the book in the scene when Guevara pleads for a United America:

> We believe, after this journey more firmly than ever, that the division of [Latin] America into unstable and illusory nations is completely fictional. We constitute a single mestizo race, which from Mexico to the Magellan Straits bears notable ethnographical similarities. And so, in an attempt to rid myself of the weight of small-minded provincialism, I propose a toast to Peru and to a United Latin America (2004, 149).

The film ends at a small airport in Caracas where the two friends separate. During the last goodbye, Alberto calls Guevara "Che" for the first and only time in the film—another fictional addition, foreshadowing what was to become of Ernesto Guevara. Guevara ends his book with a statement about his thoughts and his future:

> I see myself, immolated in the genuine revolution…I feel my nostrils dilate, savoring the acrid smell of gunpowder and blood, the enemy's death; I steel my body, ready to battle, and prepare myself to be a sacred space within the bestial howl of the triumphant proletariat can resound with new energy and new hope (2004, 165).

Salles' film inevitably leaves a Hollywood mark on the story; it is a favourable one that flatters the man from Rosario, Argentina who became one of the most enduring icons in the world as a brand of the revolution. As much as we would want to love this man based on the film, the picture is far from complete.

Salles employs a convenient Hollywood formula, depicting the earlier and more innocent years of a man, saving himself from the trouble of depicting who Ernesto Guevara became in his later years as "Che."

5.1.4. Constrained Narrative Strategy Implementation: Engagement

Since the narrative dependency is also low also for this project, as both narratives function as stand-alone texts, the story citizen can choose with which medium to engage and in which order. Readers of the book and viewers of the film will initially experience low cognitive load as the film adaptation remains mainly faithful to the book. Immersion takes place on a conceptual level only. Even though the film received positive critiques on the most popular review sites such as Rotten Tomatoes (84%), and metacritics (77%), mostly for Eric Gautier's cinematography and the performances of Gael Garcia Bernal and Rodrigo de La Serna, some critics and filmgoers alike challenge the film's intention of depicting a more innocent Guevara, and some rather harshly:

- A ludicrously rosy portrait of a future mass murderer. "Motorcycle Diaries" is as little in touch with reality as Che's blinkered devotees (Ben, metacritic, 2004)
- It's much easier to linger on his youthful idealism than on how that idealism eventually manifested itself. It certainly makes for a much prettier picture. But when your subject is Ernesto "Che" Guevara, it is disingenuous (Rodriguez, Miami Herald, 2004).
- This seems like a typical road trip film and the plot was not compelling enough to hold my attention. There was some very incredible scenery (I loved the Macchu Picchu sequence). Also, this deals with Che Guevera- the future communist revolutionary. For one who understands who Che is, that might

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make this film hard to swallow which takes a very naive (in my opinion) look at the future leader who would censor free speech and expression and have a negative influence on Cuba. (Dave, rotten tomatoes, 2004).

Proponents of the film defend Salles' decision of omitting the controversial aspects of Guevara's life:

- Critics have claimed that by failing to tackle the reality of Che's future the film does a disservice to the realities of his past. I would say that the film shows the blank slate of youth filling with experiential awareness and hinting at how those experiences might mix with the character's inherent tendencies. The future is not yet known, but the possibilities are being outlined. I think that it is done very, very well (Mathew, metacritic, 2004).

- Combine beautiful photography and powerful, natural acting with terrific writing, and you have Motorcycle Diaries. For those who criticize the movie as creating a false portrait of a man who would later advocate violent revolution, have they so little imagination that they are unable to comprehend how a young person who goes off to discover the world could legitimately grow from a sheltered son of privilege into a revolutionary, given the conditions of the world? (Stephen, metacritic, 2004)

- The point is not about who Che Guevara eventually became, but that he was once as young and idealistic as the rest of us should hope to be. This movie should inspire thoughtful discussion, as to what sort of injustice (and convoluted Marxism) could turn someone who began with the best of ideals into a killer. And be careful where you point your finger--our great "liberal democracies" are surely not the towers of high-minded ideals either. See the humanity in everyone, even a radical who ultimately did good as well as evil. And please, comments about "commies" only bely bigotry and ignorance. And of course, the acting, music, cinematography

was superb. See it with a slightly open mind and enjoy (Abby, rotten tomatoes, 2004).

The discourse about the film ranges from the glorification of a political figure of questionable character to the portrayal of a caring human being, a hero for the masses who continues to inspire. The reviews demonstrate active engagement of the story citizens with the narrative beyond the film, active exploration, and discussion of the historical context with all its challenges and problems. The reviews of the book reveal similar struggles of the readers with the distinction between the young medicine students Ernesto Guevara and the Cuban leader and icon of the revolution "Che," but in a less critical manner:

- The story of Che before he became *The* Che, when he still is a rash youngster hot blooded and filled with hunger for adventure. In spite of which, he displays a caring philosophical mind of a legend in making (Nikhil, goodreads, 2013).

- This book told me how Ernesto Guevara transformed from a humble and passionate medical student into a articulate, cunning and brilliant revolutionary who not only changed the face of the entire Latin American continent but shaped the perspectives and the thoughts of millions of people from all the world over (Mel Vincent, goodreads, 2011).

- For life, courage, adventure, endurance and what not. Non-adherence to Marxist ideology should not prejudice me against him. The moving memoir gave me an access to the mind of pre-revolutionary Che Guevara which undergoes significant changes as the motorcycle moves ahead (Sash, goodreads, 2015).

- These Diary notes provide us with an ernest and fetching account of a young Che, a middle-class kid, not yet embarked on the violent and heroic road that stretched past these early trails. Not particularly educational or insightful, but yet strangely moving (Riku, metacritic, 2014).

The book received a rating of 3.97 stars (out of five) based on over 17,000 ratings and 980 (goodreads, 2015), mostly positive reviews that largely comment on the travel experience and are mostly sympathetic towards the young Ernesto Guevara. Those critical of the book are aware of the political agenda that runs parallel through the diary that Guevara wrote during, but edited years after, the trip[17]. As one reader puts it:

- As I read it, I became very skeptical. How could Che Guevara be such an eloquent writer and have such an enormous foundation of political history in 1951/1952? He must have added a lot when he went over it an edited it (Vida, goodreads, 2010).

Salles depoliticizes the film by presenting Guevara in an overly human, almost vulnerable way (Che dealing with frequent asthma attacks), embodied by the soft and accessible actor Gael Garcia Bernard. This version of the Cuban leader is inspiring—the perfect basis for the wishful fantasy of a pop culture icon exploited by the capitalist world hated so much by Guevara himself. Guevara still has an existing fan base, even though it is unclear how much his followers, who proudly display his image, really know about him.

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[17] Despite intense research, I was unable to clarify the time frame for the writing and editing process of the diary but found sources indicating that years had passed between the journey and the edits.

5.1.5. Constrained Narrative Strategy Implementation: Marketing/Branding

The Motorcycle Diaries were originally published in 1993 under the Spanish title *Notas di Viaje*, a tie-in edition was re-published in 2004, coinciding with the release of the film. The theatrical release poster and book cover are identical, a common practice with book-to-film adaptations; the book makes reference to the film, the film comments on Guevara's diaries and the true life story as a basis for the film. It might be based in the fact that the face of Che Guevara is one of the most ubiquitous images in the world. Virtually all shopping malls, flea markets, and little shops feature bags or clothing and other merchandise with the image of the revolutionary leader, often worn by people who have no idea who he is. As McLaren notes, "because North America loves sexy heroes, Che was soon revered for his market value" (1999, 273). The commercialized Guevara, however, disguises the image of the true Guevara whose "message has been overcoded by radical chic consumer culture and his death means more than an opportunity to trade his image for a quick buck in souvenir franchises" (McLaren, 274). The image of the Che Guevara will always be as much an image of the Cuban revolution as an image of pop culture and commercialization.

5.1.6. Constrained Narrative Strategy: Analysis

The Motorcycle Diaries book-to-film adaptation exemplifies an ideal type in the constrained narrative strategy category due to low narrative deviation and a low number of release events over time (three). The instances of narrative

deviation in the adaptation process are grounded in Hollywood conventions and the affordances of the film medium that requires omission of narrative elements of the book. The film, however, faithfully covers the main narrative elements of the book. The story citizen decides whether or not to engage with both media and how deeply to immerse herself with the narrative. The post-book and film discourse was mainly context centred, focusing on the historical context of the entire life of the main subject, Ernesto "Che" Guevara, demonstrating that many story citizens do not accept the presented narrative without considering the deeper meaning and context of the story. *The Motorcycle Diarie*s, book and film, consequently may provide a learning and knowledge-creating opportunity beyond mere entertainment and invites the story citizen to expand from an initial low cognitive load to a much deeper and meaningful dialogue that engages beyond book and film. Personally, I have always been interested in the story of Che Guevara, not only because his image was so pervasive during my childhood, but also because within a plethora of conflicting information and images, I was searching for the truth about the man from Rosario. As a case, it illustrated the production, engagement, and branding principles discussed in Chapter 4. Based on this evidence, this case serves an example of the constrained narrative strategy.

5.2. Expansive Narrative Strategy

World of Warcraft **- Blizzard Entertainment, 2004**

The expansive narrative strategy pertains to narratives with high narrative deviation and a high number of release events over time. The case of the massively multi-player online role playing game *World of Warcraft (WoW)* is an exemplar of this strategy, given that Blizzard Entertainment has expanded the *WoW* universe since its inception in 2004 across a plethora of media; thus, the number of release events over time is high as well. Narrative deviation is high as the narrative expansions all add new material to the story universe. These expansions include six game expansion packs, numerous game updates, so-called patches that add new content on a regular basis, more than 20 novels, over 30 short stories, a graphic novel/manga series that includes more than 100 issues, the film trailer for the upcoming feature film, and the film itself that will be released in 2016. Consequently, this project is also characterized by a high number of release events over time that will only increase, as *WoW* is a popular franchise that will remain active for some time. In this case study, I first provide some background information about massively multi-player online role playing games; I then elaborate on narrative deviation and the number of release events over time while considering production, engagement, and branding characteristics of the project. I conclude the case study with an analysis of this constrained narrative strategy application.

5.2.1. Background: Massively Multi-Player Online Role Playing Games

Before I delve into the *World of Warcraft* franchise, I would like to delineate the boundaries of this case study. Recall that popular entertainment franchises are billion-dollar enterprises abounding with expansions that are often neither controllable nor completely traceable due to the longevity and multiplicity of authors. Thus, a complete and detailed account of the *WoW* franchise is beyond the scope of this dissertation; in general, such accounts are extremely rare, and usually appear as lengthy books. *The Frodo Franchise,* for example, a case study by Kristin Thompson based on a the *Lord of The Rings* film trilogy, is a 424-page book. My analysis of the *WoW* franchise will focus on the major narrative elements and media extensions[18]; I will analyze general rather than specific narrative instances, which will suffice to support the categorization via high narrative deviation and high number of release events over time in this application of the expansive narrative strategy.

Individuals have always had the urge to immerse themselves in different roles, be it on stage as actors or in the form of improvised play between children. These types of role-playing often simulate real life situations or stories, wrapped into a theatrical setting or into free and formless mimicry. The introduction of new media, especially the Internet, has given life to another form of role playing game: the "Massively Multiplayer Online Role Playing Game" (MMORPG). MMORPGs have seen an increase in popularity throughout the last decade, even though the press often denounces video and online games as fostering teen violence, causing game addiction, and detaching players from real life social

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[18] It will also exclude the precursor PC games "Warcraft" as these games are no longer available.

environments. Today's MMORPGs present a "new paradigm in computer gaming" (Yee, 2006, 5) because the game design is far more advanced than the early versions of the 1980s. Today, story citizens dive into persistent, vibrant storyworlds that constantly develop further and change even when the player is not present. The player can experience vast and varied landscapes and cities, and even simulated weather conditions like rain or snow. She can transform herself into characters, so-called avatars that are beyond the imagination and possibilities of a non-game world. In Indian mythology, an avatar was the carnal "gestalt" that the gods created in order to descend to earth (Adamowsky, 2000). In the game, it is quite the opposite; the story citizen experiences a metamorphosis, turning into the avatar, and vanishes from the non-game world into a virtual space. Avatars differ with regard to appearance as well as abilities and attributes like strength, dexterity or intelligence. Within the storyworld, the story citizen can engage in a variety of activities and excel in disciplines that are impossible in the non-game world, like flying or spell casting. While earlier versions of games focused only on combat and war, recent MMORPGs also allow more diversified and peaceful activities by offering a professions such as fishing, alchemy, or tailoring (Yee, 2006).

The storyworld of a MMORPG is usually divided in different areas called maps, differing with regard to content and difficulty. Depending on the level of the character, the story citizen will be successful in defeating the creatures and beasts of the respective area. The fantasy of the game designers know no boundaries, and characters meet everything from familiar dragons and demons

based on old legends and myths to demi-humans, brutes, and elements with colourful names like "Kil'jaeden" or "Vexallus." MMORPGs are often loosely based on a fantasy medieval world from existing novels; most often mentioned in this context is *Lord of the Rings* by J. R.R. Tolkien*.*

5.2.2. Expansive Narrative Strategy Implementation: Production

Azeroth, the storyworld of *WoW,* is a secondary world with little resemblance to the real world, and a beautiful place. The story citizen can ride her steed through the fascinating jungle of Stranglethorn Vale, explore the secrets of the Jade Forest on the back of her dragon, or simply travel by boat to experience the icy beauty of Northend. Azeroth's storyline originated in the PC games from the 1990's and continues in the current MMORPG. The major narrative thread in the franchise is the war between the Alliance and the Horde, depicted by Blizzard Entertainment in a number of media such as the game itself but also novels, short stories, graphic novels, manga and film. At first glance, *WoW* resembles the traditional good versus evil formula, but it quickly becomes more complex. Numerous main characters in the franchise, such as Thrall, Slyvana Wildrunner, or the Bunshee Queen for the Horde, Prince Anuin Wrynn, or Archmage Khadgar for the Alliance, recruit story citizens to fight the war on their behalf. As is the case for all franchises, the entire canon, the so-called *WoW* lore, is so complex that it is difficult to understand all its plot lines, intricacies, and detail without a significant time investment. Blizzard integrates a number of major storytelling devices in the game: cut scenes, quests, story books, and the actual

game play. The cut scenes give narrative depth to the game as they allow a more detailed account of the story events than the quests, yet they are often rendered as passive and non-interactive in these scenes; the story citizen lacks agency. Cut scenes lead to controversies in MMOPRGs and video games in general as "they prevent the player from doing anything and are in a sense a non-game element in a game" (Juul, 2006, 7). Juul's observation might be correct from a ludic point of view, but game developers deploy cut scenes in order to create a coherent storyworld and give the game a narrative-oriented framework. It is key to note, however, that the story citizen can skip cut scenes and move through the game without paying attention to this narrative context.

Another major element within the narrative framework is the quest system, consisting of the main quest line explaining the events in the storyworld and side quests that often concern the lives of the non-player characters (NPCs), or quest givers. The main quest line leads the story citizen to the end game content that he or she reaches at the maximum level. As mentioned earlier, new expansions add new quest lines and expand the main narrative. The quest structure drives the story and is infinite; Blizzard can add new quests, and thus new story elements, at any time. NPCs not only tell the story citizen what to do next, but also reveal the tale of Azeroth. Following from one quest to another, story citizens learn more about the story of Azeroth and become increasingly embroiled in its political and historical structure. I would like to provide an example of a quest that is conveyed to the story citizen, or more precisely, to those playing the class of Death Knights, by High Lord Darian Morgraine. It reads:

It is the will of the Lich King that drives us onward, <name[19]>.

None are more aware of this than death knights. Our very existence is intrinsically tied to his very consciousness.

Surely you have heard him speak to you - invading your thoughts...

Can you hear him now? Perhaps it is too early for you.

<Mograine closes his eyes and nods to an unknown host.>

Yes, my lord. It will be done.

<Name>, you are to return to Death's Breach and report to Prince Valanar.

The Lich King commands it! (wowwiki.com).

The personification of the quest by adding the name of the story citizen makes each story experience unique and augments the experience. The incentive of understanding Azeroths' mythology by completing each quest in each area is supported through the achievement "Loremaster" that the story citizen receives in each area with completed quests. In-game achievements might seem trivial for someone who has never played a video game, but the seduction of achievements is powerful in MMORPGs. Achievements lead to rewards and vanity items such as mounts, pets, or titles that increase prestige, acknowledgment, and admiration from other story citizens—something that many story citizens strive for in the game.

The story citizen finds additional story elements in books spread throughout Azeroth. As an example, I am providing an excerpt from a book, called *The Birth of The Lich King,* that can be found at a few different places within the game:

Ner'zhul and his followers entered the Twisting Nether, the ethereal plane that connects all of the worlds scattered throughout the Great Dark and

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[19] of the story citizen

Beyond.Unfortunately Kil'jaeden and his demonic minions were waiting for them. Kil'jaeden, who had sworn to take vengeance on Ner'zhul for his prideful defiance, slowly tore the old shaman's body apart, piece by piece. Kil'jaeden kept the shaman's spirit alive and intact, thus leaving Ner'zhul painfully aware of his body's gross dismemberment. Though Ner'zhul pleaded with the demon to release his spirit and grant him death, the demon grimly replied that the Blood Pact they had made long ago was still binding, and that Ner'zhul still had a purpose to serve. The orcs' failure to conquer the world for the Burning Legion forced Kil'jaeden to create a new army to sow chaos throughout the kingdoms of Azeroth. This new army could not be allowed to fall prey to the same petty rivalries and infighting that had plagued the Horde. It would have to be merciless and single-minded in its mission. This time, Kil'jaeden could not afford to fail. Holding Ner'zhul's spirit helpless in stasis, Kil'jaeden gave him one last chance to   serve the Legion or suffer eternal torment. Once again, Ner'zhul recklessly agreed to the demon's pact. Ner'zhul's spirit was placed within a specially crafted block of diamond-hard ice gathered from the far reaches of the Twisting Nether. Encased within the frozen cask, Ner'zhul felt his consciousness expand ten thousand-fold. Warped by the demon's chaotic powers, Ner'zhul became a spectral being of unfathomable power. At that moment, the orc known as Ner'zhul was shattered forever, and the Lich King was born. (www.wowhead.com)

Reading these rather lengthy descriptions of story events is again entirely optional; it is up to the story citizen how much of the story she wants to engage with and how much cultural storyworld knowledge she wants to accumulate. Blizzard, of course, encourages time spent with the main story line as it is time spent with the game, and again offers an achievement for reading these books. Reading all the books covering the basic story of Azeroth leads to the

achievement "Well Read". Once the story citizen has played through the quests and levelled the character to the maximum level, she is mostly left with so-called end-game content. End-game content takes form of raids that require either 10 or 25 players to complete, and the adversaries to defeat in these large game areas are usually main characters in the story. In general, MMORPGs encourage collaboration throughout the game, but story citizens who feel more comfortable playing solo may do so as well. Raids, however, require collaboration, the opponents in these areas are too powerful to be defeated by a single story citizen. Raids require an extremely high skill level, weapons, and armor sets. In the very last moments of the *Wrath of the Lich King* extension, for example, as part of a 25 player raid, the story citizen finally meets the Lich King himself. The Lich King, the Darth Vader of *WoW*, one of the most powerful and impressive figures in the game, visually and in terms of character, is the last opponent to defeat in the end game content of the *Wrath of the Lich King* expansion. The story citizens that participate in the 10/25 player raid witness this dialogue between Highlord Tirion Fordring and the Lich King:

> Highlord Tirion Fordring says: Our march upon Icecrown Citadel begins now!
> The Lich King says: You now stand upon the hallowed ground of the Scourge.The Light won't protect you here, paladin. Nothing will protect you...
> Highlord Tirion Fordring says: ARTHAS! I swore that I would see you dead and the Scourge dismantled! I'm going to finish what I started at Light's Hope.

The Lich King says: You could've been my greatest champion, Fordring. A force of darkness that would wash over this world and deliver it into a new age of strife.

The Lich King says: But...that honor is no longer yours. Soon, I will have a new champion.

The Lich King says: The breaking of *<this one>* has been taxing. The atrocities that I have committed upon his soul. He has resisted for so long, but he will bow down before his king soon.

Highlord Bolvar Fordragon says: NEVER! I... I will never... serve... you.

The Lich King says: In the end, you will all serve me.

Again, the dialogue is personalized for the story citizen and thus gives meaning to the final battle that follows. After the last enemy encounter, in this case the Lich King, the story citizen has exhausted the main quest line. However, raid leaders often require proof that the story citizen is adequately equipped to be part of the team setting out to defeat the final opponent. Whoever does not possess the necessary weapons, armor sets or skills will not be allowed to participate. Consequently, many story citizens never experience end-game content, and never experience the full story—a discriminatory act, forced upon the story citizen by the game mechanics that casts a serious shadow on the narrative strategy of *WoW*. I feel rather strongly about the enforcement of the game mechanics because during my time of gameplay, I never developed skills high enough to take part in serious endgame activities. This experience illustrates two things: 1) the highly competitive environment that doubtlessly resembles competitive environments in the real world, be it in sports or business; and 2) the fact that this competitiveness leads to a "survival of the fittest"

mentality that discriminates against players who do not possess adequate skills. In order to avoid generalization, I would like to add that some guilds display a true sense of community by carrying their weaker members through these raids. Just to put things in perspective, these 10- to 25-player raids can last up to several hours, require an extreme level of communication and coordination among players, and reward the players with the most valuable items in the game (not that I would have ever experienced that).

As mentioned earlier, the *WoW* franchise expands through numerous expansions packs that Blizzard releases in more or less regular intervals, as well as in game "patches" that correct bugs and, about twice a year, add new content. The storyworld grows further in copious books, short stories, graphic novels, and manga. High narrative deviation characterizes these story extensions. *World of Warcraft: Arthas: Rise of the Lich King*, for example, explores the Lich King's life from his early childhood to his later years, revealing deep background insights that the story citizen cannot experience in the game. The book, published by Simon & Schuster in collaboration with Blizzard Entertainment in 2009, is an official part of the WoW canon and acknowledged as such by the fans. The engagement with these story extensions might influence emotions and perceptions of certain characters in the game. The book Arthas: Rise of the Lich King (2009) introduces the character as Arthas Menethil, covering his childhood on before he becomes the Lich King. The story citizen learns the background story of how Arthas turned from an innocent boy to one of the most evil characters in the game. Similar to other villains in numerous other stories, the

turn from good to evil was not entirely Arthas' fault. This additional information might evoke sympathy for the man with the mask, the evil Lich King, who once, according to the book, was a loving and caring man.

5.2.3. Expansive Narrative Strategy Implementation: Engagement

In the *WoW* storyworld, the story citizen performs quests as an avatar, fully immersed as one out of 14 races such as Night Elf, Worgen, or Draeanei. The race determines the home base of the character—one of the major cities such as "Darnassus" for Night Elves or "Ironforge" for Gnomes—as well as their main traits or skills. Each race possesses different skills that are of different value, and no character possesses "the perfect skill set," a fact that makes collaboration inevitable. Races are divided in two different factions, the "Alliance" and the "Hordes." These factions are fierce enemies, and communication between them is limited to pre-determined gestures and expressions; no direct chat between factions is possible, and would pose a violation of the official game regulations that every story citizen must accept before playing (Blizzard, 2016).

WoW offers the story citizen the choice of twelve different classes, not all of which are available for every race. "Melee" classes like Warriors must "tank" (take heavy damage from) monsters and are usually at the combat front. Casters such as Mages use various forms of magic, be it for "dps" (high "damage per second") or for healing other weakened party members as Priests from a distance. Thus, every class fulfils a certain role and together an organized team can successfully master a task or a particular event. The nature of the avatar,

based on race and class, also determines the avatar's appearance. Different costumes, armor, and weapons are available for the characters. A Druid, for example, can only wear leather and fight with either staffs or maces, whereas other races wear only mail and fight with swords, axes or other weapons. These mechanics are similar to game mechanics in other MMORPGs.

In *WoW,* gender choice is clearly visible, and therefore an important factor in the avatar creation process. Success in the game is rewarded through experience points that help character to reach higher levels. In addition to the class and race choice, the player can choose from different professions to earn the game currency, called "gold." This form of in-game money is of great value because it allows the purchase of weapons, nutrition, and transportation, and is thus necessary for the advancement of the character. Popular professions are "Leatherworking" and "Mining," as quick money can be made; the player may also engage in second professions like "Cooking" and "Fishing." Complex game play requires an intense financial and time investment to develop a character in terms of skills and gear and attain the highest level, which is, in *WoW*, positioned at level 100 at the moment, but will be raised to 110 in the next expansion that will be released in September, 2016. *WoW* presents a high cognitive load for the story citizen as acquiring the actual skills in the game requires time and often collaboration with others. Frequent moments of cognitive rupture occur in the game; the story citizen needs to consult other media extensions in order to find answers to questions pertaining to the complex storyline and the background stories of the main characters in the game.

WoW is a typical franchise, yet many scholars argue have argued that in video games, the storytelling process is underemphasized. I believe that recent developments validate the argument that storytelling in video games has become more important, and often is crucial for game play. Tanja Krzywinska notes that "the game's mythic structures and elements drive the logic that underpins *WoW's* stylistic milieu and provides the context for and of gameplay" (2014, 38). Story citizens base so much meaning on the story that they expand the story on their own in order to overcome illogical or non-sensical occurrences by inventing new story elements during game play. Story citizens of one *WoW* guild, for example, playing on a role playing server and striving for an extreme level of immersion, invented a disease called "Goldshire[20] Fever" to explain the behaviour of story citizens who displayed behaviour that frustrated immersed role-players — behaviours such as typing lol, undressing their characters in public, and so forth. The guild claimed that it "was a malady causing people's loss of sanity, speech deficiencies, and a weak mind" (Linderoth, 2012, 16). This additional story element, Goldshire Fever, allowed the serious role player to stay in role while being in the vicinity of more "casual players." I argue, however, that immersion in an MMORPG might more difficult to achieve than in a single player video game. Lu contends, for example, that in video games "immersion is a highly involving and integrative process, whereby the cognitive and affective resources of the player are concentrated on a single activity" (2015, 20). That might be the case for closed world video games; in MMORPGs, however, the story citizen or player's concentration on the gameplay itself might be disrupted by either the

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[20] Goldshire is a small village in Azeroth

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chat window that allows her to view the conversation between players of the guild or players that congregate in the same area, or by the onscreen conversation or action within the gameplay itself. Some MMORPGs display speech bubbles directly over the player's head. Based on my own experience as a player, the conversations in either chats or within the game itself divert frequently from the game to real world discussions about soccer, movies or other type of media the players engaged with, or general discussions about life. I perceived these events as extremely disruptive of the immersive qualities of the game. The invention of Goldshire fever might mitigate but probably not eliminate these disruptions, but Linderoth's remarks struck me as particularly interesting as this guild made a real effort to stay immersed in the game by inventing the Goldshire fever, for example. Also, the three-page research paper written by one of the guild members on this fictional disease is comparable to the hours spent on sowing a cosplay convention costume. True fans work for the franchises they love.

Moments of cognitive rupture are plentiful in the game, and the story citizen may seek answers to remaining questions by migrating across media. The story citizen, no longer stationary within this storyworld displays nomadic behaviour (DeCerteau,1980), traversing media and platforms to hunt for story information, and in the process collaborates and interacts with other story citizens in order to take advantage of the "universally distributed intelligence" (Levy, 1997, 13) that becomes so visible in fan communities. The *WoW* fan communities congregate on abundant forums and websites such as wowwiki, wowreddit, or the official Blizzard website to discuss strategies, race and class specificities, and the *WoW*

story. Thousands of webpages answer even the most specific questions, and the amount of knowledge goes beyond the capacities of one single story citizen. This sense of fan community demonstrates the power of pop culture franchises that have received their fair share of criticism. These franchises, as continuously evolving storyworlds, favour optional thinking as background stories explore the events from different angles and viewpoints. "What-if" scenarios are not unusual but common and desired in fan works such as fan fiction, remediation, or machinima. Even though *WoW* is a fairly young franchise, there is a strong sense of nostalgia present in the game. Entire servers, referred to as "Vanilla Warcraft," are dedicated to preserving the gameplay of the early years of the franchise, and story citizens playing on these servers share their early memories and how the game changed their lives. Alexey, who worked at an Internet Cafe in Russia but played on a U.S. server in 2005, recalls:

> At that time my English wasn't very good, so I couldn't communicate with other players, but when I tried World of Warcraft it just blew my mind. I may have wasted a lot of time in Warcraft, but it did teach me English. I can assure [you] that was the biggest improvement in my life. (Kotaku, 2015).

Most story citizens connect the early years of playing *WoW* with positive aspects of their lives. Winkie summarizes the feeling of nostalgia very aptly:

> The physical World of Warcraft does not exist, so it's odd that it musters this sort of melancholic nostalgia. It's not something I'd expect anyone who didn't experience a decade in Azeroth to understand, but you can bury authentic feelings in these stoic,static, internet landmasses. There's love in Ironforge, laughter in Stranglethorn Vale, brotherhood on the trail from Lakeshire to Blackrock Mountain (Kotaku, 2015).

Just as many other popular entertainment franchises, *WoW* is often a family affair. During my own time of playing, I often encountered husband and wives (the most common combination), and fathers and sons, which indicates some level of cultural transmission.

As a videogame, *WoW* is naturally embedded in a larger system of video game culture, culture in general, as well as economic and political systems. Castranova argues, for example, that "properly designed worlds can support new forms of economics, politics, and culture that emerge from user's behaviours within those systems" (qtd. in Johnson, 2013, 115). As mentioned earlier, the game currency in Azeroth is gold that the story citizen can acquire by selling wares that she crafted in the game and through the gameplay itself. Game currency is also available through in-game sellers directing players to website that offer "gold" for real-world currency. This in-game activity is the norm in most MMORPGs, and obviously not tolerated by the game developer.

Many game developers, however—and Blizzard is no exception—offer special items for the game, such as exotic mounts or special gear, exclusively on their website for purchase. These often sought-after items are not available in the game itself, but can only be purchased with "real money." This example illustrates the merging of real world and game economics; it is a voluntary act, and nobody forces the purchase of these items, but as mentioned earlier, achievement in form of possessing items that many players do not have is one of the main goals for many story citizens in the game. The out-of-game financial interaction might impact the status of the game as a place where players can escape the real

world. Yee describes escapism as one of the factors why people play video games (2009). The concept of escapism in MMORPGs seems a fallacy to me that maybe stems from the negative stereotypes that people associate with video games. Even though story citizens/players play and live in the fictional world of Azeroth, their behaviour often replicates their behaviour in the real world.

Azeroth is a place of economics, politics, and social interactions that mimic the real world very closely. One example might illustrate these thoughts: major guilds are usually in fierce competition with each other as the ranking for guilds is publicly available on Blizzard's website. The first guild to eliminate a major enemy, for example, will be noted by everyone in the gaming community. Consequently, these guilds allow only the best players to join their ranks and require an extensive application process that is quite similar to a job application process in the real world, including a probationary period and several other requirements. Life in a major guild is afflicted with arguments, conflicts, and drama pertaining to relationships between guild members; for example, a guild leader favouring certain players, unequal distribution of loot (items gained through gameplay) and so forth can be the source of much interpersonal conflict. As Castronova observes

> As people have come together in synthetic worlds, they have begun to behave like people who come together on Earth: they talk, make agreements, exchange goods, make friendships. They also cheat and steal and abuse. They laugh, cry, and yell at one another. It's real-existing humanity, merely transported to a fantastical domain(…) When Earth's culture dominates, the game will be over, the fantasy will be punctured,

and the illusion will be ended for good. Living there will no longer be any different from living here, and a great opportunity to play the game of human life under different, fantastical rules will have been lost (2004, 196).

In spite of the negative aspects of the real world invasion in MMORPGs, one might argue that gameplay provides a simulative learning environment where story citizens can acquire real life skills such as leadership or conflict management. Video games in general have been used in the context of simulation training quite frequently, particularly by the military. Bourke notes that war games, and especially first person shooter games, have become important yet inexpensive training devices in all branches of the military (2015). Interestingly, games originally developed for the military have turned into commercial games as well and "moved from the barracks to the bedroom" (Bourke, 2015). Consequently, most war games provide the incredibly realistic environments expected and required by millions of players. Ivan Buchta, creative director of *Arma 3*, an open-world military tactical shooter video game, states that "there is a hardcore milsim [military simulation] community around our games, consisting of many military professionals, military enthusiasts and other generally knowledgeable fans, who regard military accuracy and authenticity as very important" (www.armytechnology.com, 2012).

Ultimately, it is important to remember that commercial war games are for players, not for soldiers, and entertainment is paramount. War games such as *Call of Duty* (2003) or *Battlefield* (2002) have developed into huge franchises with an increasing number of players eagerly awaiting new instalments of the games,

just as *WoW* players eagerly await the release of the newest game expansion. *World of Warcraft*, as a fantasy game, lacks this sense of realism that war games provide, as the creatures and enemies killed in the game do not exist in the real world, no blood is flowing during combat, and the game environment looks animated rather than realistic. Future research might investigate the underlying similarities and differences between these fan communities.

5.2.4. Expansive Narrative Strategy Implementation: Marketing/Branding

The *WoW* series was launched in North America in 2004. By June 2015, 5.6 million subscribers played the game, which, despite fierce competition in the sector, makes *WoW* the most-played MMORPG in the world. Azeroth has grown significantly since 2004 through numerous release events. The first expansion, *The Burning Crusade*, released in 2007, led the story citizen into a barren and fiery place named Outland introducing two new races: Blood Elves and Draeneis. *The Wrath of The Lich King* who ruled the icy continent of Northend and the Dark Knights quickly followed in 2008, but after that Blizzard continued with a two-year release schedule up to this date.

Blizzard introduced a higher maximum level for players with each expansion, an inevitable incentive for existing story citizens. Subscriptions reached a peak in 2010 with over 10 million players upon the release of *Cataclysm,* which opened new zones in the existing storyworld that were previously hidden. *Cataclysm* also introduced two new races, and again raised the maximum level for players. *The Mist of Pandaria*, a new Asian continent that followed two years later, was the

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least popular expansion, and subscriber numbers fell significantly. The introduction of the Pandaren race giant, yet cute and fuzzy Panda bears, found the approval of the critics but not the players. A rating of 4.8 on metacritic reflected a drop subscribers to 7.5 million players. At the time when Blizzard needed an expansion with strong content, due to fierce competition due from other MMORPGs such as *Star Wars The Old Republic* (Bioware, Electronic Arts), or *Final Fantasy A Realm Reborn* (Square Enix), Blizzard failed to deliver. The most current expansion, *Warlords of Draenor*, released in 2014, delivered exactly this highly anticipated content; subscriber numbers skyrocketed for about a year and fell again to an all time low of 5.6 million subscribers by January 2016. In June 2016, the franchise will release a live action film based on the franchise. Hard core fans of the video game franchise will flock the theatres, new story citizens will be drawn to the game—a classic move in the expansive narrative strategy. The highly anticipated sixth expansion, *The Legion*, expected in September 2016, will stir up the fan base as well and likely bring back story citizens who left the game.

Blizzard heavily promotes these expansions through cinematic trailers on their website, social media, and gaming magazines, and offers pre-sales of the digital version well in advance. Story extensions in other media such as novels, short stories, or graphic novels are published continuously to deepen the narrative experience and to keep the franchise alive. Blizzard keeps the brand image consistent throughout these publications and on all available merchandise such as t-shirts, replicas of swords, or game figures and controls them with strict

licensing agreements in order to keep the canon consistent. The guidelines regarding the publication of other media can be found on their website and answer the question "Can I write novels, screenplays, theatrical productions or other adaptations based on your games?" as follows:

> No. Blizzard Entertainment® reserves the right to extend and expand our properties to other media. We want to provide a consistent story and universe for our customers, and want to ensure that only the highest quality, officially licensed and approved material is created based on our characters and other creative properties. (www.blizzard.com)

Blizzard, however, embraces and encourages the non-commercial creation and publication of fan-created artworks (machinima, fanfiction, or posters) and even sporadically holds contests on their website. These fan-created artworks promote the franchise, regardless of whether they are consistent with the canon or not. That is not to say that *WoW* fan fiction does not exist. In fact, there is a quite active fan fiction community on https://www.fanfiction.net/game/Warcraft/, where people often publish stories about their own characters.

Most professional storytellers defend themselves against the commercialization of their original work. Science Fiction writer Ursula LeGuin addresses the issue on her website and writes about fan fiction:

> It's all right with me — it's really none of my business — if people want to write stories for themselves & their friends using names and places from my work, but these days, thanks to the Web, "stuff for friends" gets sent out all over the place and put where it doesn't belong and mistaken for the genuine article, and can cause both confusion and real, legal trouble.

As for anybody publishing any story "derived from" my stuff, I am absolutely opposed to it & have never given anyone permission to do so. It is lovely to "share worlds" if your imagination works that way, but mine doesn't; to me, it's not sharing but an invasion, literally — strangers coming in and taking over the country I live in, my heartland. (www.ursulakleguin.com/FAQ.html#FF)

In the fan fiction community, selling of fan fiction is frowned upon as "media fandom has tried to stay under the radar of the producers and actors and not to profit from any of their fanworks," (Busse, 2013, 285) yet it happens and "tends to result in immediate outcries and criticism as well as public mocking and shaming" (ibid). Other fan art, however, seems to be more readily available for purchase (DeKosnik, 2008); fan art and fan fiction remains a grey area and a reason for continuing debate and investigation.

5.2.5. Expansive Narrative Strategy: Analysis

This case exemplifies an ideal type in the expansive narrative strategy category due to high narrative deviation and a high number of release events over time (several hundred). High narrative deviation exists through the expansion packs that grow the storyworld and the additional media that inform the story citizen about the background stories of the main characters and major events in the storyworld. The story citizen decides whether or not to engage with all media and how deeply to immerse herself with the narrative, as many narrative extensions are also stand-alone stories. In MMORPGs, story citizens transform into avatars, which might create a high level of immersion because

they experience a playful simulation of the storyworld with other story citizens who are present at the same time. Moments of cognitive rupture are frequent, encouraging collaboration and team work, which leads to shared experiences and reciprocal knowledge creation. Since the story citizen has the possibility to explore the storyworld on her own, guided only by the game mechanics, optional thinking encourages "what-if" scenarios and active co-creation of the story. Each story citizen in *World of Warcraft*, in a sense, creates his or her own story as the gameplay differs significantly because of the open world concept. This case illustrated the production, engagement, and branding principles discussed in Chapter 4, and based on this evidence, this case is an example of the expansive narrative strategy.

5.3. Connective Narrative Strategy

The Man From U.N.C.L.E., Norman Felton, 1964 - 1968

The Man From U.N.C.L.E., Guy Ritchie, 2015

The connective narrative strategy pertains to narratives with medium to high narrative deviation and a low number of release events over time and a period of dormancy between the original and the revival. The case of *The Man From U.N.C.L.E.* is an exemplar of this strategy—a dormant franchise with few expansions released during the dormancy (a 1983 reunion film, and a 2007 DVD collection)—is revived either on the same platform or a platform with similar characteristics, in this case a television-to-feature film revival. The revival is

charaterized by medium to high narrative deviation in order to include the original story citizens from the 60's television show and later generations familiar with it, as well as the contemporary story citizen with little knowledge of the original spy series. The revival consisted of the feature film, released in 2015, and a video game, playable on a website and mobile devices, released simultaneously; thus, the number of release events is low (two). In this case study, I first provide a more elaborate background information about the original television series of the 1960s, as it will provide information about the production choices of Guy Ritchie, the producer/director of the revival; I then elaborate on narrative deviation and the number of release events over time while considering production, engagement, and marketing/branding associated with the project. This is followed by an analysis of this connected narrative strategy application.

5.3.1. Background: The Television Series from the 1960's.

Some scholars argue that *The Man From U.N.C.L.E.* was the first television series that created a significant fan community, so much so that the term "fandom," which was previously used in the context of sports of theatre events, became associated with television due to this popular spy series of the 60's (Walker, 2001; Coppa, 2006). *Star Trek* fans might dispute this, as they claim that true fandom started with their Sci-Fi adventure; in fact, both shows enjoyed great popularity during the 60's. *The Man From U.N.C.L.E,* often described as the television version of *James Bond* (Bennett & Woolacott, 1987, Brooks & Marsh, 1999)*,* aired from 1964 to January 1968. Produced by Norman

Felton, the show featured two top agents: a sophisticated American named Napoleon Solo (played by Robert Vaughn), and a mystifying Russian named Illya Kuryakin (David McCallum). The team, employed by The United Network Command for Law Enforcement (U.N.C.L.E.), whose mission was to protect all nations regardless of size or political goals, fought at least one major super villain during their world-wide weekly battles, and, curiously, always involved at least on "innocent" civilian in the affair (Walker, 2001). Within U.N.C.L.E., rugged spymaster Alexander Waverly, played by Leo G. Carroll, eagerly awaited the weekly report of his master agents. High ranking guest stars such as Joan Crawford, William Shatner, and Leonard Nimoy appeared each week on the show either as villain or as innocent victim.

The intriguing friendship between an American and a Russian, both heroes tied to the common cause of saving the world in the midst of the Cold War tensions of the Kennedy era, lured millions of viewers from all over the world to the television set. The series combined the spy genre with elements from science fiction as it included (for the time) advanced technologies such as mind reading machines, long range laser weapons, and a system that allowed spies to communicate with their technologically sophisticated home base in New York City from all over the world. U.N.C.L.E.'s fight against evil was mostly aimed at an organization known as T.H.R.U.S.H., the Technological Hierarchy for the Removal of Undesirables and the Subjugation of Humanity[21], whose aim was, of course, to rule the world and eliminate everyone who stood in the way of accomplishing this goal. In direct opposition to U.N.C.L.E.'s main purpose, the

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[21] The full name was never revealed in the series but only in the books.

heinous acts of this villainous organization created the major conflicts in the series and delivered enough material for almost four seasons. Even though the show had an overarching plot of sorts, it mainly functioned as a procedural with self-contained episodes and single cases that the agents solved at the end of each show. Story citizens could enter the show at any given time and make sense of the plot, even though a continuous viewing may have led to a deeper understanding of the relationship between the main characters.

The show attracted fans from both the science fiction and the spy adventure camp, and both genders, mainly due to their stars, Robert Vaughn and particularly David McCallum, who received more than 10,000 letters a week from fans around the world (Enns, 2000). While serious in tone and aesthetic at first, the series changed its stylistic development in the second season when the show evolved more toward comedy with satiric overtones, which actually increased its popularity. The show returned to the grimmer adventure with little humor and more emphasis on violence towards the end of its life, an inconsistency that confused the viewers and may have led to the show's demise. Since the show was made for television, sex scenes and scenes of violence were tempered compared to similar scenes in its movie inspiration *James Bond.* The producers also stated very clearly that "it was the show's intention to veer away from the Cold War as much as possible" (Walker, 88, 2001), a fact that was also reflected in the bond between the main characters, Solo and Kuryakin. Despite these peculiarities, the show created a storyworld that allowed the story citizen to

"retreat from the civilized world, into my world, the wonderful world of mysterious (and oh! so wonderful!) agents" (Enns, 124, 2000).

The ratings of the show reflected its curious development. Initially pronounced a flop, the ratings increased quickly due to the changing of the show's timeslot, cross-country appearances by Robert Vaughn and David McCallum, and the aforementioned stylistic changes; in the second season, it had a forty-six percent share with viewers in over 12 million American homes tuning in every week (Enns, 126). Soon the show was broadcast in 60 countries and consistently stayed in the top 20 programs on U.S. television (Walker, 2001). The change from the serious spy adventure to the other extreme, the comedic "camp" series, however, was again reflected in the viewer numbers as the show began to slide in the Nielsen ratings at the end of the second season, and the reversal to the original format, at the end of the third season, came too late. The show was cancelled mid-season in January 1968. Nevertheless, *The Man From U.N.C.L.E.* had developed into "mystic cult of millions" (Raddatz, 1966), and one of the reasons, apart from the appeal of the main stars, Robert Vaughn and David McCallum, was the unusual marketing campaign that accompanied the show.

The combination of parody and realism was one of the curiosities of the show. Viewers were uncertain whether to take the show seriously or not, and if what they were seeing was meant to be real or not. The show's producers played with this notion throughout the show's run and blurred the line between reality and fiction even more in the extensive marketing campaign that promoted it. Even though the agents fought their foes all over the world, all scenes were shot on

sets built on MGM's back lots at Culver City. The audience accepted this artificiality as one of the peculiarities of the show. The violence depicted in the episodes seemed equally artificial, so much so that some called it a "passive, non-violent violence" (Enns, 126, 2000).

Regardless of what was going on in the show, many of the audience members were convinced that U.N.C.L.E. was a real organization, and somehow connected to the United Nations based on the actions of the main characters, the main premise of the show seemed quite real, a fact that the producers openly exploited in the promotional campaign. The show's closing tag, "We wish to thank the United Network Command for Law and Enforcement, without whose assistance this program would not have been possible," was just the first step in blurring the lines between fiction and reality. Soon the promotional campaign handed out U.N.C.L.E. membership cards in large numbers; some viewers used the cards as official documents (Enns, 2000).

McCallum and Vaughn appeared in public as their characters even for events unrelated to U.N.C.L.E. Contests and articles citing U.N.C.L.E. together with the CIA, the FBI, and the UN further emphasized U.N.C.L.E.'s "real" status. Through this campaign, Felton and his team offered the audience almost physical entry and immersion into the storyworld of U.N.C.L.E., very similar to contemporary examples of alternate reality games such as 42 Entertainment's "Why So Serious?" campaign that promoted the release of *The Dark Knight* and blurred the lines between reality and fiction in a very similar way. *The Man From U.N.C.L.E.* quickly expanded into a franchise with a monthly TMFU magazine,

two dozen paperback novels, a series of U.N.C.L.E. comic books, and a reunion TV movie that aired in 1983. The market was also replete with U.N.C.L.E. merchandise, including everything from toy guns to spy gadgets, lunch boxes, T-shirts, action figures, and board games. After the show was taken off the air, it lived on in fanzines, fan fiction, and fan art, and the U.N.C.L.E fever still lives on today. Walker describes the feeling that fans of the show unites even now:

> Today, even people who are not self-identified fans remember the series with immediate recognition and affection. References and homages to U.N.C.L.E. continue to crop up in many areas of popular culture, so that it might be argued the series continues to exist, however faintly, in what Ang(1987) calls, "the collective cultural consciousness." (Walker, 78, 2001).

5.3.2. Connective Narrative Strategy Implementation*: Production*

In 2015, Guy Ritchie called upon this collective cultural consciousness in his attempt to revive the successful pop culture phenomenon with his feature film *The Man From U.N.C.L.E.* With the film, the producer/director addressed an admittedly "aged" original audience that might watch the film for the nostalgic reasons addressed in Chapter 3 and 4; additionally the film addressed a contemporary audience interested in the spy genre as well as the fan base of the main actors Henry Cavill and Arnie Hammer, playing Napoleon Solo and Ilya Kuryakin respectively, and the fan base of the female lead Alicia Vikander. The challenge remained in pleasing different generations by finding the right balance between narrative deviation and narrative overlap, and in preserving the charm

and the idiosyncrasies of a '60s television series. Attaining the high paced, action packed and "Hollywoodized" characteristic of a contemporary feature film that now must to compete with an equally modernized, action packed *James Bond*, proves to be an additional challenge for implementing the connective narrative strategy.

The film opens in 1963 and takes place in the primary (the real) world similar to the television series in order to establish the familiar storyworld. It takes the story citizen to Berlin (scenes actually shot in London) where the main character Napoleon Solo, at this point not associated with U.N.C.L.E. but with the C.I.A., meets Gaby Teller—an U.N.C.L.E agent, a fact that is unbeknownst to Solo at the time. Teller, daughter of a renown scientist, fears for her father's life; he has been forced by Nazi sympathizers Alexander and Victoria Vinciguerra to develop a nuclear weapon. In the face of this possible end-of-the-world scenario, the C.I.A. decides to cooperate with the KGB, and Solo and Teller meet Ilya Kuryakin, a high ranking KGB operative. The trio's tour de force from Berlin to Rome to stop the Vinciguerras begins, and the plot moves along with the usual car chases, love scenes, and the obligatory deaths. At the final stages of the film, the three characters finally meet Alexander Waverly, another character from the original television series, played by Hugh Grant as a much younger version of the head master of U.N.C.L.E., who reveals to Solo and Kuryakin that they have been reassigned to Teller's team and now are now both operating under his leadership on a new mission under the codename: U.N.C.L.E.

One of the challenges of the connective narrative strategy is to establish a storyworld that feels familiar enough to the fans of the original series while attracting a contemporary audience. Aesthetically, Ritchie remained true to the time period of the '60s in terms of costume and set design, an effort acknowledged by critics and fans alike; thus, a visual overlap is given as much as possible. The major premise of the original series is present as well, with the main characters Solo, Kuryakin, and Waverly, the backdrop of the Cold War, and U.N.C.L.E as the major international organization fighting against evil in the world. Thus, fans of the original series may feel at home in Ritchie's storyworld, which indicates medium narrative deviation. Naturally, Robert Vaughn (83), and David McCallum (82), as well as Leo G. Caroll, who played Alexander Waverly who died in 1973, had to be replaced with younger actors. Alicia Vikander's character's Gaby Teller did not appear in the original series.

Falsely labelled as an adaptation of the television series by critics and viewers alike, the film is more accurately characterized as a prequel to the original series, as T.H.R.U.S.H, the all-evil, world-destroying organization, does not appear in the film. The film's plot explains how Solo and Kuryakin first met and began working together—a scenario that was never explained in the original series. For the story citizen, the film fills the gap that the original series left. It seems, however, as if the film serves as a set-up for a number of sequels and as a true revival of the entire franchise with more films in the planning, which may have been the intention of Warner Bros. (Variety, 2015). Returning for a moment to the argument of medium specificity, the move from the length of a television

series to the length of a film constrains the narrative process, as the producers are limited by the time frame of the feature film and may have to rely on sequels in order fully exploit the potential of the original franchise. Guy Ritchie opened the door for a sequel as Alexander Waverly deploys his agents on a new mission to Istanbul in the last scene of the film.

5.3.3. Connective Narrative Strategy*:* Engagement

In general**,** it could be argued that story citizens familiar with the original series, initially bring higher levels of engagement and expectations to projects as they are familiar with the storyworld, however, this is difficult to prove. In this case, the film received mixed, and often contrasting reviews from critics and fans and was officially deemed a summer flop at the box office with an approximate loss of $80million (imdb, 2015); however, this number is unconfirmed as the film was later released on DVD and streaming services. An example of an online "conversation" between a critic, familiar with the television show and a younger viewer who has not seen the original show demonstrates the conflicting views on the film. Jonathan Romney from *The Guardian* writes,

> If you were a child in the 60s, but born just too late to enjoy that decade's
> major pop-culture phenomena when they were fresh, chances are that
> your biggest thrills   were cheap and cheerful derivatives – the Monkees
> instead of the Beatles, and instead of Bond, American TV show *The Man
> From UNCLE*. Guy Ritchie's attempt to revive cold war-defying duo
> Napoleon Solo and Illya Kuryakin is a lifelessly knowing affair, with its two
> uncharismatic lead hunks failing to catch the wry rapport of originals
> Robert Vaughn and David McCallum. Dressed up to the nines like an

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expensively retro aftershave ad, Ritchie's film is laboriously

insouciant – and no amount of funky drumming and lounge Braziliana on

the soundtrack can make it spark (2015).

In the comment section of the review another viewer responds to the critic, stating

Your review has done nothing to actually review the movie itself. You grew

up with the TV show or its derivatives? Good for you. Sorry it didn't

compare to the TV show. On the other hand, I didn't grow up with those

and I thoroughly enjoyed the perfectly pleasant, suave, comical and light-

hearted spy movie that *The Man From UNCLE* is. I read your review

before watching it and was expecting a terrible three hours but instead

was delighted. Maybe it's an age thing. (Erica, 2015).

This conversation may be illustrative of the difficulties of the connective

narrative strategy, including overcoming the generational differences, the notions

of nostalgia and the search of lost time on the one hand, versus the fast pace of

the contemporary, digital generation on the other. This case addresses the

tensions between narrative deviation and narrative overlap that are also present

in some of the other strategies. The producer must weigh the relation between

narrative deviance and narrative overlap very carefully in order to instantiate

success for the project. As Booth rightfully asserts, "to engage a fannish

audience, the text needs to be both familiar and novel at once; it must both

surprise and appease" (2015, 6). As mentioned earlier, the original television

series still has a very active and lively community that congregates on social

media, particularly on Facebook. The Facebook group, *The Man From U.N.C.L.E*

- The Inner Circle, which I joined for the purpose of this case study, remains extremely dedicated with daily postings sharing nostalgic memories or current events such as a recent book signing of David McCallum's new novel "The Crooked Man." Interestingly, the film was received extremely positive by the group with the argument that anything that keeps the U.N.C.L.E. discussion going is good. The members of the group even sent handwritten letters to Warner Bros' CEO Kevin Tsujihara asking for a sequel of the film. The nostalgic feeling resides very strongly in this group as the posts mostly refer back to the 60s and to memories from the show, and nostalgia might be the reason for the mixed reception of the film. Brotman describes these feelings:

> The opening of the movie version of The Man From U.N.C.L.E is all well and good. But with a certain demographic, it is setting hearts atwitter with memories of our long ago crushes on Ilya[22]. We adored him, we who were young girls in the '60s. But whatever Ilya had then is nearly 50 years in the past. There is a new Ilya now. We Illya girls have been all tizzy about the new movie…about whether Armie Hammer is an appropriate Illya. He's too American looking, he's too big, he's all wrong. We grew up and out of our crushes. Our adoring obsessions are memories now—good ones, tinged with wonder at the intensity of our emotions. But the thought of Illya can still bring forth a girlish sigh as well as the reading glasses to check the movie times for The Man From U.N.C.L.E. (2015).

Nostalgia means different memories and emotions for all of us. Childhood crushes, time spent with parents and childhood friends, places that carry

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[22] She is referring to the original series here.

meaning. For the fans of *The Man From U.N.C.L.E.* television series, the shared sense of nostalgia might provide the basis for a very tight, still-active community.

5.3.4. Connective Narrative Strategy*:* Marketing/Branding

The marketing for the film included a plethora of trailers, posters, extensive presence on social media, and live appearances of the main stars at press conferences and Comic-Con in San Diego in July, shortly before the film was released in the U.S. A free online/mobile game, called *The Man From U.N.C.L.E.: Mission Berlin*, accompanied the film release and gave the story citizen the choice of either playing as Napoleon Solo or Ilya Kuryakin. The game contained no real narrative, no cut scenes, or voice overs, but rather a number of unrelated, redundant missions and was generally ill-received. Story citizens are critically aware of quality differences across media and all promotional materials, and keeping an equal standard is key to the success of all franchises. Other mobile efforts included an ad campaign created by advertising agency OMD that promoted the film on the website of The Huffington Post that displayed an in-article mobile ad unit, which invited the visitors to take a game-style inspired spy quiz to identify their personal spy strategies that could be shared on social media. The campaign, a collaboration between OMD and AOL Canada, also included video and other spy-themed content across the site. Kira LaBlanc, manager of marketing and communications explains: "We found that the concept of spies resonated well with the HuffPost demographic and we wanted to create a fun way of engaging the audience with a combination of mobile and premium

display ads" (www.mediaincanada.com). Several websites offered the chance to win a *The Man from U.N.C.L.E.* merchandise pack, consisting of a USB Pen, T-Shirt, U.N.C.L.E badges and a make-up bag with hidden USB, speaker and pen. All these marketing efforts clearly addressed a younger target audience probably mostly unfamiliar with the original series. Nevertheless, in a more recent development, Warner Bros. utilized its publishing unit DC Comics in December 2016, releasing a six issues cross-over graphic novel set in which *The Man From U.N.C.L.E.* meets no other than Batman (see Appendix K), and indication that the company's relationship with *The Man From U.N.C.L.E.* is far from over. The film was released on August 14, 2015, played in over 3600 theatres worldwide, and remained in release for 10 weeks, and many fans are speculating about a sequel.

5.3.5. Connective Narrative Strategy: Analysis

This case exemplifies an ideal type in the connective narrative strategy category due to medium-to-high narrative deviation and a low number of release events over time. Medium narrative deviation establishes the connection to the original storyworld that satisfies "traditional" story citizens but increases later in order to attract and keep new story citizens. The revival may increase interest in the original story, but also serve as a stand alone project; in many cases, however, the revival addresses moments of cognitive rupture left by the original story, which is of particular interest for story citizens who engaged with the source material. It could be argued that these story citizens experience deeper

levels of immersion more quickly as they are familiar with the storyworld that often links to feelings of nostalgia and memories of earlier times.

The number of release events over time is low, in this case two, (the film and the game). As mentioned in Chapter 3, the revival of a franchise can be difficult, and many producers have failed in attempts to bring back an old storyworld. It remains to be seen if Warner Brothers will indeed produce a sequel to the film and continue the effort to revive the franchise, or if *The Man From U.N.C.L.E* will join the pool of other recently-failed revivals such as *Heroes Reborn*, *Terminator Genesis*, or *Twelve Monkeys*. This case illustrated the production, engagement, and branding principles discussed in Chapter 4, and based on this evidence, is an example of the connective narrative strategy.

5.4. Native Narrative Strategy

Sherlock Holmes and The Internet of Things - Lance Weiler, 2015

The native narrative strategy pertains to narratives with low to zero narrative deviation and a high number of release events over time. As mentioned in Chapter 3, zero narrative deviation originates from the lack of a story anchor as the story spreads across all media with no particular emphasis on just one medium. In some cases, more weight may be given to one medium but the native narrative strategy usually offers no stand-alone medium, which results in a high number of release events over time. Consequently, the story citizen needs to engage with many if not all story elements across media in order to follow and understand the story; in some cases, the story citizen turns into a co-producer.

Sherlock Holmes and The Internet of Things is an exemplar of this strategy, as the story elements consist of videos, podcasts, and short stories of the Sherlock Holmes universe, mainly conveyed through the Internet, but also through physical objects and live events in form of alternate reality games across the globe. The extreme amount of story information led to a high number of release events. Since this was a highly participatory project, the story citizen turned into co-producer and became crucial for the success of the project. For the purpose of this dissertation, I participated as a story citizen in this project. In this case study, I first provide some background information about the Internet of Things and how this concept pertains to the case study; I then elaborate on production in conjunction with engagement, as these two processes cannot be separated in this case, and lastly elaborate on the marketing/branding of the project. This elaboration is followed by an analysis of this native narrative strategy application.

5.4.1. Background: The Internet of Things

Some humans desire digital connectedness, expressed through a deep attachment to their cellphone, for example, and willingly share vast amounts of information on social media on a daily basis. Orwell's lament that "Big Brother is watching us" often seems outdated given all the information that many of us voluntarily share on social media: "K. travels from Toronto to Paris to have dinner with M.; S. just checked in at Holland theatre to watch *The Vitreous Tulip*; F. is having her 43rd birthday with her friends, drinking a 151 Swizzle at Trader Vic's".

Facebook "likes," re-tweets, numerous followers on all social media, and a high digital social status are the rewards of such efforts, and few humans are immune to this form of flattering, despite the knowledge that the willingly-shared data will be gathered, compiled, stored, and used in various ways. Admittedly, some of the information may be gathered by additional means, but the voluntary sharing eases the process. The market is replete with devices that aid the "digitally connected human" in remaining connected at all times, such as cellphones, tablets, smart watches, and connected cars. New software and hardware, introduced daily, create a path to a world of complete interconnectedness, where everyone and everything is connected at all times— an uncomfortable thought maybe, yet it comes with advantages as well.

Sensors measuring pollution, traffic, and efficiency of engines, aid with safety and maintenance. Food suppliers can now trace their wares along the supply chain, making sure they arrive in perfect condition for their consumers, who can track them as well. Sparked, a start-up company in the Netherlands, developed sensors for cows that allows farmers to monitor the health of their cows and track their movements; the sensors serve as a means of preventing cow disease from spreading across the herd (Economist, 2010). In the age of the Internet of Things (IoT), defined as "a global infrastructure for the information society, enabling advanced services by interconnecting (physical and virtual) things based on existing and evolving interoperable information and communication technologies," (ITU, 2015) everything can connect. Business Insider Inc. projects that in 2020, there will be 34 billion devices connected to the Internet, yet

traditional computing devices (e.g. smartphones, tablets, smartwatches, etc.) will comprise *only* 10 billion; IoT will account for 24 billion devices (2015). Storytelling and the final case study centres around the Internet of Things and includes the concept within the fictional storyworld of Sherlock Holmes.

5.4.2. Native Narrative Strategy*: Production and Engagement*

Lance Weiler's *Sherlock and The Internet of Things* combines the historical storyworld created by Arthur C. Doyle with everyday objects and contemporary technology in his eight-week multi-platform project that took place from August 2015 to October 2015 under the auspices of Columbia's Digital Storytelling Lab. Weiler has extensive experience with multi-platform projects; apart from Pandemic, mentioned in Chapter 3, he was also the creative director for David Cronenberg's alternate reality game *Body Mind Change,* and creator of *Collapsus*, an online transmedia project that deals with an impending energy crisis.

The goal of *Sherlock and The Internet of Things* was to build a massively, connected crime scene consisting of smart storytelling objects. The crime scene, built by story citizens from all over the world, was filled with everyday objects connected to the Internet and originally inspired by objects found in Sherlock Holmes' stories. *Sherlock and The Internet of Thing*s may be seen as a massively online/offline collaborative storytelling game that merges fictional elements with the real world and blurs the lines between analog and digital as

well as between producer and story citizen, as the story citizen expands the storyworld by telling part of the story.

The collaborative storytelling game began in August 2015 when story citizens from across the globe entered the online storyworld, consisting of the fictional world of Sherlock Holmes and the real world of a multi-platform learning experience; the experience was created by Columbia University's Digital Storytelling Lab under the aegis of Lance Weiler, game designer Nick Fortugno, and designer and futurist Jorgen van der Sloot. In what follows, I provide general overview of this unique project that exemplifies the native narrative strategy.

The project framework, anchored on the social learning platform Novoed, emphasized the collaborative nature of the project as all story citizens were assigned to teams from the start. At the time, the collaboration had 250 participants. Weiler and his team released a large amount of content weekly via Podcasts, YouTube, texts, and in live sessions via Blab or Skype, with all content leading up to final goal of creating a massive crime scene. Content consisted of instructions, general storytelling theories, references to Sherlock Holmes, interviews, Ted Talks about game design and other project-related topics, case studies, and the weekly tasks for the story citizens that were bound to tight deadlines. The massive amount of information led to an extremely high number of release events that was at times overwhelming for the story citizens. There was no pre-existing story, other than the story fragments found in the Sherlock Holmes' storyworld; consequently, there was no story anchor, and thus narrative deviation equated to zero in this project. As most tasks were collaborative in

nature, story citizens had to coordinate their collaboration as weekly deadlines were approaching quickly; many teams had international members, which often impeded the process.[23] The first individual task, to find one object from a Sherlock Holmes story, led the story citizen into the storyworld of Arthur C. Doyle. The object was to be provided with a tag line and shared with everyone via "Hackpad", a smart collaborative document that can be accessed by several people simultaneously. The objects of all story citizens served as the basis for the massive crime scene later to be created in cities all over the world and at the main event in New York City in September 2015. The object that I chose for the task was the Old Fashioned Brass Key from *The Musgrave Ritual* (see Appendix L).

In the early stages of the project, the objects were still purely analog and ranged from voodoo monkey puppets, to glowing seeds, and vintage syringes. The actual storytelling process began when teams had to connect their objects to individual crime scenes that some story citizens had created in session 0 (see image). At this point, however, teams had been shaken up already by the "request for prototype team" challenge that required the formation of new teams in order to widen the collaboration with others. Any rapport that anyone had built at this time with other team members was gone; this request came early enough in the collaboration, and my new team, *The Baker Street Sweepers*, was actually more active than the previous one. The "100 ideas design challenge" built the second main narrative element as the team had to generate 100 ideas about the

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[23] My first team had a member from Argentina and Taiwan, and it was impossible to arrange a "meeting".

possible location/setting, characters and motives of the crime scene story based on the image above, including the objects of the individual story citizens. The objects chosen by my team were: the old fashioned brass key, a towel, a ring, a map, some coins, and a watch and, just as an example, a story excerpt from the 100 ideas:

> The mouth of the little river down the road from the film studio would do for the swimming/murder scene. The typical English summer morning fog, a green screen, and some CGI creates the perfect scenery for the highly anticipated drama "The Key To Eternal Love." On the early summer morning of this last crucial shoot fiction bleeds into reality. During the final cut, the star dies on the scene.
>
> Flown in from LA, controversial in Europe because of her well know attachment to the "Sect 16," the actress plays and becomes the murder victim, killed by the river with the poisoned key in her mouth.
>
> On the scene the director, in"Hitchcockean" manner falling in love with his female star, hovering over her like a hawk over his prey. The actor-lover, jealous, not able to share her with her sect people, once said he would never let her go back; he's swears he is innocent, his head sunk into an old hotel towel, the funny odour of the fabric escapes him. The screenwriter's wife, always on set for no reason, deeply suspicious of the "Sect 16" and everyone connected to it, but why, what does she know that nobody does?
>
> The final day of the shooting, the last chance to execute the dirty deed. A director, possessed by the devil, who cannot let go of the star, or is there a deeper connection, a not so obvious one? The jealous actor/lover, who swore she could not go back, that she must stay—whatever it takes. The screenwriter's wife, who knows more than everyone else about the sect, a former member maybe? Business needs to go on, the film needs to move into post-production; the director looks at this pocket watch, an odd little

time piece, are there more than 12 hours and why? The actor/lover
nervously playing with some coins that he found near the scene, not
aware of their age and unusual print. Who took the ring from the
victim's finger, the signet a proud symbol of the sect 16? And who
took her notebook, stuffed with letters, little drawings and various notes?
The screenwriter's wife nervously paces the scene.

Eventually, all team members had to agree on one of the 100 ideas that
explained the "who, the what, the why and the where" of the murder. The final
submission for *The Baker Street Sweepers* that decided to have the major theme
of a murder related to a sect:

WHO: member of a secret sect who desired to leave the sect and was
attempting   to steal the sect's treasure.

WHAT: ring = includes symbols of the sect

watch = 16 numbers that correspond to the ring's symbols.

letter = includes logo of Padovan sequence which corresponds with
symbols on ring and numbers on watch

coins in water = one has both sides heads; other has both sides tails

key = key opens treasure box which is hidden in the swimming hole

towel = brought along assuming possible immersion to retrieve treasure
box

WHY: member of the sect wanted to leave because he became fearful of
the sect and was tempted by greed for the treasure

WHERE: swimming hole which is possible location for the treasure box,
determined by GPS coordinates that were embedded in symbols in the
objects in the case.

The collaborative online activities of the individual teams, the creation of a
crime scene by the means of a "taped body" (see Appendices M, N), the objects

near or at this body, and a basic murder story, were later replicated in the real world offline across the globe in alternate reality games with the main event being held at the Lincoln Centre in New York City, from September 25th - 26th during the early days of the New York Film Festival. The remaining active 13 teams (attrition had set in at that point) were able to see their crime scenes realized around the space of Lincoln Centre where visitors of the NYC Film Festival could engage with them. The crime scene consisted of taped and real bodies (students, who volunteered for the task) and notes that were placeholders for the actual objects, as well as near field communication (NFC) tags such as wristbands containing small microchips with little aerials, which contained a small amount of information for transfer to another NFC device. Two Internet-connected devices, both augmented by Weiler's team, were placed at the crime scene: an old rotary phone and a magnifying glass. The magnifying glass, when placed over beacons, or NFC tags at the scene, triggered audio, video, text or another type of interaction. Similar, the rotary phone held audio files (a mixture of text-to-speech as well as produced files that could include sound effects, music and/or narration) and was used to lead story citizens around the Lincoln Centre.

Story citizens entering these crime scenes in NYC, obviously aware that they were engaging with an alternate reality game, had to figure out the what, who, where, and when of the murders. A few online team members actually travelled to NYC to be part of the two-day live event where they guided visitors through their respective crime scenes, while other team members from around the globe followed the events and aided with clues online through Periscope and

Twitter. Each team from the project had two time slots that were dedicated to their particular crime scene where someone on location in NYC would periscope live for 30 minutes. As teams had prepared a short script that provided a sense of direction for the crime scene and the murder, the online/offline connection was crucial for the time slot, yet in many cases, technology hampered the accomplishment. The instability of Periscope and the Wifi at the Lincoln Centre led to unforeseen complication and much improvisation, which actually was embraced by some:

> I was most surprised by how much we had to improvise and go off-script depending on what was happening. There was a huge variable in what the teams were doing and how much and what kind of information our Watson was providing. We ended up "off script" for a majority of both sessions. I was also surprised by how this actually made the experience more interesting in some ways. Being "in the moment" and really responsive to the situation made for some interesting interactions. (Cera, *Sherlock and the Internet of Things*)

The events in New York inspired many team members to create similar events in other cities, such as Sidney, Montreal and Turin (see Appendix O) as part of *Sherlock and the Internet of Things* in a concerted effort on October 25th and 26th, 2015.

The last four weeks of the online storytelling experience with the remaining teams was dedicated to imagining and designing Internet-connected devices based on the objects chosen from Sherlock Holmes. An old fashioned brass key, for example, may turn in a GPS enabled digital device that could record audio,

location, time, and date of the opening of the lock, and in an even more daring

scenario, morph into a key that could open more than just one lock. In the early

stages of the design process, no boundaries were given to the imagination. The

teams had to settle again on just one object that could actually be realized. At

this point, due to inactivity and further attrition, I had to change teams again and

joined the *East Coast Adlers*. We decided to design a digital burning letter that

would burn completely in front of the participant at the crime scene unless he or

she was able to solve a riddle within a certain time frame that would stop the

process. Other objects included a dog collar that could record audio and video, or

a Blue Carbuncle that would guide users through the crime scene, as well as

provide insight into the crime scene, through the use of light.

Four design principles, outlined by Weiler's team, guided the design process:

1. The Trace: Where you see your contributions within the story

2. Granting Agency: Moments where your decisions impact the experience

3. Thematic: Frame Designing an emergent space for Sherlock inspired creations

4. Social movement Encouraging unexpected collaboration between participants

Even though the object designs were not realized, the final task

accomplished a number of goals: imaging an ordinary object as an Internet-

connected object that serves as a narrative tool that could be placed within the

story space of a fictional crime scene and was either closely or remotely related

to the storyworld of Sherlock Holmes. This "*Sherlock Holmes and the Internet of*

Things in a nutshell" merely provides a glimpse into a multi-layered, multi-faceted project that provides one of the most diverse examples of the native narrative strategy. Projects in this category are often not fully developed but rather in development, they may be non-linear, fragmented, ephemeral, and repeatable. Weiler and his team will rerun the storytelling game experience in Fall 2016, taking into account and improving upon the problems and issues evident in the 2015 experience.

5.4.3. Native Narrative Strategy*:* Marketing/Branding

The marketing efforts for the project were limited to invitations on the project's website and social media, as well as through press releases and interviews. Weiler emphasized the exclusiveness of the project by allowing only 250 story citizens through an application process to participate in the online collaboration. Weiler's incentive for the online participants, apart from a certificate at the end of the experience, was the steep learning curve; the higher the engagement with the project, the greater the learning effect. Weiler foregrounded the collaborative aspects of the projects, the utilization of state-of-the-art technologies and storytelling tools, and the intriguing backdrop of the storyworld of Sherlock Holmes in his marketing efforts. The alternate reality events that took place across the globe, with the major event taking place in NYC during the film festival, were promoted mostly through social media with a heavy use of Twitter by the story citizens themselves, thus making even the marketing campaign a collaborative effort.

5.4.5. Native Narrative Strategy*: Analysis

This case exemplifies an ideal type in the native narrative strategy category due to zero narrative deviation (no story anchor) and a high number of release events over time (more than one 100). Weiler's project demonstrates the ample components that go into the planning, production and execution process of the native narrative strategy in collaboration with the story citizen, as well as the many complexities that occur along the way. The native narrative strategy demands an intense expenditure of time and dedication from the story citizen, and the attrition occurring throughout this process proves that the given incentive needs to be strong enough to keep the story citizen deeply engaged through the duration of the project. This case illustrated the production, engagement, and marketing/branding principles discussed in Chapter 4; based on this evidence, it is an example of the native narrative strategy.

Chapter 6: Conclusion

6.1. Review

This dissertation began by outlining the major milestones of storytelling history in Chapter 1, reflecting in part the development of media technologies as new storytellers searched for new ways of conveying their stories. The rapid spread of digitalization beginning in the 1980s led to daring multi-platform projects such as *The Matrix (*1995); these projects ignited the transmedia storytelling discourse so central to this dissertation, but their rapid development also resulted in much confusion and ambiguity in the study of them. I argued in Chapter 2 that as a result of the current semantic morass of existing transmedia terminology, a new direction is needed in order to clarify and support the discourse between transmedia scholars, producers, and others. In this dissertation, I set out to provide a framework designed to provide more clarity in transmedia discourse by offering a tool, in the form of a typology, for meaningful comparison across existing multi-platform projects and, ultimately, to facilitate subsequent theory development and exploration in this area of enquiry.

Consequently, in Chapter 3 I introduced my typology explicating the four narrative strategies of my typological framework: the constrained narrative strategy, the expansive narrative strategy, the connective narrative strategy, and the native narrative strategy. While the four narrative strategies introduced in the typology may not be completely exhaustive of all possible narrative strategies, they cover very common forms of production strategies in today's media landscape, and they can be applied and adjusted to fictional and non-fictional

contexts. The two main dimensions I developed for this typology, the narrative deviation and the number of release events over time, will remain valid regardless of the future of multi-platform storytelling and are thus enduring as typological dimensions. In these dimensions rests the strength of the typology. In Chapter 4, I demonstrated the implementation possibilities of the four narrative strategies on the basis of production, engagement, and branding, and supported my theoretical approach with practical case studies in Chapter 5 that served as exemplars for the narrative strategies.

6.2. Methodology and Findings

As noted above, I chose in this dissertation to develop a typology to facilitate cross-project comparisons and facilitate future theory building and exploration in the area of transmedia narrative strategy and storytelling. In general, the use of typologies as a method of theoretical development is often misunderstood (Doty & Glick, 1994), as some argue that "typologies are limited to addressing the primary question asked by descriptive researchers" (Bacharach,1989, 497), and fall short of being true theories. However, properly constructed typologies reach far beyond the usefulness of taxonomies or mere categorization; rather, true typologies possess at least three central characteristics allowing their use in the facilitation of new theory development (see Bacharach, 1989; Bailey, 1994; Blalock, 1969; Dubin, 1969; Kerlinger, 1986; Whetten, 1989).

First, true typologies contain two types of constructs: ideal types and unidimensional constructs. Recall that ideal types are "complex constructs that can be used to represent holistic configurations of multiple unidimensional constructs" (Doty & Glick, 1994, 233) and are intended to provide an abstract model as the basis for subsequent theory development (see Blalock, 1969, 32). The ideal types of transmedia projects developed in my typology are represented by the four strategies noted above. The dimensions along which these ideal types vary — narrative deviation and number of release events over time — constitute unidimensional constructs, and are "first-order" constructs that "are the building blocks of traditional theoretical statements" (Doty & Glick, 1994, 234) and describe each ideal type in the typology. Second, true typologies depict relationships among constructs and, explicitly or implicitly, hypothesize that greater similarity to an ideal type results in higher probability of a desired outcome. This is certainly the case of the typology presented here. For example, should a producer wish to successfully follow a connective narrative strategy for a particular project, the typology developed here suggests that the closer the producer can bring her project in line with the characteristics of the connective narrative strategy ideal type as described, the more likely her project is to both require the implementation actions and result in the outcomes for such a strategy. Finally, true typologies, as theories, are falsifiable, meaning that they must be testable and subject to disconfirmation. Although the collection of a case study sample large enough for disconfirmation is well beyond the scope of this dissertation, the falsifiability of the typology is inherently possible; the

characteristics of a wide variety of projects may be compared to a quadrant's characteristics to ascertain the amount of deviation between a given project and the quadrant. This deviation or "fit", when combined with the appropriateness of the strategy for factors such as external environmental conditions (e.g., current cultural or economic factors), can conceivably be used to explain ultimate project effectiveness — dependant on, of course, how one defines effectiveness.

To begin the careful process of developing a useful and valid transmedia narrative strategy typology, I first analyzed existing literature in the area and identified and addressed six fundamental questions: (1) What is the role of the medium in multi-platform storytelling process and is content creation medium dependent?; (2) What are the enduring strengths that some storyworlds possess and others lack, or, in other words, what do some storyworlds evoke that leads to multiple adaptations or extensions across media?; (3) How do story citizens make sense of a narrative that often blends fiction and reality, and is there a knowledge-yielding process involved in fictional narratives?; (4) What motivates the story citizen to navigate through the different platforms and story elements?; (5) Which elements of the story change, which elements remain the same, and to what effect?; and (6) What is the relationship between production, audience engagement and marketing/branding? Exploring these questions proved to be critical within the process of typology development, as they are connected to central mechanisms of implementation within each of the four strategies, and led to the identification of two dimensions that reach across the wide variety of transmedia projects described in the literature.

After further refinement of the two dimensions and four typological quadrants, I conducted in-depth case studies of four complex narrative strategies in multi-platform environments in order to illustrate the ideal types and demonstrate the validity of the dimensions. The case studies — recall that a case study is defined as a "detailed and intensive study of a single case, usually a combination of methods, such as document analysis, interviews and observation" (Bertrand; Hughes, 2005, 238) — took place over several months and included: (1) engagement with the main media and narratives integrated in the project;, (2) the observation of forums, websites, and social media related to the projects, and (3) my active immersion/participation in two of the projects (*World of Warcraft* and *Sherlock and the Internet of Things*). Throughout the analysis, I gathered a large number of documents, reviews, images, and promotional material. The case studies present exemplars of the ideal types in their respective categories and support the validity of the typology. More specifically, the case studies served to vividly illustrate the respective strategies: 1) constrained narrative strategy: low narrative deviance, low number of release events over time (*The Motorcycle Diaries)*; 2) expansive narrative strategy: high narrative deviance, high number of release events over time (*World of Warcraft*); 3) connective narrative strategy: medium to high narrative deviance, low to medium number of release events over time (*The Man From U.N.C.L.E.*); and 4) native narrative strategy: zero to low narrative deviance, high number of release events over time *(Sherlock and The Internet of Things*). Furthermore, the case studies illustrated

in detail how the different strategies affect decisions on all levels of implementation — production, engagement, and branding.

Finally, and throughout the dissertation, I contextualized and responded to the research questions and argued that the medium matters, as content creation depends on time and space made available by the technological affordances of the medium, a notion echoed by scholars such as Wolf (2012), Ibrus (2012), and Ryan (2014). Storyworlds that allow the story citizen to roam freely and to engage in optional thinking (Shaul Nitzan, 2012), develop an astounding longevity as they offer immersive environments that the story citizen wishes to return to over and over again. Sense making processes indicate an active, often proactive story citizen who constantly compares the fictional to the real, a process known as the the concept of minimal departure (Laure Ryan, 1980). In multi-platform narratives, sense making might take the story citizen to a higher cognitive level as moments of cognitive rupture invite the him or her to travel to other media in order to find new narrative expansions with familiar elements; this process might maintain immersion/transmersion and simultaneously deepens and enriches the story experience with new story material. These expansions aid in the meaning making and contribute to the overall learning process, as even entirely fictional projects can often serve as simulated learning experiences (Mar, 2008; Herman, 2013; Weiler, 2015). All these activities take place under the commercialized umbrella of marketing and branding efforts that involve producers and story citizens. Story citizens voluntarily co-produce fan works (fan fiction, fan art, or machinima) related to the narrative of their choice that may

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serve as promotional material that "spreads the word" (Spence, 2014; Jenkins, 2013). Based on the work reported here, the future investigation of multi-platform narratives should include the three elements of production, engagement, and marketing/branding as part of a more complete, holistic view of transmedia projects.

6.3. Limitations and Future Research

As it develops and illustrates a typology, this dissertation is bound by limitations inherent in such a methodology, however useful the typology may ultimately prove to be. As noted by Faulkner and colleagues (2012), all typologies attempt to offer order out of chaos by identifying ideal types, but by doing so fail to address the ambiguities associated with hybrid cases that appear to represent a mix of ideal types. Future research designed to examine and further delineate the boundaries of the quadrants and strategies introduced here should also include the examination of such hybrid projects.

Relatedly, typologies offer rather static views of complex realities. But many transmedia projects are long-lived and dynamic; consequently, the strategies associated with these projects may change over time. For example, a project initially introduced with a constrained narrative strategy as a simple book-to-film adaptation might migrate over time into a more expansive narrative strategy as a franchise. Although the typology as presented here does not address such dynamism, future research should examine why, how, and with what consequences changes in narrative strategies affect transmedia projects.

An additional limitation of the work presented here is associated with my choice of typology dimensions and illustrative cases. Chapter two outlines the reasoning behind my choice of narrative deviation and number of release events over time as the key dimensions of the typology, but other researchers may have made different choices in this regard. My choices, however much I believe them to be appropriate, are bounded by my idiosyncratic reading, theory exposure, perspective and experience; although I believe the two dimensions to offer the best means of comparing and contrasting transmedia projects, and the cases to offer vivid and compelling examples of each strategy, others may disagree.

Finally, the study of transmedia narrative strategies itself is no static endeavour, as the field is constantly shifting, emerging, and generating new combinations and manifestations and, at the same time, eliciting new reactions and interactions from story citizens. The very nature of the field, like other contemporary fields, provides something of a moving target for the researcher. On the one hand fascinating, the sheer dynamism of the subject also precludes a precise analysis using many classic theories. As a result, and as hopefully illustrated in this dissertation, I have drawn from a wide variety of theories and theorists, examples and media, stories and conceptualizations, in order to create a usable and valid gestalt.

The goal of the work presented here was to help advance the field by providing a common vocabulary and means to compare and contrast transmedia projects. As previously noted, the central direction for future research based on the typology will involve the collection of a larger sample of cases for each

strategy, allowing comparisons and analyses both with and between strategies. My intent is to carry out this future research, drilling down within each strategy in order to bring boundaries into better relief, comparing and contrasting strategies in more detail, and pushing theorizing toward using the typology in conjunction with other external factors in order to better assess the appropriateness of a given project strategy for the project's intended outcomes. Additional directions of enquiry could include, for example, analyses the consistency of the depiction gender roles across media within a particular strategy or across strategies, or the relative effectiveness of different constellations of media used within or between strategies.

6.4 Conclusion

The rise of the "sharing economy" has exposed millions of people to the benefits and drawbacks of sharing physical assets like overnight accommodation space via services such as AirBnB, or automobile transportation via Über and similar platforms. Technology has reduced transaction costs, making sharing assets cheaper and easier than ever—and therefore possible on a much larger scale. The easy Internet access to data allows owners to find renters, and vice versa, and social networks provide a way to check up on people and build trust, while online payment systems handle the billing (The Economist , 2013).

This sharing economy does not exist in a vacuum, and those participating in it experience a heightened level of choice and engagement as compared to the traditional consumer economy. It seems natural, then, that these individuals

also have heightened expectations of engagement possibilities that extend to accessing media for entertainment. Millennials are not only active consumers, they are also more motivated by engaging in new experiences and learning than any other generation before them (Bresman, 2015). Thus, the producer today whose project fails to incorporate avenues for interaction, multi-platform exploration and learning, and story-citizen engagement and expression does so at his or her peril. Our zeitgeist is ripe for transmedia projects, making the exploration of transmedia narrative strategies presented here a particularly timely endeavour.

But beyond the desires and expectations of millennials exists the cultural implications of pervasive and interactive storytelling. As detailed at the beginning of this dissertation, storytelling represents an elemental human need to teach, to learn, and to express. Transmedia projects offer story citizens an ever-changing portal and opportunity to satisfy this need, and may come to represent the digital version of the campfire storytelling experience. Rather than feed into an internet-fueled "bunker" mentality that situates people within their homes and limits human interaction, interactive transmedia projects may facilitate more understanding and tolerance as people reach out, explore, express, and co-create with producers and with each other. And that is a very good thing.

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Appendix A

Detail from the bull's head lyre from Ur, c. 3000 B.C.E.
Source: https://oi.uchicago.edu/museum-exhibits/special-exhibits/oriental-
institute-museum

Narrative Strategies in Transmedia Environments

Number of Release Events Over Time

Overlap

Game

Book

Film
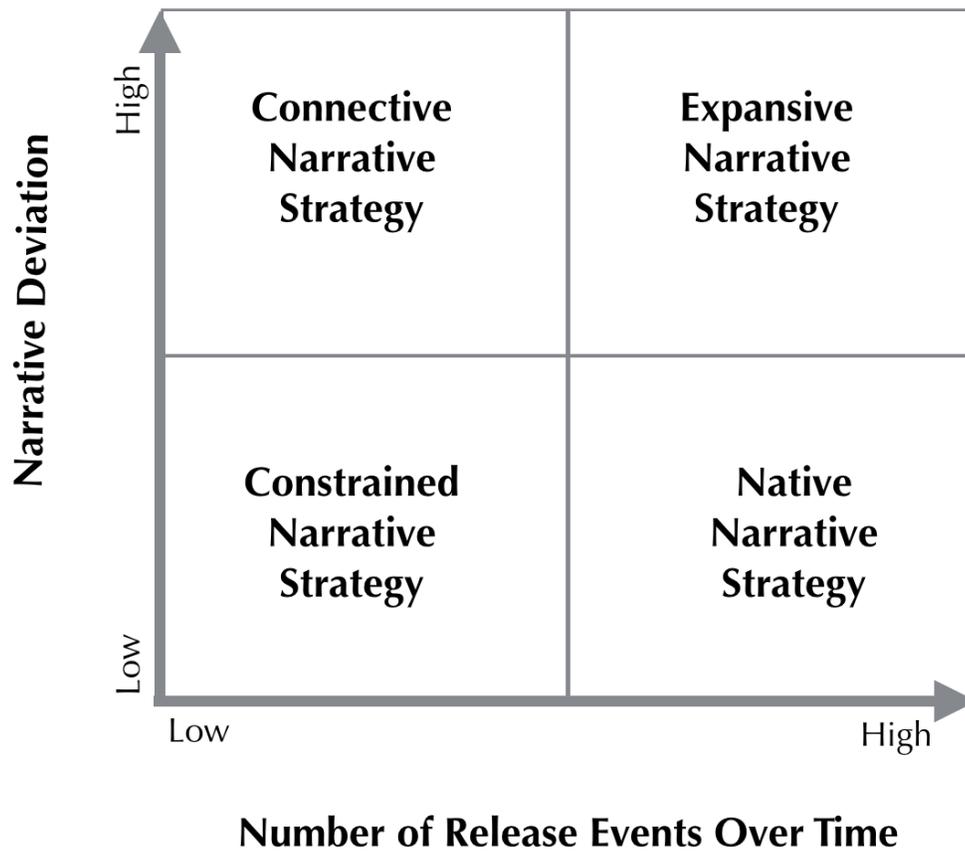
Deviation
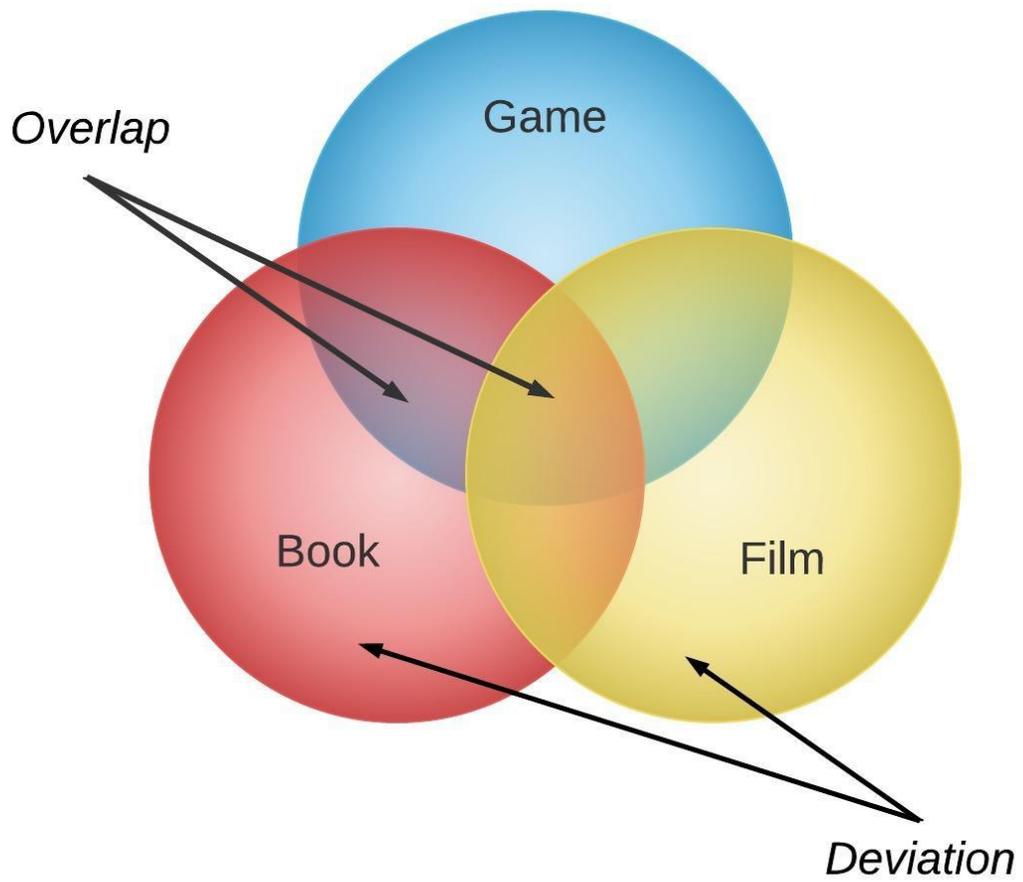
Appendix D
Number of Release Events Over Time
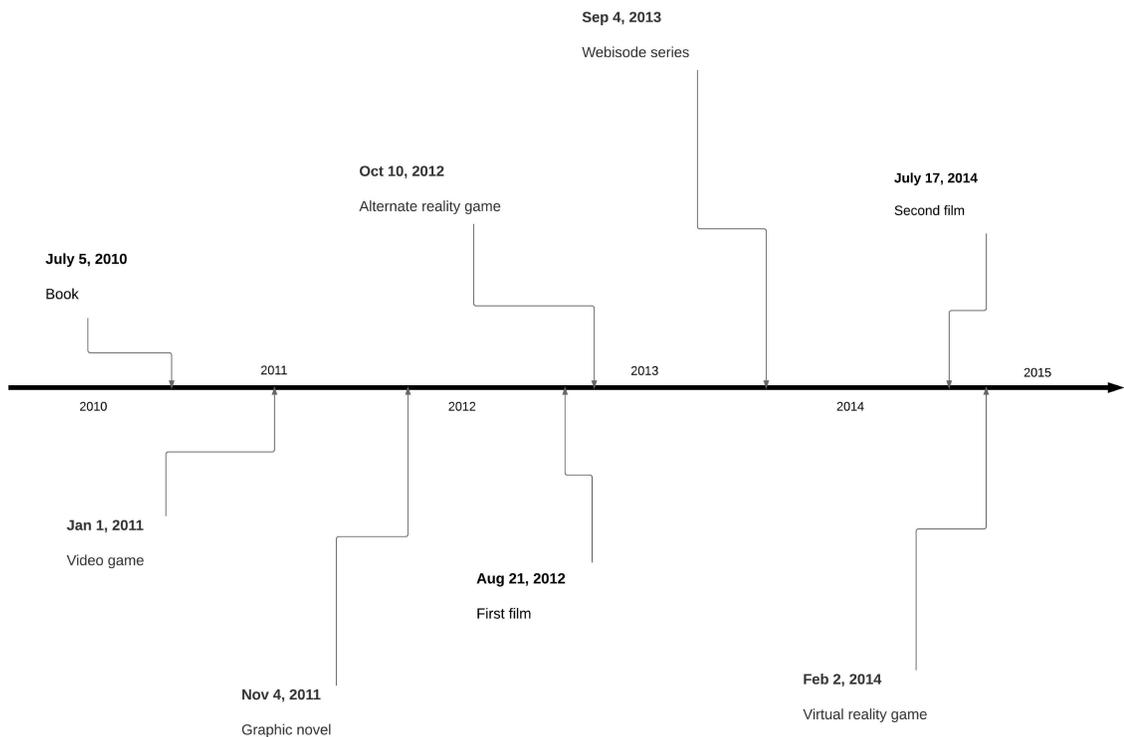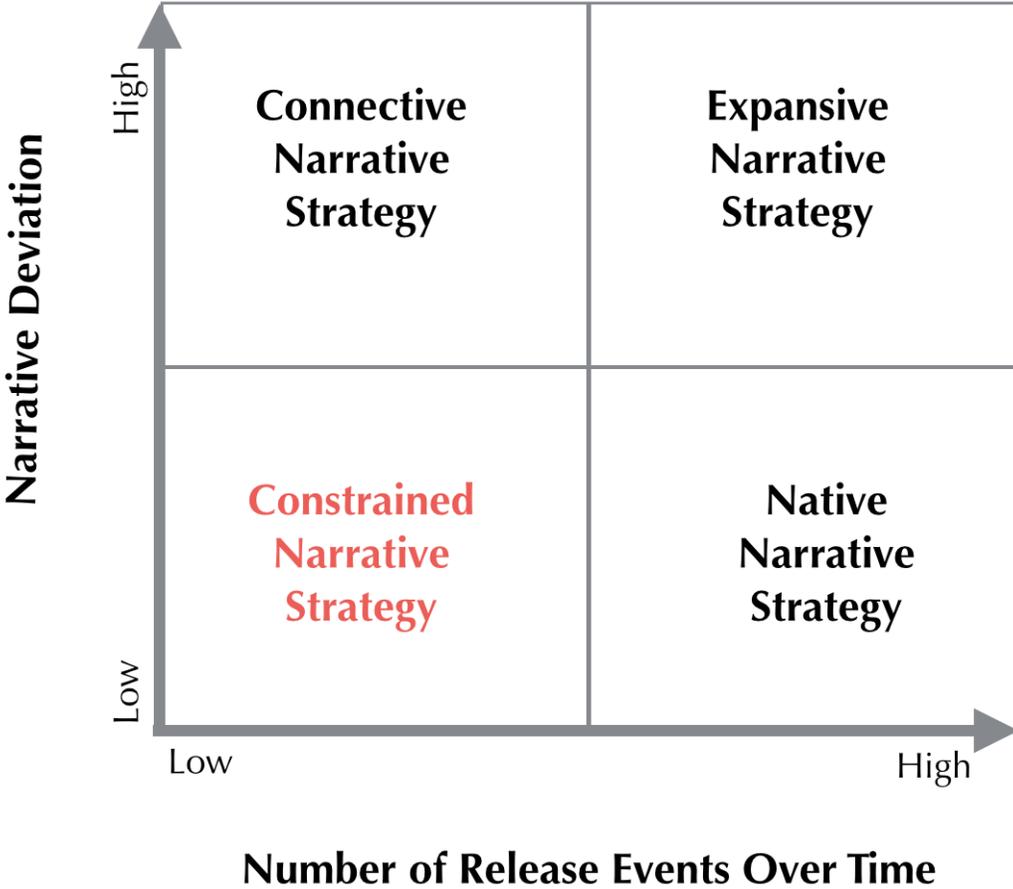
Sep 4, 2013

Webisode series

Oct 10, 2012

Alternate reality game

July 17, 2014

Second film

July 5, 2010

Book

2011

2013

2015

2010

2012

2014

Jan 1, 2011

Video game

Aug 21, 2012

First film

Feb 2, 2014

Virtual reality game

Nov 4, 2011

Graphic novel

Number of Release Events Over Time

Narrative Deviation

High

Low

Connective Narrative Strategy

Expansive Narrative Strategy

Constrained Narrative Strategy

Native Narrative Strategy

Low

High

Number of Release Events Over Time

Narrative Deviation

High

Connective Narrative Strategy

Expansive Narrative Strategy

Constrained Narrative Strategy

Native Narrative Strategy

Low

Low

High

Number of Release Events Over Time
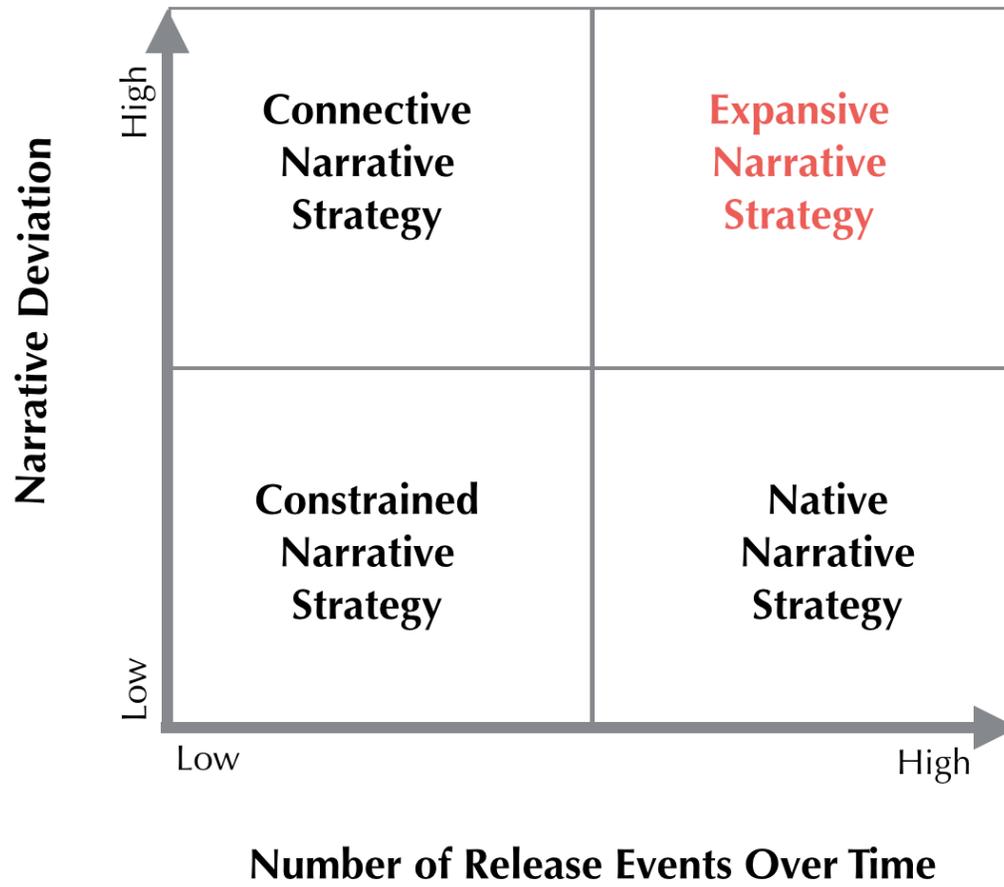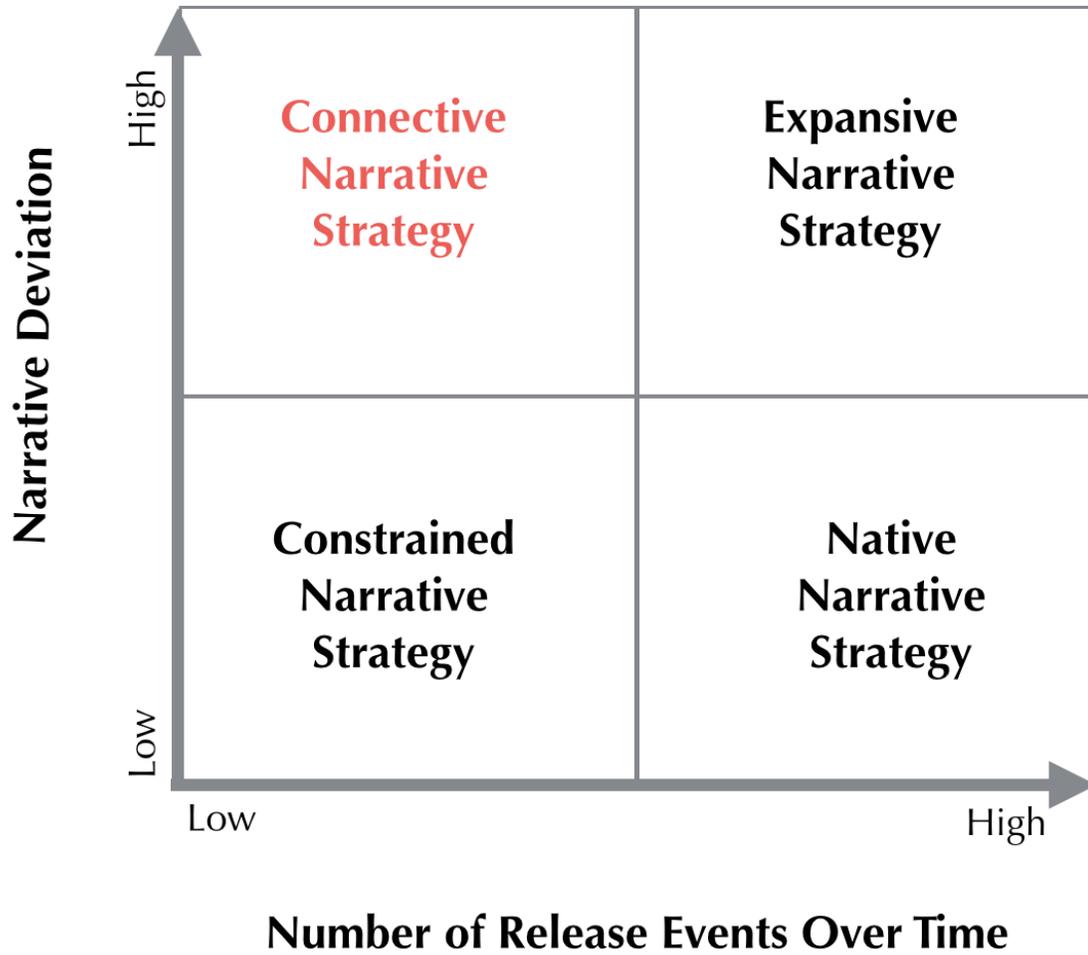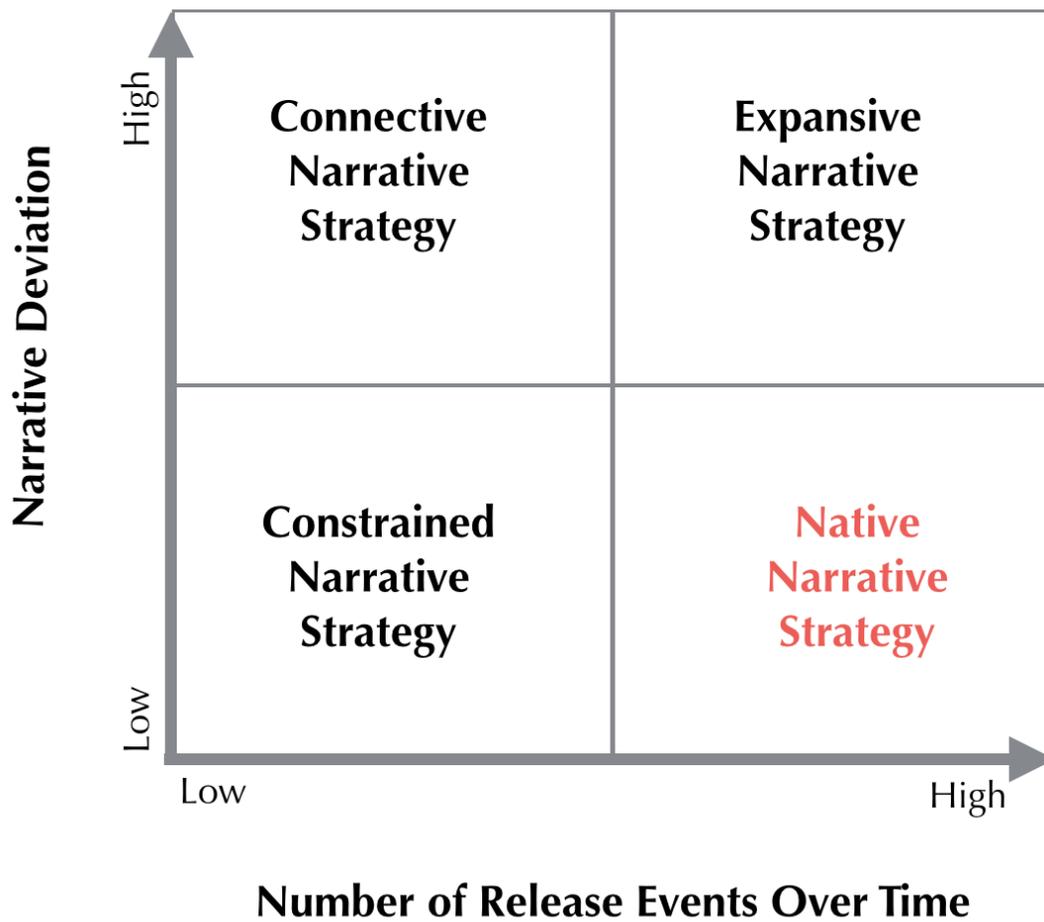
Harold X. Glenndenning - Shocking Murder

WEEKLY SALES

PAPER TOWNS

THE MARTIAN

FIFTY SHADES OF GREY

INSURGENT

THE SCORCH TRIALS

3 months before movie release | 2 weeks before release | Week of release | 2 weeks after release | 3 months after release

SOURCE: NIELSEN BOOKSCAN.
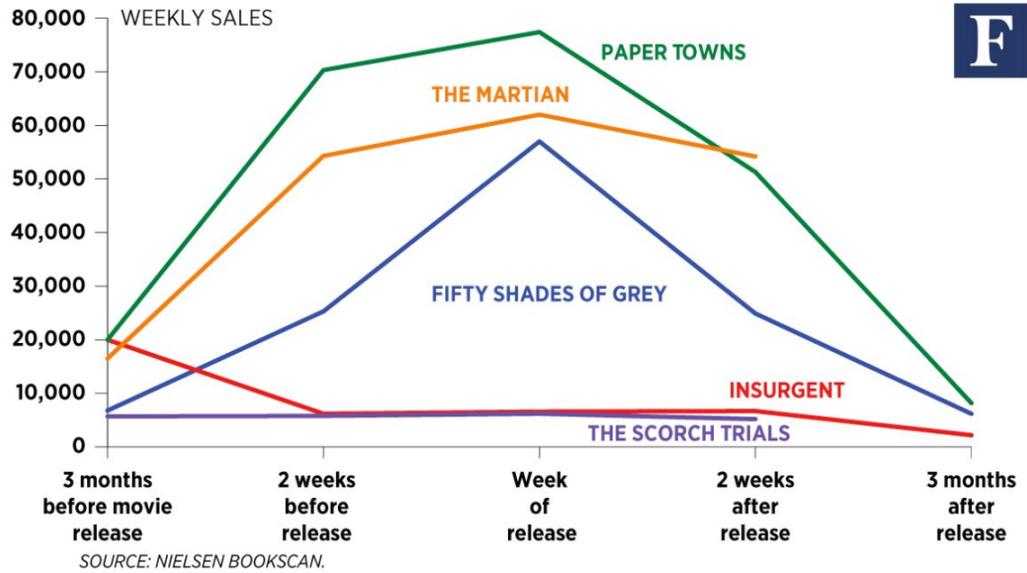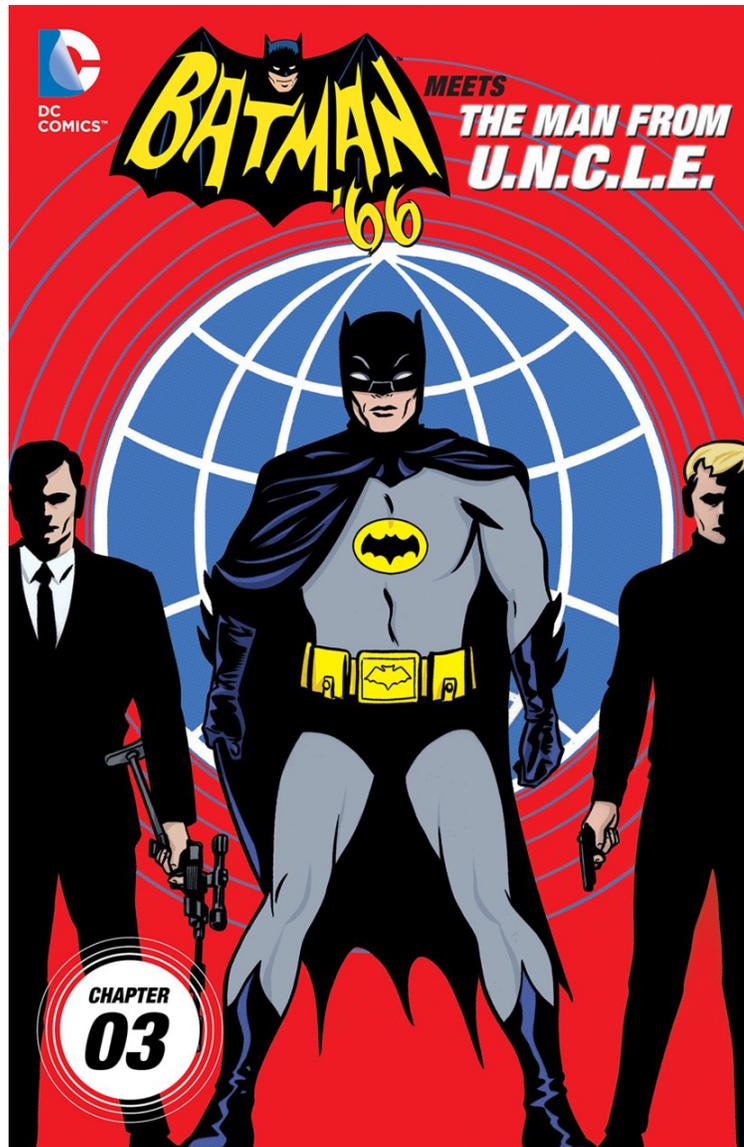
Appendix L

Example of chosen object - Screenshot
Sherlock Holmes and The Internet of Things

The Old Fashioned Brass Key 👍 1 ⌄

By **Birgit M. Schneidmueller**

Shared With Class ⇕

⬆ All Submissions

Object Stories Instructions

The Old Fashioned Brass Key

Those who have unlocked the gate to death will cross paths with Sherlock Holmes.


The Musgrave Ritual - page 4-5:

From within he produced a crumpled piece of paper, an old-fashioned brass key, a peg of wood with a ball of string attached to it, and three rusty old disks of metal.

"Well, my boy, what do you make of this lot?" he asked, smiling at my expression."It is a curious collection.""Very curious, and the story that hangs round it will strike you as being more curious still.""These relics have a history then?""So much so that they are history.""What do you mean by that?"Sherlock Holmes picked them up one by one, and laid them along the edge of the table. Then he reseated himself in his chair and looked them over with a gleam of satisfaction in his eyes."These," said he, "are all that I have left to remind me of the adventure of the Musgrave Ritual."

Appendix M
Example of a Taped Body - Screenshot
Sherlock Holmes and The Internet of Things

Appendix N
Example of a Taped Body - Screenshot
Sherlock Holmes and The Internet of Things Turin Event