

## **Value propositions of opera and theater live in cinema**

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1 May 2013

v. 6.8

An earlier version of this paper was presented at the World Media Economics & Management Conference, Thessaloniki, Greece, 23-27 May 2012. Later version to appear in a monograph collection of papers from the conference.

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### **Summary**

High-definition digital cinema is creating new opportunities to attract audiences to live cultural performances. But to be attractive, these live broadcasts must offer compelling value propositions. In this paper we measure and assess the perceived entertainment value of a live cultural performance – in this case, opera or theatre - when it is exhibited in distant movie theatres with the support of contemporary digital cinema technologies.

We seek, first, to establish why identification and interpretation of perceived entertainment value among consumers of live broadcasts in cinema is a worthwhile undertaking. Second, we seek to show how empirical investigation of the audience's perception of the value of a cultural offering can yield potentially useful insights into cultural consumers' tastes and desires. Third, we seek to show how Q methodology can provide a useful approach to explore audiences' subjective responses to cultural offerings.

Our research uncovers audiences' subjective experiences as consumers of live operatic and theatrical performances in movie theatres. We identify and describe four distinct configurations of perceived entertainment value. Audiences of a broadcast of live opera or theatre in cinema respond favorably to a value proposition revolving around perceived artistic quality, visual cinematic spectacle, novelty, and a sense of value for money.

### **Key words**

Audiences, consumer, entertainment value, opera, cinema, live performance, Q methodology

## *Introduction*

In December, 2006, The Metropolitan Opera in New York launched a series of performances broadcast live in high definition (HD) to movie theatres around the world which had previously been equipped with capabilities to receive and exhibit digital cinema. The first opera broadcast was Mozart's *Magic Flute*, and the series expanded from six broadcasts to eight in 2007, then to eleven in the 2008-09 season, and to twelve in the 2010–11 season (Heyer, 2008: 592; The Metropolitan Opera, 2010: 3). *The Met: Live in HD* was soon an artistic and financial success, leading to an increase in opera house attendance and a dramatic expansion of the worldwide audience. By 2010, broadcasts reached approximately 1,500 selected venues in 46 countries across six continents. Audiences increased from 320,000 at the end of the 2006-07 season to 1.8 million at the close of 2008-09, and by 2010 the Met had sold nearly five million tickets (The Metropolitan Opera, 2010: 2-3). More recently, a similar format was adopted in the U.K. by the *National Theatre* to deliver live broadcasts of theatrical performances from London.

High-definition digital cinema is thus creating new opportunities to attract audiences to live cultural performances such as opera and theatre. But such new forms of cultural consumption as live broadcasts of cultural performances must offer a compelling value proposition. In this paper we measure and assess the perceived entertainment value of a live cultural performance – in this case, opera or theatre - when it is exhibited in distant movie theatres with the support of contemporary digital cinema technologies.

Our intent is, first, to establish why identification and interpretations of perceived value among consumers of live cultural broadcasts in cinema is a worthwhile undertaking. Many opera and theatre companies are seeking ways to expand their audiences, asking whether the cultural offering can be “brought to the masses” (Currie, 1994). Live performances broadcast to cinema theatres are emerging as a way of expanding the audience for expensive cultural offerings.

Second, we seek to show how empirical investigation of the audience's perceptions of the value of a cultural offering can yield potentially useful insights into cultural consumers' tastes and desires. Like any producers of creative products, producers of live cultural performances and mass-mediated entertainment face the well-known problem of high uncertainty of demand (Caves, 2000). To strengthen engagement and retention of audiences, and to improve predictability and market control, insights into the audience's motives and behaviour are helpful.

Third, we suggest that Q Methodology provides a useful approach to investigate audiences' subjective responses to cultural offerings. In this paper we employ Q Methodology to uncover audiences' subjective experiences as consumers of live opera and theatre in movie theatres, and we identify and describe four configurations of perceived entertainment value. We show that in these configurations, audiences of a broadcast of live opera or theatre in cinema respond favorably to a value proposition revolving around perceived artistic quality, visual cinematic spectacle, novelty, and a sense of value for money.

### *Enabling and consuming broadcast of live opera and theatre in cinema*

Digital technologies in live and mediated entertainment are rapidly changing the distribution and consumption of moving images (PricewaterhouseCoopers, 2009; 2010). The technological drivers are advances in broadband networks, digital file compression, streaming media, storage technologies, encryption, and display technologies. e- and d-cinema<sup>1</sup> allow a film to be distributed to theatres by DVD, satellite or other broadband networks. The costs saved through digital distribution are significant. Annual distribution costs of celluloid film for Hollywood were in the range of \$1.2 to \$1.3 billion worldwide, and the six major studios together spent \$850 million a year to produce the prints (Culkin & Randle, 2003). Digital delivery provides a savings of \$2,000 on every film print, plus the costs of shipping to the theatres of approximately \$300 for each print, plus the freight and insurance totalling \$500 to \$750 for each print (DOC, 2004; Culkin & Randle, 2003; Silver & Alpert, 2003). Digital prints can be made for “less than a fifth of the cost of a traditional 35 mm version” (Aveyard, 2009: 192). Digital cinema also improves anti-piracy measures.

The enablers of adoption of digital cinema are not just economic but also aesthetic factors. Digital projection “offers a cleaner image than film”, and also provides benefits in the area of accessibility, for those who are blind, partially-sighted, deaf and hard of hearing (Crofts, 2011). Interactivity is also a benefit: with broadband transmission to cinemas, filmmakers can introduce a film personally or participate in question-and-answer sessions with audiences (DOC, 2004: 34).

Despite the apparently compelling advantages, it has still taken a long time for digital distribution and exhibition to become universal; distribution has lagged other areas of the screen industry in its adoption of digital technology (Crofts, 2011). The d-cinema business model has required a significant investment in the installation of the digital projector, and so the rollout of digital distribution has been contingent upon the availability of an adequate infrastructure, the acquisition of digital projection by the theatre operators, and the provision of digital content.

The changeover to e- and d-cinema has required buy-in by diverse stakeholders: the creative community, the studios, the distributors and cinema operators and, last but not least, the viewing public (Crofts, 2011). The first wave of digital projection in 1999 enjoyed initially a very slow uptake. Digital cinema began to take off in 2005, when the six majors (Disney, Fox, Paramount, Sony, Universal and Warner Bros.) launched the Digital Cinema Initiatives (DCI) Specification. It was a partnership to develop a new digital cinema proprietary format to address some practical concerns (i.e. protection against piracy), but also to re-assert the studios' dominance and control over the evolving digital landscape (i.e. “excluding alternate and lower-cost digital cinema formats, such as e-cinema from playing their films”) (Aveyard, 2009: 193). In order to provide incentives to exhibitors, the studios proposed the Virtual Print Fee (VPF), to compensate exhibitors for the significant cost of acquiring the digital cinema projection hardware. Under this model, the studios paid a fee to the cinema, or to a third-party hardware provider, each time a first-release digital print is shipped to the theatre (Aveyard, 2009; Crofts, 2011).

Momentum continued in 2009, with the success of Cameron's *Avatar* and technological developments regarding projection in 3D (Crofts, 2011, Ryan & Hearn, 2010). Worldwide screens equipped with d-cinema totalled 2,866 by the end of 2006 and were expected to reach

16,000 by the end of 2009 (DOC, 2007: 60). By year-end 2010, 24% of worldwide screens were digital, with 38% of UK and 42% of US screens having been converted. By 2012 digital cinema was overtaking 35mm film, and use of celluloid film in theatrical exhibition is expected to disappear almost entirely by 2015.

The transition to digitization and broadband connectivity, and the convergence across media platforms, are not only creators of opportunities for production and distribution of media entertainment, but also are “disrupting and changing the very nature of the film audience and how they are engaged with media offerings” (Ryan & Hearn, 2010: 3). As digital film delivery replaces physical film and also DVDs, video rental stores and other traditional intermediaries are disappearing (Currah, 2006, 2007; Vickery & Hawkins, 2008). In regards to theatre-based performances, several attributes of e-cinema and d-cinema support the survival of the theatre-based business model and are quite suitable for presentation of offerings other than feature films in theatres (Vickery & Hawkins, 2008; Husak, 2004; Irwin, 2004; Silver & Alpert, 2003). Husak (2004: 921) foresaw the emergence of two businesses in the theatrical community: “traditional feature film release known as Digital Cinema” and “non-traditional content known as Alternative Content.”

In Alternative Content, or alternative programming, new kinds of live or recorded content are presented on digital screens, in HD, with special sound systems and, more recently, in 3D. Included are live broadcasts of opera, theatre, ballet, classical music, sports, and the circus in digital cinemas theatres. Examples include sport (WWE Live in HD and UFC events, and Wimbledon in 3D), music concerts (Guitar Festival 2010), opera (The Met: Live in HD), theatre (NT Live and Broadway Premieres), ballet (The Bolshoi Ballet Series), talk shows (Conan O’Brien Can’t Stop) and public events. The Alternative Content trend generally has been well received by consumers.

The case of live opera and theatre in cinema and their proven success is intriguing. By their traditions and origins, theatre and opera are created and performed to be experienced live in a specific venue, the opera house or theatre. Moreover, opera is one of the most expensive and esoteric of the performing arts, not infrequently pictured in the popular mind as a distant, ornate, and patrician cultural form, and qualified in some scholarly accounts as a “fetishized ritual” (Evans, 1999: 153).

The delivery of live opera and live theatre in digital cinema-enabled theatres (called 'livecasting' by Barker, 2013) is the latest of a long list of ways that the live offering has been extended by audiovisual technologies, including audio amplification, radio, television, and cinema. Opera and theatre can be experienced outside the opera house as live television broadcasts, as recordings in theatres or at home. Opera can be experienced as audio at virtually any location, thanks to live or rebroadcast radio, the round-the-clock satellite radio channel *Sirius XM*, and the *Met Player* online streaming service (The Metropolitan Opera, 2010: 3; Sheppard, 2007: 383), although neither live opera nor live theatre has induced notable demand for video recordings of live performances (Schutt, 2010). In the family of opera-related audiovisual products and services, the live performance is the primary product, typically providing the basis for secondary and tertiary products such as DVDs and audio recordings (Lacasa & Villaneuva, 2011).

Many previous combinations of operatic content and audiovisual technologies were devised with the intention of expanding the audience for this niche performing art by lowering the barriers to public access. Observe Lévy-Garboua and Montmarquette (2011: 177-178), “the learned people, who are generally lovers of the classical arts, think that very many others would eventually feel like themselves if they were better exposed to them”. The various new distribution channels, formats, and consumption locations have raised hopes of opening up new markets by increasing the exposure of people to opera and theatre, notably by lowering the cost and risk of consumption among non-habituated. The expectation that live opera or theatre broadcasts serve to bridge “the divide between high culture and mass entertainment” (Heyer, 2008: 602) has not always yielded positive results, however, as in the case of the unsuccessful Television Opera (Barnes, 2003). This suggests that for many consumers, live opera’s traditional secondary and tertiary media products such as DVDs serve as complementary products for those whose tastes for opera have already been formed, rather than as products that recruit new consumers to the art form.

Obviously, technological mediation, including the exhibition of live performance remotely in HD on screens designed for movies, does not exactly reproduce the experience of a spectator at a live cultural performance in an opera house or theatre. The experience of a live broadcast in cinema is therefore different and, in some key respects, possibly inferior to that of the live unmediated performance. Whether secondary and tertiary media products are, should, or must be derivative, i.e. subsidiary to, or artistically inferior to, the live performance, is a matter of dispute. A longstanding issue in performance theory concerns “liveness” and the ways that the incorporation of audio-visual technologies, techniques, or cinematic conventions into opera, theatre or other live theatrical performances affects the “performativity” and aesthetics of the cultural offering (e.g. Anderson, 2011; Auslander, 2008; Barker, 2013 and 2003; Heyer, 2008; Morris, 2010; Reason, 2004; Senici, 2010). It is often considered that liveness represents, by definition, a higher level of artistic achievement than recorded performances, or a more compelling or authentic cultural consumption experience.

Mediated experience of a live cultural event has raised many concerns about loss of presence and loss of spontaneity, and particularly about modulation of the spectator’s experience through the camera’s gaze, which often ranges to close-ups of actors, costumes, and sets. Further, mediation of a live cultural production can complicate the audience’s expectations about appropriate behavior. At grand opera “it has been traditionally permissible, sans embarrassment, for even grown men to cry” (Heyer, 2008: 595), but in a mediated live performance, cues regarding emotional expression and conventions for interacting with other audience members may be ambiguous or interpreted out of context (Anderson; 2011; Esse, 2010; Heyer, 2008; Morris, 2010).

On the other hand, some audiences might prefer a live or a recorded broadcast in cinema to an unmediated live performance. Live opera and theatre experienced in a movie theatre may provide new possibilities to enjoy features of the event that are difficult or impossible to obtain at a live, unmediated performance, such as easy-to-read surtitles, close-up shots, interviews with cast members, behind-the-scene views, greater convenience of physical access, the spectacular cinematic sensation of a big screen, and a lower admission price or less travel than a live performance in New York or London.

Providers of live opera or theatre broadcast in cinema theatre must necessarily hope that the performance experienced in this context yields sufficiently compelling value to the consumer of the cultural product to induce subsequent engagement, even though the experience is not the exact equivalent of an unmediated live performance. Audience engagement with live performance in cinema can take the form of repeat visits, purchases of secondary or tertiary products, endorsements, recruitment of others through word-of-mouth, enhanced appreciation of the art form that encourages investment in learning more about it, and attendance of live unmediated performances. The latter is a key issue for opera and theater, in that it concerns the possible effects on audiences for live unmediated performances in local or metropolitan opera houses or theatres: does live performance in cinema grow a new audience for live unmediated performances, does it cannibalize existing audiences, or does it represent a complementary form of cultural consumption?

### *Perceived value of cultural performances*

Live and mass-mediated forms of entertainment which depend on advertising-supported business models have developed highly rationalized audience information systems that provide feedback about audience numbers and behavior (Gunzerath, 2012; Taneja & Mamoria, 2012). Typical metrics such as exposure, market share, and click-throughs are widely used and will continue to be key sources of market intelligence. Such measures, however, do not describe the individual and subjective consumption experience, and so do not directly help to understand value perception. Feedback on the consumption experience is “usually left to appraisals by professional or amateur critics or by consumers themselves, who routinely share opinions about experiential product quality through word-of-mouth” (Davis & Vladica, 2010: 13). Empirical scholarly research exploring the subjective, experiential perspective of the individual audience member at live events is available, but remains rather scattered and unsettled (McCarthy & Jinnett, 2001; Minor & Hausman, 2004; Swanson, Davis, & Zhao, 2008). A gap exists between what entertainment professionals are able to design, produce and deliver for entertainment consumption, and what researchers can suggest as concepts, constructs, themes, models and research methods to provide insight into the nature of the entertainment experience.

Successful innovators of experiential services actively query and investigate customers’ experiences with qualitative methods, tools, and techniques that capture “the experiential and emotional aspects of service delivery” and assess “the emotional components of the customer experience” (Zomerdijk and Voss, 2011: 67). This situation may be contrasted with the generally low degree of scholarly and professional interest in audience’s perceived value of arts consumption (Belfiore and Bennett, 2007; Radbourne et al., 2009). Notes Barker (2003):

...a few studies apart, there has been almost no attention, to date, to certain rather crucial questions: what do audiences seek, and get from, the experience of going to the theatre, and how do they go about the processes of making sense of the productions they see? It must be said that if theatre studies is underdeveloped in dealing with these questions, many other fields of cultural enquiry are not that much further on.

Audiences can be segmented in several ways: in terms of geography, in terms of

sociodemographic, psychographic, or behavioral variables, or in terms of benefits sought, frequency of participation, or brand or product loyalty (Abad-Grau et al., 2009). Schemes that are based primarily on sociodemographic variables tend to confirm that consumption of high culture is socially stratified, with audiences for the performing arts generally wealthier and better educated than the average person (Blasius, 2010; Chan and Goldthorpe, 2007; Seaman, 2005). A growing literature on performance measurement of performing arts companies provides potential insight into motivations and drivers of cultural consumption, although this literature tends to focus on global criteria for measuring success in performing arts organizations, not specifically on perceived consumption value among audiences. Research explores ways that performance quality of performing arts can be appraised (Abfalter, 2010), and shows that audiences and experts evaluate quality very differently (Boerner and Renz, 2008).

Radbourne, Glow, and Johanson (2010) propose four dimensions of audience experience: knowledge, risk, authenticity, and collective engagement. The authors seek to create comprehensive indicators of performance quality to provide guidance to those who design and deliver the product or service in question. Minor and Hausman (2004: 9) develop a model of audience satisfaction with live cultural performances, following a reconceptualization of theories from the service literature. They refer to the service dimension of a musical performance and frame service experience as drama containing four critical elements: 1) actors, who are the personnel contributing to the service, 2) audiences or consumers, 3) the service setting or physical surroundings, and 4) the service performance itself. A 25-item scale measures satisfaction with live performances. Results indicate that six factors capture attitudes toward a recent musical performance. They are sound, musical ability, musician, appearance, and audience, which reflect the attitude toward the group, the individual performers, the facilities and the stage.

Of greater interest to us are segmentation schemes that measure perceived value. The performing arts marketing literature postulates four principal motivations for attendance at a cultural event (Kolb, 2005): prior interest in a particular art form or artist; desire for entertainment; desire to participate in a social ritual; and desire for self-improvement (Kolb, 2005). These factors are intertwined in sociological and ethnographic accounts of opera audiences. Evans' (1999) sociological study of British opera audiences suggests that audience membership is determined more by considerations of social standing, privilege, ritual, preoccupations with social class, and expectations regarding class-specific lifestyles than by intrinsic interest in the opera. Benzecry's (2009: 134) study of initiation into opera culture in Buenos Aires emphasizes that "passionate opera fans enjoy opera not because they want to be swayed by it in their ignorance, but rather as a result of their belief that opera is something that needs to be learned in order to be properly enjoyed". Using factor analysis, Rossel (2011) identifies six components of the musical experience of opera audiences: feelings, analysis, escape, superficiality, body, and concentration.

Other models and measures of perceived value are proposed with regard to recorded music consumption, music involvement, consumption and purchase intention (Lacher & Mizerski, 1994; Pucely, Mizerski, & Perrewew, 1998). Hume and Sullivan (2008), who focus on value as a multi-dimensional construct, examine peripheral service quality, show experience quality, and value as separate constructs and predictors of satisfaction in the performing arts context. The



authors propose a 12-item scale and four constructs, reporting that consumers experience satisfaction based on performance attributes of the show and peripheral service aspects. “[V]alue mediates the relationship of show experience quality and peripheral service quality to satisfaction and the direct link of these pathways to satisfaction was not significant” (Hume & Sullivan, 2008: 311). In contrast, Jobst and Boerner (2011) find that peripheral service quality does not play a role in customer satisfaction in opera.

Swanson, Davis, and Zhao (2008) investigate the drivers of attendance at arts performances among spectators at a theatrical production, a comedy troupe performance, and a performance of popular vocal music. They identify six motivators in a review of the arts and sport spectator literature: aesthetic, education, escapism, recreation, self-esteem and social interaction. They utilise a number of segmentation variables for attendees in order to assess the relationship with the motivators: time of attendance, number of years with the performing arts centre, subscribers vs. nonsubscribers, time of planning/purchase (purchase and attendance behaviours), gender, age, annual household income and educational background (demographics). Four motivations (aesthetic, educational, recreational and self-esteem motivations) are significantly associated with times of attending the performing arts centre in the past year and the number of years attending the performing arts centre. In addition, “subscribers are more interested in the art form, education, recreation, and self-esteem than casual attendees” (Swanson, Davis, & Zhao, 2008: 317).

Very little empirical research has been published on audiences for live opera in cinema or theatre in cinema (but see Barker, 2013; Bakhshi, Mateos-Garcia & Throsby, 2010). What is the spectator’s perceived value of the live-performance-in-cinema consumption experience? A live broadcast in cinema combines in various ways “the shared experience of traditional movie-going with at least part of the ‘aura’ of attending a live theatrical performance” (Heyer, 2008: 602). Live opera in cinema is a much more complex cultural offering than a DVD or an audio recording. It “confounds performance, media, and mechanical reproduction theory because in it there is not one ontology of live; it is more than one at once” (Anderson, 2011: 8). As a polyvalent product, live opera and theatre in cinema would be expected to have multiple value propositions - more than one way of appealing to audiences.

### *Using Q Methodology to uncover perceived entertainment value*

Entertainment value is a multi-faceted concept widely used but poorly operationalised; it remains ill-defined and not sufficiently explained theoretically (Bryant & Vorderer, 2006; Carú & Cova, 2003). To date, insufficient effort has been devoted to explaining its nature, its components, influences, and measurement methodology (Cummins, 2005; Dobni, 2007; Gallarza, Gil-Saura, and Holbrook, 2011; Sánchez-Fernández and Iniesta-Bonilla, 2007; Swanson, Davis, & Zhao, 2008). Here, we adopt the “experiential” approach (Korkman, 2006), which has become widely accepted since the early 1980s with the recognition that in most cases, experiential value involves more than functionality or price in perception of consumption value. This is why marketing of experience goods cannot rely on frameworks that emphasize consumers' rational assessment of price and quality of offerings (Hirschman, 1983; Smith & Colgate, 2007).

The present investigation of perceived consumer value concerns subjective views about live

performance in screen-based entertainment, as described by those experiencing opera or theatre live in cinema. The experiential view of the value concept, reinvigorated by Holbrook and Hirschman, is useful with respect to conceptualizing entertainment value as the type of value that a screen-based product or live performance yields to those experiencing these generic forms of entertainment. Accordingly, “entertainment value is (perceived) consumer value, experiential and subjective -- a multi-dimensional concept and construct intrinsic to the entertainment experience” (Vladica, 2012: 84). As a conceptual framework to operationalize and measure entertainment value, we employ Holbrook's (1999) typology of consumer value. Holbrook posits three dimensions of consumer value: self-oriented vs. other-oriented, active vs. reactive, and extrinsic vs. intrinsic. These dimensions yield eight categories of value: efficiency, play, quality, beauty, status, ethics, esteem, and spirituality.<sup>ii</sup> Further and in this context, a fundamental question which needs better answers is: What are effective ways and tools to uncover and capture individual and subjective opinions about entertainment experiences and the perceived value delivered by these experiences?

We use Q Methodology to identify and describe audiences' subjective experiences of attending a cultural performance broadcast live in a cinema theatre. Q Methodology requires subjects to rank-order items to best represent their point of view. Q Methodology provides a systematic, rigorous means of objectively describing human subjectivity through the combination of qualitative and quantitative analysis (Brown 1996, 1980; McKeown & Thomas, 1988; Watts & Stenner, 2012). Once patterns of audience response are uncovered with Q Methodology, they can be linked to prevailing theory, or they can stimulate theory development, while concurrently serving as reference points for further qualitative or quantitative investigation of the audience (Davis & Michelle, 2011). Q Methodology has been used in many social science disciplines, notably political science, marketing, psychology, sociology, public policy, marketing, and health care research. However, use of Q Methodology in audience research is relatively infrequent (see Davis & Michelle, 2011, and Michelle & Davis, 2012).

In Q Methodology, a 'concourse' consists of a comprehensive set of statements and phrases about the phenomenon under investigation. In the present case, the concourse refers to all the things that can be said about the subjective experience and perceived value of attending a live cultural performance. We collected statements from two sources. First, sixteen semi-structured interviews were conducted with respondents invited directly by the researchers. Participants were asked to share their thoughts and feelings about the overall experience of one particular cultural performance they had attended recently. The interviews, conducted in English, were up to one hour long. The concourse includes things people have said about such live cultural performances as the *Northern Sea Jazz Festival* in Rotterdam, a *U2* live concert in Barcelona, a *Cirque du Soleil* circus performance in Las Vegas, a contemporary opera in Innsbruck, *Mary Poppins* on Broadway in New York, and *Don Pasquale* live in HD cinema from the Met in New York. Second, statements and phrases relating specifically to opera and theatre were collected from comments posted online by those who visited, from January to September of 2010, accounts created on Facebook and Twitter by the National Theatre in London and The Metropolitan Opera in New York. Statements were also collected from other opera- and theatre-related websites: Madison Opera, Well Sung, Opera Cast, Living at the Opera, Opera Today, I Hate Opera, and Opera Critic.

A rich and diverse concourse was generated in this way, consisting of several hundred statements and phrases. A set of 125 statements was selected and refined. Ninety-seven were distributed for feedback to three independent reviewers, colleagues of the researchers, and fifteen international students enrolled in a graduate management course at the University of Innsbruck. They were encouraged to remember their thoughts and feelings about one particular live performance, the reasons they attended, and the kind of experience they had. They were asked to rate how much they agreed or disagreed with the statement, and to comment on their relevance and clarity. They were also encouraged to offer suggestions on how to improve the statements. Five individuals provided such feedback and comments. Some statements were eliminated because: a) their meanings were too close, b) they were vague, ambiguous or too general, c) they were too specific to a group of respondents or a particular performance or context, or d) there was consensus among the five respondents, indicating that the statements/phrases were not discriminating enough.

The Q sample (the collections of items to be sorted) is extracted from the concourse. Our Q sample consists of forty statements selected from the concourse. The design of the Q sample follows a structured, deductive, balanced, Fisherian design (see McKeown & Thomas, 1988). Holbrook's value framework (Holbrook, 1999) was used to structure the Q sample consisting of five statements for each of the eight types of consumer value.

The Q sample was translated into German and Romanian. These versions were refined in November of 2010 and used until the completion of the study. Four colleagues from the University of Innsbruck assisted with the German translation and offered additional feedback on the two samples. One author, whose native language is Romanian, translated the English to Romanian. The English version was tested and refined during a pilot run and used until the completion of the data collection for the study, in April of 2011.

Participants were recruited from nine performances — six cinema broadcasts from The Metropolitan Opera in New York, and three from the National Theatre in London. The two organizations broadcast their performances live from New York and London, in HD, in selected cinemas worldwide. Participants were recruited between October 2010 and March 2011 at three locations: 1) the Metropol Multiplex in Innsbruck, Austria; 2) the Light Cinema in Bucharest, Romania; and 3) the Scotiabank Theatre Cineplex in Toronto, Canada. According to box-office numbers, 300 to 400 individuals are usually present at a screening; the number can be even larger, according to the performance broadcast and the allocation of the particular hall for screening at the cinema multiplex. Invitation letters in German, English or Romanian were distributed before the start of each performance. Twenty-five individuals completed their Q sorts online using the study's website.

Respondents were directed to a website created for the study, where the sorting process is enabled on screen with FlashQ. Respondents were instructed to think of the live cinema broadcast they attended, to remember their thoughts and feelings, and the reasons for attending, and then to sort statements into three piles: generally agree, generally disagree, and a third category in the middle representing neutral, indifferent, or don't know. They are then asked to select the two statements with which they most agree and the two with which they most disagree and place them respectively on the right and left ends of a nine point scale. Respondents

continue to select remaining statements according to degree of agreement or disagreement, rank-ordering them in a forced distribution as shown below in Table 1. After sorting the statements, respondents are asked to briefly explain why they strongly agree and strongly disagree with the statements they have selected. Respondents are also asked to provide information about their socio-demographic characteristic and their attendance at live cultural performances.

Table 1: distribution of statements on the Q sorting sheet

score	-4	-3	-2	-1	0	1	2	3	4
number of statements	2	3	4	7	8	7	4	3	2
	most disagree				neutral				most agree

The analysis below describes the viewpoints of 25 respondents who attended a broadcast in a cinema in HD, with performances by The Met (18 respondents) or the National Theatre (7 respondents).

#### ***Viewpoints and perceived entertainment value of The Met: Live in HD and NTLive***

A 4-factor solution fits the data best since it accounts for twenty-two of the twenty-five Q sorts. We characterize the four viewpoints regarding consumption value as: *avant garde* (A), *worthwhile* (B), *grateful consumer* (C), and *classical* (D). Viewpoints are graphically represented according to their Holbrookian value categories in Figure 1. Scores of every viewpoint are provided for each statement in Table 2.

It is useful to first point out what kinds of perceived entertainment value are shared across all four viewpoints. All respondents considered the performance they viewed as “attractive”, “agreeable”, “wonderful”, etc. (statement 18), indicating a positive experience for all respondents. All four groups firmly rejected the idea that consumption of live opera or theatre is motivated by a desire to enhance one’s social standing (statement 36), or that it is “culturally cool to go to this performance, because it was what everybody around was doing” (statement 37), contradicting much sociological analysis about taste fields and demonstrating a preference to regard themselves as self-directed individuals who are not affected by cultural fads or social pressure:

I feel no need to do anything to try and feel or appear cool (Canadian female respondent, age 45 to 54, performing arts administration, high school diploma).

I am not motivated by what is cool and connecting to the larger crowd (Canadian female respondent, age 55 to 64, office administrative job, undergraduate degree).

They all also rejected the idea that consumption of a cultural offering in a movie theatre is a “cold experience” (statement 15), suggesting that value is derived when the consumption experience takes place in a special venue outside the home in a social setting. This interpretation is strengthened by the rejection by all four audience groups of the idea the performance would be

more enjoyable if consumed at home on DVD (statement 3).

Four respondents represent viewpoint A, which we characterize the *avant garde* viewpoint. The defining and distinguishing statement for this group concerns an enhanced feeling of esteem: “It just felt special to see broadcast in cinema what only a few people are able to see; whatever the actors were doing on stage, it seemed like they did it just for you” (33, +4, esteem as a source of entertainment value).<sup>iii</sup> They reported an increase in personal satisfaction deriving from belonging to a select few who can witness a new cultural phenomenon:

I attended not only for an emotional experience, but also to be part of a cultural phenomenon (38, +3; status as a source of entertainment value).

The cultural phenomenon in question is high-definition live performance of a high cultural offering, broadcast on a big screen. *Avant garde* audience members considered that these live broadcasts are a legitimate cultural form, “an art form in its own right”:

I witnessed an excellent performance that defined opera/theatre broadcast in cinema as an art form in its own right (12, +3; excellence as a source of entertainment value).

*Avant garde* audience members strongly disagreed with the suggestion that live broadcast in cinema is a diminished version of a live unmediated performance:

I missed being in a theatre, where there is always the excitement of hearing the voices and watching the three-dimension action live. These are diluted when beamed from afar (20, -3; aesthetics as a source of entertainment value).

*Avant garde* audience members expressed enthusiasm about the high-quality performance and the amazing experience provided by opera and theatre watched at the cinema:

Seeing opera/theatre in cinema, broadcast in HD, set very high standards and delivered a truly amazing experience (13, +4; excellence as a source of entertainment value).

Said one respondent who expressed viewpoint A:

It was exciting. The camera work was unbelievable. I felt I was in the best seat in the house...the performance was wonderful. I don't know how else I would have the opportunity to see Netrebko, Alagno, Garanca, Fleming...the list goes on (American female respondent, age 45 to 54, public sector, graduate degree).

In summary, *avant garde* audience members (viewpoint A) are consumers who not only appreciated the quality and intensity of the consumption experience, but also perceived value in being part of the leading edge of cultural consumption. Out of the four respondents sharing this viewpoint, three attended live opera in cinema.

A second group of viewers disagreed that the value of the experience comes from being *avant-garde* consumers. Instead, for these audience members, perceived entertainment value resides in the performance which is deemed to be one of excellence and aesthetic beauty, although it

happened to take place on a screen. We call this segment the *classical* audience because they value conventional operatic or theatrical excellence (viewpoint D):

I was spectator to a classic production. You know Metropolitan Opera in New York, or National Theatre in London is going to guarantee a good performance (11, +3; excellence as a source of entertainment value).

The three respondents sharing viewpoint D attended a live opera in cinema broadcast, and were thrilled by the amazing experience of a classic production on a big cinema screen,

It is close to a real life experience and sometimes you feel like participating (Romanian female respondent, age 45 to 54, specialised professional, undergraduate degree).

I was thrilled with the combination of acting, music, and lighting, all mixed together in an excellent show on a cinema screen (17, +4; aesthetics as a source of entertainment value).

The experience of liveness was vivid for *classical* audience members (Viewpoint D), who were the only ones to strongly agree with a statement reporting parasocial involvement with the on-screen audience by sharing applause:

When the audience applauded on the screen, with the help of the HD broadcast I felt I became part of that group, and found myself applauding along with them (31, +3).

To summarize, for *classical* audience members (Viewpoint D), a live opera performance on a big cinema screen provided an immersive experience that was moving enough, and lifelike enough, to induce behaviour that would have been appropriate in a live theatre.

Viewpoint B, which we call *worthwhile* audience members, was expressed by nine respondents (of whom seven watched live opera in cinema). These viewers emphasized that the quality of the experience was worthwhile in terms of the expenditure of time and money required to consume it. A cultural performance offered in a movie theatre saves money and travel time; it is seen as an affordable way to attend world-class opera and theatre. The nine respondents strongly agreed with the following statements:

I was delighted about being able to see world-class opera/theatre at an affordable price (2, +4; efficiency as a source of entertainment value).

This HD broadcast in cinema gave me value for the time (and money) I spent on it (4, +3; efficiency as a source of entertainment value).

Respondents expressing Viewpoint B (*worthwhile*) were pleased to be able to watch and listen to The Met: Live in HD or NTLive at a local cinema, a cultural performance made affordable with the help of technology:

I enjoy watching so many productions from the Met without having to go to NYC (Canadian female respondents, 55 to 64 years old, social worker, graduate studies).

As a senior on a fixed income who loves theatre and opera, I try to extend my budget to take in as many and varied artistic performances as my budget will allow (Canadian female respondents, 65 to 74 years old, HR professional in creative sector, undergraduate studies).

Opportunity to see 'world-class' performances here in Toronto without the cost of long-distance travel. Both NT Live and Met Opera deliver amazing theatrical experiences and have the highest production standards (Canadian female respondent, age 65 to 74, retired from creative sector, undergraduate studies).

Like the *avant garde* audience members, (Viewpoint A), those who expressed the *worthwhile* viewpoint readily agreed that live broadcast in cinema is a legitimate form of art:

I witnessed an excellent performance that defined opera/theatre broadcast in cinema as an art form in its own right (12, +4; excellence as a source of entertainment value).

Their comments about excellence, indicating the nature of perceived entertainment value, concern not only the opera/theatre performance itself but also the service elements such as the technical platform and social context of the venue. Respondents in the *worthwhile* group suggested that the live cinema type of cultural performance provided a compelling cinematic experience and also a stronger cultural performance:

I love cinema more than theatre, and don't like opera at all, so it was the sheer cinematic nature of the experience which made this so pleasurable for me (British male respondent, age 55 to 64, public sector, graduate degree).

The new medium has raised the bar for acting standards in opera. No longer can the stars "park and bark". The intimate close-ups means that the highest standards of acting are required (Canadian male respondent, age 55 to 64, executive in private sector, undergraduate studies).

Theatre/opera in HD is another form of culture, and one I don't get enough of. I mean, play-acting was born in Europe. What better place to watch and enjoy and learn? To support the arts means to enrich your life experiences with something different (Canadian female respondent, age 45 to 54, office staff, undergraduate studies).

Opera stage production and the behind the scenes are what really appeal to me about the Live at The Met series. The pricing certainly allows many people to attend what otherwise is rather pricey for most, and doesn't allow the behind the scenes opportunities (Canadian female respondent, age 55 to 64, clerical job, undergraduate studies).

In summary, holders of the viewpoint (B) considered that all in all, the experience was worth the time and money it cost.

The fourth viewpoint (C), *grateful* audience members, is shared by six respondents. This

viewpoint emphasized that the experience of live in cinema was being extended to new audiences, who happen to be “people like me” - ordinary people who would not have access to opera and theatre performances of this level without digital broadcasting.

The case of HD-live broadcast in cinema is an example how media can support the role of culture, that is to offer something that is educational and useful to people like me (25, +3; ethics as a source of entertainment value).

*Grateful* audience members (Viewpoint C) attended the performance in part to show support for the digitally expanded cultural form, which they consider to be a “good cause”:

I attend the HD broadcast in cinema because I consider it a great initiative to promote cultural performances, and an exciting expansion for opera and theatre (23, +4; ethics as a source of entertainment value).

*Grateful* audience members supported the initiative to distribute opera and theatre in a cinema close to home, since this is a way for more people to access world-class cultural performances:

For me, live performance is often a very thrilling and rewarding experience. These broadcasts bring live performance to a wider audience and allow more people to discover the beauty of live theatre (Canadian female respondent, age 25 to 34, creative sector, undergraduate studies).

Usually you do not have the chance to see such wonderful actors and staging. Operas in HD are the chance to see an opera directly in the MET, also when you are not there. For me that is something big (German female respondent, age 55 to 64, retired, high-school diploma).

This was a great opportunity to show support for something that is diverse and so different from just television or movies, and to allow me to enjoy artists that I may never see here in Toronto (Canadian female respondent, age 45 to 54, clerical worker, undergraduate studies).

At the same time, *grateful* audience members believed that because they are not experiencing an *unmediated* live performance, their experience was “incomplete”:

It was rewarding and exciting to see opera/theatre broadcasted in cinema, but only in a live performance I can have a complete experience (14, +3; entertainment value as excellence)

Even believing that their experience was incomplete, *grateful* consumers found value in the quality of the consumption experience, which they agreed was thrilling, wonderful, and magical, but more enchanting than spiritually uplifting:

It was an experience that gave me a sense of wonder and of magic that I shall not soon forget (26, +3; spirituality as a source of value).



I was thrilled with the combination of acting, music, and lighting, all mixed together in an excellent show on a big cinema screen (17, +4; aesthetics as a source of entertainment value).

To summarize, *grateful* audience members considered that it is good to promote the expansion of live opera and theatre through cinema, and that live broadcast in cinema provides a thrilling, wonderful, and magical experience, even if broadcasts are inferior to unmediated performances. Out of the six respondents sharing this viewpoint, four attended live opera in cinema.

We also collected socio-demographic data to describe the respondents. Results show that the profile of the group of respondents who attended live opera in cinema is generally consistent with the profile of established opera audiences. They are mature individuals, over 60% of them 45 years or older. Regarding occupational background, live broadcasts in cinema appeals to a range of well educated (almost all have university degrees), higher income white-collar workers. They are, apparently, familiar with and loyal to this type of performance, since most attended more than twice a year, and roughly half attended more than five times, and they make the decision to attend early and thus buy tickets or season tickets well in advance.<sup>iv</sup>

## **Conclusions**

In this paper we measured the perceived entertainment value of an innovative cultural product, a live broadcast of opera or theatrical plays exhibited in distant movie theatres. The success of *The Met: Live in HD* and our results suggest that digital cinema technologies open the door to development of new audiences for live performances, and also open the door to development of new value propositions to attract audiences. While responses similar to Viewpoints B (*worthwhile*) and C (*grateful*) have been anticipated to some extent in discussions about live opera in the cinema, Viewpoints A (*avant garde*) and D (*classical*) have not been identified as potential audience value perceptions.

Research reported here is among the first empirical examinations of the perceived entertainment value of live broadcasts (opera/theatre) in cinema theatres. Our research shows that most current consumers of live opera/theatre in cinema are either loyal admirers of the artists, or devoted attendees of opera and theatre, and were recruited to the art form before the inception of live cinema broadcasts. But even among this relatively homogenous audience of opera/theatre-goers, important differences exist regarding perception of value. As long as perceived excellence, wonder, and beauty are assured, other factors come into play.

The novelty of live broadcast in cinema is an important draw. One audience segment, *avant garde*, found value in participating in the emergence of a new art form. Another segment, *grateful* audience members, appreciated that a high-status art form is being offered to “people like me” who otherwise might not have the opportunity to consume opera and theatre as much, or as well.

Those expressing the *grateful* view considered that the experience of live theatre or opera in cinema, while entertaining and rewarding, was not as “complete” as the experience of a live unmediated performance. This is the only audience segment for which the lower degree of

perceived presence seems to have affected the perception of value of live opera or theatre in cinema. One segment, *worthwhile*, appreciated the lowered cost of consuming a high quality cultural performance offered live in cinema, in terms of expenditures of time and money. Finally, all respondents rejected the idea that they consume opera and theatre in cinema for purposes of social status, as well as the idea that consumption of such cultural performance at home alone might be preferable to consumption socially in a movie theatre.

The general appreciation expressed by respondents from all four viewpoints regarding the cinematic-spectacular quality of the offering marks a departure from accounts of unmediated operatic or theatrical consumption experiences, in which the visual spectacle complements but does not surpass the primary experience of listening to a live performance in a particular social environment. Considering the predominance of the visual spectacle and cinematic effects in live opera and theatre in cinema, it seems likely that audiences for these offerings will increasingly expect live performances to employ conventions, innovations, and aesthetics drawn from the world of cinema, such that opera composers and theatrical producers will need to take these cinematic conventions into account. Also, given the attractiveness of live opera or theatre in movies theatres and the ease with which the offering can be made available in many places, the issue arises of how local, less celebrated opera or theatre companies should respond to this apparent threat to their audience base.<sup>v</sup>

Q Methodology helps to gain useful insights into cultural consumers' tastes and desires, allowing us to understand the various ways that consumers value a particular cultural experience. Beyond scholarly research, Q methodology can be employed for the study of different kinds of entertainment goods and services, with potential for use in commercially relevant research and innovative managerial practice (Vladica, 2012). The range of different viewpoints identified for The Met: Live in HD and NTLive can enrich market intelligence with empirically obtained insight, and consequently complement understandings gained from prevailing approaches to audience measurement. Ultimately, an accurate understanding of the nature, types, and sources of entertainment value, as apprehended via audience motives and experiences, can improve the likelihood of successful product innovation. Further, a better understanding of consumption experiences and perceived value propositions can inform the selection of ancillary services available at the venue before, during and after a performance, yielding increased customer satisfaction and higher revenue. Finally, Q Methodology does not require large samples of respondents. Q research can be executed relatively quickly, and it can produce market intelligence at reasonable cost while still offering rich qualitative insights.

### ***Acknowledgements***

The investigation of live cultural performances was funded in part through Ryerson University's International Research Excellence Fund (RIREF). Assistance in distributing invitations at the venues where *The Met: Live in HD* and *NT Live* were broadcast in cinema, was facilitated by Lydia Gilmour and Matt DeVuono at Cineplex Entertainment in Toronto, Mihaela Ciceu at Liberty Centre Bucharest, and Christian Hofer at Metropol Kino in Innsbruck. Special assistance in Innsbruck was provided by Dr. Dagmar Abfalter and the faculty team in the Strategic Management and Leadership Department at the University of Innsbruck.

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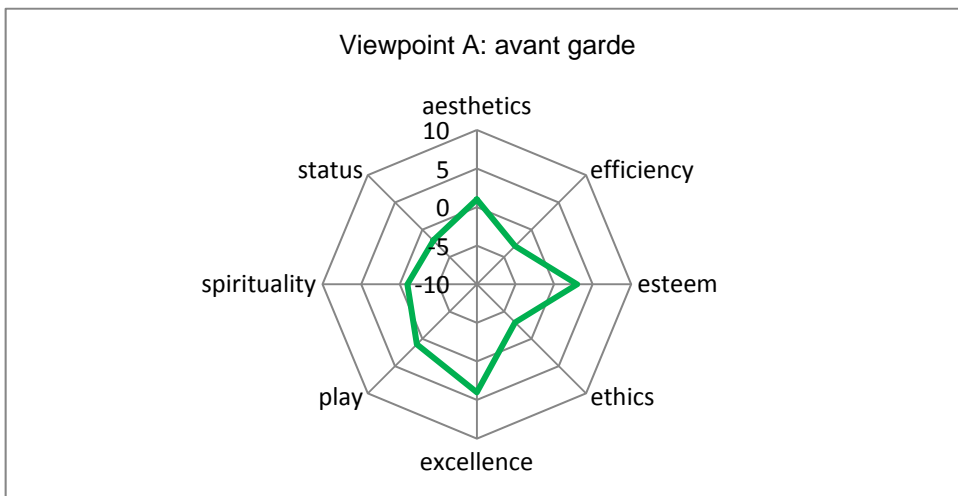
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Figure 1: 4-factor solution for opera/theatre live in cinema: defining Q sorts and types of entertainment value

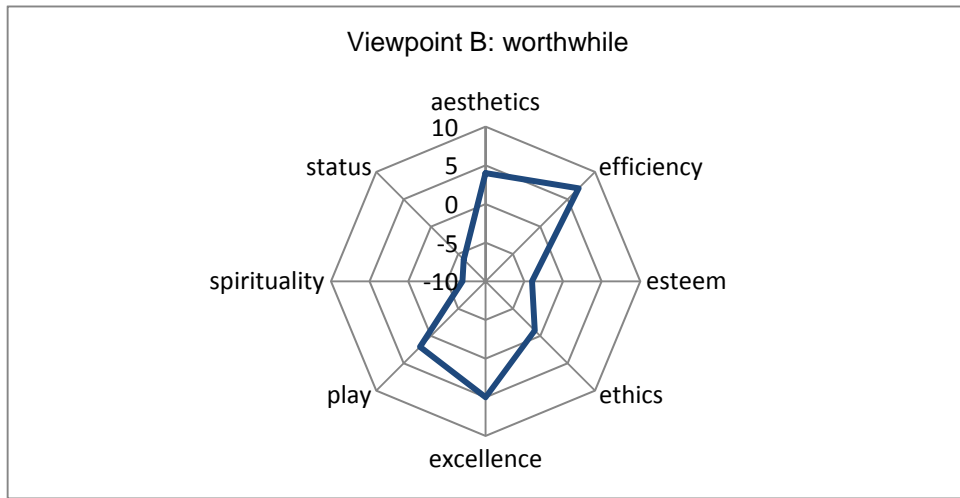
Viewpoint A: avant-garde audience



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Factor A for 11dissertationLiveCinemaQ.
=====
-4  -3  -2  -1  0  1  2  3  4
-----
15   3   5   1   9   2   4  12  13
36  20  22   8  10   6  25  18  33
    21  28  24  14   7  26  38
        37  29  17  11  40
            31  19  16
                34  27  23
                    39  30  32
                        35
    
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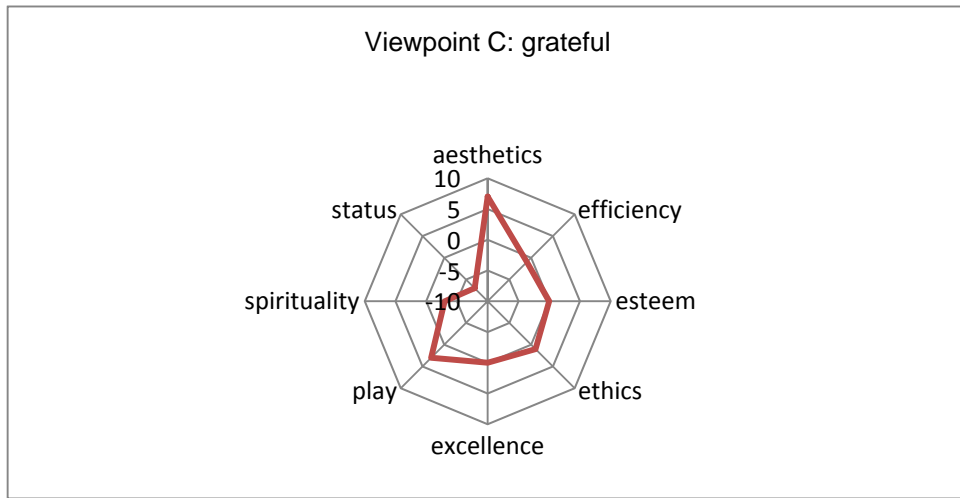
Viewpoint B: worthwhile audience members



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=====
Factor B for 11dissertationLiveCinemaQ
=====
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-----
30 3 20 10 7 5 1 4 2
36 15 24 14 8 9 6 13 12
   37 28 21 19 16 11 17
     34 27 22 23 18
       32 26 25
         35 29 39
           38 31 40
             33
  
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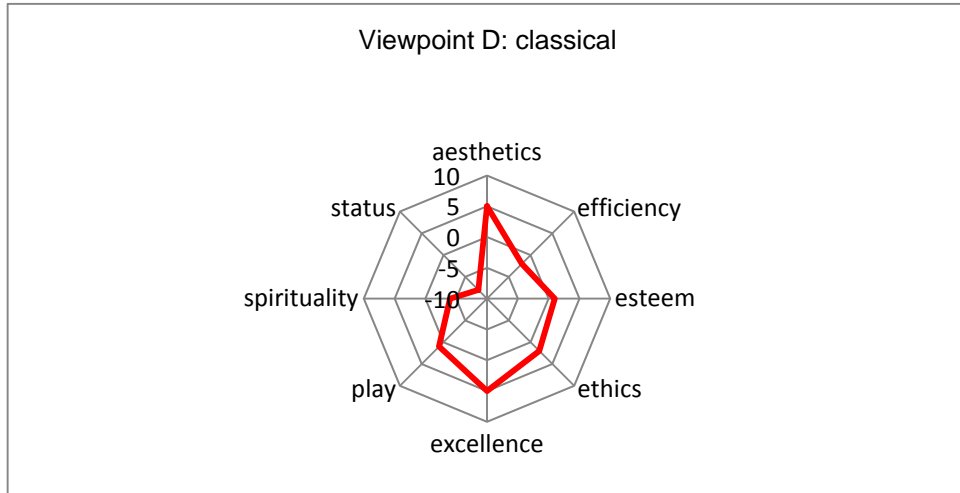
Viewpoint C: grateful audience members



-----  
 Factor C for 11dissertationLiveCinemaQ  
 =====

	-4	-3	-2	-1	0	1	2	3	4
22	15	3	5	4	1	6	14	17	
36	27	21	8	13	2	9	25	23	
		37	29	10	24	7	18	26	
			34	12	30	11	35		
				20	31	16			
				28	32	19			
				38	33	40			
					39				

Factor D: classical audience members



```

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Factor D for 11dissertationLiveCinemaQ
-----
-4 -3 -2 -1 0 1 2 3 4
15 3 5 19 1 4 2 11 13
36 37 22 20 6 10 18 31 17
   39 33 26 7 12 25 38
     34 27 8 14 35
       28 9 16
         30 24 21
           40 29 23
             32
    
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Table 2: Q sample and scores for each of the four viewpoints

Statements	Viewpoints A	B	C	D
	-----	-----	-----	-----
<b><u>efficiency</u></b>				
1.I have to say it was pretty cool, for the same ticket price, to see backstage action and interviews with the performers!	-1	2	1	0
2.I was delighted about being able to see world-class opera/theatre at an affordable price.	1	4	1	2
3.I'd rather stay home with my DVD collection, perhaps with a glass of wine, watch and listen to the performance when I want, for as long as I want.	-3	-3	-2	-3
4.This HD broadcast in cinema gave me value for the time (and money) I spent on it.	2	3	0	1
5.I attended opera/theatre broadcasted in cinema because I just love the idea to sit down, have a snack and a drink, watch the acting, and hear the beautiful voices.	-2	1	-1	-2
<b><u>play</u></b>				
6.I was attracted by the spirit of the experience. I had fun, smiled, had a good time, and fully enjoyed the moment.	1	2	2	0
7.The thrill of the unexpected, the suspense, the surprises, the playfulness - that's what captivates me about the artists I do want to see.	1	0	1	0
8.It was a playful performance, the opportunity I was looking for to have some time to relax, see what the artists had for us, have fun and enjoy it.	-1	0	-1	0
9.I got what I was looking for: a humorous and engaging opera/theatre experience when I didn't notice time passing by.	0	1	2	0
10.I considered this opera/theatre performance broadcasted in cinema as a special occasion, including preparing and dressing up, getting into the mood, and then smiling and applauding with the crowd.	0	-1	-1	1
<b><u>excellence</u></b>				
11.I was spectator to a classic production. You know Metropolitan Opera in New York, or National Theatre in London is going to guarantee a good performance.	1	2	1	3
12.I witnessed an excellent performance that defined opera/theatre broadcasted in cinema as an art form in its own right.	3	4	-1	1
13.Seeing opera/theatre in cinema, broadcast in HD, set very high standards and delivered a truly amazing experience.	4	3	0	4

<b>Statements</b>	<b>Viewpoints</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
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14.It was rewarding and exciting to see opera/theatre broadcasted in cinema, but only in a live performance I can have a complete experience.	0	-1	3	1	
15.I had this cold experience, like being sort of disconnected from the artists.	-4	-3	-3	-4	
<b><u>aesthetics</u></b>					
16.Opera/theatre broadcasted in cinema was like being together with the artists, taking me from the audience seat and entering into their musical, theatrical world.	1	1	1	1	
17.I was thrilled with the combination of acting, music, and lighting, all mixed together in an excellent show on a big cinema screen.	0	3	4	4	
18.I thought it was an attractive performance offered on the screen: wonderful production, beautiful staging, the diversity of costumes, and agreeable music.	3	2	2	2	
19.It was such a beautiful live performance, I know I would smile and feel good, but I wouldn't know how to explain why.	0	0	1	-1	
20.I missed being in a theatre, where there is always the excitement of hearing the voices and watching the three-dimensions action live. These are diluted when beamed from afar.	-3	-2	-1	-1	
<b><u>ethics</u></b>					
21.I bought tickets and attend opera/theatre broadcasted in cinema to support these art forms, to limit the use of public funds for them, and so leave more for health or education.	-3	-1	-2	1	
22.This performance, broadcasted in cinema, did not raise any social, nor ethical issue. It did not make me want to support a good cause in this sense.	-2	0	-4	-2	
23.I attended the HD broadcast in cinema because I consider it a great initiative to promote cultural performances, and an exciting expansion for opera and theatre.	1	1	4	1	
24.I thought it was really important to attend opera/theatre in cinema with the community of fans, to show support to our far away artists, and send a message to them: "Hey, we're all still here for you!"	-1	-2	0	0	
25.The case of HD-live broadcast in cinema is an example how media can support the role of culture, that is to offer something that is educational and useful to people like me.	2	1	3	2	

<b>Statements</b>	<b>Viewpoints</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
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<u>spirituality</u>					
26.It was an experience that gave me a sense of wonder and of magic that I shall not soon forget.	2	0	3	-1	
27.I enjoyed a sensation of peace and spiritual emotion; it felt like I was alone in the world and out of everything.	0	-1	-3	-1	
28.Live opera/theatre in cinema, with so many people around, is not a place where I could sense to connect spiritually with God, like I do when I am alone in my prayers.	-2	-2	-1	-1	
29.It was one of those performances that took me into their world, but not into supernatural, nor magical.	-1	0	-2	0	
30.At times, during this live performance I experienced marvel and the holiness, as I felt elevated and in touch with something bigger.	0	-4	0	-1	
<u>esteem</u>					
31.When the audience applauded on the screen, with the help of the HD broadcast I felt I became part of that group, and found myself applauding along with them.	-1	0	0	3	
32.It was a personal experience not many can have; I witnessed a unique and worthy performance that I felt it was delivered only to me.	1	-1	0	0	
33.It just felt special to see broadcasted in cinema what only a few people are able to see, whatever the actors were doing on stage, it seemed like they did it just for you.	4	0	0	-2	
34.I feel now more cultured, because I actually attended an artistic performance, not just watched a movie or a TV show with my friends.	-1	-2	-2	-2	
35.After seeing it broadcast in cinema, I would like to have this unique performance in my personal collection, recorded in HD on media such as Blue-ray, or DVD.	0	-1	2	2	
<u>status</u>					
36.I attended because I thought it may be something sophisticated that can help me fit in, can give me that cool look, and a smart reputation.	-4	-4	-4	-4	
37.I can now say it was culturally cool to go to this performance, because it was what everybody around was doing.	-2	-3	-3	-3	
38.I attended not only for an emotional experience, but also to be part of a cultural phenomenon.	3	-1	-1	3	
39.For me, it was a social event. Sharing gives you a common ground with your family or friends, and I liked that.	-1	1	0	-3	
40.I really liked the social feeling and the sense of community that I got around so many likeminded people.	2	1	1	-1	



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### *Endnotes*

<sup>i</sup> E-cinema refers to the digital or electronic projection of films or events. It includes d-cinema, which refers to the digital projection of films or live broadcast of events at levels of visual resolution on a par with 35mm analogue projection systems (DOC, 2004).

<sup>ii</sup> We have also applied the Holbrook value framework to assess customer perceived value of a computer-animated documentary (Davis & Vladica, 2010). For a discussion of the eight categories of value see Holbrook (1999).

<sup>iii</sup> In the notation system we use here, the first number represents the number of the statement in the Q sample (see Figure 3) and the second number represents the score accorded to the statement by the viewpoint in question. A negative score indicates disagreement.

<sup>iv</sup> Bakhshi, Mateos-Garcia and Throsby (2010), in their survey of NT Live audiences, found that live theatre in cinema was attracting audiences with lower incomes than existing National Theatre audiences.

<sup>v</sup> Van Eeden (2011) finds that in Vancouver, broadcasts of The Met: Live in HD establish an audience for live opera in cinema, but not necessarily for live unmediated opera. Thus, while audiences for local opera houses are not diminished by live opera in cinema, neither are they augmented.