

# Is There a Comic Book Industry?

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## **Abstract:**

*In an essay published in this journal's first volume, Jonathan Sterne provocatively argued that there is no music industry. This article uses the American comic book industry to further suggest some limitations to taking supposedly discrete industries as objects of analysis. As a label, "the American comic book industry" conceals a great deal of internal diversity, some of which can be recovered through mapping methods and by examining available sales data. On closer examination, it is not American, does not principally produce "comic books," and may not even be an industry.*

**Keywords:** Comic Books, Graphic Novels, Publishing, Maps, Sales

"Breaking into the comic book industry" is an idiom conventionally used to mean establishing a career in comics, usually with reference to creative occupations. A Google search for the term returns approximately 26,600 hits. Some are from creators' biographical statements (e.g., "Since breaking into the comics industry . . ."), but many are either questions from or advice aimed at aspiring creative professionals. Much of this discourse emphasizes the difficulty of "breaking in," although it typically assumes a particular kind of career in comics—that is, as a writer or artist freelancing with a relatively professionalized publisher on a work-for-hire basis—with a particular set of gatekeepers and challenges. Like many comic book fans, I also once dreamed of breaking in. However, my idea of what this would actually look like was still profoundly shaped by what Charles Hatfield calls the Myth of the Marvel Bullpen, the idea that comic books are made by a group of like-minded peers working in close collaboration in their publisher's offices. But Hatfield calls this a myth for a reason.<sup>2</sup> I did not understand that the Marvel Bullpen never really existed in quite the form depicted in promotional paratexts such as "Stan's Soapbox," nor could I have known that almost nine in ten comics creators work from their own homes, typically in isolation. (This figure is drawn from a survey of 570 creators of English-language comics I conducted in 2013–14.) Indeed,

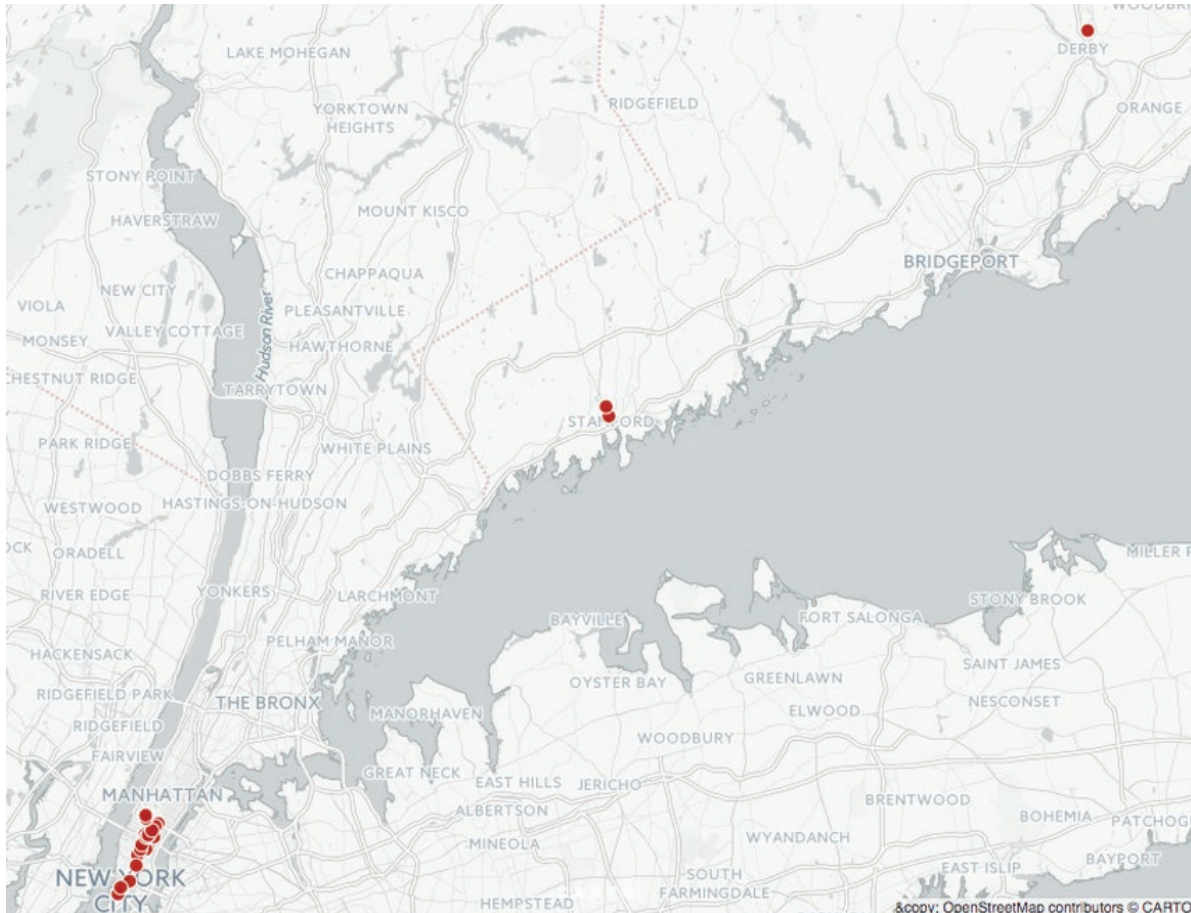
the “breaking in” discourse creates a false impression of coherence and solidity by figuring the comic book industry as a *place* one *enters*. Yet, compared with my childhood fantasy at least, it seems that the American comic book industry has no “there” there.

In an essay published in this journal’s first volume, Jonathan Sterne argued that the “music industry” invoked by both laypeople and scholars “is an incredibly limited way to understand how media industries and music interact.”<sup>3</sup> Simply put, the *music* industry is not synonymous with the *record* industry. Rather, music is produced by “a polymorphous set of relations among radically different industries and concerns . . . . There is no ‘music industry’. There are many industries with many relationships to music.”<sup>4</sup> Manufacturers of instruments and audio equipment, sheet music publishers, and concert promoters (among others) all seek to extract value from their engagement with music. Neglecting this fundamental fact means we profoundly misunderstand how and by whom music—even narrowly defined as commodity musical recordings—is produced. Much the same could be said of the field of comics, where comic book publishing should not be mistaken for the comic book industry. Printing, distribution, and retail are comic book industries, too—to say nothing of the industries that produce film and television, video games, and licensed merchandise based on intellectual property derived from comic books, or the manufacturers of art supplies and developers of computer software used in their production.

In this article, however, I want to push Sterne’s point the other direction, exploring the internal diversity that destabilizes any given notion of an “industry,” for even the comic book publishing industry contains multitudes. I begin with an exploratory analysis, mapping the locations of about one hundred comic book and graphic novel publishers. This exercise reveals something of publishers’ orientations to other cultural industries—to a certain extent, their self-conception as publishers of *characters* or *books*, respectively, is borne out in where they locate their businesses. To some extent, this replicates a long-standing distinction between “mainstream” and “independent” or “alternative” comics. Looking more closely at 2016 sales data for comic books and graphic novels, however, we find that these labels do not mean quite what we take them for. Ultimately, I argue that the comic book “industry” teaches us to be wary of that term. It is an artifact of a mode of analysis, not a pre-given object, and we must be careful about assuming where one industry ends and another starts.

## Which Comic Book Industry?

The American comic book begins in the 1930s as the product of two existing publishing industries, newspapers and the pulps.<sup>5</sup> Publishers had been printing collections of popular newspaper comic strips but soon realized they could make more money commissioning original content rather than paying hefty licensing fees to the newspaper syndicates.<sup>6</sup> Theoretically, the publishers creating this new cultural industry could have been located anywhere, but they weren’t. Most of the comic book publishers active during the 1950s were based in New York City (Figure 1). On one hand, this seems like a textbook example of an industrial cluster. At a time when production methods were entirely analog, publishers relied on a localized population of freelance creatives, as well as content “packaging” shops.<sup>7</sup> As Gordon suggests, creatives’ physical presence enabled editorial control of the production process.<sup>8</sup> Indeed, several



**Figure 1.** Comic book publishers (1950s).

Note. Locations of comic book publishers active in 1950s. Comic book production is centered in New York City. Addresses originally compiled by Bart Beaty. The full data set is available online (<http://dx.doi.org/10.5683/SP/3NGFZY>).

publishers' offices were within walking distance of Grand Central Station, meaning freelancers could easily take their portfolios around from publisher to publisher and, once a job was secured, come in for meetings with editors as necessary. They could also conceivably find employment in cognate fields such as commercial illustration or advertising. But, on the other hand, New York City is also symbolically charged, signaling the alignment of the early comics industry with the publishing industries and (much more weakly) the world of arts and letters in general. While never entirely centralized in the way suggested by the Myth of the Marvel Bullpen, comic book production had clear physical boundaries in this period.

The complex spatiality of comic publishing today is perhaps best summed up by a response on First Second Books' FAQ page (<https://us.macmillan.com/firstsecond/about/faq>) to the question, "Where is :01?":

The offices are in New York City, in the Flatiron Building where Fifth Avenue crosses Broadway, at 23rd Street. To be precise. But really, :01 comes to you from all over the world, since its creators are scattered all around America, all over Europe, Asia and Africa. So far, no one is making graphic novels for us in Antarctica, although we haven't checked the submissions pile today.

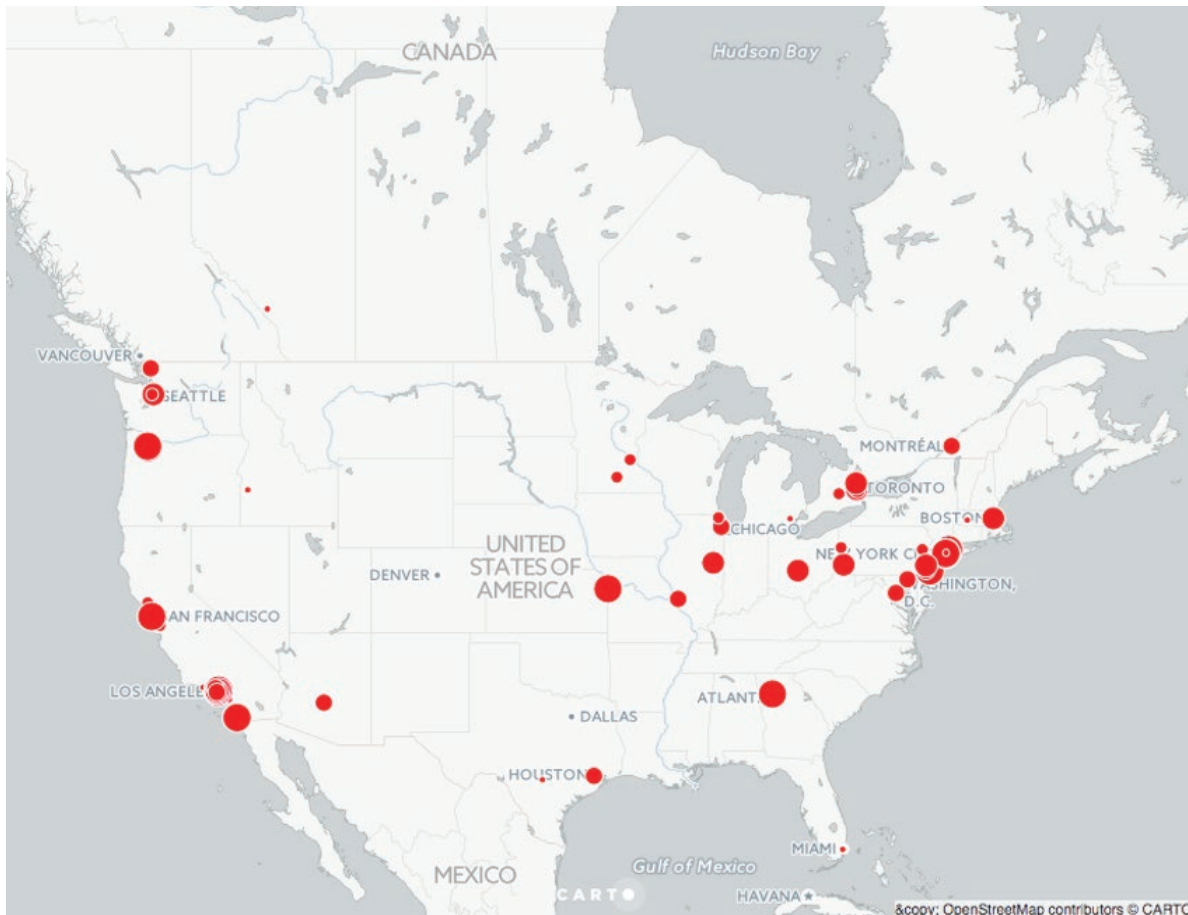
This answer encapsulates a common narrative about the deterritorialization of comics production. Not only does First Second—an imprint of Macmillan and a major publisher of young-adult graphic novels—maintain a relatively ambitious translation program for foreign comics, but, like many publishers, it can and does take advantage of a global market in creative labor:

By exploiting the possibilities of the current generation of microprocessors, of increasingly powerful small computers, of electronic communication and data transmission via the web and satellite, of ever-more-effective software, and of increasingly efficient overnight courier services, comic publishers have redefined the places where work is performed . . .<sup>9</sup>

Contrasting comic book publishing with more densely clustered forms of cultural production, Norcliffe and Rendace suggest comics represents “an alternative geography in which workers who are engaged in creative activities using sophisticated technologies . . . are comparatively dispersed.” Publishers no longer need to be located near one another, either. This fits with a broader trope about the transcendence of space common in techno-utopian discourse, yet space remains an important organizing principle in this field.

I was able to locate street addresses or PO boxes for 101 publishers of comic books and graphic novels.<sup>10</sup> Although some of this information may be out-of-date, the general patterns mapped in Figure 2 are still suggestive. One of the map’s most obvious features is a pronounced bicoastal clustering: Larger and more active presses are concentrated on the coasts of the United States, whereas presses located inland tend to be smaller, less established firms. For instance, nineteen comic book publishers are still headquartered in New York City. Notwithstanding Marvel Entertainment, publishers remaining in New York and its environs tend to be traditional trade presses (or imprints thereof) producing “graphic novels” for the general bookstore market. Notably, graphic novels represent one of the few areas of significant growth in the book publishing industry in recent years. However, if the original concentration of publishers in New York signified an alignment of comics with the world of publishing, the growth of Southern California-based publishers similarly represents a reorientation toward Hollywood.<sup>11</sup> All told, there were twenty-four comic book publishers in this second cluster, some of which literally share an address with a film studio. Even for presses that are not part of an entertainment conglomerate, a development deal for film or TV may represent a significant boost in revenue. Further up the coast, there were six publishers located in the Pacific Northwest, composing a third cluster of smaller but well-established companies, such as Fantagraphics, Dark Horse, Oni, and Top Shelf, known for producing independent and alternative comics.

Geography is not destiny, and this equation of location with “orientation” is an extreme simplification subject to numerous qualifications and exceptions.<sup>12</sup> Yet, recent moves by publishers seem to reinforce the logics I have outlined. While Marvel Entertainment’s publishing operations remain in New York, Marvel Studios operates out of Walt Disney Studios. DC Comics took a more extreme position in 2015, relocating lock, stock, and Batman to Burbank, California, a move seen by many as cementing its subsidiary relationship to its parent companies, DC Entertainment, Warner Bros. Entertainment, and Time Warner. The move more closely aligned DC with Time Warner’s Burbank-based film, television, and interactive divisions shortly after the conglomerate divested itself of other publishing divisions, such as



**Figure 2.** Comic book and graphic novel publishers (2016).

Note. Locations of 101 publishers with distinct street addresses or PO boxes appearing in 2016 sales reports from Diamond Comic Distributors and Nielsen BookScan. Comic production is now significantly more dispersed than in the 1950s. Markers are scaled by sales revenue. The full data set is available online (<http://dx.doi.org/10.5683/SP/R51SLU>).

Warner Books (now, Hachette Book Group) and Time Inc., both headquartered in New York. Conversely, although several of Image Comics' individual imprints are located around southern California, the company's central headquarters recently moved from Berkeley, California, to Portland, Oregon, registering spatially the importance that "groundlevel" comics now have to the publisher's overall brand.<sup>13</sup> Moreover, these examples demonstrate that the orientations and trajectories I have sketched here are tied up in ideas of cultural value that deeply structure the field of American comic books.<sup>14</sup>

## Will the Real Mainstream Please Stand Up?

Naturally, artists, scholars, critics, and fans have long observed internal cleavages in comic book production in the United States, notably differentiating between "mainstream" comics—typically identified with the superhero genre, in general, and the publishers Marvel Comics and DC Comics, in particular—and its various discontents—typically identified as

“alternative” or “independent” comics.<sup>15</sup> It is, notably, the former that is usually conjured up by talk of the American comic book industry. Yet, these terms remain elusive, as can be seen in the largely negative definitions of alternative and independent comics as *whatever mainstream comics are not*:

Working in opposition to their mainstream counterparts, alternative comics are aimed at an educated adult audience that is willing to read what are often very realistic stories in a medium normally devoted to heroic fantasy. These comics are often political, criticizing social mores, cultural trends, and political issues. Others merely offer a skewed view of the world or give voice to non- or even anticorporate stories.<sup>16</sup>

This is a highly tendentious definition, but at least alternative and independent music, film, games, and comics have been the subject of several important analyses, whether as phenomena in themselves or as components of a broader “indie culture.”<sup>17</sup> The category they oppose receives much less attention; as Eric Weisbard puts it, “‘Mainstream’ is a word we use without much questioning.”<sup>18</sup>

One of the few explicit attempts to articulate an affirmative definition of mainstream comics instead focuses on their creation as a cultural commodity. A mainstream comic is “produced by for-profit businesses and distributed in routinized publication outlets.”<sup>19</sup> However, these criteria would include most alternative comics, which are published by for-profit businesses and available in bookstores or on Amazon.com. Similarly, Mark C. Rogers argues that the false dichotomy between alternative and mainstream genres or styles should be replaced altogether by a distinction between “artisan” and “industrial” modes of production.<sup>20</sup> Such shifts in focus produce more stable objects of analysis but do not capture the mix of industrial, generic, and aesthetic qualities people make salient when they try to make distinctions between kinds of comics. Despite their centrality to comics readers’ sense-making practices and industrial marketing strategies, these labels are not at all straightforward. They index important differences but, as Doug Singsen argues, do so at the level of cultural *practices*, not *objects*: “what allows the categories to function is not any stylistic or other feature of the comics themselves, but rather the discourse in which they participate.”<sup>21</sup> They are, to borrow a term from Pierre Bourdieu, “position-takings” that enable artists, publishers, critics, and readers to locate themselves in a cultural field.<sup>22</sup> However, the ground they stake out has shifted in recent decades.

Comics were once a commonplace feature of the American media landscape. Surveys conducted in the 1940s found that virtually all children and a not-insignificant proportion of adults were regular readers of comic books; those who did not read them would almost certainly see them in newsstands and at drug stores.<sup>23</sup> Jean-Paul Gabilliet reports that a billion comic books were sold in 1952, garnering approximately US\$920 million, adjusted for inflation.<sup>24</sup> This was, however, their peak. Despite the contemporary visibility of franchises derived from superhero comics, comic books are now principally oriented toward a relatively restricted, subcultural audience of fans and collectors. This audience is reached through the so-called direct market, a channel constituted by Diamond Comics Distributors and a network of approximately three thousand comic book specialty stores.<sup>25</sup> Are these comic books, specifically, in any way representative of “the prevailing trend of opinion, fashion, society, etc.” (<http://www.oed.com/view/Entry/112557>)? An examination of sales in

the direct market, even at a time when comic books and graphic novels are once again making significant inroads in popular consciousness, suggests that they are not, especially when compared with sales in general trade bookstores.

According to sales estimates from John Jackson Miller's Comichron.com (<http://www.comichron.com/monthlycomicssales/2016.html>), Diamond sold just over ninety-nine million comic books in 2016 and did approximately US\$581 million in sales across all product categories. Within this market, a top ten comic book could be expected to sell just over 129,563 units in the month of its initial release.<sup>26</sup> Examining all titles for which Comichron has 2016 estimates, the average comic book sold twenty-four thousand copies, whereas the median comic book sold only a little more than thirteen thousand copies.<sup>27</sup> Table 1 displays these data by publisher. (For comparison, Miller has also compiled circulation data from the annual Statements of Ownership required by the US Postal Service from 1960 to 1969 [<http://www.comichron.com/yearlycomicssales/postaldata.html>]; in 1960, the average comic book

**Table 1.** Comic Book Sales in Direct Market Channel (2016) by Publisher.

Rank	Publisher	Units sold	Revenue (US\$)
1	Marvel Comics (Disney)	38,541,455	161,474,627.30
2	DC Comics (Warner Bros.)	33,647,659	116,533,642.42
3	Image Comics	6,493,718	22,738,966.01
4	IDW Publishing	2,907,979	12,208,060.04
5	Boom! Studios	1,765,365	7,298,988.35
6	Dark Horse Comics	1,592,796	6,250,081.34
7	Valiant Comics	951,491	3,835,492.09
8	Titan Books	732,564	2,931,958.36
9	Dynamite Entertainment	717,929	2,880,379.71
10	Archie Comic Publications	653,838	2,664,521.62
11	Oni Press	448,973	1,791,402.27
12	Avatar Comics	248,604	1,296,812.96
13	Zenescope Entertainment	272,910	1,238,015.90
14	Aftershock Comics	265,998	996,346.61
15	Bongo Comics Group	120,522	507,867.78
16	Black Mask Studios	115,828	472,515.72
17	Joe Books	149,291	452,605.09
18	Udon Entertainment	108,837	438,822.63
19	Benitez Productions	95,541	381,208.59
20	American Mythology Productions	88,331	359,857.69
...	...	...	...
50	215 Ink	2,634	10,509.66

Note. Aggregated from John Jackson Miller's estimates of sales based on Diamond Comics Distributors' monthly Top 350 ranking. The full data set is available online (<http://dx.doi.org/10.5683/SP/R5ISLU>).

sold 306,652 copies, and two titles had an average circulation of one million.) Notably, Diamond has its own categories for organizing the field of comic production. It distinguishes between “premier” publishers Boom! Studios, Dark Horse, DC, Dynamite, IDW, Image, and Marvel, which grants favored terms as a result of contractual relationships rather than direct sales performance, and the rest. Other industry reports based on Diamond sales charts refer to “top ten” publishers, which can vary from month to month and differ depending on whether they are ranked by units or revenue. Nonpremier or non-top ten companies are sometimes described as “independent” or “small press” publishers, although this classification is based purely on sales performance.

As periodical comic books are no longer widely sold outside of comic shops, a direct comparison with trade bookstores can only be made for graphic novel sales. Although Diamond’s top 120 graphic novels for 2016 (as a rough equivalent to the monthly top ten comic books mentioned above) sold just over twelve thousand copies on average and the best-selling title (volume six of *Saga* [2016]) sold almost forty-eight thousand copies, the typical graphic novel sold just over 1,700 copies to comic bookstores. All told, in the direct market, the average comic book outsells the average graphic novel by a factor of fourteen to one in terms of units or (given the higher price point of a graphic novel or trade paperback) approximately two and one-half to one in terms of revenue. However, in the same year that Diamond sold an estimated 4.5 million graphic novels to the direct market, *Publishers Weekly* reported that bookstores sold almost twelve million graphic novels (<https://www.publishersweekly.com/pw/by-topic/industry-news/publisher-news/article/72501-adult-nonfiction-stayed-hot-in-2016.html>). In fact, based on the full 2016 Nielsen BookScan data (<http://www.comicsbeat.com/tilting-at-windmills-257-looking-at-bookscan-2016-more-than-10-million-sold/>), which involves some manual cleaning to correct misclassifications, Brian Hibbs reported 17.3 million graphic novels sold for a total of almost US\$293.6 million in revenue. Given that there were over twenty-one thousand titles on offer, the bookstore market’s “long tail” drags averages down significantly (813 copies or US\$13,786.48), yet its best sellers also an order of magnitude more successful than the direct market’s.<sup>28</sup> Table 2 compares graphic novel sales in comic book shops and bookstores, grouped by publisher. (I have attempted to group the sales of publishers’ various imprints together.)

**Table 2.** Graphic Novel Sales in Direct Market and Bookstore Channels (2016) by Publisher.

Rank <sup>a</sup>	Publisher	Direct market		Bookstores	
		Units sold	Sales revenue (US\$)	Units sold	Sales revenue (US\$)
1	Marvel Comics (Disney)	1,404,311	38,651,333.48	555,715	12,088,275.00
2	DC Comics (Warner Bros.)	1,174,021	25,265,723.31	1,234,047	23,203,069.00
3	Image Comics	930,289	13,667,338.11	908,655	22,917,759.00
4	Scholastic Corporation <sup>b</sup>	5,957	73,655.43	1,873,530	22,958,094.00
5	VIZ Media	176,060	2,065,971.40	1,487,641	20,230,497.00
6	Simon & Schuster <sup>c</sup>	1,402	26,860.08	602,111	9,198,618.00
7	Dark Horse Comics	179,984	3,538,345.78	266,296	4,551,820.00
8	Penguin Random House <sup>d</sup>	59,529	866,393.37	372,125	5,874,514.00



Rank <sup>a</sup>	Publisher	Direct market		Bookstores	
		Units sold	Sales revenue (US\$)	Units sold	Sales revenue (US\$)
9	Yen Press <sup>c</sup>	—	—	395,643	5,664,829.00
10	IDW Publishing <sup>f</sup>	158,511	3,491,577.56	157,661	3,664,001.00
11	Kodansha USA	—	—	468,669	5,562,428.00
12	Andrews McMeel Publishing	—	—	432,262	4,507,300.00
13	HarperCollins Publishers <sup>g</sup>	2,336	42,019.42	195,179	3,497,885.00
14	Oni Press	61,783	1,241,188.17	46,437	1,212,723.00
15	Seven Seas Entertainment	—	—	166,793	2,434,724.00
16	Macmillan Publishers (Holtzbrinck) <sup>h</sup>	33,920	471,242.80	129,663	1,716,834.00
17	Boom! Studios <sup>i</sup>	96,601	1,620,718.99	33,385	473,842.00
18	Abrams Books (La Martinière)	1,237	19,550.15	145,298	1,693,471.00
19	Hachette Book Group (Lagardère) <sup>j</sup>	24,228	355,561.79	66,098	1,308,790.00
20	Joe Books	8,482	100,263.18	117,596	1,322,664.00
21	Vertical (Kodansha / Dai Nippon)	—	—	73,099	1,263,575.00
22	Fantagraphics Books	24,420	632,075.93	17,531	464,375.00
23	Dynamite Entertainment (Dynamic Forces)	37,705	780,818.95	9,211	230,183.00
24	Valiant Comics	55,211	815,767.89	—	—
25	Mariner Books (Houghton Mifflin Harcourt)	—	—	45,470	687,374.00
26	Disney Publishing Worldwide <sup>k</sup>	—	—	34,881	575,607.00
27	Sky Pony Press (Skyhorse Publishing)	—	—	47,653	571,359.00
28	Archie Comic Publications	26,162	466,932.38	4,203	37,785.00
29	Cartoon Books	4,916	73,494.20	9,504	379,685.00
30	Titan Books	22,984	433,131.16	—	—
31	Drawn & Quarterly	4,842	99,300.90	11,326	247,671.00
32	Udon Entertainment	7,850	121,485.50	16,174	214,229.00
33	Regnery Publishing	—	—	15,365	307,146.00
34	Humanoids Publishing	7,195	178,334.53	—	—
35	Benitez Productions	8,554	159,738.46	—	—
36	Seven Stories Press	—	—	9,330	158,144.00
37	Avatar Press	7,110	152,698.90	—	—
38	Abstract Studio	3,156	125,702.60	—	—
39	Action Lab Comics	9,595	121,310.05	—	—
40	Bloomsbury Publishing	—	—	6,368	120,992.00
41	NBM <sup>l</sup>	6,008	66,520.92	6,615	52,854.00
42	Aftershock Comics	6,213	114,292.87	—	—

Rank <sup>a</sup>	Publisher	Direct market		Bookstores	
		Units sold	Sales revenue (US\$)	Units sold	Sales revenue (US\$)
43	Tokyopop	5,796	80,505.04	4,331	30,274.00
44	Black Mask Studios	4,523	94,281.77	—	—
45	Lion Forge Comics <sup>m</sup>	4,355	80,690.45	—	—
46	Jet City Comics (Amazon)	—	—	5,304	79,295.00
47	Zenescope Entertainment	4,420	61,708.80	—	—
48	SuBLime (VIZ Media/Animate)	—	—	4,057	52,700.00
49	Hermes Press	1,029	46,976.74	—	—
50	Aspen MLT	3,084	44,753.16	—	—
...	...	...	...	...	...
84	Last Gasp	389	1,945.00	—	—

Note. Direct market sales aggregated from John Jackson Miller's estimates of sales based on Diamond Comics Distributors' monthly Top 350 ranking. Bookstore sales from Brian Hibbs's cleaned version of the Nielsen BookScan Top 750 report for the comics category. The full data set is available online (<http://dx.doi.org/10.5683/SP/R5ISLU>).

<sup>a</sup>Ranked by total revenue in both markets.

<sup>b</sup>Includes Scholastic Press, Graphix, Arthur A. Levine, and Blue Sky Press imprints.

<sup>c</sup>Includes Aladdin Books, Margaret K. McElderry, Pocket Books, and Touchstone Books imprints.

<sup>d</sup>Includes Alfred A. Knopf Books for Young Readers, Ballantine Books, Crown Books for Young Readers, Dial Books, Pantheon, Random House Books for Young Readers, Ten Speed Press, and Tundra Books imprints.

<sup>e</sup>Includes Yen On.

<sup>f</sup>Includes Top Shelf Productions.

<sup>g</sup>Includes HarperCollins, HarperTeen, and HarperTorch imprints.

<sup>h</sup>Includes First Second, Square Fish, and St. Martin's Press imprints.

<sup>i</sup>Includes BOOM!, BOOM! Box, and ka-BOOM! imprints. As of Thursday, June 15, 2017, Fox acquired a "significant minority stake" (<http://www.hollywoodreporter.com/heat-vision/fox-acquires-significant-stake-indie-comic-company-boom-studios-1014046>) in Boom! Studios.

<sup>j</sup>Includes Grand Central Publishing, Hyperion Books, Little Brown & Co., and Running Press imprints.

<sup>k</sup>Includes Disney Editions, Disney-Hyperion, Disney-Lucasfilm, and Disney Press imprints, but not Marvel Comics.

<sup>l</sup>Includes Papercutz.

<sup>m</sup>Includes the "Magnetic Collection," formerly Magnetic Press.

It is striking that of the eighty-four publishers of graphic novels present in either the Diamond or the BookScan sales data, only twenty-four appear in both, suggesting that the comic shop and bookstore markets constitute two solitudes, at least at the level of best sellers. Not one of the top twenty publishers by overall revenue appears in the Diamond data but not in BookScan, whereas four are in BookScan data but not Diamond (Yen Press, Kodansha, Andrews McMeel, and Seven Seas, nos. 12, 13, 14, and 17, respectively). Of the remaining top twenty companies, only four derive more revenue from the direct market than bookstores: Marvel (76 percent), Boom! (77 percent), DC (52 percent), and Oni (51 percent). For comparison, Scholastic (#4) and Simon & Schuster (#6) both derive 99 percent of their graphic novel sales from the bookstore market. At the other end of the list, only two of the bottom fifty publishers by overall revenue (NBM/Papercutz [#41] and Tokyopop [#43]) appear in the

sales data for both markets and five (Seven Stories [#36], Bloomsbury [#40], Jet City [#46], SuBLime [#48], and Graphic Library [#52]) appear only in the bookstore data; the remaining forty-three are only in the Diamond data set, suggesting they sell principally or exclusively through the specialty comic bookstore market.

However, comics publishing looks not only quantitatively but also *qualitatively* different when we leave the confines of the direct market retail channel. As Hibbs notes (<http://www.comicsbeat.com/tilting-at-windmills-257-looking-at-bookscan-2016-more-than-10-million-sold/>), the titles that are successful in the bookstore market (imperfectly represented by Nielsen BookScan data) give a very different picture than accounts of the comics field based on the subcultural audience of collectors and fans:

Eighteen of the Top Twenty are books aimed at younger readers . . . Only five of the top twenty books are created by white men, and only three of them could be considered work primarily aimed or created through the Direct Market comic book system.

Moreover, the only superhero title in the BookScan top twenty—Alan Moore and Brian Bolland's *Batman: The Killing Joke* (1988/2008)—came in at number eight with 130,907 copies sold. These data also show the significant presence of Japanese *manga* in the US bookstore market, with nine *manga* publishers (some of which are American branches of Japanese publishers; others, independent presses that license content from Japan) representing 26.6 percent of the bookstore market in terms of units sold and 22.6 percent in terms of revenue, compared with only 4 and 2.3 percent of the direct market, respectively. Undoubtedly, a more fine-grained analysis would uncover other metrics that would further delineate the differences between these two (or more!) comics cultures, but a case study of one cartoonist may also provide some indications of the scope of comic book publishing outside so-called mainstream comics.<sup>29</sup>

Raina Telgemeier is a towering figure in the contemporary comics field, but one who is perpetually overlooked because her work mainly addresses young readers, especially girls.<sup>30</sup> When she was named Comics Industry Person of the Year for 2014 by Heidi MacDonald's comics news website, *The Beat* (<http://www.comicsbeat.com/announcing-the-comics-industry-person-of-the-year-2014-raina-telgemeier/>), her books *Smile* (2010) and *Sisters* (2014) had an estimated 2.9 million copies in print, and she held multiple spots on *The New York Times*' paperback Graphic Books bestseller list, which she continued to dominate until the paper discontinued it in late 2016. As of that list's last appearance in *The Times Book Review*, between her original graphic novels and adaptations of Ann M. Martin's *Baby-Sitters Club* novels, Telgemeier held five of its ten spots, and those five works had been on the list for a combined 621 weeks. (Notably, none of the works on the paperback list were superhero comics, although one—*The Killing Joke*, once again—did appear on the final hardcover graphic books list on January 29.) In the BookScan data set (<http://www.comicsbeat.com/tilting-at-windmills-257-looking-at-bookscan-2016-more-than-10-million-sold/>), Telgemeier was the author of eight of the top twenty titles, representing 1.3 million copies and nearly US\$10 million in sales in 2016 alone. Given the fact that BookScan does not include institutional sales, such as libraries or school book fairs, Telgemeier's actual sales are certainly underreported, but this is

nonetheless suggestive of radically different conceptions of success than those afforded by the direct-market publishing and retailing ecosystem.

If, as Pustz argues, mainstream comics will “tell whatever kind of story, whatever genre, will sell best . . . at any given time,” then the success of trade book publishers’ graphic novel lists, of *manga* licensors, and of cartoonists like Telgemeier presents a challenge to inherited ideas about the mainstream.<sup>31</sup> Pierre Bourdieu suggests that every field of cultural production can be divided into two complementary subfields.<sup>32</sup> In the subfield of restricted production, typically associated with avant-garde works, culture is produced for an audience of other producers and for those consumers who have internalized “producer-oriented” criteria of evaluation.<sup>33</sup> Here, the autonomous principle of legitimation (“art for art’s sake”) reigns supreme, and cultural capital is the most valued contributor to symbolic capital. In the subfield of large-scale production, typically associated with commercial art and popular culture, works are judged more by the heteronomous principle of legitimation based on external signs of success, and economic capital plays a larger role in determining overall status. As a result of the tension between these two subfields, prestige and economic success have an inverse relationship, and Bourdieu famously called fields of cultural production “the economic world reversed” as a consequence.<sup>34</sup> The field of comics “reverses” the ideal-typical cultural field once more. On one hand, although the heteronomous principle is indeed important to mainstream producers, this sector does not address large, mass audiences in the way that commercial literature, film, television, and music do. It is, as Bart Beaty has quipped, “unpopular culture.”<sup>35</sup> Its scale is simply too small to represent “large-scale production”—even its best sellers do not sell all that well. On the other hand, alternative and independent comics are not necessarily avant-garde. Genuinely aesthetically difficult comics circulating in avant-garde art worlds certainly do exist, but they are rare among the most celebrated and canonical works of comic art, whether memoirs like *Maus* and Alison Bechdel’s *Fun Home* (2006) or elevated genre fare like Moore and Gibbons’s *Watchmen* (1986–87) or Vaughn and Staples’s *Saga* (2012–).<sup>36</sup> These works also, as we have seen, have the potential for significant commercial success. This returns us to Singesen’s point, and one Michael Z. Newman makes of “indie cultures” more generally, that “indie” is a discourse “whose meanings . . . far exceed the literal designation of media products that are made independently of major firms.” This oppositional discourse (“alternative, hip, edgy, [and] uncompromising”) can be mobilized and attached to quite different products, depending on the state of the field—including works that are, by any other standard, mainstream.<sup>37</sup>

So, what works and what audiences really represent the mainstream of comics publishing and comics culture in the United States? The frame of reference chosen makes all the difference. If the taken-for-granted notion of “mainstream comics” has enabled one subsector, and arguably just two publishing companies, to stand in for the comics industry and, at times, the form in general, the view that Marvel and DC’s superhero comic books are the norm against which all other comics production must be judged is increasingly difficult to maintain. But because these labels are mutually constitutive position-takings, it is not particularly useful to crown young-adult graphic novels (or any other genre or tradition of cartooning) as the *real* mainstream. Rather, we have to keep in view the range of different models in different formats and channels addressing different audiences that characterize the field of American comic books.

## Conclusion: System and Art World

Many comic books fans have an interest in the behind-the-scenes machinations that produce their comics, whether they are dedicated creators' rights advocates or simply want to know why their favorite book was canceled. However, the emerging academic field of comics studies has lagged behind. Most comics scholars work or were trained in departments of literary studies, and formal and narrative features of comic art have received much more attention than their production, circulation, and reception. This has begun to change. Brienza and Johnston's *Cultures of Comics Work*, for instance, collects recent work on the production of comic books and graphic novels. At the same time, media scholars increasingly acknowledge the importance of comics-derived intellectual property (if not the comic books themselves) to entertainment conglomerates' transmedia strategies, and comics scholarship now appears in special issues, edited collections, and handbooks about media industries more generally.<sup>38</sup> I welcome this new attention to industrial and broadly sociological factors, whether inspired by the production cultures literature, the turn to labor in British cultural studies, or a more traditional political economy of communication, but a "media industries" approach that attends to the limits and pressures exerted on cultural production by virtue of its commodity form is different from one that purports to take "the American comic book industry" as its object. As I have tried to demonstrate, that label disguises a great deal of difference. Indeed, it is wrong in virtually every respect: it is not *American* but integrated into multinational media conglomerates that employ a globalized workforce; it does not produce *comic books* but intellectual property that circulates across multiple media, ranging from film, television, and video games to licensed merchandise and even Broadway theater (e.g., *It's a Bird . . . It's a Plane . . . It's Superman* [1966] or *Fun Home* [2015]), and, finally, it is not *an industry*. Attempts to salvage the term by, for example, separating independent artists and presses from more clearly "industrial" publishers similarly wither under scrutiny. Some "alternative"/"artisanal" comics are released by presses that are subsidiaries of gigantic media companies and may even be the subject of Hollywood adaptations (e.g., *American Splendor* [2003] or *Wilson* [2017]), whereas many "mainstream"/"industrial" comics ostensibly produced for profit motive and nothing more are struggling to continue publication, and other forms of comics production do not neatly fit into either category.<sup>39</sup> The locus of creative cultural activity is not media companies but the "polymorphous set of relations" taking place around cultural goods, only some of which are industrialized, and this diversity of models, methods, careers, and conditions must be the starting point of an industrial analysis of comics.<sup>40</sup>

Perhaps other media industries show more systematicity than comic book publishing. Even so, I suspect most will break down at their margins, particularly if failed careers, amateur and hobbyist production, "piracy," and alternative models of production, distribution, and remuneration are included within the frame of analysis. This is not an accident. As Bernard Miège argues, capital, in its efforts to extract value from cultural goods, cannot fully industrialize their production as commodities:

In our society, in fact, cultural products must continue to be marked by the stamp of the unique, of genius, in order to be standardized . . . . On the one hand the research laboratories attached to the major publishing houses are capable of producing success but they can also meet with failure. But at the same time small production companies can attain great temporary success. And since the

development of a more and more collective labour process presents considerable risks in the event of failure, one understands why the process has been held back and why the major publishers, who generally have at their command very good systems of distribution, prefer to distribute the successes of their less well organized competitors.<sup>41</sup>

Media industries enable certain forms of artistic production (though not, of course, artistic production or creativity as such) but also stand in a parasitic relationship with art worlds and cultural scenes—the “overproductive signifying communities” from which new works, styles, genres, and forms emerge.<sup>42</sup> This is particularly true of Miège’s “Type 2” cultural products, where individual, often precariously employed artists and authors bear the costs of “research” on behalf of cultural industries.<sup>43</sup> To put it differently, “system” cannot entirely colonize art world without destroying its own principal inputs: symbolic creativity and the skilled labor that attends to it.

Because it lacks so much of the apparatus we associate with larger media industries (trade and professional organizations, unions or guilds, a trade press, etc.), the “American” “comic book” “industry” can remind us that industries are not a given. As a collective concept, industries are theoretical rather than empirical objects, although they obviously have empirical effects. What we perceive as an industry is itself the result of boundary-drawing practices imposed on a fluid, complex field of social practices. It must be constructed before it can be analyzed, but such processes of construction are never neutral:

The *boundary* of the field is a stake of struggles, and the social scientist’s task is not to draw a dividing-line between the agents involved in it, by imposing a so-called operational definition, which is most likely to be imposed on him by his own prejudices or presuppositions, but to describe a *state* (long-lasting or temporary) of these struggles and therefore of the frontier delimiting the territory held by the competing agents.<sup>44</sup>

Rather, this “classification struggle”<sup>45</sup> over a field’s borders is shaped by values, interests, and unexamined prejudices: What objects do we need to study? Where do they come from? Where and to whom are they sold? The answers have real consequences for who and what counts when we study media industries.

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<sup>2</sup> Charles Hatfield, *Alternative Comics: An Emerging Literature* (Jackson: University Press of Mississippi, 2005), 78–79.

<sup>3</sup> Jonathan Sterne, “There Is No Music Industry,” *Media Industries* 1 (1, 2014), 50, <http://www.mediaindustriesjournal.org/index.php/mij/article/view/17>.

<sup>4</sup> Sterne, “There Is No Music Industry,” 53.

- <sup>5</sup> It remains entangled with other media industries for its entire history, representing a form of transmedia before “transmedia”; see Jared Gardner, *Projections: Comics and the History of Twenty-First-Century Storytelling* (Stanford, CA: Stanford University Press, 2012); Ian Gordon, *Comic Strips and Consumer Culture, 1890–1945* (Washington, DC: Smithsonian Institution Press, 1998).
- <sup>6</sup> Jean-Paul Gabilliet, *Of Comics and Men: A Cultural History of American Comic Books*, trans. Bart Beaty and Nick Nguyen (Jackson: University Press of Mississippi, 2010), chaps. 1–2.
- <sup>7</sup> The Eisner & Iger and Simon & Kirby studios are among the most famous examples of comic book “packagers,” subcontractors hired by publishers to produce content and, in some cases, manage an entire line of comic books.
- <sup>8</sup> Ian Gordon, *Superman: The Persistence of an American Icon* (New Brunswick, NJ: Rutgers University Press, 2017), 100.
- <sup>9</sup> Glen Norcliffe and Olivero Rendace, “New Geographies of Comic Book Production in North America: The New Artisan, Distancing, and the Periodic Social Economy,” *Economic Geography* 79 (2003): 241–63, 243.
- <sup>10</sup> Publishers featured in this map are those appearing in Comichron 2016 Diamond sales estimates and 2016 Nielsen BookScan Top 750 graphic novels report for which an address could be determined. Addresses were sourced from information posted on publishers’ websites, various online lead-generation and business intelligence directories, and occasionally the WHOIS domain name registry. If a separate address could not be determined, imprints and subbrands were collapsed into their parent company.
- <sup>11</sup> Another potential indicator of this orientation is the use of descriptors such as “Productions,” “Entertainment,” or “Studios”—versus “Press,” “Publishing,” “Books,” or even “Comics”—in publishing company names. (Marvel and DC, notably, have it both ways.)
- <sup>12</sup> Neither does a publisher’s location determine where its creative workforce lives. Nonetheless, despite their potentially global dispersion, 72 percent of the respondents to my survey of creators resided in the United States and 14 percent in just New York or New Jersey. The benefits of living near vibrant cultural scenes may outweigh higher living costs in the coastal hubs where publishers tend to headquarter, and the location of educational institutions that offer training in comics may also shape patterns of settlement.
- <sup>13</sup> “‘Groundlevel’ was a term used [in the 1970s and 1980s] to describe comics produced by small, independent publishers, mostly in the genres of science fiction, fantasy, horror and superheroes.” Doug Singsen, “Critical Perspectives on Mainstream, Groundlevel, and Alternative Comics in *The Comics Journal*, 1977 to 1996,” *Journal of Graphic Novels and Comics*, 8 (2016), 156–72. On the relationship of groundlevel and independent comics, see Roy T. Cook, “Underground and Alternative Comics,” in *The Routledge Companion to Comics*, ed. Frank Bramlett, Roy T. Cook, and Aaron Meskin (NY: Routledge, 2016), 34–43, 42.
- <sup>14</sup> Bart Beaty and Benjamin Woo, *The Greatest Comic Book of All Time: Symbolic Capital and the Field of American Comic Books* (NY: Palgrave Macmillan, 2016).
- <sup>15</sup> Matthew Pustz, *Comic Book Culture: Fanboys and True Believers* (Jackson: University Press of Mississippi, 1999).

- <sup>16</sup> Ibid., x.
- <sup>17</sup> David Hesmondhalgh, “Indie: The Institutional Politics and Aesthetics of a Popular Music Genre,” *Cultural Studies* 13 (1999): 34–61, doi:10.1080/095023899335365; Alisa Perren, *Indie, Inc.: Miramax and the Transformation of Hollywood in the 1990s* (Austin: University of Texas Press, 2012); Bart Simon, ed., “Indie, Eh?” Special issue, *Loading . . .* 7 (11, 2013); Hatfield, *Alternative Comics*; Michael Z. Newman, “Indie Culture: In Pursuit of the Authentic Autonomous Alternative,” *Cinema Journal* 48 (3, 2009): 16–34, doi:10.1353/cj.0.0112.
- <sup>18</sup> Eric Weisbard, “How Do You Solve a Problem Like a Mainstream? Charting the Musical Middle,” *American Quarterly* 67 (2015): 253–65, 253.
- <sup>19</sup> Matthew P. McAllister, Edward H. Sewell, and Ian Gordon, “Introducing Comics and Ideology,” in *Comics and Ideology*, ed. Matthew P. McAllister, Edward H. Sewell, and Ian Gordon (NY: Peter Lang, 2001), 7.
- <sup>20</sup> Mark C. Rogers, “Understanding Production: The Stylistic Impact of Artisan and Industrial Methods,” *International Journal of Comic Art* 8 (1, 2006): 509–17.
- <sup>21</sup> Doug Singen, “An Alternative by Any Other Name: Genre-Splicing and Mainstream Genres in Alternative Comics,” *Journal of Graphic Novels and Comics* 5 (2014): 170–91, 173.
- <sup>22</sup> Pierre Bourdieu, “The Field of Cultural Production, or: The Economic World Reversed,” *Poetics* 12 (1983): 311–56, 312–13.
- <sup>23</sup> Harvey Zorbaugh, “The Comics—There They Stand!” *Journal of Educational Sociology* 18 (1944): 196–203, 197–98.
- <sup>24</sup> Gabilliet, *Of Comics and Men*, 29–30. Cover price at the time was 10¢, which was equivalent to US\$0.92 in 2017, according to the US Bureau of Labor Statistics CPI Calculator, [https://www.bls.gov/data/inflation\\_calculator.htm](https://www.bls.gov/data/inflation_calculator.htm).
- <sup>25</sup> Diamond has held a de facto monopoly on the distribution of periodical comic books since the 1990s. Matthew P. McAllister, “Ownership Concentration in the US Comic Book Industry,” in *Comics and Ideology*, ed. Matthew P. McAllister, Edward H. Sewell, and Ian Gordon (NY: Peter Lang, 2001), 15–38, 24–26; Hatfield, *Alternative Comics*, 20–23; Dan Gearino, *Comic Shop: The Retail Mavericks Who Gave Us a New Geek Culture* (Columbus: Ohio University Press/Swallow Press, 2017); Benjamin Woo, “The Android’s Dungeon: Comic-Bookstores, Cultural Spaces, and the Social Practices of Audiences,” *Journal of Graphic Novels and Comics* 2 (2011): 125–36.
- <sup>26</sup> These data come with several caveats: First, direct market sales are sales to comic book stores rather than to readers. Second, unlike in the book trade, most comic books are sold on a nonreturnable basis; some publishers have experimented with taking returns on selected titles, and Diamond adjusts these titles down by 10 percent across the board. Third, Diamond only reports sales for titles that perform above a certain, variable threshold. Fourth, Diamond reports sales as an index where a reliably selling title (usually, *Batman*) has a value of 1.0.
- <sup>27</sup> Because Diamond only releases data for titles surpassing a certain sales threshold, these averages are inflated.
- <sup>28</sup> Although Hibbs discusses the complete BookScan report for the comics category, he has only released the Top 750 comics report, which provides the basis for



- the following analysis. BookScan compiles point of sale data, meaning that these numbers reflect copies actually sold to customers. They do not, however, include all sales as some retailers do not report to BookScan, and BookScan does not track school and library sales. These are, therefore, unreliable but very suggestive figures. Cf. Colleen Doran, "Inaccurate BookScan Stats and the Plight of the Midlist Author," <http://www.adistantsoil.com/2013/01/01/big-fat-lying-book-stats-and-the-plight-of-the-mid-list-author/>.
- <sup>29</sup> For ease of reference, I have compiled Miller's direct market sales estimates and Hibbs's cleaned BookScan report in a single Microsoft Excel workbook, <http://dx.doi.org/10.5683/SP/R5ISLU>.
- <sup>30</sup> Beaty and Woo, *Greatest Comic Book of All Time*, chap. 9. Aaron Kashtan has also recently argued that Telgemeier's career demonstrates the limits of industry analysis focusing on the direct market; "'Those Aren't Really Comics': Raina Telgemeier and the Limitations of Direct-Market Centrism" (paper, International Comic Arts Forum, Seattle, WA, November 3, 2017).
- <sup>31</sup> Pustz, *Comic Book Culture*, 10.
- <sup>32</sup> Bourdieu, "Field of Cultural Production," 319–20.
- <sup>33</sup> Herbert J. Gans, *Popular Culture and High Culture: An Analysis and Evaluation of Taste*. Rev. ed. (NY: Basic Books, 1999).
- <sup>34</sup> Bourdieu, "Field of Cultural Production."
- <sup>35</sup> Bart Beaty, *Unpopular Culture: Transforming the European Comic Book in the 1990s* (Toronto, ON: University of Toronto Press, 2007), 15.
- <sup>36</sup> Beaty and Woo, *Greatest Comic Book of All Time*, chaps. 2, 5.
- <sup>37</sup> Newman, "Indie Culture," 16.
- <sup>38</sup> E.g., Ian Gordon, "Comics, Creators, and Copyright: On the Ownership of Serial Narratives by Multiple Authors," in *A Companion to Media Authorship*, ed. Jonathan Gray and Derek Johnson (Malden, MA: Wiley-Blackwell, 2013), 221–36; Alisa Perren, "The Trick of the Trades: Media Industries Studies and the American Comic Book Industry," in *Production Studies, The Sequel!: Cultural Studies of Global Media Industries*, ed. Miranda Banks, Bridget Conor, and Vicki Mayer (NY: Routledge, 2015), 227–37; Benjamin Woo, "Erasing the Lines between Leisure and Labor: Creative Work in the Comics World," *Spectator* 35 (2, 2015): 57–64.
- <sup>39</sup> Rogers, "Understanding Production."
- <sup>40</sup> Sterne, "There Is No Music Industry," 53.
- <sup>41</sup> Bernard Miège, "The Cultural Commodity," trans. Nicholas Garnham. *Media, Culture and Society* 1 (1979): 297–311, 305.
- <sup>42</sup> Barry Shank, *Dissonant Identities: The Rock'n'Roll Scene in Austin, Texas* (Hanover, NH: Wesleyan University Press, 1994), 122. On art worlds, see Arthur Danto, "The Artworld," *The Journal of Philosophy* 61 (1964): 571–84. doi:10.2307/2022937; Howard S. Becker, *Art Worlds* (Berkeley and Los Angeles: University of California Press, 1982). On cultural scenes, see Will Straw, "Systems of Articulation, Logics of Change: Communities and Scenes in Popular Music," *Cultural Studies* 5 (1991): 368–88; Will Straw, "Cultural Scenes," *Loisir et Société / Society and Leisure* 27 (2004): 411–22; Benjamin Woo, Stuart R. Poyntz, and Jamie Rennie, eds, *Scene Thinking: Cultural Studies from the Scenes Perspective* (NY: Routledge, 2016); Daniel Aaron Silver, and

Terry Nichols Clark, *Scenescapes: How Qualities of Place Shape Social Life* (Chicago: University of Chicago Press, 2016).

<sup>43</sup> Miège, “The Cultural Commodity,” 308.

<sup>44</sup> Bourdieu, “Field of Cultural Production,” 324.

<sup>45</sup> Pierre Bourdieu, *Distinction: A Social Critique of the Judgement of Taste*, trans. Richard Nice (Abingdon: Routledge, 2010), 481.

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