

“AND I THINK TO MYSELF – WHAT A MARVEL-OUS WORLD”

**AN EXAMINATION OF MARVEL STUDIOS’ INFLUENCE AND ROLE IN THE
FRANCHISING OF CONTEMPORARY SUPERHERO FILMS**

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ABSTRACT

This thesis presents a framework for understanding Marvel Studios' current domination of superhero franchising in Hollywood and the impact of this domination on the film industry as a whole. Since the turn of the millennium, superhero films have developed into one of the most reliable, and profitable, properties studios can offer in the face of shrinking film attendance. Marvel Studios has established itself as the leading producer of superhero films, culminating in the success of the *Avengers* (2012) as reportedly the third-highest grossing film domestically and worldwide in the history of the film industry. In a post-*Avengers* film industry, Marvel Studios, I argue, has created a new standard for the franchising of superhero films, through its strategic exploitation of what Henry Jenkins has referred to as "convergence culture." In the first chapter of the thesis, the success of Marvel Studios is analyzed in the context of the company's history in comic book production and marketing in the 1940s, its first attempts at film adaptation in the 1960s, and its bankruptcy in the 1990s. Chapter Two covers the establishment of the current era of Marvel Studios and the success of its franchises, like *Iron Man* (2008) and the *Avengers* (2012). In Chapter Three, I analyze how contemporary practices of transmedia and convergence culture have been crucial to the development of Marvel Studios' "Marvel Cinematic Universe." My fourth and final chapter examines the future plans of Marvel Studios' and those of other studios who own rights to superhero characters. The aim overall is to illuminate the ground breaking impact on the contemporary film industry, both creative and monetary, of Marvel Studios and its novel approach to media franchising.

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DEDICATION

**In dedication to M. Eileen Ryan, B.A., M.P.A., LL. B.,
my Aunt, Godmother, and fellow Carleton University Graduate**

INTRODUCTION

Superhero comics have often been viewed as “lowbrow” entertainment. Due to their widespread availability, popularity, and low prices, along with their soap-operatic plots and larger-than-life characters, superhero comics have had a somewhat negative stigma associated with them. The grandiosity and fantastical powers of superheroes make it difficult to appreciate the unique enjoyment offered by superhero films, despite the superhero genre’s influence on the film industry and popular culture at large, and the genre’s enormous financial success at a time of crisis in the film industry. These derisive, and at times elitist, prejudices can prevent individuals from enjoying superhero films, and appreciating the unique construction and artistry that goes into their making. Ultimately, the joke is on those who scoff at superheroes, as superhero films have become one of the most reliable and profitable franchises for Hollywood studios and the film industry at large, providing pleasure and entertainment to enormous global and domestic audiences who gladly pay to see pop culture’s equivalent of mythical gods on the big screen.

Seriality, multiple creators, long-term continuity, a character backlog, contemporary ties to a deep history, and a sense of permanence are elements that characterize comic book universes.¹ Many of pop culture’s earliest franchises drew on comics-derived material. For example, within a few years of his creation in 1938, Superman was appearing in comic books, comic strips, live action serials, animated cartoons, and radio dramas.² Each of these media platforms contributed to this iconic

¹ Sam Ford and Henry Jenkins, “Managing Multiplicity in Superhero Comics: An Interview with Henry Jenkins,” in *Third Person: Authoring and Exploring Vast Narratives*, eds. Pat Harrington and Noah Wardrip-Fruin. (Cambridge: MIT Press, 2009), 304.

² *Ibid.*, 304.

character's evolution, as did various *Superman* television productions a few decades later in the 1950s and film in the 1980s.³ Superhero comics, a transmedia phenomenon from the start, anticipated the expansive and immersive world building essential to what has been called convergence culture.⁴

The works of media scholar Henry Jenkins are crucial in comprehending developments in convergence culture and transmedia storytelling that have become prominent over that past two decades. The main development concerns the integration of multiple texts to create a narrative so large, encompassing and constantly growing, that it cannot be contained within a single medium.⁵ In convergence culture, each platform in a transmedia franchise allows for the introduction of new parts into the larger narrative.⁶ A narrative's world can be expanded and explored across multiple entertainment platforms with any given product providing a point of entry into the franchise as a whole.⁷ The Wachowskis' *Matrix* franchise exemplifies the degree to which a transmedia franchise, a narrative or property can exist across multiple platforms and formats.⁸ The possibilities are endless as to how an audience can consume a transmedia narrative, which imposes special challenges on those who wish to analyze such narratives.

Superhero comics provide the perfect medium for convergence culture and transmedia franchising. Indeed, today's convergence culture can be traced back to the comics industry in the 1930s and 1940s. Since their inception, DC Comics and Marvel Comics have treated all of their titles as interconnected; characters move across different

³ Ibid., 304.

⁴ Ibid., 305.

⁵ Henry Jenkins, "Searching for the Origami Unicorn: The Matrix and Transmedia Storytelling," in *Convergence Culture: Where Old and New Media Collide*. (New York: New York University Press, 2006), 95.

⁶ Ibid., 95.

⁷ Ibid., 96.

⁸ Ibid., 95.

series and universe-wide events periodically require readers to buy titles that they were not otherwise reading to fully understand their full ramifications.⁹ Each book approaches the same characters from a different perspective, to thus round out the story in new ways. Each book must satisfy the hardcore fan's mastery over a complex mythology while trying to remain accessible to first-time readers.¹⁰ One could also debate whether superhero comics represent multiple coherent and self-contained genres, or represent character types that play across a range of genres.¹¹ The superhero genre itself took definition slowly, building off a range of related genre traditions, i.e., the detective story (Batman), the science fiction saga (Fantastic Four), the spy genre (Iron Man, Black Widow), the soap opera (Spider-Man), horror (the Hulk), the supernatural (Doctor Strange) and so forth.¹² These different flavors of the superhero genre offer specific possibilities for superhero franchises.¹³ From one genre can emerge another, just as a secondary character in one franchise can become the lead in another franchise.¹⁴ For example, the superhero Black Panther, fellow Avenger and sovereign of his country, introduces African American and geopolitical issues in his own solo series, creating comic storylines that can be merged into other genres.¹⁵ This mixed genre strategy allows these franchises to refresh themselves on a regular basis, while expanding their demographics.¹⁶ In the following chapters, I examine how Marvel Studios has changed the standard of the franchising of superhero films, and how it has become the most successful and dominant studio regarding superhero films through the creation of its

⁹ Ford and Jenkins, "Introduction," 305.

¹⁰ *Ibid.*, 305.

¹¹ *Ibid.*, 310.

¹² *Ibid.*, 310.

¹³ *Ibid.*, 310.

¹⁴ *Ibid.*, 310.

¹⁵ *Ibid.*, 310.

¹⁶ *Ibid.*, 310.

“Marvel Cinematic Universe,” [hereafter referred to as the “MCU”] which involved the skillful exploitation of certain aspects of convergence culture.

In the First Chapter, I establish context and background for the success of Marvel Studios and its “MCU” by researching the origins of Marvel Comics, and the works of Stan Lee and Jack Kirby. The beginnings of Marvel Studios and the sale of Marvel Comics’ most iconic characters to the Hollywood studios, consisting of 20th Century Fox Pictures, Sony Pictures and Universal Studios, is documented to establish the distribution of Marvel’s superhero characters. I also investigate the Marvel films unaffiliated with the “MCU” to shed light on how Hollywood produced superhero films prior to the production of Marvel Studios’ superhero films.

In the Second Chapter, the development and growth of “Phase One” of the “MCU” is scrutinized. Here the focus is on the growing influence and power of Marvel Studios under the leadership of Kevin Feige, Marvel Studio’s President of Production, and Joss Whedon, the “MCU’s” creative showrunner. I also investigate the various components that influence the decisions made at Marvel Studios, such as considerations pertaining to the hiring of directors, actors, and other creative personnel. This chapter touches upon key films and franchises of the “MCU,” with an emphasis on the enormous success of the *Avengers* (2012), and its impact on the film industry. Also included is an assessment of rumors regarding decisions and plans for future films in the “MCU.”

The Third Chapter scrutinizes how superhero films function within convergence culture and transmedia franchising. The origins of transmedia storytelling are explored, with an emphasis placed on film scholar Marsha Kinder’s observations regarding “transmedia intertextuality,” and its historical influence on popular culture, leading to the

development of convergence culture. The *Matrix* (1999) is utilized as an example of convergence culture, and how the film industry can benefit from the application of convergence culture in the film industry, through franchises and synergy. Henry Jenkins' writings on convergence culture are used to examine the "MCU" in connection with convergence culture's increasing importance to the development of contemporary film franchises. Each transmedia element of the "MCU" (television, comics etc.) is identified, and their individual importance to the construction of the larger narrative is addressed.

The fourth and final chapter examines the future of superhero franchising in Hollywood, and how the "MCU" has changed how superhero franchises are developed by examining how Sony, 20th Century Fox, and Warner Bros., the major Hollywood studios who retain the rights to the most important superhero characters, attempt to develop their own superhero films and create their own "cinematic universes" in a post-*Avengers* world. Here I provide further context regarding the current state of the film industry, and why the studios rely so heavily upon franchises and blockbuster films. The chapter presents my research on how *The Avengers* changed the development of superhero franchises, and how the success of the "MCU" has established Marvel Studios as a quality brand to the public, on par with the Walt Disney Company's brand reputation in providing quality entertainment. I also delve into the intricate ownership of Marvel's superhero characters amongst Marvel Studios, 20th Century Fox and Sony. In addition, the superhero franchise plans of 20th Century Fox, who still retain the rights to the *X-Men* and *Fantastic Four* Marvel superheroes, and Sony, who as of 2015 now shares the rights of *Spider-Man* with Marvel Studios, are scrutinized and examined.

CHAPTER ONE

ORIGIN STORY: SUPERHERO BUSINESS AND CINEMATIC BEGINNINGS

This chapter will examine the origins of the publisher, Marvel Comics and provide a brief history of the Marvel films made prior to the creation in 2007 of Marvel Studios.¹⁷ Examining the early history of Marvel Comics, and its iconic characters creates a greater understanding of the project of Marvel Studios and how it, along with DC Comics, became one of the two most powerful comics publishers in the comic book industry. In turn, analyzing the Marvel films non-affiliated with Marvel Studios (*Blade*, *X-Men*, *Spider-Man* et. al) will provide context for the impetus of Marvel establishing its own studio in-house to make its own films based on its properties. The examination of Marvel's business and cinematic past, both distant and recent, will shed light on Marvel Studio's present success.

"Marvel's Origins in Pulp Magazine Publishing"

Marvel Comics was created by American pulp magazine publisher Martin Goodman. Born in Brooklyn, New York in 1908 to Russian immigrants, Goodman copyrighted his new company under the name of Timely Comics in 1939.¹⁸ The growing popularity of the comic book medium, and the nascent trend of superheroes – in particular the runaway success of Jerry Siegel and Joe Shuster's *Superman*, published by Detective Comics (later known as DC Comics) in June 1938, premiering on the cover

¹⁷ Devin Leonard, "The Pow! Bang! Bam! Plan to Save Marvel, Starring B-List Heroes," *Bloomberg Businessweek*, April 2, 2013, accessed April 20, 2014, <http://www.businessweek.com/printer/articles/192489-kevin-feige-marvels-superhero-at-running-movie-franchises>, 8.

¹⁸ Sean Howe, *Marvel Comics: The Untold Story* (New York: Harper Perennial, 2012), 9.

feature of *Action Comics #1* – propelled Goodman to contract with the newly formed comic book packager, Funnies, Inc.¹⁹ Funnies, Inc., and sales agent Frank Torpey, made a deal for Goodman to publish strips for a new comic book anthology: *Marvel Comics #1*, which featured the first appearances of two characters who would become associated with the Marvel brand: the android Human Torch and Namor, the Sub-Mariner.²⁰ The issue sold 80,000 copies on its first printing in September 1939, and a massive 800,000 copies on its second printing, which was better than the sale of an average DC Comics title for the time.²¹ From then on a cohesive “Marvel” universe began to coalesce. A key development was the release of *Marvel Mystery Comics #7*—Marvel Comics’ new title instituted by Goodman with its second issue—which hinted that the characters Namor and the Human Torch existed within the same fictional universe.²² In 1940, *Marvel Mystery Comics #8* and *#9* featured as its headline character Namor, who was shown attacking renowned monuments from the Empire State Building to the Bronx Zoo, thus establishing the cohesion of Marvel Comics as a fictional universe with a grounding in the “real world.”²³ Further successful productions from Marvel Comics soon followed, such as Captain America. Created by Jack Kirby, born Jacob Kurtzberg, and Joe Simon, Captain America followed the lead of earlier Marvel Comics heroes existing in the “real world” by combatting the real-life villains of World War II; on December 20, 1940 *Captain America #1* – featuring Captain America punching Adolf Hitler – hit the newsstands and sold nearly a million copies, exceeding everyone’s expectations.²⁴ It was also during this period, before *Captain America #1* went to press, when Stan Lee, born

¹⁹ Howe, *Untold Story*, 14.

²⁰ *Ibid.*, 14.

²¹ *Ibid.*, 14.

²² *Ibid.*, 15.

²³ *Ibid.*, 16.

²⁴ *Ibid.*, 18, 20.

Stanley Lieber – aspiring writer and cousin to Martin Goodman’s wife Jean Goodman – was hired at Timely Comics as an assistant, and soon began writing comics stories for Timely Comics’ characters, including Captain America.²⁵ Captain America’s runaway popularity marked the beginning of Marvel Comics’ (nee Timely) success, but after World War II the comics publisher had to adapt its creative strategies and create new, more relevant characters for their fans to enjoy.

Following the aftermath of World War II, Marvel Comics returned to the creative drawing board for new stories and characters. Throughout the war, *Captain America* had been Marvel’s best-selling title in a field that was rapidly growing. In less than two years, the number of comic books sold each month grew from 15 million to 25 million, and by 1943 it was a \$30 million (the equivalent of roughly \$412 million today, adjusted for inflation) per year industry.²⁶ However, comic book trends changed quickly. Superheroes waned in popularity, as they now lacked Axis enemies and a dedicated readership of U.S. servicemen.²⁷ A large percentage of the comics’ industry sales were to overseas GIs, and *Captain America* couldn’t have had a better audience; with stories like “Trapped in the Nazi Stronghold” and “Blitzkrieg to Berlin,” the average print run of a Marvel comic book during the war approached a half million per issue.²⁸ Another factor influencing the comics industry was panic in Postwar America over the “influence” comic books had on juvenile delinquency, with provincial towns organizing comic bonfires, respected publishers, such as the *Times*, printing scathing articles denouncing comics, and some towns and cities, including Detroit, introducing legislation to ban the

²⁵ Ibid., 21.

²⁶ Referring to the sale of comic books see “US Inflation Calculator,” and Sean Howe’s *Marvel Comics: The Untold Story*, 25.

²⁷ Ibid., 25.

²⁸ Ibid., 27.

supposed comic-book “scourge.”²⁹ Comics publishers took preemptive action and devised a series of content guidelines, with crime and horror comics supplanted by western, comedic, and romantic comics.³⁰ Unfortunately, the anti-comic furor reached a boiling point in April 1954 when the well-known and respected child psychologist Frederic Wertham – a prominent critic of comics for years – published selections from his book *Seduction of the Innocent*, a full-blown attack on the lurid contents of crime, horror and superhero comics.³¹ A U.S. Senate sub-committee on juvenile delinquency followed, expressing the same views towards comics, using Wertham as an expert witness.³² Fifteen comic publishers closed down in the summer of 1954, and the remaining publishers formed the Comics Magazine Association of America that instituted self-regulating rules modeled after Hollywood’s Hays Code; if a comic book didn’t have a Comics Code seal, the distributors wouldn’t stock it.³³ Comic books were losing their momentum; then at Marvel Comics a new savior arrived: *The Fantastic Four*.

The impetus for *The Fantastic Four*, which would lead to the development of a larger, connected “Marvel Universe,” came from the time-old tradition of copying the competition. In 1961 after a game of golf between Martin Goodman and Jack Liebowitz, the publisher of rival DC Comics, Goodman went to Stan Lee with an order to copy DC Comics’ idea of *The Justice League of America*, where DC Comics put its most popular characters such as Superman, Batman, and Wonder Woman, into a single superhero group, and found themselves with a surprise success.³⁴ Lee’s result was *The Fantastic Four #1*, published on August 8, 1961, and was nothing like the other superhero titles for

²⁹ Ibid., 27.

³⁰ Ibid., 27

³¹ Ibid., 29-30

³² Ibid., 30

³³ Ibid., 31.

³⁴ Ibid., 2.

sale.³⁵ The Fantastic Four were the principle characters, lacking colorful costumes while having distinct and complicated personalities, which led them to bicker with each other. Lee and Kirby emphasized the internal struggles of the dysfunctional team, offset by sleek gadgets and impressive headquarters, and how they were ultimately a family to one another.³⁶ *The Fantastic Four* saved Marvel Comics at a time when, in the words of Jack Kirby, “[Marvel] was on its ass, literally...when I came around, they were practically hauling out the furniture,” and the key to their success was creating relatable, but complicated, human characters who had struggles and triumphs like ordinary people.³⁷ Stan Lee and Steve Ditko soon introduced the iconic everyman superhero Spider-Man on June 1962 in *Amazing Fantasy #15*, who behind his superhero identity was the ordinary Peter Parker, an outcast nerd who struggled to make the right choices.³⁸ Spider-Man’s character development as the angst-ridden outsider was radically different from the traditional superhero character, and struck a chord with readers; so much so that the superhero got its own title, *The Amazing Spider-Man* by the end of the year.³⁹ Marvel further developed the idea of the “outsider” superhero with the creation of the *X-Men* (first issue sold on September 10, 1963), who were composed of heroic super-powered teenage mutants, who used their abnormal abilities to fight against destructive mutants, while being viewed with suspicion by the very society they fought to protect.⁴⁰ That same month Marvel also introduced another superhero team, *The Avengers*, consisting of an all-star team of Marvel marquee names (Iron Man, Ant-Man, the Wasp, Thor, the

³⁵ Ibid., 38.

³⁶ Ibid., 39.

³⁷ Ibid., 2.

³⁸ Ibid., 2, 41.

³⁹ Ibid., 42.

⁴⁰ Ibid., 47-48.

Hulk, later joined by Captain America in *The Avengers #4*) joining forces to defeat crime.⁴¹

This star-studded superhero lineup marked a new era for Marvel Comics, opening a new phase in how their characters interacted with each other within their own “Marvel Universe.” Although there had been earlier examples of Marvel’s heroes interacting with one another, for example when Spider-Man attempted to join the Fantastic Four in *Amazing Spider-Man #1* and the Hulk appearing in *The Fantastic Four #12*, the team-up of Marvel’s popular heroes in *The Avengers* is the definitive example of how Marvel’s creations built the groundwork for a self-contained fictional construct called “The Marvel Universe,” in which all of the publisher’s heroes’ adventures were intertwined with great complexity.⁴² Not only did this shared universe come with the benefit of unlimited cross-promotion of Marvel’s titles, but more importantly, it had narrative effects that would become the Marvel Comics touchstone: the impression that these characters shared a world, that the actions of each character had repercussions on the others, with each comic being a thread in one mega Marvel story.⁴³ Inside its “Marvel Universe,” *The Fantastic Four*’s nemesis Doctor Doom battled Spider-Man, the Human Torch spoke at Peter Parker’s high school assembly, and the Marvel heroes populated every corner of the world, with the Fantastic Four, Spider-Man, Daredevil, and the Avengers based in New York City, the X-Men making their home in Westchester county, with Marvel’s heroes’ adventures taking them all around the world.⁴⁴

⁴¹ Ibid., 47.

⁴² Ibid., 3, 47.

⁴³ Ibid., 47.

⁴⁴ Ibid., 47, 70.

“Superheroes in Hollywood”

As Marvel’s empire and stable of characters grew, its popularity (and profits) piqued the interest of Hollywood. In 1968, Martin Goodman sold the company to Perfect Film & Chemical Corp., which changed its name to Cadence Industries.⁴⁵ In the late 1970s, Cadence sent Stan Lee to Los Angeles, but the major studios weren’t interested in costumed heroes who weren’t Superman.⁴⁶ Although it seems laughable now that Hollywood would have nothing to do with Marvel’s superheroes, it was an era long before computer graphics lowered the cost of making a Spider-Man movie with special effects that weren’t laughable and crude.⁴⁷ It was in 1986 that Marvel Comics’ parent company, the Marvel Entertainment Group (MEG; now known as Marvel Entertainment), began licensing the characters from its expansive library to various studios.⁴⁸ One might think Marvel Entertainment would select one of their most popular characters to make into their first feature film, such as Spider-Man, The Hulk, or the X-Man Wolverine, but the first Marvel character to be theatrically brought to life was the ill-tempered cult classic Howard the Duck.⁴⁹ *Howard the Duck* was created by Steve Gerber, with its first issue in 1976 after appearing in earlier Marvel comics, and chronicled the existentialist, social satirical, and at times meta-fictional, misadventures of the anthropomorphic duck in human society.⁵⁰ However, Howard the Duck was ultimately a one-hit wonder, whose popularity dropped off remarkably after its first several issues.⁵¹ Despite George Lucas

⁴⁵ Devin Leonard, “The Pow! Bang! Bam! Plan to Save Marvel, Starring B-List Heroes,” *Bloomberg Businessweek*, April 2, 2013, accessed April 20, 2014, <http://www.businessweek.com/printer/articles/192489-kevin-feige-marvels-superhero-at-running-movie-franchises>, 2.

⁴⁶ *Ibid.*, 2.

⁴⁷ *Ibid.*, 2.

⁴⁸ Diane Panosian, “Behind The Money of Marvel’s Mighty Movies,” *Studio System News*, May 2, 2013, accessed February 20, 2014, <http://www.studiosystemnews.com/behind-the-money-of-marvels-mighty-movies/>, 1.

⁴⁹ Panosian, “Money Marvel,” 1.

⁵⁰ Howe, *Untold Story*, 134, 178-179.

⁵¹ *Ibid.*, 205.

– creator of the classic pop culture properties *Star Wars* and *Indiana Jones* – producing *Howard the Duck* the character’s cult classic appeal made the Marvel Entertainment’s decision to produce its first feature length film around such a niche character rather illogical.⁵² The result was that the film was a colossal failure. The film cost \$37 million, (roughly the equivalent to an \$80 million budget today), with an additional \$8 million on P&A (\$17 million adjusted for inflation), but only grossed \$37 million worldwide when it opened on August 1, 1986, and was considered an enormous box office disappointment, bringing Marvel’s ambitions to a halt [See Appendix B].⁵³ The film strayed from the comic in terms of the character’s personality and the books’ satirical approach, and has infamously gone down as an insult to the comic book character.⁵⁴ *Howard the Duck* was nominated that year for seven Razzies (the Raspberry Awards are the Oscar equivalent for bad films), and won four of its categories.⁵⁵ It was also rumored a fistfight broke out between the heads of production at Universal Studios, Marvel’s studio collaborator in making the film, over the *Howard the Duck*’s critical and financial failure.⁵⁶ *Howard the Duck* did not provide Marvel with the springboard into film, and Hollywood, it had hoped for.

Marvel’s reputation in film, mishandled by its owner Cadence Industries, continued to slide through the 1970s and early 80s. Cadence’s cavalier distribution of Marvel’s character rights to second-tier studios, such as Cannon Films, whose low-budget films of *The Punisher* (1989) and *Captain America* (1990) were commercial

⁵² Panosian, “Money Marvel,” 1.

⁵³ Referring to the cost of *Howard the Duck* see “US Inflation Calculator,” and Sean Howe *Marvel Comics: The Untold Story*, 292.

⁵⁴ Referring to the failure of *Howard the Duck* see [Chris Dillard](#) “History of Marvel Studios,” 6 and Diane Panosian “Behind The Money of Marvel’s Mighty Movies,” 2.

⁵⁵ Dillard “History,” 6.

⁵⁶ *Ibid.*, 6.

failures.⁵⁷ In 1993, producer Roger Corman raised the funds for a two million dollar budgeted *Fantastic Four* film and was completed in 1994, but the film ultimately went unreleased.⁵⁸ Marvel's future, and now former, CEO/chairman Avi Arad, bought the title and destroyed every print, with only one copy surviving, which can now be found on YouTube.⁵⁹

However, in the 1980s, the situation began to change when multiple Hollywood studios purchased the rights to various Marvel characters. The year of 1986 was a watershed moment for the comics industry; comics were gaining more respect from the rest of the world, and Marvel got its first real foothold in Hollywood.⁶⁰ There was little improvement to Marvel's business and finances when financier Ron Perelman took control of Marvel in 1989, solely planning to use it as the cornerstone of his own media empire.⁶¹

"Bankruptcy and Merger in the 1990s"

As a result of the quality of Marvel's comics, their central creative medium, plummeting, the fans rebelled by closing their wallets, and Marvel Comics filed for Chapter 11 bankruptcy in late 1996.⁶² Marvel's bankruptcy is what led to the parceling and selling of its characters to Hollywood's studios. Beginning in 1991, Marvel licensed several series to 20th Century Fox Pictures; the most popular being the animated *X-Men* (1992-1997) and *Spider-Man* (1994-1998) series.⁶³ The Marvel superhero group known

⁵⁷ Leonard, "Pow!," 2.

⁵⁸ Panosian, "Money Marvel," 2.

⁵⁹ Ibid., 6.

⁶⁰ Howe, *Untold Story*, 292.

⁶¹ Leonard, "Pow!," 2.

⁶² Ibid., 3.

⁶³ Dillard "History," 7.

as *Power Pack* was intended to become a TV show, but never got past the filmed pilot; however, Fox did show reruns of *Power Pack*'s pilot over the years, especially on Saturday mornings to coincide with *Spider-Man* and *X-Men* cartoons.⁶⁴ Due to the *X-Men*'s growing popularity, Fox attempted a live-action film of *Generation X* in 1996, a spin-off of the animated *X-Men*, but the most infamous Fox production was *Nick Fury: Agent of SHIELD* (1998), which cast actor David Hasselhoff as the titular Fury.⁶⁵

While Marvel's plans for films based on its characters stalled, and remained stuck in the realm of made-for television movies, DC Comics' *Superman* and *Batman* franchises dominated the box office in the 1980s and early 90s.⁶⁶ Warner Bros. Studios attained the rights to the entire DC Comics library during the time period when Steve Ross and his Kinney Corporation purchased the company in November 1969, which became Warner Communications, Inc.⁶⁷ Ross had also purchased DC Comics, and its classic characters, which were folded into Warner Communications, Inc, making Warner Bros. Studios the sole proprietor of DC Comics' entire library.⁶⁸ The purchase paid off immensely with the critical and box office successes of *Superman* (1978), *Batman* (1989), and *Batman Returns* (1992). Marvel existed in a realm of middling embarrassment, until its merger with company ToyBiz revitalized its ambitions.

Marvel's merger with ToyBiz in 1998 gave the company an opportunity to rebuild and regroup, and successfully broke the cinematic glass ceiling associated with comic-book superheroes, proving once and for all that superheroes were viable business

⁶⁴ Ibid., 7.

⁶⁵ Ibid., 7.

⁶⁶ Panosian, "Money Marvel," 2.

⁶⁷ "Warner Bros. Company History," Warner Bros. Entertainment Inc., 2014, accessed October 15, 2014, <http://www.warnerbros.com/studio/about/company-history>.

⁶⁸ "Warner Bros. Company History, 1."

opportunities.⁶⁹ The mastermind of Marvel's rebirth was ToyBiz CEO and co-owner Avi Arad, a successful former toy designer, with creations like the Pretty Ballerina doll and the Zap-it Disappearing Ink Gun.⁷⁰ In 1989, he teamed up with fellow Israeli immigrant Isaac "Ike" Perlmutter, whose company, Toy Biz, had a deal with Ron Perelman to make Marvel toys.⁷¹ Arad persuaded Perelman to send him to Los Angeles to assist Stan Lee in persuading Hollywood superheroes were viable film properties, and before long Arad supplanted Lee as Marvel's Hollywood ambassador.⁷² In 1996, Marvel Entertainment formed Marvel Films after the sale of its parent company New World Communications Group, with ToyBiz purchasing Marvel in 1998.⁷³ Once Marvel was out of bankruptcy it licensed off one of its characters, *Blade*, a supernatural vampire hunter who is half vampire himself, as the first feature film licensed by Marvel films to be theatrically released.⁷⁴ Arad's work for Marvel in Hollywood began to pay off when New Line Cinema released *Blade*, starring Wesley Snipes as the titular vampire slayer, on August 21, 1998.⁷⁵ *Blade* cost \$60 million and grossed over \$130 million worldwide; the film was a hit, and while Marvel only made \$25,000, *Blade* laid the groundwork for other studios to tap into their properties [See Appendix A, Appendix B].⁷⁶ *Blade* was also well-received by critics, although it does not have the same critical acclaim as Marvel's later films, which was impressive when one considers how comics were viewed more as "low-culture" entertainment in the 1990s than they are now. *Blade* was one of the first

⁶⁹ Dillard, "History", 8.

⁷⁰ David Leonard, "Calling All Superheroes," *Fortune*, May 23, 2007, accessed February 20, 2014, http://archive.fortune.com/magazines/fortune/fortune_archive/2007/05/28/100034246/index.htm, 2.

⁷¹ *Ibid.*, 2.

⁷² *Ibid.*, 2.

⁷³ Panosian, "Money Marvel," 2.

⁷⁴ Dillard, "History", 7.

⁷⁵ Regarding the *Blade* film see David Leonard, "Calling All Superheroes," 2 and [Chris Dillard](#) "History of Marvel Studios," 7.

⁷⁶ Panosian, "Money Marvel," 2.

modern Marvel films, replacing the iconic spandex of comic books with a more realistic aesthetic.⁷⁷ It was also the first attempt to translate Marvel characters into R-rated films, making its success even more impressive.⁷⁸ *Blade* was also the first cinematic Marvel character to receive a sequel (*Blade II*, 2002) and end in a trilogy (*Blade Trinity*, 2004), which served to establish the idea that trilogies for superhero films could successfully work [See Appendix A, Appendix B].⁷⁹ After proving its comic book characters could help get more funding, Marvel began an exodus of licensing its characters in order to help ensure bankruptcy would never occur again, and spurred on a wave of superhero adaptations that would continue to grow and create franchises that are still released in theaters today.⁸⁰ *Blade* kickstarted a Golden Era of Marvel Movies, pre-Marvel Studios, which would reign for the next ten years, with the most well-known and popular films being the *X-Men* and *Spider-Man* films.⁸¹

Blade proved Marvel characters could be successful, but it took 20th Century Fox Pictures releasing *X-Men* in 2000, and Sony Pictures releasing *Spider-Man* in 2002, to establish comic book films as viable projects for the studios [See Appendix J, Appendix K].⁸² Following *Blade's* success, Fox returned to its *X-Men* roots and licensed the mutant characters for a film, choosing to also ground the film in the “real world.”⁸³ A large aspect of the film’s success was its producers’ and director Bryan Singer’s decision to retain the team dynamic inherent to the *X-Men* comics, rather than distancing the film from its comic book roots. In doing so, the comic fans were happy that the characters

⁷⁷ Dillard “History,” 8.

⁷⁸ *Ibid.*, 7.

⁷⁹ *Ibid.*, 7.

⁸⁰ *Ibid.*, 7.

⁸¹ *Ibid.*, 6.

⁸² Panosian, “Money Marvel,” 3.

⁸³ Dillard “History,” 8.

they loved were being accurately brought to life, while the film also created new fans out of people who didn't read comics. *X-Men* elevated the cast to stardom, its associate producer Kevin Feige to an enormously successful career at Marvel, and spawned a franchise with a \$296 million gross, supported by strong critical reviews and audience reception that prompted other studios to make their own superhero films [See Appendix D].⁸⁴ *X-Men* was followed by *X2: X-Men United* (2003), another record breaking box-office and critical success for superhero films making \$407 million worldwide, and *X-Men: The Last Stand* (2006), a critically panned end to the trilogy despite making \$234 million domestically, the franchise's highest domestic box office, and \$459 million worldwide [See Appendix D].⁸⁵ The release of *X-Men Origins: Wolverine* (2009) did not add to the franchise's critical acclaim, being universally panned despite a domestic box office of \$179 million [See Appendix D].⁸⁶ Fox corrected course with *X-Men: First Class* (2011) and another Wolverine spin-off, *The Wolverine* (2013), regaining the franchise's critical acclaim and good reputation, despite the films' lower domestic box office of \$146 million and \$136 million respectively, culminating in 2014's *X-Men: Days of Future Past*, merging the past and present casts of *X-Men* and achieving the franchise's second highest domestic box office with \$233 million, and the franchise's best worldwide box office of \$746 million, buoyed by audience and critical rave reviews [See Appendix D].⁸⁷ Despite the franchise's ups and downs, *X-Men* is a classic superhero franchise, with Fox continuing to use its license to its advantage, as Sony did with *Spider-Man*.⁸⁸

⁸⁴ Panosian, "Money Marvel," 3.

⁸⁵ "X-2: X-Men United," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=x2.htm>; "X-Men: The Last Stand," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=x3.htm>. All entries accessed October 16, 2014.

⁸⁶ "X-Men Origins: Wolverine," *Box Office Mojo*, web, accessed October 16, 2014. <http://boxofficemojo.com/movies/?id=wolverine.htm>.

⁸⁷ "X-Men: First Class," *Box Office Mojo*, web, <http://www.boxofficemojo.com/movies/?id=xmenfirstclass.htm>; "The Wolverine," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=wolverine2.htm>; "X-Men: Days of Future

Sony, who had bought the web-slinger's rights in the 1980s, followed Fox's lead by releasing *Spider-Man* in 2002.⁸⁹ It was the first contemporary film in cinematic history to have a \$100+ million opening weekend, and launched a highly lucrative franchise.⁹⁰ The *Spider-Man* franchise went on to gross \$822 million in the first film, \$784 million for the second, \$891 million for the third, \$752 Million in the 2012 *Amazing Spider-Man* remake and \$708 million in the 2014 sequel *The Amazing Spider-Man 2*, ultimately having earned \$3.9 billion for the studio [See Appendix C].⁹¹ Until recently, *Spider-Man* was the most successful franchise to come from Marvel, both financially and critically.⁹² The first film was nominated for several Academy Awards, which was a first for superhero adaptations; *Spider-Man 2* (2004) until it brought home an Oscar for Best Visual Effects.⁹³ While the first two *Spider-Man* films were beloved by critics and audiences, the original trilogy would end with poor critical reviews and middling audience reception for *Spider-Man 3* (2007), and lead to Sony willingly reinventing the entire character and series in 2012 with *The Amazing Spider-Man*.⁹⁴ Both Fox and Sony have kept their respective Marvel properties active in order to retain the rights and prevent the characters they have licensed from reverting back to Marvel ownership.⁹⁵ Unfortunately for Hollywood, the non-*X-Men* and *Spider-Man* films superhero films released prior to 2008 have less than stellar critical reputations, despite decent box office returns.

Past," *Box Office Mojo*, web. <http://boxofficemojo.com/movies/?id=xmen2014.htm>. All entries accessed October 16, 2014.

⁸⁸ Panosian, "Money Marvel," 3.

⁸⁹ *Ibid.*, 3.

⁹⁰ *Ibid.*, 3.

⁹¹ Referring to the *Spider-Man* movie grosses see Diane Panosian "Behind The Money of Marvel's Mighty Movies," 3 and *Box Office Mojo*'s "The Amazing Spider-Man 2."

⁹² Dillard "History," 8.

⁹³ Panosian, "Money Marvel," 3.

⁹⁴ *Ibid.*, 3.

⁹⁵ *Ibid.*, 3.

The runaway success of *X-Men* and *Spider-Man* led to a bounty of superhero films, with mixed results. *Daredevil*, another Marvel property licensed to Fox, was released in 2003, with Ben Affleck wearing the shoes of the vigilante blind lawyer.⁹⁶ Despite *Daredevil* earning \$102 million, it was detested by critics and audiences, along with its sequel *Elektra*, which earned a paltry \$24 million domestically [See Appendix D].⁹⁷ That same year, *The Hulk* looked to make a return to popularity after losing his television series, *The Incredible Hulk*, in the 1980s.⁹⁸ Ang Lee (*Crouching Tiger, Hidden Dragon*), was hired by Universal Studios, who had licensed *The Hulk*, to bring to life the emotion-fueled rage creature for the public.⁹⁹ Unfortunately, the film only earned \$132 million domestically and was largely rejected by audiences, with critical reviews praising its ideas and themes but calling attention to its fumbled execution [See Appendix B].¹⁰⁰ In 2004, Lionsgate attempted to replicate *Blade*'s R-rated success with *The Punisher*.¹⁰¹ Despite obtaining an R rating, the film did not gain critical or audience traction, and bombed with \$33 million in the domestic box office [See Appendix B].¹⁰² *The Punisher* only served to water down the already increasing lot of superhero films taking over the market; its reboot in 2008, *Punisher: War Zone*, was even a worse failure domestically and critically, earning \$8 domestically [See Appendix E].¹⁰³ The studios, despite the growing pile of misfires, still wanted to take a shot at the superhero genre and to make

⁹⁶ Dillard "History," 8.

⁹⁷ "Daredevil," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=daredevil.htm>; "Elektra," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=elektra.htm>. All entries accessed October 16, 2014.

⁹⁸ Dillard "History," 8.

⁹⁹ *Ibid.*, 8.

¹⁰⁰ "The Hulk," *Box Office Mojo*, web, accessed October 16, 2014, <http://boxofficemojo.com/movies/?id=hulk.htm>.

¹⁰¹ Dillard "History," 8.

¹⁰² "The Punisher," *Box Office Mojo*, web, accessed October 16, 2014, <http://boxofficemojo.com/movies/?id=punisher.htm>.

¹⁰³ Referring to the *Punisher* films see *Box Office Mojo* "Punisher: War Zone," and Chris Dillard "History of Marvel Studios."

comic book money.¹⁰⁴ Fox brought comics' "first family" to life on the screen, releasing *Fantastic Four* in 2005 and included a cast of A-list actors, consisting of Jessica Alba, Michael Chiklis, and Chris Evans (who ironically would later become Captain America in 2011).¹⁰⁵ *Fantastic Four* was neither a smash nor embarrassment, earning middling (but not overly negative) reviews and audience reception, and accumulating a \$151 million domestic box office, but it did not make any aesthetic or thematic progress for the superhero genre [See Appendix D].¹⁰⁶ Two years later in 2007, it would receive a sequel in *Fantastic Four: Rise of the Silver Surfer*, which earned less than its first movie with \$131 million domestically, and received apathetic reviews [See Appendix D].¹⁰⁷ In that same year, *Ghost Rider* was released by Sony with Nicholas Cage playing the hero Johnny Blaze, earning \$115 million domestically along with critical and audience scorn [See Appendix B].¹⁰⁸ 2007 was also the same year *Spider-Man 3* was released, and marked the beginnings of a bloated genre getting past its prime.

"The Founding of Marvel Studios"

These second-tier superhero films' profits, despite their middling-to-bad critical and fan reception and reputation, along with the profits of *X-Men* and *Spider-Man*, gave Marvel the incentive to establish in 2007 their own studio, and make their own films "in house."¹⁰⁹ Marvel's discontent with the money it was making from the films featuring their superhero characters was the determinant in creating their own studio. Ultimately,

¹⁰⁴ Ibid., 9.

¹⁰⁵ Ibid., 9.

¹⁰⁶ Ibid., 9.

¹⁰⁷ "Fantastic Four: Rise of the Silver Surfer," *Box Office Mojo*, web, accessed October 16, 2014,

<http://boxofficemojo.com/movies/?id=fantasticfour2.htm>.

¹⁰⁸ "Ghost Rider," *Box Office Mojo*, web, accessed October 16, 2014,

<http://boxofficemojo.com/movies/?id=ghostrider.htm>.

¹⁰⁹ Leonard, "Pow!," 8.

Marvel was unsatisfied with the portion of cash they received from these films, but the paltry revenue from the films was offset by profits generated via additional media platforms. In 1998, Marvel made only \$25,000 from *Blade*, but the film proved superheroes were a viable film commodity, and made it possible for Marvel to participate in a variety of future deals that would far surpass the meager financial return from *Blade*. Furthermore, Marvel profited from the merchandise sales from its licensed characters; its box-office take wasn't much when *Spider-Man* opened in 2002, but the company sold so much merchandise that its net sales rose from \$181 million in 2001 to \$299 million in 2002.¹¹⁰ Profits soared from \$1 million to \$80 million over the same period.¹¹¹

Unfortunately, soon after *Spider-Man 2* opened in 2004, Marvel's stock dropped more than a third; Wall Street thought Marvel's sole value was Spider-Man.¹¹² By that time, Fox had *Fantastic Four* and *X-Men: The Last Stand* in production, but those characters didn't sell merchandise like Spider-Man, who was not set to return to the screen until 2007.¹¹³ Marvel's profits from the first two *Spider-Man* films are unavailable to the public, but according to a Lehman Brothers analysis, Marvel's combined take was only \$62 million, from a combined \$1.6 billion worldwide box office [See Appendix C].¹¹⁴ Spider-Man wasn't the only Marvel star to make lots of money for somebody else; Fox's *Fantastic Four* films, released in 2005 and 2007, grossed a combined \$624 million, but Marvel only made \$13 million from the films [See Appendix

¹¹⁰ Leonard, "Calling All Superheroes," 2.

¹¹¹ *Ibid.*, 2.

¹¹² *Ibid.*, 2.

¹¹³ *Ibid.*, 2.

¹¹⁴ "Spider-Man," *Box Office Mojo*, web, accessed October 16, 2014, <http://boxofficemojo.com/movies/?id=spiderman.htm>; "Spider-Man 2," *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=spiderman2.htm>. All entries accessed October 16, 2014.

D].¹¹⁵ The three *X-Men* movies, also produced by Fox, grossed a combined \$2 billion, while Marvel's total share was \$26 million [See Appendix D].¹¹⁶ Marvel had had enough. Instead of depending on other studios, Avi Arad felt Marvel should produce its own movies, and the answer came from David Maisel, a Harvard MBA who started his career at Boston Consulting Group, whom Arad had met in 2004 and introduced to Perlmutter.¹¹⁷ As part of his long-term plan to make Marvel's second tier heroes, such as Captain America, Iron Man, and Thor, as lucrative for his company as Spider-Man, the X-Men, and the Fantastic Four had been for Sony and Fox, Maisel's idea was to fund movies with borrowed money backed by superhero movie rights.¹¹⁸ Perlmutter liked the idea and hired Maisel as COO and chairman of Marvel Studios, establishing the foundation of Marvel Studios' future legacy.¹¹⁹ The profits the Hollywood studios were making off of Marvel's characters are what ultimately drove Marvel Entertainment—in the footsteps of their own characters—to take hold of their own destiny and develop an independent studio to make their own films based on their characters, outside of the Hollywood system.

The creation of the current version of Marvel Studios in 2007 by Marvel Entertainment marked the beginning of Marvel's superhero dominance of Hollywood; only this time *they* were the party in control of the productions and profits. Marvel's plan was to break cinematic barriers and accomplish a goal Hollywood never attempted because it was impossible: to create a cohesive creative "universe," like the Marvel Comics universe, where all of their characters, and their films, exist. This goal of Marvel

¹¹⁵ Leonard, "Calling All Superheroes," 2.

¹¹⁶ *Ibid.*, 2.

¹¹⁷ *Ibid.*, 2.

¹¹⁸ *Ibid.*, 2.

¹¹⁹ *Ibid.*, 2.

Studios would ultimately become the “Marvel Cinematic Universe,” also known as the “MCU,” and utterly dominate superhero franchising in Hollywood.

CHAPTER TWO

“SOME ASSEMBLY REQUIRED”: MARVEL STUDIO’S METEORIC MONOPOLY OF HOLLYWOOD

Following the previous chapter’s background on Marvel Comics and in-depth examination Marvel’s involvement in film, this chapter will review Marvel’s ascent from 2008 onwards as one of the most successful studios in Hollywood. By scrutinizing the circumstances surrounding the creation of Marvel Studios, a better comprehension of the risks and intricate planning involved in Marvel’s plan to create a “Marvel Cinematic Universe” [hereafter referred to as the “MCU”] is gained. Marvel Studios claims in its publicity to have organized its output of films according to three “Phases,” with “Phase One” having been completed, “Phase Two” currently ongoing, and “Phase Three” planned and announced. In forming the plan, Marvel attempted to achieve creative storytelling through the hiring of engaging actors who can bring Marvel’s characters to life. The meticulous organization of the “MCU” allowed Marvel Studios to plan how they wanted their cinematic universe to span out across the different creative media, and thus create the foundation for the pivotal role played by the “MCU” in today’s convergence culture. The chapter details how Marvel Studios’ ambitious and creative business decisions led to the commercial and artistic success of the “MCU,” in particular after the unprecedented juggernaut of *The Avengers* (2012).

Marvel’s Rebirth

Marvel Studios’ landmark deal with the Merrill Lynch, the wealth management division of Bank of America, is what gave the studio a foothold in the film and television

industry, and begin its long-term gamble of establishing an intertwined cinematic superhero universe.¹²⁰ After *Spider-Man 3*'s commercial success, but critical failure, in 2007 business was bleak. The ratio of superhero-film hits to misses was starting to even out for the studios committed to the genre, and investors were becoming anxious.¹²¹ Ike Perlmutter, made CEO of Marvel Entertainment in 2005, enlisted David Maisel, COO and chairman of Marvel Studios, to secure the credit to fund their ambitious cinematic plans.¹²² The deal between Marvel Studios and Merrill Lynch, negotiated by Maisel and finalized in 2005, issued the studio a revolving credit facility, a type of loan secured by collateral where if the borrower defaults, the issuer can seize the collateral but cannot pursue the borrower for further compensation, even if the collateral does not cover the full defaulted amount.¹²³ The loan secured \$525 million, enabling Marvel to produce ten films, which were to be distributed by Paramount Pictures.¹²⁴ The deal enabled Marvel to do three things: first, Marvel would keep all the profits from its superhero movies.¹²⁵ Second, Marvel would determine the film's release dates, which would make it easier to coordinate the films with the selling of action figures and other merchandise.¹²⁶ Lastly, Marvel would be allowed to use the publicity and buzz generated by the pending movies to institute further licensing deals.¹²⁷ However, there was a major caveat to their deal; Marvel put up the film rights of the characters they still controlled – ie. Iron Man,

¹²⁰ "About Merrill Lynch," Merrill Lynch: Bank of America Corporation, 2014, accessed November 6, 2014, http://www.ml.com/index.asp?id=7695_8134.

¹²¹ Chris Dillard, "History of Marvel Studios," *ComicUI*, March 31-April 2, 2014, accessed April 12, 2014, <http://news.comicui.com/2014/03/history-of-marvel-studios-part-1/>, 3.

¹²² Referring to the merger see Jonah Welland "Isaac Perlmutter New CEO Marvel Enterprises," 2 and Devin Leonard "Calling All Superheroes," 2.

¹²³ "Non-Recourse Debt," Investopedia, LLC, 2015, accessed January 16, 2015, <http://www.investopedia.com/terms/n/nonrecoursedebt.asp>.

¹²⁴ Diane Panosian, "Behind The Money of Marvel's Mighty Movies," *Studio System News*, May 2, 2013, accessed February 20, 2014, <http://www.studiosystemnews.com/behind-the-money-of-marvels-mighty-movies/> 2.

¹²⁵ David Leonard, "Calling All Superheroes," *Fortune*, May 23, 2007, accessed February 20, 2014, http://archive.fortune.com/magazines/fortune/fortune_archive/2007/05/28/100034246/index.htm, 2.

¹²⁶ *Ibid.*, 2.

¹²⁷ *Ibid.*, 2.

Captain America, Nick Fury etc. – as collateral.¹²⁸ In spite of the enormous risk of the Merrill Lynch deal, the studio ignored criticism that Marvel was relying too heavily on secondary characters, stating audiences would come for Iron Man et al., because Marvel is a powerful brand like Disney or Pixar.¹²⁹ Marvel Studios' gamble ultimately led to a new power structure within Marvel and Marvel Studios.

The shake-up of the Merrill Lynch deal led to a new hierarchy within the studio, and the firm establishment of its creative and business approaches. There was dissent and disagreement regarding Marvel's larger plan, and Avi Arad, who held the titles of CEO, Chairman and creator of Marvel Studios, resigned the following year in 2006.¹³⁰ Despite playing a key role in establishing Marvel Studios, successfully selling the idea to Wall street and personally calling Brad Grey, the CEO of Paramount Pictures, to arrange distribution, Arad feared Maisel wanted to produce too many movies, too fast, and that Marvel was putting too many weak characters in the lineup.¹³¹ In May 2006, Arad left Marvel and cashed out almost all of his stock for \$59 million, despite remaining one of the producers of *Iron Man* and *The Incredible Hulk*.¹³² As a result, Kevin Feige was named studio chief and president of Marvel Studios in 2007. Marvel Studios' reputation and stature have endured since *Iron Man*'s release in 2008, in no small part due to their stringent business and financial regimens.

After the careless business and financial blunders made by their former owner, Cadence Industries, Marvel successfully ran a tight and efficient financial ship, beginning

¹²⁸ Devin Leonard, "The Pow! Bang! Bam! Plan to Save Marvel, Starring B-List Heroes," *Bloomberg Businessweek*, April 2, 2013, accessed April 20, 2014, <http://www.businessweek.com/printer/articles/192489-kevin-feige-marvels-superhero-at-running-movie-franchises>, 4.

¹²⁹ *Ibid.*, 2.

¹³⁰ Leonard, "Pow!," 3.

¹³¹ Leonard, "Calling All Superheroes," 2.

¹³² *Ibid.*, 2.

by stabilizing the larger company itself. Isaac Perlmutter brought in Peter Cuneo, who was CEO of Marvel in July 1999 for a three-year turnaround that was completed by the end of 2002.¹³³ Marvel was not in good shape; at one point in 2000, the company had only \$3 million in the bank, barely enough to cover its cash needs.¹³⁴ There were only 250 employees, no facilities that could be closed to cut costs, and the company's stock fell as low as a dismal 96 cents per share.¹³⁵ With six previous successful turnarounds on his résumé, including Remington and divisions of Black & Decker and Clairol, Cuneo knew Marvel would require both short-term fixes to put cash in the bank and new strategies to generate long-term revenue, especially with Marvel burdened with \$250 million in high-yield debt and 11 million shares of preferred stock.¹³⁶ Cuneo, in his interview with journalist Robert Reiss in "How Marvel Became a Business Superhero," in the February 1, 2010 issue of *Forbes*, stated that the most significant strategic decision behind Marvel's turnaround was adopting a licensing model for all forms of media, such as movies and television, and for consumer products such as clothing and school supplies.¹³⁷ This method served to maximize the exposure of the Marvel brand worldwide in a short amount of time, focusing on the existing library of successful intellectual properties that were recognizable to the public (Spider-Man, the Hulk, Captain America, etc.), rather than assuming greater risk by creating new content.¹³⁸ Marvel then licensed out to the toy industry for action figures and role-playing games,

¹³³ Robert Reiss, "How Marvel Became a Business Superhero," *Forbes*, February 1, 2010, accessed February 20, 2014, <http://www.forbes.com/2010/02/01/peter-cuneo-marvel-leadership-managing-turnaround.html>, 1.

¹³⁴ *Ibid.*, 1.

¹³⁵ *Ibid.*, 2.

¹³⁶ *Ibid.*, 2.

¹³⁷ *Ibid.*, 2.

¹³⁸ *Ibid.*, 2.

which had previously been run internally.¹³⁹ As a result of licensing, capital was created that Marvel then used to purchase their own bonds at 52 cents on the dollar, and effectively own themselves and make their own agenda, thus not having to be held accountable to volatile consumers and investors.¹⁴⁰ Toys and merchandise became Marvel's largest licensed business, having issued thousands of licenses over the last decade with the benefit of committing minimal capital to them.¹⁴¹ As a result, Marvel retired the high-yield debt and converted the preferred shares into common shares within four years.¹⁴² Once Marvel had been stabilized through the profits and cost-saving measures of licensing, Cuneo could focus on making the company grow.

Film and video games heavily contributed to Marvel's growth, along with the rehabilitation of their original medium – the comic book. Cuneo, and Marvel, recognized that in order to grow the company the characters (and thus the brands) had to be exposed to the global general public, not only the comic book fans.¹⁴³ Film and video games were the best mediums for reaching the masses.¹⁴⁴ Film is unparalleled in its ability to generate worldwide excitement for a fantasy property, which has paid off handsomely for Marvel; since *X-Men* (2000) Marvel has had the best track record for worldwide box office grosses.¹⁴⁵ Meanwhile, video games traditionally served a demographic identical to the core comic book fan base: males thirteen to thirty.¹⁴⁶ Marvel's strategy was to spread game production among several producers so as to avoid domination by any single entity; as of 2010, video game revenue was Marvel's second largest merchandise

¹³⁹ Ibid., 2.

¹⁴⁰ Ibid., 2.

¹⁴¹ Ibid., 2.

¹⁴² Ibid., 2.

¹⁴³ Ibid., 3.

¹⁴⁴ Ibid., 3.

¹⁴⁵ Ibid., 3.

¹⁴⁶ Ibid., 3.

contributor, after toys.¹⁴⁷ Marvel also went back to their roots, deciding to retell their old stories so that new fans would be attracted, shortened story arcs and the number of issues it took to complete a story, and pursued new distribution channels, such as bookstores, mass merchants and convenience stores.¹⁴⁸ The result was that Marvel's North American comic book market share grew from about 25% in 1999, to between 45% and 50% in 2010.¹⁴⁹ Marvel's growth as a company allowed Cuneo to implement follow-on strategies for Marvel's future.

Marvel's continued success after Peter's Cuneo's completion of the turnaround in 2002 was sustained by three key strategies implemented by its Board of Directors. First, Marvel expanded their international presence, replacing their representation firms (and high commissions) with their own personnel; today, international licensing has exceeded domestic.¹⁵⁰ The second decision was to self-produce Marvel animated television shows, including *Ultimate Spider-Man* (2012) and *Avengers Assemble* (2013), as television remains the best medium for keeping Marvel characters in front of the global public between movie releases.¹⁵¹ The final decision was the Merrill Lynch deal to launch Marvel's in-house movie studio in 2005: Marvel Studios.¹⁵² Peter Cuneo's tenure at Marvel, and role as Vice Chairman of Marvel's Board of Directors, was an explicit success, with Cuneo stepping down upon Disney's acquisition of Marvel.¹⁵³ Marvel's ambitions and profits led to the shocking purchase of Marvel by The Walt Disney Company in 2009.

¹⁴⁷ Ibid., 3.

¹⁴⁸ Ibid., 3.

¹⁴⁹ Ibid., 3.

¹⁵⁰ Ibid., 3.

¹⁵¹ Referring to Marvel animation see *Wikipedia* "Marvel Animation" and Robert Reiss "How Marvel Became a Business Superhero," 3.

¹⁵² Ibid., 3.

¹⁵³ Ibid., 1.

Disney's Acquisition

In 2009, Marvel Studios shocked Hollywood with the announcement that it had been acquired by The Walt Disney Company, the corporation that owns Walt Disney Motion Pictures Studios, one of the major “Big Six” studios. At the time, Disney’s acquisition wasn’t hailed as a smart move; its stock price sank on news of the deal.¹⁵⁴ Superheroes were hot properties in Hollywood, but in Wall Street’s eyes, Disney was spending billions for a company that had years ago signed away the film rights to its most popular characters, i.e. Spider-Man and the X-Men.¹⁵⁵ A possible reason for the ultimate success of the Marvel and Disney partnership is the similarities that exist between the two different companies.

Bob Iger, Chairman and CEO of The Walt Disney Company, foresaw endless possibility with purchasing Marvel.¹⁵⁶ Iger had been watching Marvel closely, and had his own fair share of company turnarounds.¹⁵⁷ He’d been named CEO of Disney in 2005 and was revitalizing the company after its troubled years under Michael Eisner. Iger had a clear strategy for Disney, like Isaac Perlmutter and Peter Cuneo did for Marvel. He believed the company needed more enduring characters, such as Mickey Mouse and Sleeping Beauty, that could be turned into movies, television shows, theme park rides, and cruise ship attractions.¹⁵⁸ In 2006, Iger increased the population of the Disney universe with a \$7.4 billion acquisition of Pixar Animation Studios; one of the things that impressed him most were the movies Pixar had in the pipeline for the next seven years,

¹⁵⁴ Leonard, “Pow!,” 1.

¹⁵⁵ *Ibid.*, 1.

¹⁵⁶ “Robert A. Iger,” The Walt Disney Company, accessed November 14, 2014, <http://thewaltdisneycompany.com/about-disney/leadership/ceo/robert-iger>.

¹⁵⁷ *Ibid.*, 2.

¹⁵⁸ *Ibid.*, 2.

among them *Cars*, *Ratatouille*, *Wall-E*, *Up*, and *Toy Story 3*.¹⁵⁹ Furthermore, he recognized that Marvel's core male demographic complemented the demographic for the Disney library of characters, with some Marvel franchises, like Spider-Man, appealing to consumers of all ages.¹⁶⁰ Iger was also impressed by how the films Marvel had in development were interconnected and primed the audience for not just one *Avengers* feature, but also sequels.¹⁶¹ Disney was also a good fit for Marvel because they knew how to develop, maintain and promote beloved characters. Mickey Mouse, Donald Duck, Goofy, and the rest of Disney's menagerie of beloved characters have maintained their popularity across generations for decades since their inception, while taking part of every aspect of creative media, from film to video games to books, and their visages on any and every piece of merchandise that can be imagined. The creative and business regimens applied to Disney's characters could also be applied to Marvel's superheroes with similar success, despite the adventures of Mickey Mouse et. al. being mostly stand-alone narratives rather than maintaining narrative continuity.

Despite those with misgivings about Marvel's long-term film plans, Disney proved its purchase of Marvel was well warranted with the runaway success of the *Avengers*. Iger believed Iron Man and Captain America would fit in nicely with Disney and Pixar characters, and eventually the two men eventually negotiated a deal. Disney would purchase Marvel, but would allow Perlmutter to remain in charge; Marvel would continue to make movies under its old system, but Disney would have final approval.¹⁶² This was a beneficial arrangement for both parties, as Perlmutter became solely focused

¹⁵⁹ Ibid., 3.

¹⁶⁰ Reiss, "Marvel Business," 3.

¹⁶¹ Ibid., 4.

¹⁶² Ibid., 4.

on the operational matters of Marvel with no creative involvement in the Marvel Studios' films.¹⁶³ On December 31, 2009, Disney finalized the purchase of Marvel Entertainment for \$4.3 billion dollars, for \$54 a share and bought Paramount Studios out of its final two films in its distribution deal with Marvel.¹⁶⁴ Paramount ceded its worldwide distribution rights for Marvel Studios' *Iron Man 3* and *The Avengers* to Disney for a minimum of \$115 million, or 9% and 8% respectively, and would continue to reap revenues generated by Marvel's films across all platforms (theatrical, home video, VOD, etc.).¹⁶⁵ Naysayers who declared \$4 billion too high a price to purchase Marvel Entertainment were quickly proven wrong by *The Avengers*' \$1.5 billion dollar gross in 2012.¹⁶⁶

Marvel Money

Marvel Studios has long since had a reputation of being financially thrifty, perhaps even excessively so, especially in regards to negotiating acting salaries. Terrence Howard, who played billionaire Tony Stark's confidante Colonel James "Rhodey" Rhodes, a.k.a the hero War Machine, got a 50% to 80% pay cut after Marvel learned that his role as War Machine was limited.¹⁶⁷ Howard was paid \$4.5 million for *Iron Man*, and despite Howard's contract suggesting he would be paid \$8 million for an *Iron Man* sequel, Marvel Studios countered Howards with \$1 million, but eventually Don Cheadle was recast as Rhodey when negotiations broke down.¹⁶⁸ Mickey Rourke and Scarlett

¹⁶³ Ibid., 4.

¹⁶⁴ Referring to the Disney purchase please see Diane Panosian "Behind The Money of Marvel's Mighty Movies," 4 and Robert Reiss, "How Marvel Became a Business Superhero," 1.

¹⁶⁵ Panosian, "Money Marvel," 4.

¹⁶⁶ Ibid., 4.

¹⁶⁷ "The Salaries of Marvel's *The Avengers*," *TheRichest*, July 11, 2012, accessed November 9, 2014,

<http://www.therichest.com/expensive-lifestyle/entertainment/marvels-the-avengers-salaries/>.

¹⁶⁸ Kristy Puchko. "Terrence Howard Left *Iron Man 2* Because They Would Only Pay Him \$1 Million," *CinemaBlend*, March 18, 2013, accessed November 9, 2014, <http://www.cinemablend.com/new/Terrence-Howard-Left-Iron-Man-2-Because-They-Would-Pay-Him-1-Million-36432.html>.

Johansson were originally offered \$250,000 for their roles as Ivan Vanko and the Black Widow, which was then negotiated to around \$400,000.¹⁶⁹ Robert Downey Jr. arguably has best advantage over Marvel. He reportedly earned \$5 million for *Iron Man* (2008), then \$12.5 million for *Iron Man 2*.¹⁷⁰ However, Downey Jr.'s profit from *Avengers* was on another level, reportedly having received \$70-80 million for the blockbuster.¹⁷¹ This financial coup was a result of the representatives of Downey Jr. negotiating with Marvel back in 2008, when *Iron Man* freshly earned \$585 million worldwide, to give Downey Jr. a fraction of Marvel's revenue for any film that will feature his likeness as Iron Man, including box office bonuses and back end compensation [See Appendix G].¹⁷² Downey Jr.'s iconic performance of the brilliant narcissistic genius Tony Stark sparked the success of *Iron Man*, the *Avengers* and the larger "MCU." Thus, if he were recast or "let go," audiences would revolt; the perfect synergy of actor and character would be impossible to replicate, making his paycheck a necessary financial evil. In contrast, all the other actors from the *Avengers* were said to only receive \$2 million to \$3 million for the film.¹⁷³ Events came to a head in May 2013 when the cast of the *Avengers* held a united front against Marvel regarding salaries and compensations.¹⁷⁴

The show of solidarity by the *Avengers* cast served to unnerve Marvel, which ended in hard-earned results. As reported by Nikki Finke in her article, "'Avengers' Cast And Stingy Marvel Ready To Rumble Over Sequel Cash & Strong-Arming," the other members of the cast, including Chris Evans and Chris Hemsworth, were paid leanly for

¹⁶⁹ Kim Masters, "Haggling With the Stars," *The Daily Beast*, April 2, 2009, <http://www.thedailybeast.com/articles/2009/04/02/haggling-with-the-stars.html>.

¹⁷⁰ "Salaries."

¹⁷¹ Nikki Finke, "'Avengers' Cast And Stingy Marvel Ready To Rumble Over Sequel Cast & Strong-Arming," *Deadline*, May 7, 2013, accessed November 6, 2014, <http://deadline.com/2013/05/robert-downey-jr-avengers-marvel-negotiations-fight-491675/>, 1.

¹⁷² "Salaries."

¹⁷³ Ibid.

¹⁷⁴ Finke, "Stingy Marvel," 2.

their first movies, not much better for the sequels, and were counting on at least \$5 million upfront and better back ends for the *Avengers* sequel.¹⁷⁵ After hard-fought bargaining, Chris Evans for *Captain America 2* and Chris Hemsworth for *Thor 2* wound up with deals still weighted on the back end, but at least with attainable break-even numbers and small upfront guarantees and box office bonuses.¹⁷⁶ Marvel threatened to sue or recast when contracts and/or options were challenged, but the cast maintained solidarity.¹⁷⁷ As a result, Marvel and Disney were in a bind regarding the *Avengers* sequel because the upfront pay, backend compensation, break-even points and box office bonuses weren't yet pinned down for the cast, which was even more troubling because they didn't have Robert Downey Jr., the most essential actor, signed on for another contract.¹⁷⁸ Downey Jr. knew his worth, stating publically "I'm what's known as a strategic cost," and added further pressure on Marvel by hinting publicly to the media that it may be time to retire Tony Stark."¹⁷⁹ Some of the casts' representation tried to go straight to Bob Iger or Alan Horn, the chairman of Walt Disney Studios, in hopes of discussing renegotiations since Disney purchased Marvel but were rebuffed.¹⁸⁰ Nikki Finke, creator of Hollywood industry column *Deadline*, heavily suggested in her column Iger and Horn were fearful of Perlmutter, and wanted to steer clear of the nightmarish negotiations.¹⁸¹ Eventually a resolution came about, with Robert Downey Jr. signing for two future *Avengers* sequels, and other cast members striking deals, such as Scarlett

¹⁷⁵ Ibid., 2.

¹⁷⁶ Ibid., 2.

¹⁷⁷ Ibid., 2.

¹⁷⁸ Ibid., 2.

¹⁷⁹ Ibid., 3.

¹⁸⁰ Ibid., 3.

¹⁸¹ Ibid., 3.

Johansson scoring \$20 million to reprise her role as the Black Widow.¹⁸²

Despite complaints from actors, Marvel's tough approach regarding salaries allowed it to remain a profitable studio. Peter Cuneo has stated that the studio's leadership doesn't want to waste money on "non-productive spending."¹⁸³ However, he also asserts that Marvel is committed to paying for performance, and focusing on productivity from both financial and creative viewpoints, stating Marvel "made cash the core measurement for the company's success and its employees' performance metric...bonus targets were tied to cash flows rather than profitability."¹⁸⁴ Cuneo served as Marvel's chief executive and chief financial officer for about two years during the turnaround phase in order to save the company about half a million dollars annually.¹⁸⁵ This action allowed Cuneo to stay close to the numbers and follow the details of Marvel's progress during that critical early stage, while maintaining a very low head count of approximately 250 employees, all full-time, with the cash flow per employee in excess of \$1.5 million.¹⁸⁶ Marvel's stringent financial stance was needed to keep afloat and profitable in an industry where it is becoming harder to do so when people are going to the theatres less and less.

There is an element of necessity to Marvel Studios' financial thriftiness. The delicate balance of an interconnected cinematic universe, with well-known and popular characters interacting with one another on an enormous creative scale, would understandably enforce a studio's desire to safeguard themselves financially in case of failure or setbacks. However, Marvel Studios' thrifty reputation precedes them; Devin

¹⁸² Referring to the casts' salary see Nikki Finke, "Robert Downey Jr. Signs For Two More 'Avengers'" and David K. Li "ScarJo Makes' em Pay."

¹⁸³ Reiss, "Marvel Business," 4.

¹⁸⁴ *Ibid.*, 4.

¹⁸⁵ *Ibid.*, 4

¹⁸⁶ *Ibid.*, 5.

Leonard's article "The Pow! Bang! Bam! Plan to Save Marvel, Starring B-List Heroes" deliberately notes Marvel Studios' offices at the Disney headquarters in Burbank, California were furnished like a college dormitory, with threadbare couches.¹⁸⁷ Nikki Finke also reports one reason why the *Avengers* was nominated for only one Oscar, Best Visual Effects, at the 85th Academy Awards was because Marvel refused to pay for an awards season campaign for the picture, even when Disney offered to foot the bill.¹⁸⁸

Along with their prudent economic systems, Marvel Studios' creative regimen was another factor that contributed to the studio's success. Marvel knew in order to remain afloat and profitable in Hollywood, they had to develop unique, yet familiar, stories for their audience. Film studios normally hire outside producers to craft individual films, but Marvel decided against this process, and instead formed a six-member creative committee consisting of personnel steeped in comic book lore.¹⁸⁹ Its members consisted of Kevin Feige, Louis D'Esposito, co-president of Marvel Studios, and Dan Buckley, president of publishing, Joe Quesada, Marvel's chief creative officer; and Brian Michael Bendis, writer of comics hits such as *Ultimate Spider-Man*, the *New Avengers*, *Alias*, and the *All-New X-Men*, with the committee overseen by Alan Fine, the president of Marvel Entertainment.¹⁹⁰ In Hollywood, there is an unfavorable reputation for the practice of making movies by committee; supposedly, it results in "lifeless" products.¹⁹¹ However, the creative-by-committee strategy worked for Marvel, and the central factor contributing to the success of Marvel Studios' films is that they aren't reinventing the wheel. They utilize epic showdowns taking place at major locations

¹⁸⁷ Leonard, "Pow!," 2.

¹⁸⁸ Finke, "Stingy Marvel."

¹⁸⁹ Leonard, "Pow!," 2.

¹⁹⁰ Referring to Marvel executives see *Wikipedia* "Brian Michael Bendis" and Devin Leonard, "The Pow! Bang! Bam! Plan to Save Marvel, Starring B-List Heroes," 2.

¹⁹¹ *Ibid.*, 2.

around the world, with a liberal use of special effects, computer-generated graphics, and 3-D to keep the audience's attention.¹⁹² Nonetheless, the films feel like a refreshment of the genre, so much so that instead of diminishing returns, Marvel's sequels make progressively more money, an increasing rarity in a world where people are going to the theatres less and less due to increasing variety of entertainment options and middling quality of product.¹⁹³ *The Avengers* sold \$1.5 billion dollars in tickets globally in 2012, making it the third-highest-grossing movie of all time; all told, Marvel has made consistent hits, which is a very difficult goal to achieve in a creative industry, even more so today [See Appendix G].¹⁹⁴ The intricate and innate storytelling now inherent to Marvel Studios was shepherded by its co-president, Kevin Feige.

Kevin Feige

Kevin Feige cultivated the reputation of shepherding the "MCU," after being made studio chief and president of Marvel Studios at thirty-three years old, in charge of Hollywood's first major independent movie studio since the creation of DreamWorks Studios in 1994.¹⁹⁵ Growing up in Westfield, New Jersey, Feige was an enormous fan of film classics and franchises such as *Star Wars*, *Indiana Jones*, *Star Trek*, *Back to the Future* and *Robocop*.¹⁹⁶ He decided to study film at the University of Southern California upon learning that George Lucas, the creator of *Star Wars*, attended the same institution.¹⁹⁷ Upon graduating he worked as an assistant to producer Lauren Shuler Donner on three movies; the disaster flick *Volcano* (1997), the romantic comedy classic

¹⁹² Ibid., 1.

¹⁹³ Ibid., 1.

¹⁹⁴ Ibid., 1.

¹⁹⁵ Ibid., 3.

¹⁹⁶ Ibid., 3.

¹⁹⁷ Ibid., 3.

You've Got Mail (1998) starring the quintessential 1990s romantic duo Meg Ryan and Tom Hanks, and lastly and most infamously, *X-Men* (2000).¹⁹⁸

Feige credited the success of *X-Men* (2000) making \$424 million worldwide to working with the director Bryan Singer to portray the mutants as they had been in the comic books: an anguished ensemble of youthful heroes torn between saving humanity and turning against it as their enemies did [See Appendix D].¹⁹⁹ Avi Arad was impressed, and hired Feige the same year to be his second-in-command; from then on, Feige has had a production credit with Marvel film and television shows.²⁰⁰ Feige concedes that Marvel most likely won't recover the film rights to all of its characters anytime soon, but believes Marvel has something more valuable: a universe of thousands of characters it controls entirely.²⁰¹ That means Feige can produce an unlimited number of films with interweaving story lines and characters, creating a vast audience for almost any Marvel character, and thus any Marvel movie.²⁰² For example, when people might show up for *The Avengers*, and meet the Black Widow, they can come back for her movie, too.²⁰³ Kevin Feige holds the position of the master planner of the "MCU" at Marvel Studios, while the directors execute the long-term vision of the "MCU."

Marvel Studios Actors and Directors

Marvel Studios' would not have been as successful as it is without the careful construction of its cinematic universe, and ensuring its actors remain part of its larger

¹⁹⁸ *Ibid.*, 5.

¹⁹⁹ *Ibid.*, 1.

²⁰⁰ Adam Rogers, "How Marvel Unified Its Movie Universe (And Why That Won't Be Easy for DC)," *Wired*, August 7, 2013, accessed November 8, 2014, <http://www.wired.com/2013/08/kevin-feige-marvel-dc-movies/all/>.

²⁰¹ Leonard, "Pow!," 1.

²⁰² *Ibid.*, 1.

²⁰³ *Ibid.*, 1.

plan. As described by Feige his July 21, 2009 interview with *The Hollywood Reporter*, “unlike a major studio that makes and is responsible for twenty or so films a year, Marvel Studios only makes two films, allowing them to plan exactly what they are going to be.”²⁰⁴ Feige further explains, “we don't develop anything that we don't plan to make, and if it does feel like we're rushing, then we change the date.”²⁰⁵ As evident from its non-stop successes, Marvel’s methods have worked so far. The studio had even hinted they have plans extending to 2028. The actors of the “MCU” are also an important factor of Marvel’s success; the studio goes to great lengths to guarantee that their actors are part of their long-term plan, which they do so through the actors’ contracts. Due to Marvel Studios’ construction of its “MCU,” it requires its actors to have multi-picture contracts.²⁰⁶ It is standard for major studios to sign actors for multi-picture contracts, especially when making blockbuster movies that will result in sequels.²⁰⁷ Marvel Studios is an extreme example of such a studio, due to how the “MCU” implies a single narrative, spanning decades of real-world production, with all of the films tying into one another like chapters in a long novel.²⁰⁸ The “MCU” is a continuous story, with unlimited crossover potential for its characters, and as such, Marvel’s actors would have to be contracted to sign on for multiple films in order for the cinematic narrative to work.²⁰⁹ Samuel L. Jackson’s contract is a nine-picture deal to play S.H.I.E.L.D. Director Nick Fury, which was unprecedented for its time at the time, as does Sebastian Stan, who

²⁰⁴ Borys Kit, “The Avenger: Q&A with Kevin Feige.”, *The Hollywood Reporter*, July 21, 2009, accessed February 20, 2014, <http://www.hollywoodreporter.com/news/qampa-kevin-feige-86744>.

²⁰⁵ Ibid.

²⁰⁶ Gavia Baker-Whitelaw, “Being a Superhero Isn’t Very Super for Marvel’s “Avengers” Actors,” *The Daily Dot*, March 28, 2014, accessed November 6, 2014, <http://www.dailydot.com/fandom/marvel-avengers-contracts-gilded-cage/>, 3.

²⁰⁷ Ibid.

²⁰⁸ Ross Miller, “Iron Man is Forever. Robert Downey Jr. Isn’t,” *The Verge*, October 16, 2014, accessed November 6, 2014, <http://www.theverge.com/2014/10/16/6985725/marvel-iron-man-is-forever-rdj-isnt>, 3.

²⁰⁹ Referring to Marvel actors’ salaries see Ross Miller, “Iron Man is Forever. Robert Downey Jr. Isn’t,” 3 and Gavia Baker-Whitelaw, “Being a Superhero Isn’t Very Super for Marvel’s “Avengers” Actors,” 2.

portrayed Bucky Barnes in the *Captain America* films.²¹⁰ The general contract for Marvel actors appears to be six options, when an actor is contracted to appear a certain number of times within a series of films, as Chris Evans has to portray Steve Rogers, a.k.a Captain America.²¹¹ When an actor completes, or is nearing completion of, the options in their contract they have to be paid by the studio to appear in future films. In the case of Marvel Studios, actors who have completed their contracts have the upper hand to negotiate a much higher salary than Marvel paid them in earlier films, as Robert Downey Jr. did after his contract expired after *Iron Man 3*, due to Marvel needing central characters such as Iron Man and Captain America.²¹² While completing a six-movie deal seems perfectly plausible, it means an actor is stuck in a contract for up to a decade.²¹³ Marvel's hard edge approach to actor salaries is another pressure point. To actors like Scarlett Johansson, Chris Evans and Chris Hemsworth, who sign on for high-profile movies such as Marvel's, to stay on the A-list and fund a career doing low-budget indie movies, there is little incentive to continue with Marvel when they can earn ten times as much from a different blockbuster.²¹⁴

Marvel's directors were another important aspect of Marvel Studios' success. The studio's *modus operandi* regarding directors for their films is to select a professional who can make their individual film unique and interesting, but still fit within the larger "MCU." Marvel tends to choose "outcast" directors, which include unexpected choices such as Jon Favreau, the Russo brothers, and James Gunn and this strategy has paid off

²¹⁰ Referring to cast's contracts see Michael Fleming, "Samuel Jackson Joins 'Iron' Cast," 1 and Gavia Baker-Whitelaw, "Being a Superhero Isn't Very Super for Marvel's 'Avengers' Actors," 3.

²¹¹ *Ibid.*, 3.

²¹² Robert Yaniz Jr, "Robert Downey Jr. on Iron Man Potentially Being Recast After 'The Avengers 2,'" *Screenrant*, November 2, 2013, accessed November 12, 2014, <http://screenrant.com/avengers-2-iron-man-robert-downey-jr-recasting/>.

²¹³ Baker-Whitelaw, "Being a Superhero," 3.

²¹⁴ *Ibid.*, 3.

for the company since *Iron Man*.²¹⁵ Marvel's best examples of director and film synergy are illustrated through the director/film combinations of Kenneth Branagh and *Thor* (2011), and Joe Johnston and *Captain America: The First Avenger* (2011). Branagh was a perfect fit for *Thor*, as the film allowed him to draw upon the Shakespearean themes that permeated his other films, such as *Henry V* (1989) and *Hamlet* (1996), giving what could have been a very implausible film a solid foundation and sense of gravitas.²¹⁶ Johnston had experience with the superhero genre and in creating a WWII-era genre film, as the director of the golden-age adventure film *The Rocketeer* (1991).²¹⁷ Both professionals had experience with studio filmmaking and blockbusters, making them further ideal directorial candidates for Marvel Studios. However, as Marvel Studios build and branch out their multiple, interconnected franchises, artistic license becomes caught in the crossfire for Marvel filmmakers.

Marvel Studios' was not exempt from the tug of war that exists between business and creative forces in Hollywood. From Marvel's perspective, its characters must be informed by contractual needs, marketability and general audience expectations in order to ensure every film is a Marvel property.²¹⁸ Unfortunately, adherence to this principle comes at a cost to the filmmakers, who are creatively constricted by these demands, as well as Marvel's need for a palatable product.²¹⁹ This tension is best illustrated through Jon Favreau's, experience at Marvel Studios.²²⁰ The director of *Iron Man*, Favreau was the future model of what Marvel Studios looked for in directors, being paradoxically safe

²¹⁵ Referring to Marvel director decisions see Matt Patches, "The Marvel Way: How the Comic-Book Studio Chooses Its Directors," 1 and Ken Hanley, "Universally Speaking: Marvel & The Director's Chair," 1.

²¹⁶ "Kenneth Branagh," *Internet Movie Database (IMDb)*, N.p., n.d., web, accessed November 13, 2014, http://www.imdb.com/name/nm0000110/?ref=nm_sr_1.

²¹⁷ Hanley, "Universally Speaking," 6.

²¹⁸ *Ibid.*, 1.

²¹⁹ *Ibid.*, 1.

²²⁰ *Ibid.*, 2.

and unique. He was an actor/writer, turned director with a sharp ear for comedy (having started his career at Chicago's ImprovOlympic), grew from independent film, penning his breakout *Swingers* (1996) and directing the film *Made* (2001).²²¹ His transition to studio filmmaking with *Elf* (2003) showed off his ability to deliver studio-friendly fare, while *Zathura* (2005) touted competent action and a passion for sci-fi/fantasy, although the film was a box-office bomb.²²² After the blockbuster success of *Iron Man*, Favreau was quickly positioned as the wunderkind of the studio, especially after the disappointment of Louis Leterrier's *The Incredible Hulk* (2008).²²³ Favreau signed on as the director for *Iron Man 2* and as the executive producer of Marvel's biggest property yet, the *Avengers*.²²⁴ However, there were troubles; Favreau's request for more scripting time for *Iron Man 2* was denied, and he unexpectedly entered production for *Iron Man 2* under tumultuous conditions with the recasting of Terrence Howard.²²⁵ Favreau frequently clashed with Marvel executives, who nudged his vision aside in the name of developing their wider, Avenger-friendly universe as much as possible. Along with other setbacks, *Iron Man 2* ultimately debuted to a lukewarm fan response.²²⁶ Despite being contractually tied to the company as producer on future *Iron Man* and *Avengers* productions, Favreau opted not to direct *Iron Man 3*.²²⁷ As a result, Marvel Studios searched for a new visionary to help craft the "MCU," and made their smartest decision in the company's history in selecting Joss Whedon.²²⁸

Joss Whedon, director of the *Avengers*, is in charge of maintaining the creative

²²¹ Referring to Jon Favreau's career see *IMDB (IMDB)* "Jon Favreau" and Ken Hanley, "Universally Speaking: Marvel & The Director's Chair," 2.

²²² *Ibid.*, 2.

²²³ *Ibid.*, 2.

²²⁴ Hanley, "Universally Speaking," 3.

²²⁵ *Ibid.*, 3.

²²⁶ *Ibid.*, 3.

²²⁷ *Ibid.*, 3.

²²⁸ *Ibid.*, 4.

fires of “MCU.” He could be viewed as Marvel’s secret weapon, having successfully culminated “Phase One” with the runaway smash of the *Avengers*, and acting as Marvel Studios’ creative consultant to shepherd and develop the “MCU’s” long-term goals. When it was time for Marvel to make *The Avengers*, Feige wanted the film to explore how the different Avengers responded to each other emotionally, and knew “[the studio] needed somebody who wasn’t going to reinvent the wheel, because the die was cast and the cast was cast...[but who had a] unique voice, because [the *Avengers*] had to feel like a part one, not *Iron Man 3* or *Thor 2*.”²²⁹ Whedon had been on Marvel’s radar since the turn of the millennium, and was heavily involved in film adaptations of comic books behind the scenes.²³⁰ He wrote a treatment for *Iron Man* that was approved, but had to bow out at the last minute.²³¹ There were also brief discussions of Whedon directing *X-Men* and *X2* (which were ultimately directed by Bryan Singer) the first of which he scripted, and in 2005 Whedon attempted to bring Wonder Woman to the big screen for Warner Bros., a project which unfortunately never got off the ground.²³² He also became involved in writing for Marvel, diving into the X-Men universe and authoring the critically acclaimed *Astonishing X-Men* (2004-2008).²³³ When it came time to select the director for the *Avengers*, Feige knew Marvel needed to find a professional who could handle both action and juggle multiple storylines required in an ensemble piece.²³⁴ Whedon originally didn’t want to take on the project, as he was busy with his own “Whedonverse” of properties, and originally only felt comfortable with the *X-Men*

²²⁹ Amy Pascale, *Joss Whedon: the Biography*, Chicago: Chicago Review Press Incorporated, 2014, 330.

²³⁰ *Ibid.*, 330

²³¹ *Ibid.*, 330,

²³² *Ibid.*, 263, 331.

²³³ Referring to Joss Whedon’s comics work see Amy Pascale *Joss Whedon: the Biography*, 235 and Wikipedia “Astonishing X-Men.”

²³⁴ Pascale, *Joss Whedon*, 330.

universe.²³⁵ However, after a discussion about the current version of *The Incredible Hulk* script with screenwriter Zak Penn, Whedon became hooked on the “MCU.”²³⁶ Between the end of filming on *Thor* and the start of filming *Captain America: The First Avenger*, Feige and Whedon met and Feige explained the *Avengers* script and laid out how each film related to the next.²³⁷ Whedon in turn scrapped the script and wrote five pages of material explaining how he would tell the story of the Avengers, and was promptly hired.²³⁸ Joss Whedon’s role as director of the *Avengers*, and larger influence as Marvel Studios’ creative consultant was the beginning of a mutual partnership.

Joss Whedon may have been Marvel Studios’ riskiest choice at the time, but their decision to hire him as the *Avengers*’ director and Marvel Studios’ creative consultant benefited the studio enormously in the long run. Joss Whedon’s role as Marvel Studios’ central creative consultant, began with involvement of the post-production of *Thor*, and a dialogue polish and rewrite of *Captain America: The First Avengers*, contributing the film’s tear-jerking conclusion.²³⁹ He has also overseen the development of Marvel Studios “Phase Two” films and the studio’s venture in prime-time television with Marvel’s Agents of S.H.I.E.L.D., following the lives and adventures of S.H.I.E.L.D. agents.²⁴⁰ Whedon was also instrumental in selecting Mark Ruffalo; as the new Hulk after negotiations with Edward Norton broke down. Ironically Louis Leterrier, *The Incredible Hulk*’s director, originally wanted Ruffalo for the role of Bruce Banner.²⁴¹ Whedon also cast Colbie Smulders (*How I Met Your Mother*, *Delivery Man*), who had

²³⁵ Ibid., 332.

²³⁶ Ibid., 333.

²³⁷ Ibid., 333.

²³⁸ Ibid., 333.

²³⁹ Referring to Joss Whedon’s rewrites see John Wilding, “Marvel Studios Clash with THE AVENGERS 2 Stars Over Money; Cast Threatening to Quit?,” and Amy Pascale *Joss Whedon: the Biography*, 335.

²⁴⁰ Ibid., 378.

²⁴¹ Ibid., 366.

been his choice as the titular character for his *Wonder Woman* film as S.H.I.E.L.D. agent Maria Hill, an integral supporting character of the *Avengers*.²⁴²

Although Marvel had utilized other non-blockbuster directors, such as Jon Favreau and Kenneth Branagh, those professionals had film experience; Whedon had directed just one feature film, *Serenity*, the film sequel to Whedon's cult classic *Firefly*.²⁴³ However, in hiring Whedon, Marvel Studios hired a successful "showrunner," a creator with experience interweaving ensemble arcs into television and comic books.²⁴⁴ When it became clear that *Iron Man*, *Thor*, and *Captain America* were building toward *The Avengers*, Marvel embraced small-screen logic for big-screen storytelling.²⁴⁵ Furthermore, as the creator of the iconic television shows *Buffy the Vampire Slayer* (1997-2003), *Buffy's* spinoff *Angel* (1999-2004), the cult classic space-Western *Firefly* (2002-2003) and its film sequel *Serenity* (2005), and *Dollhouse* (2009-2010), Joss Whedon's reputation made the fans confident in Marvel's choice of director for the *Avengers*.²⁴⁶ This confidence is further emphasized by Feige's support of Whedon, as he emphasized "if you look at what [Joss] did with his television work and his Marvel comics, the characters always shine through."²⁴⁷ Whedon's involvement at Marvel Studios not only benefits the studio, but himself as well. As reported by journalist Nikki Finke, Whedon reportedly has a deal with Marvel Studios worth an impressive \$100 million dollars for a combination of product and services including several films,

²⁴² Referring to Cobie Smulder's casting see Amy Pascale *Joss Whedon: the Biography*, 271, 337 and *Internet Movie Database (IMDB)* "Cobie Smulders."

²⁴³ Pascale, *Joss Whedon*, 333.

²⁴⁴ Matt Patches, "The Marvel Way: How the Comic-Book Studio Chooses Its Directors," *Grantland*, November 6, 2013, accessed March 20, 2014, <http://grantland.com/hollywood-prospectus/the-marvel-way-how-the-comic-book-studio-chooses-its-directors/?src=mobile>, 4.

²⁴⁵ *Ibid.*, 4.

²⁴⁶ Referring to Joss Whedon's filmography see Amy Pascale *Joss Whedon: The Biography*, 333 and *Internet Movie Database IMDB* "Buffy the Vampire Slayer," "Angel," "Firefly," "Serenity," "Dollhouse."

²⁴⁷ Leonard, "Pow!," 10.

consulting work, a pilot on ABC that eventually became the television show *Marvel's Agents of S.H.I.E.L.D.* and many other projects that effectively take him off the marketplace for years to come.²⁴⁸ After the immense success of *Avengers*, and “Phase One,” Marvel Studios entered “Phase Two,” now in the position to pursue any director they want.

Although they now had the freedom to select any director, Marvel Studios made the decision to continue choosing easily malleable, but unique and talented, directors. For *Iron Man 3*, Marvel recruited Shane Black, esteemed screenwriter of action hits *Lethal Weapon* (1987) and *The Long Kiss Goodnight* (1996), Black had previously worked with Robert Downey Jr. in his directorial debut, *Kiss Kiss Bang Bang* (2005), which was an instrumental film in Downey Jr.’s comeback after his jail time and past drug use.²⁴⁹ Hiring Black was a successful proposition, as *Iron Man 3* became the second highest grossing film in the “MCU” to date with \$1.2 billion dollars.²⁵⁰ The other “Phase Two” films had more difficulties. After talks with HBO regular director Brian Kirk fell through, *Thor: The Dark World* was initially to be directed by Patty Jenkins, the director of *Monster* (2003), a favorite of *Thor* star Natalie Portman, and the first female director on a Marvel Studios production.²⁵¹ Unfortunately, Jenkins left production when creative restrictions left her unsatisfied with the project.²⁵² Shortly after, Marvel recruited *Game of Thrones* director Alan Taylor, who, like Joe Johnston, was familiar with thematically

²⁴⁸ Finke, “Stingy Marvel,” 4.

²⁴⁹ Referring to Robert Downey Jr.’s career pre-*Iron Man* see (IMDB) *Internet Movie Database* “Shane Black” and Ken Hanley, “Universally Speaking: Marvel & The Director’s Chair,” 4.

²⁵⁰ “Iron Man 3,” *Box Office Mojo*, web, accessed November 13, 2014, <http://boxofficemojo.com/movies/?id=ironman3.htm>.

²⁵¹ *Ibid.*, 5.

²⁵² *Ibid.*, 5.

similar material and could be trusted to deliver what Marvel expected.²⁵³ However, Taylor was dissatisfied by last minute script polishes from Whedon to add more comedy to the project, and was vocally opposed to the post-production choices on the film.²⁵⁴ Additional rumors of Taylor being locked out of the editing bay spreading around the Internet added further fuel to the fire.²⁵⁵ Taylor even expressed frustration towards Marvel for their standard post-credit stingers (scenes that lay the groundwork for continuity and future Marvel films), feeling as though the scene, shot unbeknownst to him, was tonally inappropriate for the film.²⁵⁶ *Captain America: The Winter Soldier* also had a strange beginning finding their directors. After taking pitches from many potential directors, Marvel chose Anthony and Joe Russo, who came from the world of independent comedies and honed their skills in television, with programs such as *Arrested Development* (2003-2005), *Community* (2009-2014) and *Happy Endings* (2011-2012).²⁵⁷ The choice was puzzling at first, as the Russo brothers had been unproven with the material and budget, but Marvel's instincts were proven right again, as *Captain America: The Winter Soldier* grossed over \$700 million worldwide, causing the studio to quickly option the Russos for *Captain America 3*.²⁵⁸ Marvel Studios' announcement of the Russo brothers as the directors of the *Avengers: Infinity War P.1* and *P. 2*, further cemented their confidence in the duo.²⁵⁹

Ironically, the selection of the director for Marvel's riskiest film for "Phase Two,"

²⁵³ Ibid., 5.

²⁵⁴ Ibid., 6

²⁵⁵ Ibid., 6.

²⁵⁶ Ibid., 6.

²⁵⁷ Referring to the Russo bros.' careers see (*IMDB*) *Internet Movie Database* "Anthony Russo" and "Joe Russo," and Ken Hanley, "Universally Speaking: Marvel & The Director's Chair," 5.

²⁵⁸ Ibid., 6.

²⁵⁹ Borys Kit, "Russo Brothers to Direct 'Avengers: Infinity War' Part 1 and 2," *The Hollywood Reporter*, March 23, 2015, accessed March 23, 2015, <http://www.hollywoodreporter.com/heat-vision/russo-brothers-direct-avengers-infinity-783685>, 1.

Guardians of the Galaxy (2014), was untroubled.²⁶⁰ Marvel took a pitch from James Gunn, director of gross-out horror comedy *Slither* (2006) and violent dark superhero satire *Super* (2012), on the recommendation of Joss Whedon.²⁶¹ Despite, Gunn's risqué and offbeat resume, Marvel signed Gunn quickly for what was expected to be their most epic, expansive film to date.²⁶² Gunn's script inspired confidence in Marvel, who trusted the filmmaker to introduce a new batch of unfamiliar, yet important characters, to mainstream audiences, and the result was a breakout success exceeding even *Iron Man*, with *Guardians of the Galaxy* making \$333,079,971 domestically [See Appendix G].²⁶³ Working for Marvel has provided career boost for the majority of its directors. Jon Favreau used the momentum from directing his *Iron Man* films to make *Cowboys and Aliens* (2011) and Kenneth Branagh directed and starred in Paramount's Jack Ryan remake, *Jack Ryan: Shadow Recruit* (2014), and directed a live-action version of *Cinderella* (2015) for Disney, while Alan Taylor is slated to direct the Terminator remake, *Terminator: Genisys*, and Shane Black is attached to a *Doc Savage* remake.²⁶⁴ Despite Marvel Studios' at times tenuous relations with its directors, their curation of their individual franchises has been successful in keeping fans interested in the larger "MCU," while creating new audiences for films featuring the Marvel characters.

²⁶⁰ Ibid., 6.

²⁶¹ Referring to Marvel Studio's hiring of James Gunn see (*IMDB*) *Internet Movie Database* "James Gunn" and Ken Hanley, "Universally Speaking: Marvel & The Director's Chair," 6.

²⁶² Ibid., 6.

²⁶³ Regarding the success of *Guardians of the Galaxy* see *Box Office Mojo* "Guardians of the Galaxy" and Ken Hanley, "Universally Speaking: Marvel & The Director's Chair," 6.

²⁶⁴ Regarding directors' careers see *Internet Movie Database (IMDb)* "Jon Favreau," "Kenneth Branagh," and "Shane Black."

Marvel Studios Maintenance

Marvel Studio's deliberate crafting of each of the individual franchises of the "MCU" as a specific genre was essential to the company's strategy. Marvel developed *Iron Man*, and its franchise, as a "grounded" superhero film centered on real-life issues of politics, weapons drama and terrorism, while *Thor* was a Shakespearean fish out of water tale that expanded into epic fantasy for its sequel. *Captain America: The First Avenger* was a traditional "let's defeat the Nazis!" WWII actioner, whose sequel is a 1970s political and espionage thriller, while *Guardians of the Galaxy* has firmly established itself as an irreverent, wacky space opera.²⁶⁵ Marvel's "Phase Three" follows that pattern of genre curation. Scott Derrickson, the director of horror films *The Exorcism of Emily Rose* (2005) and *Sinister* (2012), will take on *Doctor Strange* (2016), grounding the film in the supernatural and mysticism appropriate to the character.²⁶⁶ Marvel's hiring of Peyton Reed, director of comedies *Down with Love* (2003) and *Yes Man* (2008), after Edgar Wright, who had been attached to the project since 2006, left production suggests an attempt to create a broad comedic heist film.²⁶⁷ Ultimately, the lesson regarding the choice of directors by Marvel Studios is that any and all risks come with a threshold. While James Gunn and the Russo brothers each posed their unique risks in "Phase Two" of the "MCU," they were able to tailor their directorial sensibilities to Marvel's larger plan.²⁶⁸ They also came with the approval of Joss Whedon, as part of the master plan for *Avengers: Age of Ultron*, in comparison to the directors who had more specific visions

²⁶⁵ Ibid., 4.

²⁶⁶ "Scott Derrickson," *Internet Movie Database (IMDb)*, N.p., n.d., web, accessed November 13, 2014, http://www.imdb.com/name/nm0220600/?ref=nm_sr_1.

²⁶⁷ Referring to Peyton Reed see *Internet Movie Database (IMDb)*, "Peyton Reed" and Rodrigo Perez, "Why Edgar Wright Left Marvel's 'Ant-Man': Analysis & The Screenplay Rumors."

²⁶⁸ Hanley, "Universally Speaking," 6.

for their films, such as Alan Taylor and Edgar Wright.²⁶⁹ Marvel's careful construction of their individual franchises, and how they relate to the larger "MCU," makes their films stand out amongst the increasing volume of superhero films catering to audience consumption. *Iron Man*'s breakout success launched Marvel Studios, and caused Hollywood to sit up and take notice, while laying the foundation for the "MCU."

Marvel Studios: Phase One

Iron Man, released May 2, 2008, was the first entry in the nascent "MCU" and Marvel Studios' "Phase One" of this universe; it needed to succeed, or else their plans for a cinematic universe would be for naught.²⁷⁰ It was the first film made under Marvel's Merrill Lynch deal, and there were immediate doubts in Marvel deciding to use the second-tier (at the time) character of Iron Man as the lynchpin for the studio's cinematic universe.²⁷¹ Adding further fuel to the fire was Kevin Feige and Jon Favreau's decision to hire Robert Downey Jr. to play Tony Stark.²⁷² Due to previous addictions and legal trouble, Downey Jr. was one of the highest-risk actors in the industry, to the point where he could not be insured.²⁷³ Marvel Studios had no experience in making films and had yet to establish themselves as a proven company. Before 2008, *Iron Man*, and the *Avengers* comic book series, were nowhere near the household names they are now.²⁷⁴ These were huge risks, even for superhero films.²⁷⁵ Ultimately, Marvel Studios' biggest risk was rewarded, with Robert Downey Jr.'s nuanced and bombastic portrayal of Tony

²⁶⁹ Hanley, "Universally Speaking," 6.

²⁷⁰ "Iron Man," *Box Office Mojo*, web, accessed November 16, 2014, <http://boxofficemojo.com/movies/?id=ironman.htm>.

²⁷¹ Referring to Iron Man's role in the "Marvel Cinematic Universe" see Diane Panosian "Behind The Money of Marvel's Mighty Movies," 4 and Chris Dillard "History of Marvel Studios," 4.

²⁷² Panosian, "Money Marvel," 4.

²⁷³ Dillard "History," 4.

²⁷⁴ *Ibid.*, 4.

²⁷⁵ *Ibid.*, 4.

Stark becoming the standard for character and actor synchronicity, of the actor embodying a character so well that he or she becomes inextricably linked to the character in the minds of the public.²⁷⁶ *Iron Man* also hedged its bets with the inclusion of big name and respected actors, including Jeff Bridges (*The Big Lebowski*, *True Grit*) as antagonist Obadiah Stone, and Gwyneth Paltrow (*Seven*, *Shakespeare in Love*) as Virginia “Pepper” Potts.²⁷⁷ These actors helped ground the film in reality, and give *Iron Man* a more serious quality.²⁷⁸ In hindsight, Marvel selecting *Iron Man* as its first film was a smart strategic move. The character of Iron Man is a superhero whose origins, as a rich genius industrialist who builds himself a weaponized suit to save himself, then uses the suit to save others, is within the realm of plausible possibility; it allowed audiences to better connect with its protagonist. *Iron Man*’s more realistic tone, along with Marvel updating the story to address current issues such as terrorism and warfare, and partially taking place in present-day Afghanistan, offered a refreshing change of pace from the often-fantastical superhero films that preceded it.²⁷⁹ The film also began the unprecedented construction of a larger superhero “cinematic universe.” At the end of *Iron Man*, after the credits, the studio included a special scene that included Director of S.H.I.E.L.D. Nick Fury, portrayed by Samuel L. Jackson, the biggest-name actor in the film’s cast at the time.²⁸⁰ Kevin Feige has since stated, “that [scene] was a stunt and a treat for fans,” but it also was a landmark moment in superhero film history.²⁸¹ In less than a minute, Marvel Studios set up the expectation that future films would lead to an

²⁷⁶ Panosian, “Money Marvel,” 4.

²⁷⁷ “Gwyneth Paltrow,” *Internet Movie Database (IMDb)*, N.p., n.d, web, accessed November 16, 2014, http://www.imdb.com/name/nm0000569/?ref=nm_sr_1; “Jeff Bridges,” *Internet Movie Database (IMDb)*, N.p., n.d, web, http://www.imdb.com/name/nm0000313/?ref=nm_sr_1. All entries accessed November 16, 2014.

²⁷⁸ Dillard “History,” 4.

²⁷⁹ *Ibid.*, 4.

²⁸⁰ *Ibid.*, 4.

²⁸¹ Paul Bond and Borys Kit, “Marvel’s Machine in Gear,” *The Hollywood Reporter*, May 6, 2008, accessed February 20, 2014, <http://www.hollywoodreporter.com/news/marvels-machine-gear-110880>, 2.

Avengers feature, prior to establishing any superhero characters other than Iron Man through the studio.²⁸² With this bold move, Marvel Studios definitively laid the groundwork for cinematic continuity with Marvel's history in comics via characters who reference and interact with one another across multiple films.²⁸³ This continuity, which was unprecedented in Hollywood, was enough to entice comic book fans and the general audience to the point that if Marvel Studios did not deliver on its grand plan to become a successful studio and to establish a "MCU," the studio would collapse.²⁸⁴ *Iron Man* ended up being a huge success in both financial and critical terms, with an extremely impressive \$585 million worldwide box office, and officially silenced the naysayers of the comic book movie genre and those who frowned upon the risks that Marvel Studios took to create their first film.²⁸⁵ A.O. Scott's rave review for *The New York Times* proclaimed that "'Iron Man' ... is distinguished by light touches and grace notes.... his heroism is all handicraft, elbow grease and applied intelligence."²⁸⁶ Paramount expanded its distribution deal with Marvel Studios to six pictures, and Marvel proved that its five-year goal of becoming a full-fledged movie production company was worth the wait, with investors rewarding the company by bidding its shares up 9.4% to \$33.10.²⁸⁷ Marvel's share price, the highest the stock had been since going public in 1998 at a split-adjusted \$4.54, valued the company at \$2.6 billion, with Marvel posting a \$45.2 million profit in the first quarter (58 cents per share) besting by a wide margin the 43 cents Wall Street

²⁸² Dillard "History," 4.

²⁸³ *Ibid.*, 5.

²⁸⁴ *Ibid.*, 5.

²⁸⁵ Referring to *Iron Man*'s success see Diane Panosian "Behind The Money of Marvel's Mighty Movies," 4 and Chris Dillard "History of Marvel Studios," 5.

²⁸⁶ A.O. Scott, "Heavy Suit, Light Touches," *The New York Times*, May 2, 2008, accessed November 16, 2014, http://www.nytimes.com/2008/05/02/movies/02iron.html?_r=0.

²⁸⁷ Regarding Marvel's shares see Diane Panosian "Behind The Money of Marvel's Mighty Movies," 4 and Paul Bond and Borys Kit, "Marvel's Machine in Gear," 2.

predicted.²⁸⁸ *Iron Man* cemented Marvel Studios' reputation as a powerful player in Hollywood, and paved the way for *The Incredible Hulk*, *Iron Man 2*, *Thor*, and *Captain America: The First Avenger* to enrich the world of the "MCU."²⁸⁹ With five films that established a large and interconnected universe and endeared characters to audiences, the stage was set for the main event: *The Avengers*.

The immense success of *Avengers*, released May 4, 2012, was the culmination of Marvel Studios' hard work and patient planning.²⁹⁰ 2012 was the pinnacle year for comic book films and superhero exposure, with Marvel's the *Avengers* and Christopher Nolan's *The Dark Knight Rises*, the final film in *The Dark Knight* trilogy, showing in theatres within two months of each other.²⁹¹ Adding further pressure on Marvel was that the *Avengers* was the only film it released in 2012, while the studio had previously released two films a year. However, the *Avengers* had a scheduling advantage, as it was the first blockbuster of the summer season that year. The pressure was on, as it was the most ambitious project by any studio to date, bringing together the main (and supporting) actors from five previous films and placing them into one movie.²⁹² After deliberately developing the larger "MCU" across all of their earlier films, the *Avengers* was shot in ninety-two days in the spring of 2011.²⁹³ In the *Avengers*, Iron Man, Thor, Captain America, the Hulk, Hawkeye, and Black Widow all took main stage as they fought against the manipulative Loki and his army of Chitauri.²⁹⁴ While Marvel's films often had multiple writers, *Iron Man* having had thirteen, the *Avengers* only had one: Joss

²⁸⁸ Ibid., 2.

²⁸⁹ Dillard "History," 4.

²⁹⁰ "Marvel's The Avengers," *Box Office Mojo*, web, accessed November 16, 2014, <http://boxofficemojo.com/movies/?id=avengers11.htm>.

²⁹¹ Dillard "History," 5.

²⁹² Ibid., 5.

²⁹³ Panosian, "Money Marvel," 4.

²⁹⁴ Ibid, 5.

Whedon.²⁹⁵ Marvel smartly leveraged the superheroes' prodigious brand awareness by hiring a well-known geek icon, responsible for creating some of television's most enduring and beloved shows, whose fans are some of the most dedicated and zealous in pop culture.²⁹⁶

Hiring Whedon was Marvel Studios' statement to the "geeks," "nerds," comic books fans, and those involved in the entertainment and pop culture industry that they meant business and were serious about the quality of the *Avengers*. Whedon was the perfect individual to direct and script the *Avengers*, bringing together so many actors and characters, while maintaining story and development, was not going to be simple or easy.²⁹⁷ His years on shows that featured a team of characters (*Buffy the Vampire Slayer*, *Firefly*, *Dollhouse*), established his ability to keep drama, humor, and character development balanced, yet still remain successful.²⁹⁸ Marvel's decision paid off, as *The Avengers* is now the highest-grossing superhero film of all time, and the third highest-grossing film of all time with a worldwide gross of \$1,518,594,910 billion dollars [See Appendix G]. "Phase One" culminated with a post-credits scene involving Thanos, a legendary Marvel Comics villain, hinting at the classic storyline of the Infinity Gauntlet.²⁹⁹ The teaser proved to the fans once again that Marvel Studios meant business in bringing beloved Marvel stories to the big screen, and cemented the fans' loyalty and devotion. The success of the *Avengers* banished any remaining doubts about Bob Iger's \$4 billion investment in Marvel. With the *Avengers*, the bar had been set higher than ever before, for any series or studio's attempts at filmmaking in the future, and Marvel

²⁹⁵ Ibid., 4.

²⁹⁶ Ibid., 4.

²⁹⁷ Dillard "History," 5.

²⁹⁸ Ibid., 5.

²⁹⁹ Dillard "History," 5.

Studios continued to build on their foundation by making their “Phase Two” films (Dillard).³⁰⁰

Marvel Studios: Phase Two

After Marvel Studios blasted past all expectations with the *Avengers*, it wisely refused to rest on its laurels and continued forward with “Phase Two.” The grosses of *Iron Man 3*, released May 3, 2013, and *Thor: The Dark World*, released November 8, 2013, rose 36% and 30% respectively from their previous corresponding franchise entries, benefiting from the *Avengers*’ “halo” effect. Marvel Studios’ consecutive films *Captain America: The Winter Soldier* and *Guardians of the Galaxy*, maintained its successes while expanding the scope of their narratives. Actions taken by Marvel Studios’ following “Phase Two” films, *Captain America: The Winter Soldier*, released April 4, 2014, and *Guardians of the Galaxy*, released August 1, 2014, had serious consequences for the larger “MCU.”³⁰¹ Marvel’s choice of Anthony and Joe Russo, whose experience was primarily in television, over fellow finalists Tim Story (*Fantastic Four*) and George Nolfi (*The Adjustment Bureau*) to direct the second *Captain America* film may have seemed odd at first, but they were ultimately an inspired and smart choice.³⁰² The goal of television directors is to keep the narrative moving, in comparison to feature film directors, who aim to establish an individual directorial style and

³⁰⁰ Dillard “History,” 5.

³⁰¹ “Captain America: The Winter Soldier,” *Box Office Mojo*, web, <http://boxofficemojo.com/movies/?id=marvel14b.htm>; “Guardians of the Galaxy,” *Box Office Mojo*. Web, <http://boxofficemojo.com/movies/?page=main&id=marvel2014a.htm>. All entries accessed November 16, 2014.

³⁰² Andy Greenwald, “Introduction to Blockbuster Filmmaking: Why a Couple of *Community* Producers Are a Perfect Match for Marvel,” *Grantland*, June 8, 2012, accessed November 17, 2014, <http://grantland.com/hollywood-prospectus/introduction-to-blockbuster-filmmaking-why-a-couple-of-community-producers-are-an-inspired-choice-for-the-marvel-universe/>, 1.

aesthetic.³⁰³ The humility and work ethic honed by television direction ultimately appealed to Marvel Studios, which chose professionals they knew could do their job and make the film they wanted, rather than linking a film, and its franchise, to a particular filmmaker and run the 50/50 chance of success or failure.³⁰⁴ Marvel's instincts once again rewarded them, with *Captain America: The Winter Soldier* receiving rave reviews, with critics praising the film's action, character development, and spy-thriller narrative, and a 48% increase in its opening weekend, culminating in a \$714,083,572 million dollar box office [See Appendix G].

Guardians of the Galaxy was Marvel Studios' riskiest property, featuring a team from one of Marvel's more obscure comic titles and consisting of characters such as a talking raccoon and living tree, while remaining only peripherally connected to the other Marvel Studios' films. Director James Gunn delivered a balancing act of zany humor and meta-references mixed with a conventional heroic narrative, a la Stephen Spielberg and George Lucas, set against a space-opera backdrop.³⁰⁵ The resulting film was an immensely enjoyable, yet crazy, mixture of *Star Wars* and Mel Brook's *Spaceballs*, with an aura of breezy humor throughout.³⁰⁶ Freed from high expectations, or any expectations at all, Gunn was able to take risks while still staying within Marvel's playbook.³⁰⁷ Marvel Studios' brand power and reputation, established by its consecutive successes and \$6.54 billion dollars in ticket sales worldwide, also allowed the studio to build up enough momentum to take risks and for audiences to go out on a limb with

³⁰³ Ibid., 1.

³⁰⁴ Ibid., 1.

³⁰⁵ Jason Concepcion, "I Feel Groot!," *Grantland*, August 1, 2014, accessed November 18, 2014, <http://grantland.com/features/guardians-of-the-galaxy-get-on-up-review/>, 6.

³⁰⁶ Ibid., 6.

³⁰⁷ John Lopez, "How 'Guardians of the Galaxy' Cherry-Bombed the Box Office and Made Off With All of Our Money," *Grantland*, August 4, 2014, accessed November 18, 2014, <http://grantland.com/hollywood-prospectus/how-guardians-of-the-galaxy-cherry-bombed-the-box-office-and-made-off-with-all-of-our-money/>, 1.

unknown properties.³⁰⁸ *Guardians of the Galaxy* was a sorely needed smash hit for the film industry in a the disappointing 2014 summer box office, and was the only movie in 2014 to cross over \$300 million dollar mark, making \$333,079,971 [See Appendix G].³⁰⁹ Marvel Studios' most current releases have helped cement their status as the studio to beat in Hollywood, while continuing to draw healthy grosses and profits and constantly expanding their "MCU."

Marvel Studios, and its "MCU," has effectively become a game changer for superhero films and the film industry itself. By being the first studio to *successfully* develop a cinematic universe that could branch out in different storylines, while maintaining narrative continuity and in which multiple characters (and their potential franchises) interact with one another across multiple films, Marvel Studios establishing a new standard of superhero franchising in Hollywood. Warner Bros. is attempting to mount a "cinematic universe" equivalent for its DC Comics characters, including Superman, Batman, the Flash and its Avengers equivalent, the Justice League, while Sony Pictures and 20th Century Fox Pictures are currently developing a similar "cinematic universes" for the Marvel properties they still possess. The unlimited possibilities of the "MCU" is reflected through the multiple forms of media it employs, from film to television to cinematic "one-shots," making it a prime example of convergence culture.

³⁰⁸ Ibid., 3.

³⁰⁹ "Guardians of the Galaxy," *Box Office Mojo*, web, accessed November 13, 2014, <http://boxofficemojo.com/movies/?page=main&id=marvel2014a.htm>.

CHAPTER THREE

“A FINGER IN EVERY PIE”: CONVERGENCE CULTURE AND THE TRANSMEDIA NARRATIVE OF THE “MARVEL CINEMATIC UNIVERSE.”

After examining the unprecedented success of Marvel Studios and its “Marvel Cinematic Universe,” [hereafter referred to as the “MCU”] this chapter will attempt to define and explore the role of transmedia storytelling in convergence culture, and how the “MCU” utilizes its franchises within a transmedia context. The classification “MCU” is misleading in that the inclusion of “cinematic” can lead casual fans to believe the “MCU” consists only of films. However, the “MCU” consists of multiple entertainment media, ranging from film to television, to comics to cinematic “one-shots” bundled in Marvel Studios’ Blu-rays detailing events occurring outside of the films, but within the larger “MCU.” Franchise films are known mainly as a business innovation, and are often viewed as easy “money-makers” by studios, critics, and film audiences. However, franchise films can also exhibit a distinctive artistry. The “MCU” films can be seen as comprised mainly of franchise films, but in order to appreciate the artistic development and construction of the “MCU,” we need to understand these films in the context of convergence culture. The transmedia structure of the “MCU” cements its role and influence in convergence culture, and immensely contributes to its films’ successes.

The origins of transmedia storytelling and convergence culture are crucial to understanding the larger influence of transmedia storytelling influence on popular culture and the entertainment industry. An influential account is provided by Marsha Kinder, who identified in the late 1980s a set of textual forms and practices of production and

consumption that emerged at around that time as “transmedia.”³¹⁰ Through exploring how children consumed film, television, and video games in tandem, Kinder observed a “transmedia intertextuality” grooming children to recognize genres, identify with characters, and perceive the value of systemic operations across media.³¹¹ Feeding this “transmedia intertextuality” were what Kinder called “entertainment super systems.”³¹² These properties, such as *Teenage Mutant Ninja Turtles* and *The Muppets*, could be experienced in unique ways through textual offerings in different media.³¹³ In Chapter One of this thesis I traced important elements of this kind of intertextuality back to the comics industry of the 1940s. The presence of the seeds of convergence culture and transmedia storytelling in the comic industry demonstrates that they precede the 1980s. Overall, this chapter provides a corrective measure, illustrating how historical context is needed in order to fully understand contemporary developments within a creative industry such as film, where value is often placed upon new and breaking developments.

Kinder’s concept of “transmedia intertextuality” has provided a basis for American media scholar Henry Jenkins’ concept of transmedia storytelling. Henry Jenkins suggests that the forms of production that make up transmedia involve a revolution in storytelling.³¹⁴ Transmedia storytelling, he proposes, amounts to “a new aesthetic that has emerged in response to media convergence – one that places new demands on consumers and depends on the active participation of knowledge

³¹⁰ Derek Johnson, *Media Franchising: Creative License and Collaboration in the Culture Industries* (New York: NYU Press, 2013), 22.

³¹¹ *Ibid.*, 31.

³¹² *Ibid.*, 31.

³¹³ *Ibid.*, 31.

³¹⁴ Anna Zaluzkowska, “Storyworld: the Bigger Picture, investigating the world of multi-platform/ transmedia production and its affect on storytelling processes,” *Journal of Screenwriting* 3.1 (2011): 85.

communities.³¹⁵ Transmedia storytelling is in turn part of a “convergence” culture; the flow of content across multiple media platforms, the cooperation between multiple media industries, and the migratory behavior of media audiences who would go almost anywhere in search of the kinds of entertainment experiences they want.³¹⁶ In the world of convergence culture, there is unlimited potential to tell every possible story and sell every possible brand, with every consumer being courted across multiple media platforms.³¹⁷ It is shaped and defined by the desires of media conglomerates to expand their empires across multiple platforms and by the desires of consumers to have the media what they want, where they want it, when they want it, and in the format they want.³¹⁸ The role of transmedia storytelling has had a further impact on narrative, world building, and the development of creative properties.

As Jenkins illustrates through the examination of the Wachowski’s *The Matrix* franchise in his article “Searching for the Origami Unicorn: The Matrix and Transmedia Storytelling,” a transmedia story unfolds across multiple media platforms, with each new installment making a distinctive and valuable contribution to the whole story.³¹⁹ For example, in *The Matrix* franchise, key information about the story is conveyed through three live action films, a series of animated shorts, two collections of comic book stories, and several video games.³²⁰ There is no one single source or ur-text where one can turn

³¹⁵ Ibid., 85

³¹⁶ Henry Jenkins, “Introduction: Worship at the Alter of Convergence: A New Paradigm for Understanding Media Change,” in *Convergence Culture: Where Old and New Media Collide*. (New York: New York University Press, 2006), 2.

³¹⁷ Ibid., 2.

³¹⁸ Ibid., 2.

³¹⁹ Henry Jenkins, “Searching for the Origami Unicorn: The Matrix and Transmedia Storytelling,” in *Convergence Culture: Where Old and New Media Collide*. (New York: New York University Press, 2006), 95.

³²⁰ Henry Jenkins, “Transmedia Storytelling 101,” *Confessions of an Aca-Fan*, March 22, 2007, accessed February 22, 2014, http://henryjenkins.org/2007/03/transmedia_storytelling_101.html, 1.

to gain all of the information needed to comprehend the *Matrix* universe.³²¹ Ideally in transmedia storytelling, each medium maximizes its individual creative advantages so that a story might be introduced in a film, then expanded through television, novels and comics; its world-building might be explored through gameplay or experienced as an amusement park.³²² Each franchise entry needs to be self-contained so a consumer doesn't need to have seen the film to enjoy the game, and vice versa.³²³ Any given product is a point of entry into the franchise as a whole, and experiencing the story across the media sustains a depth of experience that motivates more consumption.³²⁴ As a result, consumers cultivate a "gotta catch them all" collector mentality when consuming transmedia storytelling across multiple media of entertainment.

Transmedia storytelling complements convergence culture, offering new levels of insight and experience for fans and consumers while refreshing a franchise and sustaining consumer loyalty.³²⁵ The economic logic of a horizontally integrated entertainment industry, where a single company has roots across all of the different media sectors, dictates the flow of content across media.³²⁶ Different media attract different market niches; however, redundancy and subpar quality can burn up fan interest and cause franchises to fail.³²⁷ A good transmedia franchise works to attract multiple audiences by framing the content somewhat differently across the different media.³²⁸ In particular, if there is enough content to sustain those different installments, and if each work offers fresh experiences, then the franchise can tap into an enormous potential market and

³²¹ *Ibid.*, 1

³²² Jenkins, *Convergence Culture*, 96.

³²³ *Ibid.*, 96.

³²⁴ *Ibid.*, 96.

³²⁵ *Ibid.*, 96.

³²⁶ *Ibid.*, 96.

³²⁷ *Ibid.*, 96.

³²⁸ *Ibid.*, 96.

expand its potential gross.³²⁹ The entertainment industries, especially the film industry, often utilize transmedia storytelling in their franchises in the hopes they will become crossover successes.

The media franchise is an important component to the concept of transmedia storytelling. Prior to the 1980s, the term “franchise” held two primary meanings. First, the right to vote and exercise agency as the subject of an institution; and second, a retail operation, such as McDonald’s or Coca-Cola, in which independent operators in local markets paid a license fee for the right to conduct ongoing business under a shared, corporate trademark.³³⁰ However, in the last thirty years the concept of the franchise has taken on a third meaning. In media and pop culture, the franchise is the multiplied replication of culture from a common intellectual property resource.³³¹ Essentially, it is an intellectual property that can be, or has the potential to be, part of a series and spawn lucrative sequels while lending itself to merchandising.³³² Robert Iger, president and CEO of Disney further describes the franchising of media content production as “something that creates value across multiple businesses and across multiple territories over a long period of time.”³³³ Unlike stand-alone films, franchise pictures are typically high-concept, big budget and/or blockbuster films that aim for “marquee” status in a studio’s annual marketing campaigns.³³⁴ Due to the large financial risk involved, such pictures can be excessively formulaic and are frequently developed from widely

³²⁹ Ibid., 96.

³³⁰ Johnson, *Media Franchising*, 6.

³³¹ Ibid., 6.

³³² Stephen Wise, “Movie Terms That Should Be Retired,” *FilmVerse*, November 30, 2011, accessed January 10, 2015, <http://filmverse.com/2011/11/30/movie-terms-that-should-be-retired/>.

³³³ Johnson, *Media Franchising*, 6.

³³⁴ John Thornton Caldwell, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television* (North Carolina: Duke University Press, 2008), 264.

recognized big-hit television, publishing, or comic book properties.³³⁵ *Harry Potter*, *Star Trek* and *Lord of the Rings* are examples of extremely profitable franchises, and of the proliferation of media franchising in popular culture.³³⁶ In television there are multiple spinoffs of *Law and Order*, *CSI*, and *NCIS*, and in film there is a constant rebooting of past franchises, such as James Cameron's *The Terminator*, or the remaking of films suitable for franchise marketing, such as the remake of *The Karate Kid* (1984) classic in 2010.³³⁷ Even when a creative property reaches its narrative conclusion, the franchise can still endure through spinoffs, as with Warner Bros.' planned adaptation of J.K. Rowling's *Harry Potter* short story *Fantastic Beasts and Where to Find Them* set as three mega-movies.³³⁸ While it is unquestionable that franchises can yield unlimited profits for as long as they remain relevant, popular and maintain a level of positive critical and consumer reception, there are cons to their utilization.

The franchise, while potentially extremely profitable, has a somewhat negative and derogatory reputation amongst entertainment critics and fans. In light of the film industry and studios' wholehearted and desperate embrace of franchises, brought on by a multitude of factors such as piracy, the shrinkage of the DVD and Blu-ray market and the growth of VOD and Netflix, entertainment and media critics and consumers view franchising as an unimaginative and manufactured manner of making money, while eschewing character and narrative development and construction. In many cases, the franchise has become shorthand for creative and cultural bankruptcy, and blatantly

³³⁵ Ibid., 264

³³⁶ Ibid., 2.

³³⁷ Ibid., 2.

³³⁸ Zach Dionne, "J.K. Rowling's 'Harry Potter' Spinoff Will actually Be Three 'Megamovies,'" *Grantland*, March 31, 2014, accessed January 11, 2015, <http://grantland.com/hollywood-prospectus/jk-rowling-trilogy/>.

transparent ploys for its audience's money.³³⁹ As Bob Rehak, Associate Professor of Film and Media Studies and contributor to the journals *Film Criticism* and *Information, Communication and Society*, stated in 2007, "such is the nature of the successful media franchise...doomed to plow forward under the ever-increasing inertia of its own fecund replication."³⁴⁰ Franchises do not necessarily denote subpar quality in storytelling and narrative, but if they are not maintained and supported by creativity and originality, they can become bland, mediocre, and utterly forgettable. While the risks of franchise banality are real, Marvel has successfully maneuvered their way to becoming one of, and arguably *the*, most economically and aesthetically successful modern media franchises.

Marvel Studios' success with the "MCU" is credited to its embracing of the benefits of transmedia storytelling and being able to foster a creative environment within franchise boundaries. Through transmedia storytelling, "synergy," the interaction or cooperation of two or more organizations, or agents to produce a combined effect greater than the sum of their separate effects, is created, reflecting the economics of media consolidation.³⁴¹ The majority of modern media companies are horizontally integrated holding interests across a range of what were once distinct media industries.³⁴² A media conglomerate has an incentive to spread its brand or expand its franchises across as many different media platforms as possible.³⁴³ For example, the comic books published in advance of the release of such films as *Batman Begins* (2005) and *Superman Returns* (2006), were distributed by DC Comics, which is in turn owned by Warner Bros., the

³³⁹ Johnson, *Media Franchising*, 2.

³⁴⁰ Referring to Professor Bob Rehak see Swarthmore College "Bob Rehak" and Derek Johnson, *Media Franchising: Creative License and Collaboration in the Culture Industries*, 2.

³⁴¹ "Synergy," *Oxford Dictionaries.com*, 2015, <http://www.oxforddictionaries.com/definition/english/synergy>.

³⁴² Henry Jenkins, "Transmedia Storytelling 101," *Confessions of an Aca-Fan*, March 22, 2007, accessed February 22, 2014, http://henryjenkins.org/2007/03/transmedia_storytelling_101.html, 1.

³⁴³ *Ibid.*, 1.

studio who released the films.³⁴⁴ These comics provide back-story that enhance the viewer's experience of the film even as they also help to publicize the forthcoming release, thus blurring the line between marketing and entertainment.³⁴⁵ The current configuration of the entertainment industry makes transmedia expansion an economic imperative, and can become somewhat formulaic in its implementation.³⁴⁶

In spite of the rigidity of franchise-related media productions, there is much creativity that can exist within its boundaries. By nature, a media franchise provides a context in which the negotiated exchanges and identifications of industrial creativity can play out with an eye toward supervision, control, and continuity.³⁴⁷ However, there are media companies who utilize marketplace pressures to create genuinely compelling and immersive transmedia stories, as Marvel Studios has done with the "MCU."³⁴⁸ Henry Jenkins suggests that in contemporary media, "storytelling has become the art of world-building, as artists create compelling environments that cannot be fully explored or exhausted within a single work or even a single medium," but there are some limitations to a theory of franchise creativity based in world-building.³⁴⁹ What distinguishes world-building in media franchising from that in "traditional" media works is the degree to which worlds, once built, become shared among creative stakeholders working in and across multiple production sites.³⁵⁰ Franchising is better conceived in the terms of world-sharing than world-building, as it occurs when creative resources are exchanged across contexts of production, where sequels, spin-offs, and tie-ins ask multiple production

³⁴⁴ Ibid., 1.

³⁴⁵ Ibid., 1.

³⁴⁶ Ibid., 1.

³⁴⁷ Johnson, *Media Franchising*, 142, 151.

³⁴⁸ Jenkins, *Transmedia 101*, 1.

³⁴⁹ Johnson, *Media Franchising*, 108.

³⁵⁰ Ibid., 109.

communities to work in successive or parallel relation to one another.³⁵¹ The “worlds” in play in a franchise thus offer a shared creative context in which many different creators and artists can then draw resources and make their own individual and original contributions, rendering their creative labor meaningful.³⁵² The connectivity of all of the components of the “MCU” reflects a unique artistry in the cinematic universe’s construction. It takes skill and talent to be able to create and develop a creative universe featuring multiple characters, each with their own individual stories. It takes even more skill to ensure that these same multiple characters team up, interact and work together, becoming part of a larger story spanning multiple creative media, from film to television to comics, all the while maintaining the individual stories of each individual character. The “MCU” is an exemplar of the intricate artistry of convergence culture, and how the construction of franchise films can be creatively and artistically rewarding, as well as financially successful.

The environment and foundations of the franchise can be stifling, for some, but for others it can provide the best possible canvas to create a narrative and bring structure to the creative field. Justin Theroux, one of the screenwriters for *Iron Man 2*, downplayed the relationships between filmmakers working on the projects marketed by Marvel Studios as part of the coordinated buildup to the *Avengers*.³⁵³ Theroux stated “there’s no dialogue right now” between filmmakers, by which he meant that each director had the freedom to craft the best possible version of their film, within the boundaries dictated by Marvel Studios, rather than micro-managing over how their film

³⁵¹ Ibid., 109.

³⁵² Ibid., 108.

³⁵³ Ibid., 108.

fits within the larger “MCU.”³⁵⁴ Franchising, therefore, creates unique circumstances in which to consider the nature of creative identity in industrial contexts, since the territory in which creativity occurs is by definition a shared one, and networked creators must negotiate and give meaning to that sociality in their practice.³⁵⁵ Cultural convergence and transmedia storytelling consist in the enrichment, a.k.a the quality, of a cultural product’s content. This quality of product is then diversified across a variety of different media and develops into a profitable industry, along with gaining a loyal audience and fans.³⁵⁶ For the product’s receivers then, there emerges the task of identifying the circulating information and making attempts towards the restoration of completeness.³⁵⁷ Marvel Studios’ handling of its transmedia narrative is what made its larger “MCU” unique.

The narrative continuity and seriality of the “MCU” makes this multi-franchise stand out within the crowded entertainment industry. At the end of *Iron Man*, Marvel Studios made a bold declaration about how its comics characters would be used in cinema henceforth.³⁵⁸ In a post-credits cameo of *Iron Man* Samuel L. Jackson appears as Colonel Nick Fury, Director of S.H.I.E.L.D. (Strategic Homeland Intervention, Enforcement and Logistics Division), setting the stage for the *Avengers* and with every following film in the production of the “MCU,” Marvel Studios continued its tease of future movies, each post-credit scene contributing to the future narrative.³⁵⁹ In these isolated moments across discrete films, Marvel established narrative interrelationships

³⁵⁴ Ibid., 108.

³⁵⁵ Ibid., 108.

³⁵⁶ Elisavet Ioannidou, “Adapting Superhero Comics for the Big Screen: Subculture for the Masses,” *Adaptation* 6.2 (Aug. 2013): 230-238, accessed February 20, 2014, 2.

³⁵⁷ Ibid., 2.

³⁵⁸ Derek Johnson, “Cinematic destiny: Marvel Studios and the trade stories of industrial convergence,” *Cinema Journal* 52.1 (Fall 2012): 24, accessed February 21, 2014, 5.

³⁵⁹ Ibid., 5.

and limited serial progression across installments.³⁶⁰ In contrast, Marvel's earlier film releases made no attempt to draw links between heroes like the X-Men, Spider-Man, Hulk, and the Punisher.³⁶¹ Promising that its releases would work in unison as the "MCU," Marvel presented individual films as mere episodes in a larger, cohesive work.³⁶² In emphasizing connectivity between its films, Marvel relied on the aesthetics of "incompleteness" that are attributed to convergence culture.³⁶³ Dangling scenes and quick character teases in Marvel's films foster not just narrative expansion, but also an audience participation that extends the commercial viability of the films into new media markets beyond theatrical distribution.³⁶⁴ In other words, Marvel Studios' film narratives are crafted to make repeated consumption on DVD or digital download compulsory. The narrative links constituting the "MCU" encourage careful, repeated, often frame-by-frame viewing, and audiences and fans are driven to purchase and consume all "MCU" products in order to attain narrative completion.³⁶⁵ Although these moments of interconnectivity constitute only a handful of scenes in otherwise self-contained films, when subjected to close visual scrutiny, those scenes offer a manufactured seriality.³⁶⁶ For example, producers used digital compositing to insert Captain America's shield into the background of Tony Stark's lab in the first *Iron Man* film and Tony would more explicitly interact with the shield as a prop in *Iron Man 2*.³⁶⁷ These scenes, whose significance is known to diehard comic book fans and only realized by the casual viewers

³⁶⁰ Ibid., 6.

³⁶¹ Ibid., 6.

³⁶² Ibid., 6.

³⁶³ Ibid., 7.

³⁶⁴ Ibid., 7.

³⁶⁵ Ibid., 7.

³⁶⁶ Ibid., 7.

³⁶⁷ Ibid., 3.

after watching later films, keep fans hooked and coming back to consume new films, television shows, comics etc.

Marvel Studios has developed a reputation as a studio at the top of the media franchising game, with its dominance of the San Diego Comic-Con International establishing its power in the entertainment industry. The San-Diego Comic-Con, established in 1970, has gained the reputation of being an entertainment Mecca for comic fans and pop culture enthusiasts, making it an ideal launch pad for Hollywood's projects.³⁶⁸ The summers of 2000 and 2001 were game changers regarding Hollywood's presence at Comic-Con, as the successes of *X-Men* and *Spider-Man*, served as examples of well-realized, faithfully executed comic adaptations that worked well as films and attracted an enormous box office gross.³⁶⁹ Comic-Con is a natural fit as Hollywood's testing ground; over 130,000 pop culture fanatics are present to market towards, while surrounded by press.³⁷⁰ The advent of social media accelerated and amplified the studios' intended result of creating word-of-mouth buzz from the "trusted," "authentic" and "authoritative" attendees of Comic-Con.³⁷¹ In particular, Comic-Con's Hall H has become the grand stage for the promotion of the newest and hottest Hollywood transmedia franchises.³⁷² However, Hall H does not guarantee immediate success. There have been many misfires and non-starters over the years, including Jon Favreau's *Cowboys and Aliens* (2011) and Michel Gondry's *The Green Hornet* (2011), or titles that received overwhelmingly positive reception and feedback in Hall H to go on an fail to

³⁶⁸ "About Comic-Con," Comic-Con International: San Diego, 2015, accessed January 18, 2015, <http://www.comic-con.org/about>.

³⁶⁹ Rob Salkowitz, *Comic-Con and the Business of Pop Culture: What the World's Wildest Trade Show Can Tell Us About the Future of Entertainment*, (New York: McGraw-Hill, 2012), 104-106.

³⁷⁰ *Ibid.*, 104.

³⁷¹ *Ibid.*, 104

³⁷² *Ibid.*, 104.

connect to a wider audience and bomb in the box office, such as Zack Snyder's *Sucker Punch* (2011) and Edgar Wright's *Scott Pilgrim vs. The World* (2011).³⁷³ The studios have stuck with the superhero formula, despite the hit or miss quality of the marketing payoff and the spotty track record of comics properties in both critical and commercial terms, because when superhero movies succeed, a franchise is born and that can spawn sequels with reduced marketing costs, and (theoretically) increasing audiences and profit.³⁷⁴ Star power has always played a role in Comic-Con's off the charts attendance boom since the late 1990s and it has contributed to the media-driven narrative that San-Diego is *the* place to be for the entertainment industry.³⁷⁵ It is often the only place where fans have the opportunity to meet their favorite stars and creators in person, establishing further (or at least the appearance of) intimacy and fan interaction. Marvel Studios has held panels and had their talent, crew and executives for the *Iron Man* trilogy, *The Incredible Hulk*, *Thor*, *Captain America: The First Avenger*, *The Avengers*, *Captain America: The Winter Soldier*, and *Avengers: Age of Ultron* attend Comic-Con and hold panels for their years of their respective releases. Marvel Studios' surprise announcement of the *Avengers* cast in 2010 set the bar for star appearances, only to be exceeded in 2013 when Tom Hiddleston, the actor who portrays the *Avengers*' villain, appeared in full Loki costume to promote *Thor: The Dark World*.³⁷⁶ Ultimately, a balance is key for telling satisfying stories across multiple media, while the success or failure of a transmedia project coming down to one brilliant decision (i.e. Tony Stark and

³⁷³ Salkowitz, 104.

³⁷⁴ *Ibid.*, 107.

³⁷⁵ *Ibid.*, 104.

³⁷⁶ Referring to Marvel Studios' star appearances see The Deadline Team, "'MARVEL-OUS STAR WATTAGE: Actors Assemble For Comic-Con Panel Including 'The Avengers', 'Captain America', & 'Thor'" and The Deadline Team, "Comic-Con: Loki Crashes Marvel Panel."

RDJ) or a misguided one (making Frank Miller the director of *The Spirit*).³⁷⁷ Marvel Studios also employs cross-promotion to advertise the “MCU.” An important transmedia narrative advantage Marvel Studios has over its competition is its Marvel “One-Shots,” direct-to-video short films available on the Blu-rays and digital distribution of “MCU” films.

Marvel Studios’ Marvel “One-Shots” occupy a unique place within the “MCU.” These shorts serve as a self-contained story and provide more backstory to the world of the “MCU” and characters who would not warrant their own franchises. They also serve as a testing ground for new television projects for the company [See Appendix N].³⁷⁸ Brad Winderbaum, co-producer of the “One-Shots” stated in 2011 the shorts were “a way for us to expand the Marvel Cinematic Universe and tell stories that live outside the plot of our features.”³⁷⁹ Marvel Studios co-president Louis D’Esposito has also stated “[not all Marvel characters can] be at the same level... so we introduce them [with a short] – and [some] they take off.”³⁸⁰ The development of a fan favorite character occurred with Agent Phil Coulson (Clark Gregg), a recurring minor character in “Phase One” of the “MCU.” *The Consultant*, the first of Marvel “One-Shots,” released in 2011, was Coulson’s first solo outing and introduces the concept of “Level 7” clearance at S.H.I.E.L.D. that would play into the *Marvel’s Agents of S.H.I.E.L.D.* series mythology, as well as Coulson’s fellow SHIELD agent Sitwell (Maximiliano Hernandez), building out the world behind the superheroics unfolding in the main films.³⁸¹ *A Funny Thing*

³⁷⁷ Salkowitz, 112.

³⁷⁸ Graeme McMillan, “From DVD to ABC: Why Marvel’s ‘One-Shots’ Matter,” *The Hollywood Reporter*, September 23, 2013, accessed March 20, 2014, <http://www.hollywoodreporter.com/live-feed/dvd-abc-why-marvels-one-634738>, 1.

³⁷⁹ *Ibid.*, 1.

³⁸⁰ *Ibid.*, 1.

³⁸¹ *Ibid.*, 2.

Happened on the Way to Thor's Hammer (2011) further cemented Coulson's ability to be a lead role, sowing the seeds for Joss Whedon's development and creation of the television series *Marvel's Agents of S.H.I.E.L.D.*, of which Coulson is the main character.³⁸² Peggy Carter, Strategic Scientific Reserve agent and love-interest of Captain America, and yet another fan favorite, also featured in the "One-Shot" *Agent Carter*, which proved to be so popular that an *Agent Carter* miniseries featuring Peggy's missions and life after World War Two, was put into production.³⁸³ Shorts featuring Loki, Nick Fury and the Black Panther had been developed but were scrapped because the cost to produce them would have been too high to make them worth it, and in addition to releasing the shorts on Blu-ray, Marvel considered introducing them in theaters before a Marvel film release.³⁸⁴ The Marvel "One-Shots" also gave added value to purchasing the Blu-rays of the "MCU" films. Their addition stood out to fans and consumers, even amongst the general bonus features of behind-the-scenes information, interviews, and director commentaries, thus giving them more of a reason to purchase the Blu-rays. The Marvel "One-Shots" paved the way for the Marvel Studios to become involved in the television medium.

Marvel Studios utilizes cross-promotion through the American Broadcasting Company (ABC) television network, owned by the Walt Disney Company, to advertise and promote the "MCU." Cross-promotion occurs when major studios or conglomerates acquire television, cable networks, and new media series to advertise and promote their

³⁸² *Ibid.*, 2

³⁸³ *Ibid.*, 2

³⁸⁴ Marc Graser, "How Marvel is Turning to Short Films to Sell More DVDs, Blu-rays," *Variety*, July 23, 2013, accessed March 20, 2014, <http://variety.com/2013/biz/news/how-marvel-is-turning-to-short-films-to-sell-more-dvds-blu-rays-1200566759/>

own feature films and television programs on other platforms within the conglomerate.³⁸⁵ Examples of this studio cross-promotion include Universal Studios, which owns the NBC network and MSNBC, and 20th Century Fox, which owns the Fox Broadcasting Company and Fox News.³⁸⁶ Most producers generally agree that the single biggest factor affecting the success of a feature film upon release remains television advertising, so owning a broadcast or cable network, local stations, or an extensive internet presence gives a studio several advantages and places them in a good position in advertising.³⁸⁷ The studio can negotiate (essentially with itself) to buy and place advertising slots in the most desirable and highly catered programming segments, with the heaviest barrage slated in the week leading up to the release.³⁸⁸ The studio and network or networks can create and encourage, well in advance of a film's release, intertextual references to earlier films and their stars within existing television shows, as most studios have film and television production arms.³⁸⁹ The network can also produce and program "specials" timed to spike buzz during the week of the release of a film.³⁹⁰ Marvel Studios has smartly taken advantage of Disney's ownership of the ABC network. On March 18, 2014 the network aired its first specials "Marvel Studios: Assembling a Universe," examining the business and creative journeys behind Marvel Studios formation of the "MCU" while featuring sneak peeks of future films *Captain America: The Winter Soldier*, *Guardians of the Galaxy*, *Avengers: Age of Ultron*, and *Ant-Man*.³⁹¹ ABC followed up with another special on November 4, 2014, "Marvel 75 Years: From Pulp To Pop!," which aired after

³⁸⁵ Johnson, *Media Franchising*, 275.

³⁸⁶ *Ibid.*, 275.

³⁸⁷ *Ibid.*, 275.

³⁸⁸ *Ibid.*, 276.

³⁸⁹ *Ibid.*, 275.

³⁹⁰ *Ibid.*, 275.

³⁹¹ Matt Strom, "Get Ready for Marvel Studios: Assembling a Universe With 3 New Clips," *Marvel.com*, March 17, 2014, accessed January 18, 2004, http://marvel.com/news/tv/22159/get_ready_for_marvel_studios_assembling_a_universe_with_3_new_clips.

that week's episode of *Marvel's Agents of S.H.I.E.L.D.* and was hosted by Emily Van Camp, lead actress of ABC's television melodrama *Revenge* and member of *Captain America: The Winter Soldier*'s cast.³⁹² The special debuted an extended official trailer of *Avengers: Age of Ultron*, after the trailer's unplanned leak on October 22 prior to the planned release of the trailer after that week's episode of *Marvel's Agents of S.H.I.E.L.D.*³⁹³ The process of cross-promotion shifts much of a studio's risk and costs of a large film marketing campaign onto the shoulders of affiliate networks and stations within the conglomerate.³⁹⁴ The conglomerate's broadcast and cable networks also initiate programming and promotional budgets as part of their own internal programming and promotional budgets, again taking risk away from the studios.³⁹⁵ Marvel Studios, through the Walt Disney Company, utilizes the ABC network (as Disney owns both Marvel Studios and ABC). Television has become a crucial entertainment medium for a franchise to employ, especially for the "MCU."

Television has become an integral component of transmedia storytelling and the maintenance of franchises. With the increasing integration of new media technologies into practices in TV production and promotion, television has become a crucial aspect of transmedia and is the entertainment medium most often utilized to enrich and bring context to a franchise's universe.³⁹⁶ Transmedia storytelling is the latest way to imagine and create a TV show; the story has to be complex with a compelling seriality and mythology, engaging for fans to dive emotionally and intellectually into, and innovative

³⁹² Tyler McCarthy, "Avengers: Age Of Ultron' Trailer Breaks Records, Marvel Promises More Footage During 'Agents Of SHIELD,'" *International Business Times*, October 26, 2014, accessed January 18, 2015, <http://www.ibtimes.com/avengers-age-ultron-trailer-breaks-records-marvel-promises-more-footage-during-agents-1714697>.

³⁹³ *Ibid.*, 1.

³⁹⁴ Johnson, *Media Franchising*, 275.

³⁹⁵ *Ibid.*, 276

³⁹⁶ Melanie Bourdaa, "'Following the Pattern': The Creation of an Encyclopaedic Universe with Transmedia Storytelling," *Adaptation* 6.2 (Aug. 2013): 202, accessed February 28, 2014, 12.

in its narration and in the way it makes fans interact.³⁹⁷ In the case of Marvel Studios' television shows, along with telling their own stories, they serve to expand and maintain the "MCU" brand. Branding has emerged as a central part of the film and television industries in the age of digital convergence and as one of the chief means through which marketing identity is engineered.³⁹⁸ It refers not only to product or company names, titles, or the trademark designation created by marketers and advertisers, but a projected image of a more holistic identity to viewers and consumers.³⁹⁹ Through branding, a product aims to achieve a set of recurrent goals and market ideals: a widely and recognizable image, a distinct personality among competitors, a consistency wherever the brand is encountered, and a confidence in the quality of the brand.⁴⁰⁰ With Marvel Studios' television shows, they theoretically have a built in audience consisting of the "MCU" film fans. Television is an important pillar of the "MCU."

Marvel Studios' premier television show *Marvel's Agents of S.H.I.E.L.D.* (2013), *Marvel's Agent Carter* (2015) is cautionary tale about how to adapt a franchise to for television. *Marvel's Agents of S.H.I.E.L.D.*, executive produced and co-created by *Avengers* director Joss Whedon, his brother Jed Whedon and Jed's wife Maurissa Tancharoen, was Marvel Studios first foray into television, with mixed results.⁴⁰¹ *Marvel's Agents of S.H.I.E.L.D.* got a huge audience of 12.12 million viewers for its pilot, but half of those viewers left after the show turned out to be not enough like the

³⁹⁷ Ibid., 12.

³⁹⁸ John Thornton Caldwell, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television* (North Carolina: Duke University Press, 2008), 245.

³⁹⁹ Ibid., 245.

⁴⁰⁰ Ibid., 245.

⁴⁰¹ Referring to *Marvel's Agents of S.H.I.E.L.D.*'s creation see *Marvel.com* "Marvel's Agents of S.H.I.E.L.D.," and Jaime Weinman, "Why is it so hard to make a successful TV spinoff of a hit film?," 2.

movies.⁴⁰² The show's pilot was successful but was unable to successfully blend the unique cinematic superheroics with the routine of network television, and came off as generic and mundane to audiences, leading to declining ratings with each successive episode. However, the show did succeed as a transmedia narrative. *Marvel's Agents of S.H.I.E.L.D.* had tie-in episodes to *Thor: The Dark World* and *Captain America: the Winter Soldier* in its first season, and gave backstory and focus to what was occurring in the "MCU" world outside of the main films, while still remaining connected to them; the virus Extremis featured in *Iron Man 3* and the female warrior Sif, a supporting character from *Thor*, were part of important narrative arcs in the first season. The show also further dived into the comic mythology, featuring Marvel comics' characters such as the cyborg assassin Deathlok, and the Asgardian sorceress Amora in its first season, and the hero Bobbi Morse, a.k.a Mockingbird, in the second season. The show eventually gained new life as the characters faced irreparable consequences after the shocking aftermath of *Captain America: The Winter Soldier*, in the latter half of its first season and with a much better reviewed second season, which laid the groundwork for the future *Inhumans* (2019) film, but its ratings remain low [See Appendix L]. The lesson from *Marvel's Agents of S.H.I.E.L.D.*'s stumble is that while superhero films can dominate the box office, it doesn't guarantee television success.⁴⁰³ However, Marvel isn't the only successful movie producer to prove mortal and fallible when it comes to the younger medium.⁴⁰⁴ *Star Wars* and *Indiana Jones* are two of the best film franchises in the world, but their live-action TV spinoffs, *The Young Indiana Jones Chronicles* (1994-1996) and

⁴⁰² Referring to *Marvel's Agents of S.H.I.E.L.D.*'s average success see *Wikipedia* "Agents of S.H.I.E.L.D. (season 1)" and Jaimie Weinman, "Why is it so hard to make a successful TV spinoff of a hit film?," 2.

⁴⁰³ *Ibid.*, 1.

⁴⁰⁴ *Ibid.*, 1

the infamous *Star Wars Holiday Special* (1978) crashed and burned.⁴⁰⁵ The prequel spinoff of James Cameron's *Terminator* films, *Terminator: The Sarah Conner Chronicles* (2008-2009), was also short lived.⁴⁰⁶ The issue regarding the lack of television spinoffs is due to studios saving their important franchises for the films because there is more money in film than television, and the difference in narrative structure: what's suited to a film, or even a series of films, doesn't work so well for a show that has to develop with thirteen to twenty-two episodes a year.⁴⁰⁷ The name recognition that comes with a movie tie-in can actually be a negative: the more people know the original movies, the more they'll be disappointed with the television version.⁴⁰⁸ The core audience (the fans of the films) will tune in for the first episode, but they can be lost quickly if their attention is not kept.⁴⁰⁹ Furthermore, fans are particularly hard to please when they're used to better production values than a television show, even a relatively expensive one, can ever deliver.⁴¹⁰ Rather than going big, and then busting, television appears to be the best medium to introduce and develop the minor characters of a transmedia franchise, a course correction Marvel Studios took to heart.

Despite its missteps with *Marvel's Agents of S.H.I.E.L.D.*, Marvel Studios' following television series, *Marvel's Agent Carter* (2015) and its future series with on-demand streaming service Netflix demonstrate the future growth of the "MCU" outside of film. *Agent Carter*, having premiered on January 6, 2015, received strong critical reviews and was received with more excitement and warmth than *Marvel's Agents of S.H.I.E.L.D.* [See Appendix N]. Marvel Studios took the criticism of *Marvel's Agents of*

⁴⁰⁵ Ibid., 1.

⁴⁰⁶ Ibid., 1.

⁴⁰⁷ Ibid., 2.

⁴⁰⁸ Ibid., 2.

⁴⁰⁹ Ibid., 1.

⁴¹⁰ Ibid., 2.

S.H.I.E.L.D. to heart and focused on crafting a contained story within *Marvel's Agent Carter's* eight episodes, and embracing the pulp adventure genre that characterized 1940s entertainment. In November 2014, it was announced that Disney and Marvel Studios had partnered with Netflix to produce four superhero series (*Daredevil*, *Jessica Jones*, *Iron Fist* and *Luke Cage*), whose leads ultimately would team up for a miniseries, *The Defenders*.⁴¹¹ These characters are less tiered in the comics and aren't considered popular enough to warrant big-budget films, but if enough of Netflix's forty million subscribers worldwide take to them, they could be.⁴¹² As Tim Beyers, from the multimedia financial-services company The Motley Crew, notes "the Netflix effect [of popularity] is real and an attractive draw for studios...known characters offer the most upside.... unknowns cost less to produce and, for Netflix, less to acquire."⁴¹³ Another upside is that newer and larger projects could develop from the limited series, such as solo feature films and appearances in future "MCU" films and television fan favorite characters equivalent to Tony Stark/Iron Man could be uncovered, adding to the shows' popularity.⁴¹⁴ At the same time, Netflix benefits from the additional original programming and the series will also prove more cost effective than the Marvel Studios shows, which are pricier shows for ABC and require bigger budgets for visual and special effects.⁴¹⁵ Marvel Studios also uses comics and video games to expand the "MCU's" transmedia franchise.

The separate, yet distinct, mediums of comics and video games contribute to the

⁴¹¹ Paul Bond, "Analysts Split on Netflix Deal With Marvel For 'Defenders'," *The Hollywood Reporter*, November 13, 2013, accessed April 2, 2014, <http://www.hollywoodreporter.com/news/netflix-marvels-defenders-analysts-split-655382>, 1.

⁴¹² *Ibid.*, 1.

⁴¹³ *Ibid.*, 1.

⁴¹⁴ *Ibid.*, 1.

⁴¹⁵ *Ibid.*, 1.

transmedia narrative of the “MCU.” The “MCU” uses the comics as tie-in materials when promoting its films and television series. The role of “tie-in” comics is to give further backstory to events occurring within the “MCU” films and television series, and stir up anticipation for future projects. For example, *Thor: The Dark World Prelude* addresses the return of Thor and Loki to Asgard after Loki’s defeat in the *Avengers*, and how Thor restored inter-planetary travel by using the Tesseract to repair the Bifrost [See Appendix O]. Like the comics, each film in the “MCU,” with the exception of the *Avengers*, has a licensed tie-in video game. Rather than license their video games out to different production companies, Marvel awarded a single master license to Sega for all game software related to the *Iron Man*, *Captain America*, and *Hulk* movies, reflecting its own centralized reorganization of film production.⁴¹⁶ Although Marvel could not directly control production of video games and other licensed merchandise at the same time that it financed its own film operations, it similarly consolidated its licenses, and brought further continuity to the licensing program.⁴¹⁷ Justin Lambros, the Marvel Studios executive who oversaw the production of licensed video games of Marvel characters, stated “[the production company] take the lead from where the film is going, then take stuff from the comics for the game and filter it through the film.”⁴¹⁸ The priority of the “MCU” video games was ensuring conformity to emerging film styles and strategies, emphasizing how Marvel’s filmmaking operations trumped anything developing in other markets.⁴¹⁹

⁴¹⁶ Johnson, *Media Franchising*, 97.

⁴¹⁷ *Ibid.*, 97.

⁴¹⁸ *Ibid.*, 97.

⁴¹⁹ *Ibid.*, 97.

Marvel allowed its master game license with Sega to expire in 2012, with the Paris based video game production company Gameloft, producing the subsequent “MCU” video games [See Appendix P]. Gameloft has ties to Disney, having produced video games for Disney properties such as *Cars* and *Monsters University*, which suggests Marvel is looking to eventually have future video games produced in-house by Disney, the first of which was *Guardians of the Galaxy: The Universal Weapon*, produced by the Disney Interactive Media group [See Appendix P]. Each disparate entertainment medium whether comics, video games, or television, plays an essential part in the sustained popularity and prosperity of the “MCU.”

The success of the Marvel Studios’ “MCU” illustrates the influence and power of convergence culture. The transmedia elements that constitute the “MCU,” from the tie-in comics for each individual film to the Marvel One-Shots, some of which developed into Marvel Studios’ television shows *Marvel’s Agents of S.H.I.E.L.D.* and *Marvel’s Agent Carter*, enable its constantly growing and expanding universe, and attract old and new fans who then explore the other products within the franchise. Marvel Studios’ accomplishments with the “MCU” has led the other studios in Hollywood who hold the rights to superhero characters to try and emulate their financial and critical success.

CHAPTER FOUR

“GREEN WITH ENVY (AND CASH)”: THE FUTURE OF SUPERHERO FRANCHISING IN HOLLYWOOD

Marvel Studios’ “Marvel Cinematic Universe” [hereafter referred to as the “MCU”] has had an enormous influence on superhero franchising within Hollywood. By 2012, after the juggernaut success of the *Avengers*, 20th Century Fox Pictures and Sony Pictures, the studios that still retained the rights to certain Marvel Comics characters, and Warner Bros. Pictures, who held the rights to all of DC Comics’ characters, began to plan how to emulate Marvel Studios’ success. Each studio has attempted to create a “megafranchise” in the style of the “MCU” around their superhero characters, hoping to attract audiences and revenue with the same characters across multiple sequels and spinoffs set within a self-contained cinematic universe. The “MCU” definitively altered the production and franchising of superhero films, and has become the gold standard for imitators.

Hollywood’s studios have embraced the franchise, and the blockbuster films that comprise them, stuffed with sumptuous visual effects and A-list stars, with the desperation indicative of a volatile industry.⁴²⁰ This recent shift towards a franchise-minded mentality is due to a variety of factors. At first glance, the “blockbuster strategy” employed by the studios, where a studio puts itself in a position where their overall performance and survival rests on a few big films each year, and lets spending on those films reach levels that make recovering costs appear almost impossible, seems

⁴²⁰ Anita Elberse, *Blockbusters: Hit-making, Risk-taking, and the Big Business of Entertainment* (New York: Henry Holt and Co., 2013), 3.

illogical.⁴²¹ In fact, however, the “blockbuster strategy,” in key respects, *works*. Warner Bros.’ 2010 film slate is an example of the success of the “blockbuster strategy.”⁴²² Warner Bros. released twenty-two films in 2010, spending about \$1.5 billion in production costs and upward of \$700 million on advertising and promotion domestically.⁴²³ The studio spent a third of its 2010 production budget on its three biggest titles: \$250 million on *Harry Potter and the Deathly Hallows: Part 1*, \$175 million on *Inception* and \$125 million on *Clash of the Titans*. Big films such as these often feature not only A-list talent, but also elaborate visual effects, all of which drive up the pictures’ costs.⁴²⁴ However, Warner Bros.’ results lived up to their prediction that their films with the highest costs would also bring the highest revenues and profits.⁴²⁵ *Harry Potter and the Deathly Hallows: Part One*, *Inception*, and *Clash of the Titans* accounted for only a third of the total production budget, but were responsible for over 40% of the domestic and 50% of the worldwide box-office revenues generated that year.⁴²⁶ This jackpot of revenue is the reason why the leaders of film studios, and of other sectors of the entertainment industry thrive on making huge investments to acquire, develop and market concepts with strong hit potential, and they bank on the sales of those to make up for the middling performance of their other content.⁴²⁷ The decrease in the cost of promotion and advertising is another factor in the studios’ wholehearted support of blockbuster/franchise films.

⁴²¹ Ibid., 3.

⁴²² Ibid., 3.

⁴²³ Ibid., 19.

⁴²⁴ Ibid., 19.

⁴²⁵ Ibid., 19-20.

⁴²⁶ Ibid., 20.

⁴²⁷ Ibid., 3.

Advertising is another cost attached to a film, often unreported to the press, which can be partially negated by blockbuster/franchise films. The success of the “blockbuster strategy” is even more apparent when marketing costs are included, since making bigger films results in advertising efficiencies.⁴²⁸ Put bluntly, making a less expensive, non-franchise film is more expensive to studios because it costs more to raise awareness of the film to the public and advertise nationally it through traditional media. In comparison, marketing a blockbuster or franchise film will not require the same amount of money to advertise (unless a studio pushes for spectacle) due to the public knowing and having pre-awareness of such a blockbuster film/franchise.⁴²⁹ Alan Horn, current chairman of Walt Disney Studios and former president and COO of Warner Bros., explains that “the advertising expenditures for a movie that costs \$150 million to make are not twice those for a \$75 million movie, even if you saturate the market... you need a certain amount [of money] to make sure you can support [a] film nationally, just to tell audiences you are out there.”⁴³⁰ Betting heavily on likely blockbusters and spending considerably less on smaller films is the surest way to lasting success in the film industry, especially in the face of the fickle taste of consumers and complexities of a production process that often involves hundreds of people.⁴³¹ Studios would be taking a greater risk if they make more films with lower production budgets. For a larger studio, smaller movies could in a typical year actually lose the studio more money than they bring in; even if some smaller investments do make money, a dollar spend on a big-budget film will average a much higher profit.⁴³² The studios take their chances by

⁴²⁸ Ibid., 24.

⁴²⁹ Ibid., 24.

⁴³⁰ Ibid., 24.

⁴³¹ Ibid., 4, 18-19.

⁴³² Ibid., 27.

investing heavily in the development, supporting them with promotional spending, often well in advance of their release into the marketplace and distributing them as widely as possible.⁴³³ However, blockbuster strategies are not free of risk; even the biggest productions supported by the highest advertising budgets can, and sometimes will, fail to create a splash in the market, as did *John Carter* (2012) and *The Lone Ranger* (2013).⁴³⁴

Another factor as to why the studios rely so heavily on the revenues of their blockbuster/franchise films is the collapse of the DVD market. In the late 1990s and early 2000s, DVDs famously provided the film industry with significant new forms of revenue.⁴³⁵ As numerous critics have noted, many Hollywood films only began to see profits after their DVD release, prompting some to suggest that the theatrical release is merely a means of promoting the DVD, a loss leader with an eye toward the home market.⁴³⁶ Media studies scholar John Thornton Caldwell went so far as to say that the DVD experience is “the primary consumer product.”⁴³⁷ Entertainment reporter Edward Jay Epstein also noted that in 2002, some 50 million Americans, more than twice the weekly movie audience, went to one of the country’s more than thirty thousand local video stores to rent a movie, spending some \$24 billion (19 Tryon), approximately four times what they spent on movie tickets.⁴³⁸ DVDs continued to provide a crucial revenue stream with consumer spending on sell-through DVDs (the percentage of units shipped that were actually sold) holding relatively steady at around \$16 billion per year in 2006

⁴³³ Ibid., 4.

⁴³⁴ Referring to Disney’s blockbuster failures see Anita Elberse, *Blockbusters: Hit-making, Risk-taking, and the Big Business of Entertainment* (New York: Henry Holt and Co., 2013), 4 and Jaime Weinman, “The decline of Disney,” 1.

⁴³⁵ Chuck Tyron. *Reinventing Cinema: Movies in the Age of Media Convergence* (New Jersey: Rutgers University Press, 2009), 19.

⁴³⁶ Ibid., 19.

⁴³⁷ Ibid., 19.

⁴³⁸ Ibid., 19.

and 2007.⁴³⁹ However, since then these numbers have been enormously offset by the rise of digital cable, video-on demand services such as Netflix and Amazon Prime, and digital distribution via services such as Apple's iTunes, leaving video rental chains such as Blockbuster in the dust and bankrupt.⁴⁴⁰ The DVD market was critical to the studios, because the historical movie business, with all of the cumulative Hollywood studios, runs at about a 10% profit margin.⁴⁴¹ For every billion dollars spent in revenue, a hundred million dollars is received in profit.⁴⁴² The DVD business represented 50% of the studios' profits, with the consequence that the decline of that business brought down their entire profit margin to only around 5-6%.⁴⁴³ The loss of profit from the DVD market halved the studios' profit margin, and at best cut into their profit by half for new movies, which has already been put under further strain with the rise of piracy, VOD and cable.⁴⁴⁴ The international market will still grow but the DVD sell-through business is not coming back.⁴⁴⁵ Consumers will watch their movies on Netflix, iTunes, Amazon et al before they will purchase a DVD. The old profit margin has gone the way of old media.⁴⁴⁶ In response, the Hollywood studios have turned to the rapidly growing global box office to maintain their profits and revenues.

The global box office has become a beacon of hope for Hollywood, especially in regards to blockbuster films/franchises. With the growing importance of global markets, the relevance of blockbuster films/franchises will only increase.⁴⁴⁷ As Alan Horn,

⁴³⁹ Ibid., 20.

⁴⁴⁰ Ibid., 20.

⁴⁴¹ Lynda Obst, *Sleepless in Hollywood: Tales from the New Abnormal in the Movie Business*, (New York: Simon & Schuster, 2013), 40.

⁴⁴² Ibid., 40-41

⁴⁴³ Ibid., 41.

⁴⁴⁴ Ibid., 41.

⁴⁴⁵ Ibid., 42.

⁴⁴⁶ Ibid., 42.

⁴⁴⁷ Ibid., 24.

chairman of Walt Disney Studios, remarked in 2012, “international box office results are especially strong for event movies...that’s where the real growth is...by 2016 the international box office is projected to be \$27 billion, much larger than the [2012] domestic box office at a projected \$11 billion.”⁴⁴⁸ The key concern is with theatrical markets that are said to be “under-screened,” where in comparison to the United States, there are relatively fewer theatres serving moviegoers. Such markets, which include China and India, tend to be more selective with regard to the type of films that do well with audiences.⁴⁴⁹ Most desirable are what are called four-quadrant films (films that appeal to males and females both over and under twenty-five) with familiar stars or characters.⁴⁵⁰ While there are certain A-list stars (ie. Tom Cruise, Angelina Jolie etc.) whose names have become genuine international box office draws, what draws the vast international audiences is a well-known and popular brand, such as *Harry Potter* or *Transformers*.⁴⁵¹ The apathetic attitude of the international audiences towards stars work in the studios’ favor; they can then invent stars for blockbuster films/franchises, pay them less up front, and put them under contract for infinite options for sequels, as Chris Hemsworth did for *Thor*.⁴⁵² This results when the film/franchise is more important than the star (ie. *James Bond*), while giving the studios enough room to remake films; if a studio remakes a franchise, they do not need to increase the salary of the lead if the star is an unknown.⁴⁵³ The franchise is the star for a film that costs a fortune; the benefit for the star is that if the movie does well, and has large international numbers, they have enough

⁴⁴⁸ Ibid., 24.

⁴⁴⁹ Ibid., 24.

⁴⁵⁰ Ibid., 18.

⁴⁵¹ Ibid., 18.

⁴⁵² Ibid., 18-19.

⁴⁵³ Ibid., 19.

influence to make other films they are passionate about.⁴⁵⁴ Marvel Studios' success is tied to how it has differentiated itself from other franchises, and how it has cultivated its "Marvel Studios" brand, and essential in this regard have been films that imply the four-quadrant formula.

Marvel Studios' brand is not only its films or characters, although they are essential to the brand, but the studio itself. Marvel Studios is in the business of making superhero movies and *only* superhero movies; they only develop and produce two to three films a year in comparison to Warner Bros., who releases all kinds of movies, with superhero films being just one small portion of their annual slate of films.⁴⁵⁵ Thus, the studio would naturally be able to spend more time developing a much larger slate of distinct franchises, and give more individual attention to each movie. Marvel Studios developed a detailed plan, in multiple phases, with the most effective part of their plan being branding the name "Marvel" so that audiences worldwide now respond to that brand in a way almost no other studio or production company can match.⁴⁵⁶ The name "Marvel" has become synonymous with high-quality, successful superhero movies, and people everywhere, not just comic book fans, but also the mainstream public, recognize the brand name when they see it and know what to expect.⁴⁵⁷ Only Disney and Lucasfilm (now owned by Disney) achieved that kind of distinct name recognition for their studio when it comes to content branding.⁴⁵⁸ In most comparable cases, it is a big director or a movie star whose name brings the brand recognition, or the particular franchise itself, but

⁴⁵⁴ Ibid., 19.

⁴⁵⁵ Mark Hughes, "Why Marvel Is Defining The Modern Superhero Film Genre," *Forbes*, October 10, 2013, accessed February 20, 2014, <http://www.forbes.com/sites/markhughes/2013/10/29/why-marvel-is-defining-the-modern-superhero-film-genre/>, 3.

⁴⁵⁶ Ibid., 3.

⁴⁵⁷ Ibid., 3.

⁴⁵⁸ Ibid., 3

with Marvel, like with Disney or Lucasfilm, the name alone brings with it the same sort of recognition and familiarity.⁴⁵⁹ The result from this is not only does each new Marvel Studios film have the increased likelihood of becoming a box office blockbuster, but that their future franchises don't have to have name recognition for the characters because the Marvel branding alone brings instant top-tier recognition to even the least-known characters.⁴⁶⁰ Marvel Studios' smash success *Guardians of the Galaxy* is proof that their branding works. The implications for this situation are enormous, especially in comparison to Warner Bros.' development of its DC Comics franchises, which seem focus on how bankable each individual character is, and remain thus far reluctant to take risks on lesser-known commodities.⁴⁶¹ Marvel Studios' branding success is what has enabled it to position itself as a studio with agency within Hollywood, and to place emphasis and importance on its characters.

Despite being bought by the Walt Disney Company in 2009, Marvel Studios still retains agency and control of its productions and characters. The significance of Marvel Studios establishing the Merrill Lynch deal in 2005 was that it granted the studio creative control and agency over its production.⁴⁶² By transforming from a licensor that sold studios the right to create and profit from their comic book characters to a production entity that maintained control and adopted the risks of film development itself, Marvel Studios carved a space within Hollywood for an external production studio with (at first) limited film expertise.⁴⁶³ Through cultural convergence, Marvel Studios developed a unified brand for itself and its films while at the same time devising diverse approaches

⁴⁵⁹ Ibid., 4.

⁴⁶⁰ Ibid., 4.

⁴⁶¹ Ibid., 4.

⁴⁶² Derek Johnson, "Cinematic Destiny: Marvel Studios and the trade stories of industrial convergence," *Cinema Journal* 52.1 (Fall 2012): 24, accessed February 21, 2014, 9.

⁴⁶³ Ibid., 9.

to mobilizing the characters that made up that brand.⁴⁶⁴ Ultimately, the studio recasts the production of comic book films and video games, not in terms of specific media platforms, but instead in terms of the iconic characters Marvel had on offer, emphasizing a special relationship with its consumers.⁴⁶⁵ Former Marvel Studios chairman and CEO David Maisel perpetuated this narrative when he told the *Hollywood Reporter* upon the release of *Iron Man* in May 2008, "we are in the *Iron Man* business . . . so whether it is a major motion picture or a video game, we have somewhat of an obligation to our fans and the consumer to stay involved with the creative process."⁴⁶⁶ Along with being a strong supporter of its comics characters, Marvel Studios established itself as a stronghold of creativity within Hollywood, as well as a strong supporter of its comics characters.

Marvel Studios has cultivated a reputation as a creative bastion as part of its reputation and brand. Marvel Studios has cultivated an image of a "creative savior" to its superhero characters. Its executives have deliberately promoted their corporate control and managerial expertise in direct opposition to creative processes in the film industry, to which it has attributed any and all past critical or commercial failures.⁴⁶⁷ One example of such promotion is a comment Avi Arad made shortly after the Merrill Lynch deal closed in 2005: "we've had one bad movie, *Elektra* [produced by 20th Century Fox], and it was bad because we did not have creative control. That won't happen again."⁴⁶⁸ Marvel's ability to manage the creative enterprise of filmmaking was framed as a necessity for commercial and critical success, rather than as meddling by an outside executive office

⁴⁶⁴ Ibid., 8.

⁴⁶⁵ Ibid., 16.

⁴⁶⁶ Ibid., 16.

⁴⁶⁷ Ibid., 17.

⁴⁶⁸ Ibid., 17.

without filmmaking expertise.⁴⁶⁹ These self-reflexive discourses cast Marvel Studios in a parental role vis-à-vis their films and their place in convergence culture, framing their “parental rights” as a function of corporate management as much as creativity, positioning and rebranding Marvel as the corporate entity best suited to the job of overseeing converged film production.⁴⁷⁰ Marvel Studio's relationship with comic book fans is another crucial factor behind their reputation.

Cultivating a legitimate reputation as “fans” of the original comic source material is another narrative employed by Marvel Studios. The studio characterized Marvel's external expertise in managing comic book culture as a boon to the specific needs of the film industry by playing up affinities between key managers and its consumer base of purported value.⁴⁷¹ Marvel Studios executives such as David Maisel, Avi Arad and Kevin Feige positioned themselves as “fans,” and claimed a unique, insider perspective into the tastes of a “fanboy” audience of adult and adolescent males targeted by Hollywood blockbusters.⁴⁷² Feige, for example, claimed insight into fanboy skepticism, and by self-identifying with this fan position in his interviews, he not only called into question the Hollywood studios' ability to handle the material, but also built up his own authority to handle the material.⁴⁷³ These self-reflective discourses were supported by trade publications fed by effusive praise from reporters such as Borys Kit in the *Hollywood Reporter* proclaiming, “Kevin Feige's love of comic books goes back to childhood.”⁴⁷⁴ Now, as the man who produces all of Marvel's movies, Feige is attempting to do what only a kid might dream up: create multiple movie franchises that tie in to one

⁴⁶⁹ Ibid., 17.

⁴⁷⁰ Ibid., 17.

⁴⁷¹ Ibid., 19.

⁴⁷² Ibid., 19.

⁴⁷³ Ibid., 19.

⁴⁷⁴ Ibid., 19.

cohesive universe.”⁴⁷⁵ Marvel Studios’ carefully constructed persona of “fanboy” credibility gained the comics’ fans seal of approval, who in turn reassured the public that Marvel Studios is the “real deal.”⁴⁷⁶

Marvel Studios has reinforced the “Marvel brand” in its films, and its “MCU” library can be broken down into three distinct phases. The studios’ future films, in particular the films comprising “Phase Two,” demonstrates its confidence in its brand. Marvel Studios’ “Phase One” films consisted of *Iron Man* (2008), *The Incredible Hulk* (2008), *Iron Man 2* (2010), *Thor* (2011), *Captain America: The First Avenger* (2011), and the *Avengers* (2012), establishing the foundation for the future phases to come. Marvel Studios’ final films for “Phase Two” of the “MCU” are the *Avengers* sequel, *Avengers: Age of Ultron* (2014) and *Ant-Man* (2015). *Avengers: Age of Ultron*, directed by Joss Whedon and to be released May 1, 2015, features the returning *Avengers* cast teaming up once again to fight Ultron, an alien artificial intelligence bent on destroying humanity in order to create peace.⁴⁷⁷ The film, as the sequel to the third biggest domestic and worldwide grossing film of all time, had been described by the cast as the biggest Marvel Studios film to date, with Joss Whedon stating the *Avengers* sequel will be “more personal, more painful.”⁴⁷⁸ The film was surrounded by controversy after its first official trailer leaked a week early in October 22, 2014.⁴⁷⁹ Marvel Studios took swift action against the leak, subpoenaing Google in the hopes of obtaining the identity of the

⁴⁷⁵ Ibid., 19.

⁴⁷⁶ Ibid., 19.

⁴⁷⁷ Brian Feldman, “Here Is Everything We Know About *The Avengers 2: Age of Ultron*,” *Vulture*, August 19, 2014, accessed August 28, 2014, <http://www.vulture.com/2014/08/everything-we-know-about-the-avengers-2-age-of-ultron.html>, 1.

⁴⁷⁸ Ibid., 1.

⁴⁷⁹ Eriq Gardner, “Marvel Seeks to Subpoena Google Over ‘Avengers: Age of Ultron’ Leak (Exclusive),” *The Hollywood Reporter*, November 6, 2014, accessed November 10, 2014, <http://www.hollywoodreporter.com/thr-esq/marvel-seeks-subpoena-google-avengers-747024>, 1.

leaker.⁴⁸⁰ The studios' actions may seem overzealous to some, but the leaks of blockbuster films such as *X-Men Origins: Wolverine* and *Expendables 3* prior to their release illustrate a real threat of online piracy to meticulously planned blockbuster films whose box office is crucial to a studio's bottom line.⁴⁸¹ Marvel Studios' *Ant-Man*, to be released July 17, 2015, starring Paul Rudd, Michael Douglas and Evangeline Lilly, will conclude "Phase Two" of the "MCU."⁴⁸² The film was to be directed by Edgar Wright (*Shaun of the Dean*, *Hot Fuzz*, *Scott Pilgrim vs. The World*), but Wright dropped out of the project in May 2014 only months before production was supposed to start, despite being attached to the project for over eight years.⁴⁸³ Wright supposedly left over "creative differences," due to him wanting *Ant-Man* to be more in line as a stand-alone film, while Marvel Studios wanted the film to fit within the greater "MCU."⁴⁸⁴ Despite the initial drama, *Ant-Man* successfully began production, and Peyton Reed (*Bring It On*, *Yes Man*) was hired as the film's new director and Adam McKay (*Anchorman*, *The Other Guys*) and *Ant-Man* star Paul Rudd rewrote Wright's screenplay.⁴⁸⁵ Marvel's "Phase Three" films and its forthcoming television series sit on the shoulders of the films in "Phases One" and "Two" and are a culmination of the studio's long-term planning.

Marvel Studios' "Phase Three" films, and its Netflix television series solidifies Marvel Studios' dominance in the superhero genre. On October 28, 2014, Marvel

⁴⁸⁰ Ibid., 1.

⁴⁸¹ Ibid., 1

⁴⁸² Jason Concepcion, "A Movie-by-Movie Guide to Marvel's Phase 3, From Civil War to Infinity Wars," *Grantland*, October 29, 2014, accessed November 16, 2014. <http://grantland.com/hollywood-prospectus/a-movie-by-movie-guide-to-marvels-phase-3-from-civil-war-to-infinity-wars/>, 2.

⁴⁸³ Rodrigo Perez, "Why Edgar Wright Left Marvel's 'Ant-Man': Analysis & The Screenplay Rumors," *The Playlist*, May 24, 2014, accessed November 13, 2014, <http://blogs.indiewire.com/theplaylist/why-edgar-wright-left-marvels-ant-man-analysis-the-screenplay-rumors-20140524>, 1.

⁴⁸⁴ Ibid., 3.

⁴⁸⁵ Kevin Jagernauth, "Comic Roundup: Adam McKay May Direct A Marvel Movie, Quicksilver To Appear In 'X-Men: Apocalypse' & More," *Playlist*, October 24, 2014. Accessed October 15, 2014. <http://blogs.indiewire.com/theplaylist/comics-roundup-adam-mckay-may-direct-a-marvel-movie-quicksilver-to-appear-in-x-men-apocalypse-and-more-20141024>, 1.

Studios announced the film slate of “Phase Three” of the “MCU,” consisting of *Captain America: Civil War* (May 16, 2016), *Doctor Strange* (November 4, 2016), *Guardians of the Galaxy 2* (May 5, 2017), the untitled *Spider-Man* film (July 28, 2017), *Thor: Ragnarok* (November 3, 2017), *Black Panther* (July 6, 2018), *Captain Marvel* (November 2, 2018), *Inhumans* (July 12, 2019) and *Avengers: Infinity Wars Part 1* (May 4, 2018) and *Part 2* (May 3, 2019).⁴⁸⁶ This announcement was momentous because it confirmed the “MCU” ’s buildup to an endgame involving the classic Marvel Comics supervillain Thanos and the all powerful Infinity Gauntlet, a conflict whose story has been subtly established throughout Marvel Studios’ “Phase One” and “Phase Two” films. Dedicated comic fans rejoiced at an adaptation of the 2006 Marvel Comics mega-crossover event *Civil War* with *Captain America: Civil War*, while casual and committed fans of the “MCU” alike celebrated the announcement of *Black Panther* and *Captain Marvel*.⁴⁸⁷ Marvel Studios has been criticized for its lack of persons-of-color and female superheroes, with fans clamoring for *Black Panther* and *Black Widow* films.⁴⁸⁸ Although the majority of Marvel Studios’ superheroes remain male and Caucasian, the announcement of *Black Panther*, starring the up-and-coming Chadwick Boseman (*42, Get On Up*), and *Captain Marvel*, whose comic book series featuring Air Force pilot turned superhero Carol Danvers was restarted in 2012 to much critical and popular acclaim, are a good start to further superhero diversity in film.⁴⁸⁹ Along with its film slate, the first of Marvel’s Netflix television series, *Daredevil* starring Charlie Cox (*Boardwalk Empire, Stardust*), is to be released in April 10, 2015, with Krysten Ritter

⁴⁸⁶ Concepcion, “Movie-by-Movie,” 1-13.

⁴⁸⁷ *Ibid.*, 3-5.

⁴⁸⁸ Andrew Wheeler, “Why Marvel Studios Succeeds (And How It Will Fail If It Doesn’t Diversify),” *Comics Alliance*, August 6, 2014, accessed August 28, 2014, <http://comicsalliance.com/marvel-studios-success-marvel-movies-diversity/>, 4-6.

⁴⁸⁹ Concepcion, “Movie-by-Movie,” 9-11.

(*Breaking Bad*, *Don't Trust the B---- in Apartment 23*) and Mike Colter (*The Good Wife*) and the leads for *A.K.A Jessica Jones* and *Luke Cage* [See Appendix M].⁴⁹⁰ Marvel Studios success has led other Hollywood studios to develop their own superhero cinematic universes, one example being Warner Bros., which is attempting to establish a DC Comics cinematic universe.

Warner Bros. is the frontrunner in developing an equivalent cinematic universe with its DC Comics characters. Warner Bros. has a clear advantage over Marvel Studios in that they have *all* of DC Comics' characters at their disposal, and have an entire comic book universe to adapt as they see fit.⁴⁹¹ The current DC cinematic universe slate, announced on October 15, 2015 by Warner Bros.' CEO Kevin Tsujihara, consists of *Batman Vs. Superman; Dawn of Justice* (2016), *Suicide Squad* (2016), *Wonder Woman* (2017), *Justice League: Part One* (2017), *The Flash* (2018), *Aquaman* (2018), *Shazam* (2019), *Justice League: Part Two* (2019), *Cyborg* (2020) and *Green Lantern* (2020).⁴⁹² Warner Bros. lacks an official showrunner of their DC Comics cinematic universe, as Marvel Studios has with Kevin Feige and Joss Whedon. However, *Man of Steel* director Zack Snyder (*300*, *Watchmen*) and screenwriter David S. Goyer (*The Dark Knight Trilogy*) are heavily involved in the production and development of the DC Comics films.⁴⁹³ Snyder is the director of *Batman Vs. Superman: Dawn of Justice* and is set to direct both *Justice League* films and Goyer is to write the screenplays for all three

⁴⁹⁰ Referring to Marvel Studios' television casting see Kevin Jagernauth, "'Boardwalk Empire' & 'Stardust' Star Charlie Cox To Play 'Daredevil' In Netflix Series," Edward Davis, "'Breaking Bad' Star Krysten Ritter To Play Marvel's 'Jessica Jones'; Mike Colter May Play Luke Cage," and Nellie Andreeva, "Marvel Confirms Mike Colter As Luke Cage In 'Jessica Jones' Netflix Series."

⁴⁹¹ Charlie Jane Anders, "Which Studio's Attempt to Copy Marvel's Movie Universe is Most Doomed?," *io9*, March 31, 2014, accessed April 2, 2014, <http://io9.com/which-studios-attempt-to-copy-marvels-movie-universe-1555390988>, 7.

⁴⁹² Jason Concepcion, "Your Year-by-Year Guide to the 10 (10!) New DC Comics Movies Warner Bros. Plans Through 2020," *Grantland*, October 16, 2014, accessed October 16, 2014, <http://grantland.com/hollywood-prospectus/your-year-by-year-guide-to-the-10-10-new-dc-comics-movies-warner-bros-plans-through-2020/>, 1-7.

⁴⁹³ Anders "Studio Copy," 3.

films.⁴⁹⁴ The first film in Warner Bros.' tentative DC cinematic universe was Zack Snyder's *Man of Steel* (2013), starring Henry Cavill and Amy Adams, effectively introducing the character of Superman to a new movie-going generation.⁴⁹⁵ Rather than follow Marvel's footsteps and introduce each superhero with a film, and give audiences time to learn about and care for each hero, Warner Bros. has chosen to introduce a large cast of characters in *Batman vs. Superman: Dawn of Justice*, then follow up within a few years with even bigger *Justice League* films.⁴⁹⁶ The studio also faces further issues regarding its characters in its DC Comics cinematic universe.

Character development and tone are two crucial issues Warner Bros. face in the development of their DC Comics cinematic universe. The pressing issue for the studios is whether supporting characters such as Wonder Woman or Aquaman will make enough of an impression on audiences to successfully launch their own solo series later.⁴⁹⁷

Wonder Woman, which will star Gal Gadot and to be directed by Patty Jenkins (*Monster*) with a screenplay by Jason Fuchs (*Pan*), will be an important film for Warner Bros.⁴⁹⁸ It could not only be the first successful film adaptation of the most influential female superhero in comic books, but *Wonder Woman* might also be the first standalone superhero film in the DC Comics cinematic universe. The film's success will depend on whether the studio does right by such an iconic character, and if audiences for *Superman Vs. Batman: Dawn of Justice* are intrigued and excited enough about the character of Wonder Woman to see the new film. The return of Batman in *Batman Vs. Superman:*

⁴⁹⁴ Kevin Jagernauth, "Zack Snyder To Direct 'Justice League' For Warner Bros, 'Batman Vs. Superman' Will Lead Into Super Sequel," *The Playlist*, April 27, 2015, accessed January 24, 2015, <http://blogs.indiewire.com/theplaylist/zack-snyder-to-direct-justice-league-for-warner-bros-batman-vs-superman-will-lead-into-super-sequel-20140427>, 1.

⁴⁹⁵ Concepcion, "Year-by-Year," 4.

⁴⁹⁶ Anders "Studio Copy," 9.

⁴⁹⁷ Concepcion, "Year-by-Year," 4.

⁴⁹⁸ Mark Hughes, "'Wonder Woman' Film Sets Sights On Jason Fuchs," *Forbes*, December 4, 2014, accessed December 6, 2014, <http://www.forbes.com/sites/markhughes/2014/12/04/wonder-woman-film-sets-sights-on-jason-fuchs/>, 1-2.

Dawn of Justice, with Ben Affleck being the newest iteration of the character, is another possible problem. With Christopher Nolan's *The Dark Knight Rises* to have been released only four years prior to *Batman Vs. Superman: Dawn of Justice*, it may be too soon for audiences to accept or care about another Batman.⁴⁹⁹ The tone of the films is another possible issue; *Man of Steel* has established the DC cinematic universe on the realistic and gritty side of the superhero spectrum, in the manner of Christopher Nolan's *Dark Knight* trilogy.⁵⁰⁰ While Marvel Studios' films feature serious and dangerous situations, they also contain plenty of humor, as *Iron Man 3* and *Guardians of the Galaxy* do, and are not overly dark and somber. In contrast *Man of Steel* features a horrendous and destructive battle in the climax of the film, which has been judged by some audiences and critics to have been excessive.⁵⁰¹ The overly dark tone characteristic of the Warner Bros. films could inadvertently overwhelm audiences and alienate them from the characters, making them less likely to go to the theatre to see further films featuring the same characters.

A further factor that differentiates Marvel from its competitors concerns the ownership of the properties. In comparison to Warner Bros., which owns the complete rights to all of DC Comics' characters, Marvel Studios' only owns a majority of the Marvel Comics' characters, which means that no studio holds a monopoly on the Marvel Comics character rights. In the 1990s, as part of the company's plan to recuperate from its bankruptcy, Marvel sold off the rights of its characters to multiple studios [See Appendix J]. As of 2015, Marvel's characters are divided amongst four studios; Sony

⁴⁹⁹ Anders "Studio Copy," 9.

⁵⁰⁰ Ibid., 9.

⁵⁰¹ Simon Brew, "Zack Snyder defends the mass destruction of Man Of Steel," *Den of Geek*, August 30, 2013, accessed January 24, 2015, <http://www.denofgeek.com/movies/man-of-steel/27096/zack-snyder-defends-the-mass-destruction-of-man-of-steel>, 1.

owns Spider-Man and all of Spider-Man's adjacent characters (ie. The Green Goblin, Venom etc.) and shares them with Marvel Studios, 20th Century Fox owns the complete library of X-Men characters, along with Fantastic Four and its adjacent characters (ie. The Skrulls, the Badoon etc.), Universal owns Namor the Sub-Mariner, and Marvel Studios owns all remaining Marvel characters.⁵⁰² In the last decade, the character rights of various characters have reverted back to Marvel's ownership, due to a clause regarding the ownership of Marvel characters; if a studio does not begin principal photography by a specified time, the character rights revert back to Marvel.⁵⁰³ Marvel has regained ownership of numerous characters, such as Daredevil and Elektra from 20th Century Fox, the Hulk from Universal, and Blade from New Line Cinema, due to a studio's deadline elapsing. However, there is very little chance of Marvel Studios regaining full ownership of the *X-Men* and *Spider-Man* characters, as 20th Century Fox and Sony know their Marvel characters are beyond value in the reality of a franchise oriented film industry with shrinking revenues and profits and in a post-*Avengers* superhero cinematic universe. The box office of both film franchises are large enough that 20th Century Fox and Sony won't deliberately let the rights lapse, and the two studios are constantly remaking their superhero films and making spinoffs to ensure their characters don't revert back to Marvel.⁵⁰⁴ Sony announced the remake of the *Spider-Man* franchise in 2007 in order to prevent the Spider-Man rights to lapsing back to Marvel after Sam Raimi's plans for *Spider-Man 4* fell through.⁵⁰⁵ There are also two particular characters who can be used

⁵⁰² Carl Lee, "Answered: Which Studios Own Which Marvel Characters," *Screenrant*, October 6, 2014, accessed January 12, 2015, <http://screenrant.com/marvel-comics-movies-characters-carl-6766/>, 2-3.

⁵⁰³ *Ibid.*, 3.

⁵⁰⁴ *Ibid.*, 3.

⁵⁰⁵ Terri Schwartz, "Sam Raimi Explains Why *Spider-Man 4* Didn't Happen," *Comic Book Resources*, March 6, 2013, accessed January 24, 2015. <http://spinoff.comicbookresources.com/2013/03/06/sam-raimi-explains-why-spider-man-4-didnt-happen/>, 1.

by Marvel Studios and 20th Century Fox: brother and sister speedster Quicksilver and the Scarlet Witch. The heroes/supervillains in the comics are the children of Magneto, the archenemy of the X-Men, who later become members of the Avengers, thus occupying places in both X-Men and Avengers history. Kevin Feige has stated that legally both Marvel Studios and 20th Century Fox can use Quicksilver and the Scarlet Witch in their films.⁵⁰⁶ This has led to the rare instance of two versions of a superhero existing concurrently; 20th Century Fox was the first studio to use Quicksilver, with Evan Peters (*American Horror Story*) cast as the speedster for *X-Men: Days of Future Past* (2014) in the X-Men cinematic universe, while Aaron Taylor-Johnson (*Kick-Ass*, *Anna Karenina*) was cast as Quicksilver for the “MCU.”⁵⁰⁷ While Marvel Studios does not have control of the *Spider-Man* and *X-Men* characters, the strength of its “MCU” demonstrates that it does not need those particular characters to be successful. 20th Century Fox’s control of the *X-Men* and *Fantastic Four* characters has allowed it to restart both franchises in the wake of the “MCU’s” success.

Since the success of Marvel Studio’s “MCU,” 20th Century Fox has recalibrated the *X-Men* franchise, giving it a fresh start with a new cast and narrative after the franchise’s original trilogy, and made plans to restart the *Fantastic Four* franchise in 2015. 20th Century Fox’s *X-Men* franchise was arguably the first mainstream superhero franchise, embraced by the general public, comic book fans and critics for its characters and stories. However, the subpar critical and audience reception of *X-Men: The Last Stand* (2006) and *X-Men Origins: Wolverine* led to a stagnation of the *X-Men* franchise

⁵⁰⁶ Edward Davis, “Kevin Feige Says Both Marvel & Fox Can Use Quicksilver & The Scarlet Witch In 'Avengers' & 'X-Men' Films,” *Playlist*, April 20, 2012, accessed January 20, 2015. <http://blogs.indiewire.com/theplaylist/kevin-feige-says-both-marvel-fox-can-use-quicksilver-the-scarlett-witch-in-avengers-x-men-films-20120420>, 1.

⁵⁰⁷ Referring to Quicksilver castings see Kevin Jagernauth, “Sorry 'The Avengers 2,' 'X-Men: Days Of Future Past' Will Get Quicksilver On The Big Screen First,” 1 and Edward Davis, “'Kick-Ass' Star Aaron Taylor-Johnson Confirmed To Play Quicksilver In 'Avengers: Age Of Ultron.’”

for the studio [See Appendix D]. In 2011 Fox released *X-Men: First Class* (2011), starring James McAvoy, Michael Fassbender and Jennifer Lawrence, set in the 1960s as a prequel to the original trilogy and as the beginning of a remake of the *X-Men* franchise. *X-Men: First Class* and the following *X-Men* film *The Wolverine* (2013), a standalone film focusing on Wolverine in Japan, laid the groundwork for creating a cohesive *X-Men* cinematic universe, while leading *First Class*' sequel *X-Men: Days of Future Past*, an adaptation of a popular *X-Men* comic storyline, to be rolled out. Directed by Bryan Singer, the director of *X-Men* and *X2: X-Men United*, *Days of Future Past*'s time travel narrative allowed the film to have past and present *X-Men* casts exist within the same film and to reunite the classic *X-Men* cast, including Patrick Stewart, Sir Ian McKellan, Halle Berry and Ellen Page.⁵⁰⁸ *Days of Future Past* was a success, securing \$233,921,534 in the domestic box office and nearly \$750 million worldwide, making the film the highest grossing *X-Men* film in the franchise, while successfully reinventing the *X-Men* franchise for a new generation and winning back its fans [See Appendix D]. The film didn't completely fix all of its continuity issues, such as the loss of Magneto's powers and the supposed death of Professor X in *X-Men: The Last Stand*, but it succeeded in making a plausible interconnected universe from its films.⁵⁰⁹ *Days of Future Past* also paved a new path for future *X-Men* films while allowing the option of the old *X-Men* cast members appearing in cameos to establish future continuity of its universe. The film effectively erased the past mistakes of the *X-Men* franchise and allowed 20th Century Fox to rework the franchise into a cinematic universe for audiences to consume.

⁵⁰⁸ Referring to *X-Men: Days of Future Past* see Charlie Jane Anders, "Which Studio's Attempt to Copy Marvel's Movie Universe is Most Doomed?," 6 and *Internet Movie Database (IMDb)*, "X-Men: Days of Future Past."

⁵⁰⁹ Anders "Studio Copy," 6.

X-Men: Days of Future Past provided 20th Century Fox with a clean slate to create future *X-Men* films with a new cast and expand their *X-Men* universe, alongside its remake of the *Fantastic Four*. Due to *X-Men: First Class* being created as a pseudo-remake of the franchise, it would allow the studio to recast key *X-Men* characters, and provide them the opportunity to make countless future movies in a linear narrative with a new cast. For *Days of Future Past* sequel, *X-Men: Apocalypse* (May 27, 2016), Tye Sheridan (*Mud*), Sophie Turner (*Game of Thrones*) and Alexandra Shipp (*House of Anubis*) have been cast respectively as the young versions of Cyclops, Jean Grey, and Storm, hinting at the planning for future films featuring these characters.⁵¹⁰ The production of multiple *X-Men* spinoffs is also underway, with Channing Tatum to play the titular Southern mutant hero in *Gambit* in November 2016 and Ryan Reynolds to reprise his role as motor mouth mutant assassin Deadpool from *X-Men Origins: Wolverine* in February 2016, expanding the *X-Men* cinematic universe [See Appendix Q].⁵¹¹ 20th Century Fox is also planning to restart the *Fantastic Four* franchise. The studio has grounded the premise of four individuals who gain superpowers in a more realistic setting, and selected a cast of rising stars to support the film. Miles Teller (*Whiplash*), Kate Mara (*House of Cards*), Jaime Bell (*Billy Elliot*, *Snowpiercer*) and Toby Kebbell (*Black Mirror*, *Dawn of the Planet of the Apes*) will respectively play Mr. Fantastic, the Invisible Woman, the Thing, and super-villain Doctor Doom, with 20th Century Fox demonstrating a commitment to diversity by casting Michael B. Jordan

⁵¹⁰ Kevin Jagernauth, "Tye Sheridan, Sophie Turner & More Join 'X-Men: Apocalypse,' Patrick Stewart & Ian McKellen Not Returning." *Playlist*, January 22, 2015. Accessed January 25, 2015. <http://blogs.indiewire.com/theplaylist/tye-sheridan-sophie-turner-more-join-x-men-apocalypse-patrick-stewart-ian-mckellen-not-returning-20150122>, 1.

⁵¹¹ Referring to *X-Men* spinoffs see Edward Davis, "Channing Tatum's 'X-Men' Spin-Off 'Gambit' Hired 'RoboCop' Writer & Moves Forward," and Mike Fleming Jr, "Ryan Reynolds In 'Deadpool' Deal."

(*Fruitvale Station*) as the Human Torch.⁵¹² 20th Century Fox's ownership of the *X-Men* and *Fantastic Four* properties has led to tensions with the Marvel conglomerate.

Marvel Studios will not be regaining control of the *X-Men* and *Fantastic Four* properties anytime in the near future, but the conglomerate can still create a tenuous and uncomfortable environment for its competitors. Due to the Marvel character rights conditions, whereby if a studio doesn't make films with its Marvel characters within a specified time the rights revert back to Marvel, it is in Marvel's best interest for Sony and Fox to lose their rights to their big characters, because it would mean that Marvel would reclaim those popular, money-making franchises.⁵¹³ In the 1980s and 1990s, the *X-Men* were Marvel's central comic franchise, with its merchandise ranging from toys, to trading cards, and cartoons.⁵¹⁴ However, Marvel controls the source material that Sony and Fox use, and has say when it comes to cartoons, toys, and licensing; thus, Marvel could downplay their favorite characters by limiting the merchandise.⁵¹⁵ The lack of *X-Men* merchandise and promotion for 20th Century Fox's *X-Men Days of Future Past*, and the absence of *X-Men* and *Fantastic Four* Marvel characters in comparison to the Marvel characters owned by Marvel Studios, from the company's promotion and from comic news at large, give some weight to claims of Marvel favoritism.⁵¹⁶ Comics fans have claimed over the past few years that the *X-Men* have been put on the backburner by Marvel in order to promote and develop teams, such as *Guardians of the Galaxy* and the

⁵¹² Referring to *Fantastic Four* (2015 casting see Beth Hanna, "'Fantastic Four' Has a Cast: Michael B. Jordan, Kate Mara, Miles Teller and Jamie Bell," 1 and Kevin Jagernauth, "Toby Kebbell Lining Up To Play 'Fantastic Four' Villain Dr. Doom," 1.

⁵¹³ Alex Abad-Santos, "Why Marvel wants the X-Men to fail," *Vox*, August 11, 2014, accessed October 15, 2014, <http://www.vox.com/2014/8/11/5974743/marvels-x-men-conspiracy-theory-guardians-future>, 5.

⁵¹⁴ *Ibid.*, 3.

⁵¹⁵ *Ibid.*, 3.

⁵¹⁶ Referring to possible *X-Men* and *Fantastic Four* favoritism see Alex Abad-Santos, "Why Marvel wants the X-Men to fail," 6 and Jaime Weinman, "Marvel, Fox and the fantastic fracas," 2.

Avengers, that they hold the film rights to.⁵¹⁷ There have even been edicts issued to the Marvel comics creators and writers not to create any new characters for the “X-Men” and “Fantastic Four” comic series so as to not give 20th Century Fox more characters to use in their films.⁵¹⁸ There are also hints of antagonism on part of 20th Century Fox. Both Marvel Studios and 20th Century Fox can use the characters of Quicksilver and the Scarlet Witch, and in 2013 Fox announced Quicksilver would be part of *X-Men: Days of Future Past*.⁵¹⁹ This meant 20th Century Fox’s version of Quicksilver would be the first cinematic representation of the superhero, a full year ahead of Marvel Studios’ *Avengers: Age of Ultron*, which also features the character of Quicksilver.⁵²⁰ This move was seen in the film industry as the gauntlet being thrown down by 20th Century Fox, especially since the scene with Quicksilver in *Days of Future Past* was originally written for another character.⁵²¹ Marvel Studios has also been working its way around the mutant heritage of Quicksilver and the Scarlet Witch. The brother and sister superheroes/villains are mutants in the comics, but the studio cannot legally use the term “mutant” in the “MCU,” so there have been hints of recalibrating their backstory to be possible members of the Marvel superhuman race, the Inhumans.⁵²² The Inhumans were an integral part of Marvel’s “Infinity” comic book crossover event, where a Terrigen Mist bomb—the Terrigen Mist being what grants Inhumans their powers—was released on Earth, turning vast numbers of people into Inhumans.⁵²³ From an editorial standpoint, this comic storyline could provide a loophole for Marvel Studios to create *X-Men*-esque characters

⁵¹⁷ Abad-Santos, “X-Men to fail,” 3.

⁵¹⁸ *Ibid.*, 5.

⁵¹⁹ Weinman “Marvel, Fox,” 2.

⁵²⁰ *Ibid.*, 2.

⁵²¹ *Ibid.*, 2.

⁵²² Abad-Santos, “X-Men to fail,” 7-8.

⁵²³ Abad-Santos, “X-Men to fail,” 7-8.

without having to use the X-Men themselves with the additional benefit of expanding their cinematic universe.⁵²⁴ Marvel's cancellation of their progenitor comic book, "The Fantastic Four" is the most current example of the conglomerate exerting its dominance.

The cancellation of the classic Marvel Comics series "The Fantastic Four" has sobering repercussions for 20th Century Fox. On October 12, 2014 at the New York Comic-Con, "Fantastic Four" series writer James Robinson confirmed the cancellation of the series, stating the series was "going away for a while."⁵²⁵ The comic's cancellation was unsettling as it meant the end of Marvel Comics' first and longest comic series of fifty-three years, from 1961 to present day, which had cemented Marvel Comics' status as one of the two comics giants in the industry, but also presents obstacles to 20th Century Fox's *Fantastic Four* reboot.⁵²⁶ In Marvel's eyes, the "Fantastic Four" comic series would serve as free publicity promotion for audiences curious about the new *Fantastic Four* reboot and act as promotion for the film.⁵²⁷ Thus, it makes sense from a business perspective to cancel a series that would give free promotion to a rival studio that owns Marvel characters. "The Fantastic Four" has never been a bestseller, so there would be less chance of a fan revolt if it were cancelled, unlike the fan mutiny that would occur if Marvel attempted to cancel their "X-Men" comics.⁵²⁸ The "Fantastic Four" cancellation policy was enacted by Marvel CEO Isaac Perlmutter, and the ultimate damage to 20th Century Fox is that they lost a venue in which potential audiences could learn and care

⁵²⁴ Ibid., 7-8.

⁵²⁵ Jonah Welland, "NYCC: Robinson Discusses End of 'Fantastic Four,'" *Comic Book Resources*, October 12, 2015, accessed October 15, 2014, <http://www.comicbookresources.com/?page=article&id=56237>, 1.

⁵²⁶ Abraham Riesman, "It's Tragic and Disappointing That Marvel Is Canceling *Fantastic Four*," *Vulture*, October 14, 2014, accessed October 15, 2014, <http://www.vulture.com/2014/10/fantastic-four-comics-canceled-marvel.html>, 2.

⁵²⁷ Weinman "Marvel, Fox," 2.

⁵²⁸ Sean O'Neal, "Marvel's dealings with *Spider-Man*, *X-Men*, and *Fantastic Four* are a mess right now," *A.V. Club*, October 8, 2014, accessed October 15, 2014, <http://www.avclub.com/article/marvels-dealings-spider-man-x-men-and-fantastic-fo-210241>, 1-2.

about the “Fantastic Four” characters, which would have given people a reason to see the *Fantastic Four* reboot in theatres. If audiences do not care about a film’s characters, or more importantly a franchise’s characters, a film will most likely fail. The remaining Marvel characters not owned by Marvel Studios are Spider-Man and his related characters, which are owned by Sony.

Upon its remake of the *Spider-Man* franchise in 2012, which was done in order to prevent the rights from reverting back to Marvel, Sony has attempted to create a cinematic universe for Spider-Man, with mixed results. After the release of *The Amazing Spider-Man* in 2012, starring Andrew Garfield and Emma Stone, to the lowest domestic and worldwide box office of the total *Spider-Man* films at the time [See Appendix C]. Sony began planning a *Spider-Man* cinematic universe along the vein of the “MCU.” The studio committed to two additional *Amazing Spider-Man* films, and two spin offs focusing on the classic *Spider-Man* villains Venom and the Sinister Six.⁵²⁹ Sara Vilkomerson’s “The Amazing Spider-Plan!” gave the impression Sony was anxious to establish a *Spider-Man* cinematic universe in the face of the growth of franchises in the past five years. Amy Pascal, co-chairman of Sony, stated in a promotional article for *The Amazing Spider-Man 2* for *Entertainment Weekly* that “[a *Spider-Man* universe] was something we had always planned on doing.”⁵³⁰ Sony, displaying a one-size-does-not-fit-all vision, also developed a “brain trust” of writers to shepherd in the *Spider-Man* cinematic universe. The group included Ed Solomon, Jeff Pinkner, Drew Goddard, and writers and producers of television series *Alias* and Paramount franchise *Star Trek*, Alex

⁵²⁹ Sara Vilkomerson, “The Amazing Spider-Plan!” *Entertainment Weekly*, May 9, 2014, accessed May 30, 2014, <http://www.ew.com/ew/article/0,,20801730,00.html>, 1.

⁵³⁰ *Ibid.*, 1.

Kurtzman and Roberto Orci.⁵³¹ Unfortunately, *The Amazing Spider-Man 2* debuted to unfavorable critical reviews, the lowest of all the *Spider-Man* films, and the final film's box office became the newest film with the lowest domestic and worldwide total in the total *Spider-Man* franchises [See Appendix D]. The failure of *The Amazing Spider-Man 2* was a key factor leading to the momentous deal between Marvel Studios and Sony allowing for shared custody of the character of Spider-Man.

On February 9, 2015 Marvel Studios and Sony entered into a partnership that will lead to the two studios sharing Spider-Man, which will allow the character to appear in, and be a part of the "MCU."⁵³² Kevin Feige and Amy Pascal will co-produce all future *Spider-Man* films, with Matt Tolmach and Avi Arad, who have served as producers on both the first and second *Spider-Man* franchises, and will also serve as executive producers going forward.⁵³³ This announcement was unprecedented, not only due to Marvel Studios regaining partial ownership of one of their most popular Marvel Comics characters, but also because it marked new ground regarding inter-studio collaboration. As per the arrangement between Marvel Studios and Sony, Spider-Man is allowed to be incorporated into the "MCU" and Marvel Studios' films, and will appear in an as of yet unannounced Marvel Studios film prior to appearing in a new solo feature film on July 28, 2017.⁵³⁴ It is likely that the first "MCU" film in which the new Spider-Man will appear will be *Captain America: Civil War*, to be released in 2016, given that Spider-

⁵³¹ Gabe Toro, "Discuss: Why One Size Does Not Fit All For Superhero Franchises & Where Sony Went Wrong With 'Amazing Spider-Man,'" *The Playlist*, July 21, 2014, accessed March 20, 2014, <http://blogs.indiewire.com/theplaylist/discuss-why-once-size-does-not-fit-all-for-superhero-franchises-where-sony-went-wrong-with-amazing-spider-man-20140721>, 3.

⁵³² Borys Kit, "'Spider-Man' Swings to Marvel Studios in Major Sony Partnership," *The Hollywood Reporter*, February 9, 2015, accessed February 28, 2015, 1.

⁵³³ *Ibid.*, 2.

⁵³⁴ Adam B Vary, "Spider-Man Joins Marvel Studios In Deal With Sony Pictures," *Buzzfeed Entertainment*, February 9, 2015, accessed February 28, 2015. http://www.buzzfeed.com/adambvary/spider-man-joining-marvel-studios-in-deal-with-sony-pictures#_rt55JvMnN, 1.

Man played a crucial role in the original Marvel Comics *Civil War* crossover event.⁵³⁵

The future solo film will be released by Sony, which will continue to finance, distribute, own, and exercise final creative control over future *Spider-Man* films.⁵³⁶ Spider-Man is now in a unique position in the superhero genre. While Spider-Man can now exist within the “MCU,” and interact with “MCU” characters, he still retains his own franchise that is separate from the Marvel Studios and the “MCU,” which will be managed by Sony.⁵³⁷

Furthermore, Sony and Marvel Studios are exploring opportunities to integrate characters from the “MCU” into future *Spider-Man* films.⁵³⁸ This is not simply a case of characters having their own franchises who exist within the same cinematic universe, and interact and team up with one another in further films. Sony and Marvel Studios’ deal is the first step to cinematic universe crossovers and collaborations between studios, which could change and influence the superhero film genre in a manner comparable to the “MCU.” As a result of the new Marvel Studios/Sony partnership, Sony’s past plans regarding the *Amazing Spider-Man* films have been drastically altered.

Sony’s hope for a *Spider-Man* cinematic universe was stunted due to the limited number of characters around when they can build and develop a universe. Built around one character, a *Spider-Man* universe, by itself, doesn't have the same breadth and depth as the “MCU” or even the *X-Men* cinematic universe.⁵³⁹ One of the reasons why Spider-Man works as a character in the comics is his capacity for interacting with and bouncing off other Marvel characters outside of his sphere of influence, such as X-Men, the Avengers and the Fantastic Four. By attempting to build a cinematic universe around

⁵³⁵ Ibid., 1.

⁵³⁶ Ibid., 1.

⁵³⁷ Ibid., 1.

⁵³⁸ Ibid., 1.

⁵³⁹ Anders “Studio Copy,” 3.

only Spider-Man as the nucleus, one makes the universe smaller and generic, and limits audience excitement for future films.⁵⁴⁰ As a result of the Marvel and Sony partnership regarding future *Spider-Man* films, *The Amazing Spider-Man 3* and *The Amazing Spider-Man 4* have been cancelled, and the creative team behind the *Amazing Spider-Man* films, including director Marc Webb, has been disbanded.⁵⁴¹ Andrew Garfield, who portrayed the titular character in *The Amazing Spider-Man* (2012) and *The Amazing Spider-Man 2* (2014), will not reprise the role, which will be recast.⁵⁴² There has been much talk about the direction Marvel Studios and Sony will take the character, in particular as to whether or not Spider-Man will once again be Peter Parker, or Miles Morales, the Black Hispanic teenager in *Ultimate Comics: Spider-Man* who has taken on the mantle of Spider-Man.⁵⁴³ Miles Morales is a popular character amongst Marvel fans, and would go a long way to increase diversity within the “MCU” and the larger superhero genre. While the originally planned *Amazing Spider-Man* sequels have been cancelled, Sony has put the long-planned *Sinister Six* and *Venom* spin-offs on indefinite hiatus.⁵⁴⁴ These films will most likely be redeveloped to accommodate the new plans for Spider-Man to join the “MCU,” and to better incorporate them into Sony’s future *Spider-Man* plans. Drew Goddard, the director of the meta-horror film *Cabin in the Woods* (2012), and writer for television shows *Buffy the Vampire Slayer*, *Angel*, *Alias*, and *Lost*, is set to write and direct Sony and Marvel Studios’ untitled 2017 *Spider-Man* film.⁵⁴⁵ The Marvel Studios and Sony

⁵⁴⁰ Ibid., 3.

⁵⁴¹ Schilling, Dave. “It’s Official: Marvel Gets to Borrow Spider-Man. Now What?.” *Grantland*, February 10, 2015. Accessed February 28, 2015. <http://grantland.com/hollywood-prospectus/its-official-marvel-gets-to-borrow-spider-man-now-what/>, 1.

⁵⁴² Ibid., 1.

⁵⁴³ Ibid., 1.

⁵⁴⁴ Ibid., 1.

⁵⁴⁵ Referring to Drew Goddard’s involvement in *Spider-Man* see Kevin Jagernauth, “Drew Goddard To Write And Direct Sony & Marvel’s ‘The Spectacular Spider-Man’; ‘Sinister Six’ Scrapped,” 1 and *Internet Movie Database (IMDb)*, “Drew Goddard.”

partnership has most likely been a blessing for both parties after the failure of *The Amazing Spider-Man 2*. Prior to Marvel Studios and Sony's announcement, Roberto Orci had left the franchise, and the consensus from the cast, crew and fans appears to be that Sony attempted to do too many things at once in the film, in particular stuffing the film with too many *Spider-Man* villains to set up for *The Sinister Six*.⁵⁴⁶ *Amazing Spider-Man* star Andrew Garfield has stated "I read the script that [Alex Kurtzman] and [Bob Orci] wrote, and I genuinely loved it...[but] ultimately the studio [has] the final say in those movies because they're the tentpoles [films], so you have to answer to those people."⁵⁴⁷ At the time, Alex Kurtzman, a member of Sony's *Amazing Spider-Man*'s "brain trust," bluntly stated the franchise is "up for grabs." In comparison to Marvel's strained relationship with 20th Century Fox's regarding Fox's ownership of the X-Men and the Fantastic Four, Marvel does not have the same animosity regarding Sony ownership of Spider-Man. This is due to the transaction between Marvel and Sony, where Marvel purchased Sony's participation rights in Spider-Man merchandising in exchange for Marvel's participation rights in the making of Spider-Man films, allowing Marvel to control and profit from all Spider-Man merchandising.⁵⁴⁸ Spider-Man is still an iconic and beloved Marvel character, but its cinematic future is in flux at Sony, while Marvel Studios is in the enviable position of no longer requiring its once flagship characters of Spider-Man and the X-Men to be successful.

The attempts of Warner Bros., 20th Century Fox, and Sony to establish their own

⁵⁴⁶ Referring to *Amazing Spider-Man* delays see Oliver Lyttelton, "With Rumors Of A Delay For 'The Amazing Spider-Man 3,' Is Sony's Biggest Franchise In Trouble?," 2 and Gabe Toro, "Discuss: Why One Size Does Not Fit All For Superhero Franchises & Where Sony Went Wrong With 'Amazing Spider-Man,'" 3.

⁵⁴⁷ Zach Hollwedel, "Andrew Garfield Says Studio Cuts Damaged 'Amazing Spider-Man 2,' Alex Kurtzman Talks Venom," *Playlist*, September 11, 2014, accessed January 25, 2015, <http://blogs.indiewire.com/theplaylist/andrew-garfield-says-studio-cuts-damaged-amazing-spider-man-2-alex-kurtzman-talks-venom-20140911>.

⁵⁴⁸ DCMarvelFreshman, "Disney Acquires Sony's Merchandising Participation For *The Amazing Spider-Man*," *ComicBookMovie.com*, October 11, 2011, accessed October 15, 2014, <http://www.comicbookmovie.com/fansites/MarvelFreshman/news/?a=49687>, 1.

superhero cinematic universes reflect the studios' response to the pressure of shrinking profit in the film industry, and their eagerness to become equals to Marvel Studios in superhero franchising. However, Marvel Studios still has the advantage over the other studios due to the firm establishment of their "MCU" brand, and how they have utilized transmedia and convergence culture to their advantage. The other studios have not yet been able to properly mobilize convergence culture for the benefit of their superhero cinematic universes to the same degree as has Marvel. A further question concerns whether future superhero cinematic universes can succeed in the face of the possible threat of superhero oversaturation, but as the saying goes: "imitation is the sincerest form of flattery." One must wait and see if Warner Bros., 20th Century Fox, and Sony's attempts to frame their superhero films in the model of the "MCU" will lead to success, or ruin.

CONCLUSION

The year 2015 concludes “Phase Two” of the official plan for the “Marvel Cinematic Universe,” [hereafter referred to as the “MCU”] with *Avengers: Age of Ultron*, sequel of the *Avengers* to be released May 1, 2015, and *Ant-Man*, to be released July 17, 2015, bringing another meticulously planned and lucrative slate of Marvel Studios’ films to a close [See Appendix Q]. The extended examination of Marvel Studios’ and its “MCU” in the preceding chapters of this thesis illustrates the role of Marvel Studios in setting the standard for superhero franchising that other studios are scrambling to emulate.

Whether such emulation will produce comparable results remains an open question. The looming threat of an oversaturation of superhero films in the market could lead to disastrous consequences for the superhero plans of any studio. Within the five-year time period between 2015 and 2020, over thirty superhero films are to be released; in 2016 alone, assuming that these plans are realized, eight superhero films will be in theatres [See Appendix Q]. Paul Dergarabedian, the senior box-office analyst for media-tracking firm Rentrak, has noted that “2015 is where we’ll see the really perfect storm of comic-book films and spinoffs...it’s either going to be a bloodbath or the greatest year at the box office ever—or both.”⁵⁴⁹ The simple truth is that there is a very real possibility that the studios’ bombardment of audiences with superhero films could turn against them and create a backlash. The comic book medium survives and thrives on decades-old characters and product lines being constantly rebooted with universe changing events that

⁵⁴⁹ Barry Hertz, “Hollywood banks on profitable superhero universes,” *Macleans*, January 4, 2014, accessed March 20, 2014, <http://www.macleans.ca/culture/a-comic-balm/>, 2.

alter the narrative status quo.⁵⁵⁰ In a medium where creators and writers can constantly “do over” their mistakes, it is standard procedure to end a long run of dragging, mediocre issues with a big starting-from-scratch ending, with the assumption that faithful, if irked, readers will stay on board and those who have drifted away will return.⁵⁵¹ The comic book medium allows room for a margin of error that motion picture studios can’t afford, especially during a period of decreasing movie attendance and shrinking profit throughout the film industry. The studios need an immediate decent-to-stellar film success, or else they flame out.

Warning signs of the fickle nature of audiences towards superhero franchising have been evident for some time. Marvel Studios faced their first major roadblock with *Marvel’s Agents of S.H.I.E.L.D.* in 2013; the television show received mixed-to-negative reviews for the majority of the first season, alienating viewers who tuned into the show due to being fans of the Marvel Studios’ films.⁵⁵² The show managed to gain positive reception in the last five episodes, but experienced a large drop in ratings and has not been able to stabilize an audience, making it a last minute, but problematic, success for Marvel Studios.⁵⁵³ The series maintained enough strength to earn a second-season renewal, with the second season itself being an enormous improvement over the first, although it was most likely due to *Marvel’s Agents of S.H.I.E.L.D.* airing on ABC, which is owned by Disney, who in turn owns Marvel Studios.⁵⁵⁴ As the owner of Marvel Studios and ABC, Disney is in the position to give time and leeway in the name of corporate synergy to *Marvel’s Agents of S.H.I.E.L.D.* in order for the show focus on

⁵⁵⁰ Mark Harris. “Are We at Peak Superhero?,” *Grantland*, May 22, 2014, accessed May 30, 2014, <http://grantland.com/features/comic-book-movies-marvel-x-men-batman-dc-comics/>, 1.

⁵⁵¹ *Ibid.*, 1.

⁵⁵² *Ibid.*, 1.

⁵⁵³ *Ibid.*, 1.

⁵⁵⁴ *Ibid.*, 1.

regroup and regaining an audience. Sony's *Amazing Spider-Man 2* is another cautionary tale; its disappointing performance as the lowest grossing domestically of the five films in the series, suggests serious audience weariness with a premature remake of the property.⁵⁵⁵ The stumbling of Sony's *Spider-Man* plans also indicates that audiences are becoming tired of the comic book story formula of a single man facing tragedy who is then entrusted with great powers/rededicates his life to justice. Marvel Studios has successfully managed to tell entertaining narratives that use the comic book formula, but will soon have to be more creative in order to retain its critical and economic advantage over the other studios that own superhero properties. Marvel Studios has already begun to lay the groundwork for the future by establishing new franchises, such as *Guardians of the Galaxy*, *Doctor Strange* and *Inhumans* to eventually replace the longer running franchises, such as *Iron Man* and *Thor*, while introducing more diverse superheroes in their own solo films, such as *Black Panther* and *Captain Marvel*. Despite the familiarity of the standard comic book formula, Marvel Studios' films, and their sequels, have so far brought in increasing streams of revenues. The films of Marvel Studios' "Phase Two" yielded enormous revenue increases, due perhaps to the popularity of the *Avengers*, which created fans out of audience members who normally weren't interested in superhero films. *Iron Man 3*'s gross rose 36% from *Iron Man 2*'s gross, and is currently the second most profitable Marvel Studios with a worldwide gross of \$1,215,439,994 billion dollars [See Appendix G]. *Thor: The Dark World* also received a 30% bump, mirroring *Iron Man 3*'s gross increase, while *Captain America: The Winter Soldier* experienced 49% increase [See Appendix G]. Marvel Studios' films are not without its faults, particularly the overabundance of white male Caucasian leads, which has been

⁵⁵⁵ Ibid., 1.

critiqued by in particular by fans of the “MCU,” which can be attributed to a more diverse and educated audience, aware of diversity and visual representation (or rather the lack of) in Hollywood films. Nonetheless, Marvel Studios has successfully established itself as a signature of reliable quality entertainment. The success of *Guardians of the Galaxy* is a testament to the solidity of the Marvel Studios brand as a mark of quality. *Guardians of the Galaxy* was a risk due to being the first non-sequel film since 2012, only tangentially connected to the central “MCU,” and featuring new and unorthodox characters to audiences, such as a talking tree and an anthropomorphic raccoon. However, audiences took a chance on this film from “the creators of *Iron Man* and the *Avengers*” and it ultimately made \$774,176,000 worldwide, enough to launch another superhero franchise for Marvel Studios [Appendix Q]. Marvel Studios also addressed criticism concerning their reliance on white male protagonists by announcing two new films as part of their “Phase Three” slate: *Black Panther*, which features one of the most well-known black superheroes in comics history, and *Captain Marvel*, a female Marvel superhero enjoying a resurgence in popularity [Appendix Q]. Marvel Studios’ films still consist mostly of white men, but *Black Panther* and *Captain Marvel* demonstrate progress for more diverse superhero films, and the studio’s ability to listen to criticism.

In its six years and ten films, Marvel Studios’ has avoided critical and commercial failure while maintaining consistency and profit.⁵⁵⁶ It is unique in comparison to competing studios that produce superhero films. Marvel Studios makes only one to two films a year, and from 2016 onwards, it will make three films per year. In contrast, the superhero films produced by 20th Century Fox Pictures, Sony Pictures and Warner Bros.

⁵⁵⁶ Andrew Wheeler, “Why Marvel Studios Succeeds (And How It Will Fail If It Doesn’t Diversify),” *Comics Alliance*, August 6, 2014, accessed August 28, 2014, <http://comicsalliance.com/marvel-studios-success-marvel-movies-diversity/>, 1.

Pictures make up only a small portion of a much larger production slate.⁵⁵⁷ Moreover, Marvel Studios, while a subsidiary of Walt Disney Motion Pictures, is largely autonomous and operates as its own brand, making only superhero films, allowing them to put all of their attention and resources into making each film that the other studios aren't capable to doing.⁵⁵⁸

As I have argued in the preceding pages of this thesis, Marvel Studios and its "MCU" have altered the status quo of superhero franchising, with the result that Hollywood studios now construct superhero films with a larger "cinematic universe" in mind. Through an investigation into Marvel Studios' background in the comics industry, its transformation in the wake of the Merrill Lynch deal, and its exploitation of convergence culture to create a sprawling transmedia franchise that has dominated the genre of superhero films, my intent has been both to explain how Marvel Studios has become the titan of superhero films and to contribute to a greater understanding of the essential role of superhero films in today's media culture.

⁵⁵⁷ *Ibid.*, 1.

⁵⁵⁸ *Ibid.*, 1.

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APPENDICES

Appendix A

Major Superhero Films Released Pre-Superhero Boom (2000)

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office
Superman	December 15, 1978	\$55 million	\$134, 218, 018	\$166, 000, 000	\$300, 218, 018
Superman II	June 19, 1981	\$54 million	\$108, 185, 706		\$108, 185, 706
Superman III	June 17, 1983	\$39 million	\$59, 950, 623		\$59, 950, 623
Superman IV: The Quest for Peace	July 24, 1987	\$17 million	\$15, 681, 020	–	\$15, 681, 020
Batman	June 23, 1989	\$35 million	\$251, 188, 924	\$160, 160, 000	\$411, 348, 941
Batman Returns	June 19, 1992	\$80 million	\$162, 831, 698	\$103, 990, 656	\$266, 822, 354
Batman Forever	June 16, 1995	\$100 million	\$184, 031, 112	\$152, 498, 032	\$336, 529, 032
Batman and Robin	June 20, 1997	\$125 million	\$107, 325, 195	\$130, 881, 927	\$238, 207, 122
Steel	August 15, 1997	\$16 million	\$1, 710, 972		\$1, 710, 972
Blade	August 21, 1998	\$45 million	\$70, 087, 718	\$61, 095, 812	\$131, 183, 530

The information used from the above table was drawn from Box Office Mojo and The Numbers. Accessed October 16, 2014.

Appendix B**Major Film Productions of Marvel Comics Characters Non-Affiliated with Marvel Studios**

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office
Howard the Duck	August 1, 1986	\$37 million	\$16, 295, 774	\$21, 667, 000	\$37, 962, 774
Blade	August 21, 1998	\$45 million	\$70, 087, 718	\$61, 095, 812	\$131, 183, 530
X-Men	July 14, 2000	\$75 million	\$157, 299, 171	\$139, 039, 810	\$296, 339, 527
Blade II	March 22, 2002	\$54 million	\$82, 348, 319	\$72, 661, 713	\$155, 010, 032
Spider-Man	May 3, 2002	\$139 million	\$403, 706, 375	\$418, 002, 176	\$821, 708, 551
Daredevil	February 14, 2003	\$78 million	\$102, 543, 518	\$76, 636, 200	\$179, 179, 718
X2: X-Men United	May 2, 3003	\$110 million	\$214, 949, 694	\$192, 761, 855	\$407, 711, 549
Hulk	June 20, 2003	\$137 million	\$132, 177, 234	\$113, 183, 246	\$245, 360, 480
The Punisher	April 16, 2004	\$33 million	\$33, 810, 189	\$20, 889, 916	\$54, 700, 105
Spider-Man 2	June 30, 2004	\$200 million	\$373, 585, 825	\$410, 180, 516	\$783, 766, 341
Blade: Trinity	December 8, 2004	\$65 million	\$52, 411, 906	\$76, 493, 460	\$128, 905, 366
Elektra	January 14, 2005	\$43 million	\$24, 409, 722	\$32, 271, 844	\$56, 681, 566
Fantastic Four	July 8, 2005	\$100 million	\$154, 696, 080	\$175, 883, 639	\$330, 579, 719
X-Men: The Last Stand	May 26, 2006	\$210 million	\$234, 362, 462	\$224, 997, 093	\$459, 359, 555
Ghost Rider	February 16, 2007	\$110 million	\$115, 802, 596	\$112, 935, 797	\$228, 738, 393
Spider-Man 3	May 4, 2007	\$258 million	\$336, 530, 303	\$554, 341, 323	\$890, 871, 626
Fantastic Four: Rise of the Silver Surfer	June 15, 2007	\$130 million	\$131, 921, 738	\$157, 126, 025	\$289, 047, 763

The information used from the above table was drawn from Box Office Mojo.
Accessed October 16, 2014.

Appendix C**Sony/Columbia Pictures Films**

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office	IMDB Score	Rotten Tomatoes Score	Metacritic Score
Spider-Man	May 3, 2002	\$139 million	\$403, 706, 375	\$418, 002, 176	\$821, 708, 551	7.3	89%	73
Spider-Man 2	June 30, 2004	\$200 million	\$373, 585, 825	\$410, 180, 516	\$783, 766, 341	7.4	94%	83
Spider-Man 3	May 4, 2007	\$258 million	\$336, 530, 303	\$554, 341, 323	\$890, 871, 626	6.2	63%	59
The Amazing Spider-Man	July 3, 2012	\$230 million	\$262, 030, 663	\$495, 900, 000	\$757, 930, 663	7.1	73%	66
The Amazing Spider-Man 2	May 2, 2014	\$200 million	\$202, 853, 933	\$506, 128, 390	\$708, 982, 323	6.9	53%	53

The information used from the above table was drawn from Box Office Mojo, IMDB, Rotten Tomatoes and Metacritic.
Accessed October 16, 2014.

Appendix D20th Century Fox Pictures Films

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office	IMDB Score	Rotten Tomatoes Score	Metacritic Score
X-Men	July 14, 2000	\$75 million	\$157, 299, 171	\$139, 039, 810	\$296, 339, 527	7.4	82%	64
Daredevil	February 14, 2003	\$78 million	\$102, 543, 518	\$76, 636, 200	\$179, 179, 718	5.4	10%	42
X2: X-Men United	May 2, 3003	\$110 million	\$214, 949, 694	\$192, 761, 855	\$407, 711, 549	7.5	87%	68
Elektra	January 14, 2005	\$43 million	\$24, 409, 722	\$32, 271, 844	\$56, 681, 566	4.8	45%	34
Fantastic Four	July 8, 2005	\$100 million	\$154, 696, 080	\$175, 883, 639	\$330, 579, 719	5.7	27%	40
X-Men: The Last Stand	May 26, 2006	\$210 million	\$234, 362, 462	\$224, 997, 093	\$459, 359, 555	6.8	58%	58
Fantastic Four: Rise of the Silver Surfer	June 15, 2007	\$130 million	\$131, 921, 738	\$157, 126, 025	\$289, 047, 763	5.6	37%	45
X-Men Origins: Wolverine	May 1, 2009	\$150 million	\$179, 833, 157	\$193, 179, 707	\$373, 062, 864	6.7	38%	40
X-Men: First Class	June 3, 2011	\$160 million	\$146, 408, 305	\$207, 215, 819	\$353, 624, 124	7.8	87%	65
The Wolverine	July 25, 2013	\$120 million	\$132, 556, 852	\$282, 271, 394	\$414, 828, 246	6.7	69%	60
X-Men: Days of Future Past	May 23, 2014	\$200 million	\$233, 921, 534	\$512, 124, 166	\$746, 045, 700	8.1	91%	74

The information used from the above table was drawn from Box Office Mojo, IMDB, Rotten Tomatoes and Metacritic. Accessed October 16, 2014

Appendix ESecondary Marvel Films Post-2008

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office	IMDB Score	Rotten Tomatoes Score	Metacritic Score
Punisher: War Zone	December 5, 2008	\$35 million	\$8, 050, 977	\$2, 049, 059	\$10, 100, 036	6.0	27%	30
Ghost Rider: Spirit of Vengeance	February 17, 2012	\$57 million	\$51, 774, 002	\$80, 789, 928	\$132, 563, 930	4.3	18%	32

The information used from the above table was drawn from Box Office Mojo, IMDB, Rotten Tomatoes and Metacritic. Accessed October 16, 2014.

Appendix F**DC Comics/DC Comics Vertigo Imprint Productions Released Post-2000**

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office	IMDB Score	Rotten Tomatoes Score	Metacritic Score
Catwoman	July 23, 2004	\$100 million	\$40, 202, 379	\$41, 900, 000	\$82, 102, 379	3.3	9%	27
Constantine	February 18, 2005	\$100 million	\$75, 976, 178	\$154, 908, 550	\$230, 884, 728	6.9	46%	50
Batman Begins	June 15, 2005	\$150 million	\$205, 343, 774	\$167, 366, 241	\$274, 218, 673	8.3	85%	70
V for Vendetta	March 17, 2006	\$54 million	\$70, 511, 035	\$62, 000, 000	\$132, 511, 035	8.2	73%	62
Superman Returns	June 28, 2006	\$270 million	\$200, 081, 192	\$191, 000, 000	\$391, 081, 192	6.1	76%	72
The Dark Knight	July 18, 2008	\$185 million	\$533, 345, 358	\$469, 700, 000	\$1, 004, 558, 444	9.0	94%	82
Watchmen	March 6, 2009	\$130 million	\$107, 509, 799	\$77, 749, 184	\$185, 258, 983	7.6	65%	56
The Losers	April 23, 2010	\$25 million	\$23, 591, 432	\$5, 788, 291	\$29, 379, 732	6.4	49%	44
Jonah Hex	June 18, 2010	\$47 million	\$10, 547, 117	\$354, 95	\$10, 903, 312	4.6	12%	33
Red	October 15, 2010	\$58 million	\$90, 380, 162	\$108, 626, 225	\$199, 006, 387	7.1	71%	60
Green Lantern	June 17, 2011	\$200 million	\$116, 601, 172	\$103, 250, 000	\$219, 851, 172	5.7	26%	39
The Dark Knight Rises	July 20, 2012	\$250 million	\$448, 139, 099	\$636, 300, 000	\$1, 084, 439, 099	8.5	88%	78
Man of Steel	June 14, 2013	\$225 million	\$291, 045, 518	\$377, 000, 000	\$668, 045, 518	7.2	55%	55
Red 2	July 19, 2013	\$84 million	\$53, 262, 560	\$94, 813, 005	\$148, 075, 005	6.7	43%	47

The information used from the above table was drawn from Box Office Mojo, IMDB, Rotten Tomatoes and Metacritic. Accessed October 16, 2014

Appendix GMarvel Studios Films/Marvel Cinematic Universe Films

Title of Film	Release Date	Budget	Domestic Box Office	Foreign Box Office	Total Box Office	IMDB Score	Rotten Tomatoes Score	Metacritic Score
Iron Man	May 2, 2008	\$140 million	\$318, 412, 101	\$266, 762, 121	\$545, 174, 222	7.1	93%	79
The Incredible Hulk	June 13, 2008	\$150 million	\$134, 806, 913	\$128, 620, 638	\$263, 427, 551	6.9	67%	61
Iron Man 2	May 7, 2010	\$200 million	\$312, 433, 331	\$311, 500, 000	\$623, 933, 331	7.2	73%	57
Thor	May 6, 2011	\$150 million	\$181, 030, 624	\$268, 295, 994	\$449, 326, 618	7.0	77%	57
Captain America: The First Avenger	July 22, 2011	\$140 million	\$176, 654, 505	\$193, 915, 269	\$370, 569, 774	6.8	79%	66
Marvel's The Avengers	May 4, 2012	\$220 million	\$623, 357, 910	\$895, 237, 000	\$1, 518, 594, 910	8.2	92%	69
Iron Man 3	May 3, 2013	\$200 million	\$409, 013, 994	\$806, 426, 000	\$1, 215, 439, 994	7.3	79%	62
Thor: The Dark World	November 8, 2013	\$170 million	\$206, 362, 140	\$438, 421, 000	\$664, 783, 140	7.2	66%	54
Captain America: The Winter Soldier	April 4, 2014	\$170 million	\$259, 766, 572	\$454, 317, 000	\$714, 083, 572	7.8	89%	70
Guardians of the Galaxy	August 1, 2014	\$170 million	\$333, 079, 971	\$439, 600, 000	\$772, 679, 971	8.2	91%	76

The information used from the above table was drawn from Box Office Mojo, IMDB, Rotten Tomatoes and Metacritic. Accessed October 16, 2014.

Appendix HProfit – Marvel, MCU

	Total Domestic Box Office Gross	Total Worldwide Box Office Gross
Marvel Cinematic Universe Films (Marvel Studios)	\$2, 954, 918, 061	\$7, 158, 012, 578
Spider-Man Universe (Original and Reboot)	\$1, 578, 707, 099	\$3, 963, 259, 504
X-Men Universe	\$1, 299, 381, 721	\$3, 050, 971, 565

The information used from the above table was drawn from Box Office Mojo. Accessed October 16, 2014.

Appendix I

Major Marvel Characters

Marvel Characters	Creator	First Appearance
The Avengers	Stan Lee Jack Kirby	<i>The Avengers</i> #1 (September 1963)
Captain America	Joe Simon Jack Kirby	<i>Captain America Comics</i> #1 (March 1941)
Iron Man	Stan Lee Jack Kirby Larry Lieber Don Heck	<i>Tales of Suspense</i> #39 (March 1963)
Thor	Stan Lee Jack Kirby Larry Lieber	<i>Journey into Mystery</i> #83 (August 1962)
Loki	Stan Lee Jack Kirby Larry Lieber	Historical: <i>Venus</i> #6 (August 1949) Modern day: <i>Journey into Mystery</i> No. 85 (October 1962)
Black Widow	Stan Lee Don Heck Don Rico	<i>Tales of Suspense</i> #52 (April 1964)
Hawkeye	Stan Lee Don Heck	<i>Tales of Suspense</i> #57 (Sept. 1964)
The Hulk	Stan Lee Jack Kirby	<i>The Incredible Hulk</i> #1 (May 1962)
Ant-Man I (Hank Pym)	Stan Lee Jack Kirby Larry Lieber	<i>Tales to Astonish</i> #27 (January 1962)
Ant-Man II (Scott Lang)	David Michelinie John Byrne	As Scott Lang: <i>Avengers</i> #181 (March 1979) As Ant-Man: <i>Marvel Premiere</i> #47 (April 1979)
The Wasp	Stan Lee Jack Kirby	<i>Tales to Astonish</i> #44 (June 1963)
The Vision	Stan Lee Roy Thomas John Buscema	<i>The Avengers</i> #57 (October 1968)
Nick Fury	Stan Lee Jack Kirby	<i>Sgt. Fury and His Howling Commandos</i> #1 (May 1963)
Captain Marvel (Mar-Vell)	Stan Lee Gene Colan	<i>Marvel Super-Heroes</i> #12 (December 1967)
Ms. Marvel/Captain Marvel (Carol Danvers)	Roy Thomas Gene Colan	As Carol Danvers: <i>Marvel Super-Heroes</i> #13 (March 1968) As Ms. Marvel: <i>Ms. Marvel</i> #1 (January 1977)
She-Hulk	Stan Lee John Buscema	<i>Savage She-Hulk</i> #1 (February 1980)
Mockingbird	Len Wein Neil Adams	<i>Marvel Team-Up</i> #95 (July, 1980)
Wonder Man	Stan Lee Jack Kirby	<i>Avengers</i> #9 (Oct. 1964)
Bucky Barnes/The Winter Soldier	Bucky: Joe Simon, Stan Lee Winter Soldier: Ed Brubaker, Steve Epting	As Bucky: <i>Captain America Comics</i> #1 (March 1941) As Winter Soldier: <i>Captain America</i> #1 (Jan. 2005)
Fantastic Four (Group)	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #1 (November 1961)
Fantastic Four – Mr. Fantastic	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #1 (Nov. 1961)
Fantastic Four – Invisible Woman	Stan Lee	<i>The Fantastic Four</i> #1 (Nov. 1961)

	Jack Kirby	
Fantastic Four – The Human Torch (Johnny Storm)	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #1 (Nov. 1961)
Fantastic Four – The Thing	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #1 (Nov. 1961)
Doctor Doom	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #5 (July 1962)
Silver Surfer	Stan Lee Jack Kirby	<i>The Fantastic Four</i> #48 (March 1966)
Galactus	Stan Lee Jack Kirby	<i>Fantastic Four</i> #48 (March 1966)
The Skrulls	Stan Lee Jack Kirby	<i>Fantastic Four</i> #2 (January 1962)
The Badoon	Stan Lee John Buscema	<i>Silver Surfer</i> vol. 1, #2 (October 1968)
Spiderman	Stan Lee Steve Ditko	<i>Amazing Fantasy</i> #15 (Aug. 1962)
The Green Goblin	Stan Lee Steve Ditko	<i>The Amazing Spider-Man</i> #14 (July 1964)
Gwen Stacy	Stan Lee Steve Ditko	<i>The Amazing Spider-Man</i> #31 (December 1965)
Mary Jane Watson	Stan Lee Steve Ditko John Romita Sr.	(Partial) <i>The Amazing Spider-Man</i> #25 (June 1965) (Full) <i>The Amazing Spider-Man</i> #42 (November 1966)
Norman Osborn	Stan Lee Steve Ditko	As Green Goblin: <i>The Amazing Spider-Man</i> #14 (July 1964) Named as Norman Osborn: <i>The Amazing Spider-Man</i> #37 (June 1966)
Harry Osborn	Stan Lee Steve Ditko	As Harry Osborn: <i>The Amazing Spider-Man</i> #31 (December 1965)
Venom	Randy Schueller (original idea) David Michelinie Mike Zeck (alien costume design) Todd McFarlane	As “The Alien Costume”: <i>The Amazing Spider-Man</i> #252 (May 1984) Symbiote Origin Story: <i>Secret Wars</i> #8 (December 1984) As Venom: <i>The Amazing Spider-Man</i> #299 (April 1988)
Thanos	Jim Starlin	<i>Iron Man</i> #55 (February 1973)
Ultron	Roy Thomas John Buscema	<i>Avengers</i> #54 (July 1968) – cameo <i>Avengers</i> #55 (August 1968) – first appearance
Guardians of the Galaxy (Group)	Original: Arnold Drake, Gene Colan Modern: Dan Abnett, Andy Lanning	Original: 1969 Modern: <i>Guardians of the Galaxy</i> #1 (May 2008)
Guardians of the Galaxy – Rocket Raccoon	Bill Mantlo Keith Giffen	<i>Marvel Preview</i> #7 (Summer 1976)
Guardians of the Galaxy – Groot	Stan Lee Jack Kirby Dick Ayers	<i>Tales to Astonish</i> #13 (November 1960)
Guardians of the Galaxy – Peter Quill/Starlord	Steve Englehart Steve Gan	<i>Marvel Preview</i> #4 (January 1976)
Guardians of the Galaxy – Gamora	Jim Starlin	<i>Strange Tales</i> #180 (June 1975)
Guardians of the Galaxy – Drax the Destroyer	Mike Friedrich Jim Starlin	<i>Iron Man</i> #55 (February 1973)
The Kree	Stan Lee Jack Kirby	<i>Fantastic Four</i> #65 (August 1967)
The Inhumans et al.	Stan Lee Jack Kirby	<i>Fantastic Four</i> #45 (December 1965)

Daredevil	Stan Lee Bill Everett	<i>Daredevil</i> #1 (April 1964)
Electra	Frank Miller	<i>Daredevil</i> #168 (January 1981)
Doctor Strange	Steve Ditko	<i>Strange Tales</i> #110 (July 1963)
Luke Cage	Archie Goodwin John Romita, Sr.	<i>Luke Cage, Hero For Hire</i> #1 (June 1972)
Power Pack	Louise Simonson June Brigman	<i>Power Pack</i> #1 (May 1984 release; August 1984 cover)
Ghost Rider	Gary Friedrich Roy Thomas Mike Ploog	<i>Marvel Spotlight</i> #5 (Aug. 1972)
Cloak and Dagger	Bill Mantlo Ed Hannigan	<i>Peter Parker, the Spectacular Spider-Man</i> #64 (March 1982)
Jessica Jones	Brian Michael Bendis Michael Gaydos	<i>Alias</i> #1 (November 2001)
Iron Fist	Roy Thomas Gil Kane	<i>Marvel Premiere</i> #15 (May 1974)
The Defenders	Roy Thomas Ross Andru	<i>Marvel Feature</i> #1 (December 1971)
Black Panther	Stan Lee Jack Kirby	<i>Fantastic Four</i> #52 (July 1966)
Scarlet Witch	Stan Lee Jack Kirby	<i>The X-Men</i> #4 (March 1964)
Quicksilver	Stan Lee Jack Kirby	<i>The X-Men</i> #4 (March 1964)
The Human Torch (Andriod)	Carl Burgos	<i>Marvel Comics</i> #1 (Oct. 1939)
Namor the Sub-Mariner	Bill Everett	<i>Motion Picture Funnies Weekly</i> (April 1939)
X-Men (Group)	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 10, 1963)
X-Men – Charles Xavier/Professor X	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Magneto	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Cyclops	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Jean Grey/Phoenix/Marvel Girl	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Angel	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Beast/Hank McCoy	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Iceman	Stan Lee Jack Kirby	<i>The X-Men</i> #1 (September 1963)
X-Men – Storm	Len Wein Dave Cockrum	<i>Giant-Size X-Men</i> #1 (May 1975)
X-Men – Nightcrawler	Len Wein Dave Cockrum	<i>Giant-Size X-Men</i> #1 (May 1975)
X-Men – Colossus	Len Wein Dave Cockrum	<i>Giant-Size X-Men</i> #1 (May 1975)
X-Men – Kitty Pryde/Shadowcat	Chris Claremont John Byrne	<i>Uncanny X-Men</i> #129 (January 1980)
X-Men – Rogue	Chris Claremont Michael Golden	<i>Avengers Annual</i> #10 (November 1981)
X-Men – Gambit	Chris Claremont Jim Lee	Cameo: <i>Uncanny X-Men Annual</i> #14 (July 1990) Full: <i>Uncanny X-Men</i> #266 (August 1990)

X-Men – Jubilee	Chris Claremont Marc Silvestri	<i>Uncanny X-Men</i> #244 (May, 1989)
X-Men – Emma Frost	Chris Claremont John Byrne	<i>Uncanny X-Men</i> #129 (January 1980)
X-Men – Mystique	Dave Cockrum Chris Claremont	Actual: <i>Ms. Marvel</i> No.16 (May 1978) Full: <i>Ms. Marvel</i> No.17 (June 1978)
X-Men – Wolverine	Roy Thomas Len Wein John Romita, Sr.	Cameo: <i>The Incredible Hulk</i> #180 (October 1974) Full: <i>The Incredible Hulk</i> #181 (November 1974)
X-Men – Deadpool	Fabian Nicieza Rob Liefeld	<i>New Mutants</i> #98 (February 1991)
X-Men – Polaris	Arnold Drake Don Heck Werner Roth Jim Steranko	<i>The X-Men</i> #49 (October, 1968)
X-Men – Cable	As Nathan Summers: Chris Claremont, Rick Leonardi As Cable: Louise Simonson, Rob Liefeld	As Nathan Summers: <i>Uncanny X-Men</i> #201 (January 1986) As Cable: <i>New Mutants</i> #87 (March 1990)

The information used from the above table was drawn from the Marvel Comics Database.
Accessed October 16, 2014.

Appendix JMarvel Ownership: Past Film Studio Owners of Marvel Comics Film Character Rights – 2008

Marvel Studios	Sony	20 th Century Fox	Universal	Lionsgate	Artisan Entertainment	New Line Cinema
Captain America	Spiderman et. al.	X-Men et. al.	The Hulk	The Punisher	Luke Cage	Blade
Iron Man	Ghost Rider	Fantastic Four et. al. (Silver Surfer, the Skrulls, the Badoon)		Man-Thing		
Thor		Daredevil				
Black Widow		Elektra				
Hawkeye		Scarlet Witch and Quicksilver – SHARED WITH MARVEL				
Doctor Strange						
Ant-Man						
Wasp						
Black Panther						
The Kree						
Captain Marvel						
Inhumans						
Scarlet Witch and Quicksilver – SHARED WITH FOX						
ETC.						

The information used from the above table was drawn from Carl Lee's *Screenrant* article, "Which Studios Own Which Marvel Characters." Accessed October 16, 2014.

Appendix KMarvel Ownership: Current Ownership of Marvel Comics Film Character Rights Regarding Film – 2015

Marvel Studios	20 th Century Fox	Sony	Universal Pictures
Captain America	X-Men et. al.	Spiderman et. al. – SHARED WITH MARVEL	Namor the Sub-Mariner
Iron Man	Fantastic Four et. al. (Silver Surfer, the Skrulls, the Badoon)		
Thor	Scarlet Witch and Quicksilver – SHARED WITH MARVEL		
Black Widow			
Hawkeye			
The Hulk			
Doctor Strange			
Ant-Man			
Wasp			
Black Panther			
The Kree			
Captain Marvel			
Inhumans			
Daredevil			
Elektra			
The Punisher			
Luke Cage			
Blade			
Iron Fist			
Scarlet Witch and Quicksilver – SHARED WITH FOX			
Spiderman et. al. – SHARED WITH MARVEL			
ETC.			

The information used from the above table was drawn from Carl Lee's *Screenrant* article, "Which Studios Own Which Marvel Characters." Accessed October 16, 2014.

Appendix LMarvel Cinematic Universe – Films

<u>Phase One</u>	<u>Phase Two</u>	<u>Phase Three</u>
Iron Man – May 2, 2008 (dir. Jon Favreau)	Iron Man 3 – May 3, 2013 (dir. Shane Black)	Captain America: Civil War – May 6, 2016 (dir. Anthony and Joe Russo)
The Incredible Hulk – June 13, 2008 (dir. Louis Leterrier)	Thor: The Dark World – November 8, 2013 (dir. Alan Taylor)	Doctor Strange – November 4, 2016 (dir. Scott Derrickson)
Iron Man 2 – May 7, 2010 (dir. Jon Favreau)	Captain America: The Winter Soldier – April 4, 2014 (dir. Anthony and Joe Russo)	Guardians of the Galaxy 2 – May 5, 2017 (dir. James Gunn)
Thor – May 6, 2011 (dir. Kenneth Branagh)	Guardians of the Galaxy – August 1, 2014 (dir. James Gunn)	Untitled Spider-Man film – July 28, 2017
Captain America: The First Avenger – July 22 2011 (dir. Joe Johnston)	Avengers: Age of Ultron – May 1, 2015 (dir. Joss Whedon)	Thor: Ragnarok – November 3, 2017
The Avengers – May 4, 2012 (dir. Joss Whedon)	Ant-Man – July 17, 2015 (dir. Peyton Reed)	Avengers: Infinity War Part 1 – May 4, 2018 (dir. Anthony and Joe Russo)
		Black Panther – July 6, 2018
		Captain Marvel – November 2, 2018
		Avengers: Infinity War Part 2 – May 3, 2019 (dir. Anthony and Joe Russo)
		Inhumans – July 12, 2019

The information used from the above table was drawn from Box Office Mojo. Accessed October 16, 2014.

Appendix MMarvel Cinematic Universe – Television

<u>Title</u>	<u>Broadcast Dates</u>	<u>Seasons</u>	<u>Episodes</u>
Marvel's Agents of S.H.I.E.L.D.	September 24, 2013-present	2	44
Marvel's Agent Carter	January 6, 2015	1	8
Marvel's Daredevil	April 10, 2015	1	13
Jessica Jones	-	1	13
Iron Fist	-	1	13
Luke Cage	-	1	13
The Defenders	-	1	4-8

The information used from the above table was drawn from the Marvel.com Accessed October 16, 2014.

Appendix NMarvel Cinematic Universe – Marvel One-Shots

Title	Home Media Reference	U.S. Release Date
The Consultant	Thor	September 13, 2011
A Funny Thing Happened on the Way to Thor's Hammer	Captain America: The First Avengers	October 25, 2011
Item 47	The Avengers	September 25, 2012
Agent Carter	Iron Man 3	September 24, 2013
All Hail the King	Thor: The Dark World	February 25, 2014

The information used from the above table was drawn from Marvel.com
Accessed October 16, 2014.

Appendix OMarvel Cinematic Universe – Comic Tie-ins

Title	Issue	Publication Date	Writers	Arists
Iron Man 2: Public Identity	3	April-May 2010	Joe Casey and Justin Therous	Barry Kitson and Ron Lim
Iron Man 2: Agents of S.H.I.E.L.D.	1	September 2010	Joe Casey	Tim Green, Felix Ruiz and Mat Camp
Captain America: First Vengeance	4	May-June 2011	Fred Van Lente	Neil Edwards and Luke Ross
The Avengers Prelude: Fury's Big Week	4	February-April 2012	Chris Yost and Eric Pearson	Luke Ross
The Avengers Prelude: Black Widow Strikes	3	May-June 2012	Fred Van Lente	Neil Edwards
Iron Man 3 Prelude	2	January-February 2013	Christos Gage	Steve Kurth
Thor: The Dark World Prelude	2	June-July 2013	Chris Yost and Craig Kyle	Scott and Ron Lim
Captain America: The Winter Soldier Infinite Comic	1	January 2014	Peter David	Rock He-Kim
Guardians of the Galaxy Prequel Infinite Comic	1	April 2014	Dan Abnett and Andy Lanning	Andrea DiVito
Guardians of the Galaxy Prelude	2	April-May 2014	Dan Abnett and Andy Lanning	Wellinton Alves
Agents of S.H.I.E.L.D.: The Chase	1	July 2014	George Kitson	Mirko Colak, Neil Edwards ad Mirco Pierfederici
Ant-Man Prelude	2	February 2015	Will Corona Pilgrim	Miguel Sepulveda
Avengers: Age of Ultron Prelude – This Sceptre'd Isle	1	February 2015	Will Corona Pilgrim	Wellinton Alves

The information used from the above table was drawn from Marvel Cinematic Universe Wiki - Comics.
Accessed January 18, 2015.

Appendix PMarvel Cinematic Universe – Video Games

Title	Video Game Production Company	Release Date
Iron Man	Sega	May 2, 2008
The Incredible Hulk	Sega	June 5, 2008
Iron Man 2	Sega	May 4, 2010
Thor: God of Thunder	Sega	May 3, 2011
Captain America: Super Soldier	Sega	July 19, 2011
Iron Man 3	Gameloft	April 25, 2013
Thor: The Dark World	Gameloft	October 31, 2013
Captain America: The Winter Soldier	Gameloft	March 27, 2014
Guardians of the Galaxy: The Universal Weapon	Disney Interactive Media Group	July 17, 2014

The information used from the above table was drawn from Marvel Cinematic Universe Wiki – Video Games. Accessed January 18, 2015.

Appendix Q

Film Property	Studio	Release Date	Director
Avengers: Age of Ultron	Marvel Studios	May 1, 2015	Joss Whedon
Ant-Man	Marvel Studios	July 17, 2015	Peyton Reed
The Fantastic Four	20 th Century Fox	August 7, 2015	Josh Trank
Deadpool	20 th Century Fox	February 12, 2016	Tim Miller
Batman vs. Superman: Dawn of Justice	Warner Bros.	March 25, 2016	Zack Snyder
Captain America: Civil War	Marvel Studios	May 6, 2016	Anthony and Joe Russo
X-Men: Apocalypse	20 th Century Fox	May 27, 2016	Bryan Singer
Suicide Squad (DC Comics)	Warner Bros.	August 5, 2016	David Ayer
Gambit	20 th Century Fox	October 7, 2016	
Doctor Strange	Marvel Studios	November 4, 2016	Scott Derrickson
The Sinister Six (Spiderman)	Sony/Columbia	On Indefinite Hiatus	
Untitled <i>The Wolverine</i> Sequel	20 th Century Fox	March 3, 2017	
Guardians of the Galaxy 2	Marvel Studios	May 5, 2017	James Gunn
Wonder Woman	Warner Bros.	June 23, 2017	Patty Jenkins
Untitled <i>Fantastic Four</i> sequel	20 th Century Fox	July 14, 2017	
Untitled Spider-Man film	Marvel Studios/Sony	July 28, 2017	
Thor: Ragnarok	Marvel Studios	November 3, 2017	
Justice League: Part One	Warner Bros.	November 17, 2017	Zack Snyder
The Flash	Warner Bros.	March 23, 2018	
Avengers: Infinity War – Part One	Marvel Studios	May 4, 2018	Anthony and Joe Russo
Black Panther	Marvel Studios	July 6, 2018	
Untitled Marvel film	20 th Century Fox	July 13, 2018	
Aquaman	Warner Bros.	July 27, 2018	
Captain Marvel	Marvel Studios	November 2, 2018	
Shazam	Warner Bros.	April 5, 2019	
Avengers: Infinity War – Part Two	Marvel Studios	May 3, 2019	Anthony and Joe Russo
Justice League: Part Two	Warner Bros.	June 14, 2019	Zack Snyder
Cyborg	Warner Bros.	April 3, 2020	
Green Lantern	Warner Bros.	June 19, 2020	
Inhumans	Marvel Studios	July 12, 2019	

The information used from the above table was drawn from Gregg Kilday and Borys Kit's *The Hollywood Reporter* article "29 Superhero Movies Through 2020: a Breakdown of What's Coming," and Kevin Jagernauth's *The Playlist* article "Channing Tatum's 'Gambit' Sets Fall 2016 Release Date, 'Game Of Thrones' Heads To IMAX And More." Accessed December 26, 2014.