Is there a comic book industry?[1]

Existe uma indústria de histórias em quadrinhos?

Benjamin Woo[2]

Carleton University

Abstract

The "American comic book industry" is not American, its true product is not comic books, and it may not even be an industry. This article uses a geospatial map of comic book and graphic novel publishers active in the US market as well as sales estimates derived from both the direct market of specialty comic book retailers and trade book stores to question inherited "mental maps" of comic book publishing, such as the divide between "mainstream" and "alternative"/"independent" publishing. Adopting a relational approach, it suggests that a sociology of comics publishing – and of the cultural industries more generally – must be cautious of taking on board un-sociological concepts like "industry."

Keywords: Comic book publishing. Political economy. Sales. Media industries.

Resumo

A "indústria americana de revistas em quadrinhos" não é americana, seu verdadeiro produto não são revistas em quadrinhos e ela pode nem mesmo ser exatamente uma indústria. Este artigo parte de um mapa geoespacial de editores de revistas em quadrinhos e graphic novels ativos no mercado dos Estados Unidos, bem como estimativas de vendas derivadas do mercado direto [*direct market*] de varejistas especializados em revistas em quadrinhos e lojas de livros comerciais. A partir deles, coloca em questão certos "mapas mentais" herdados da publicação de revista em quadrinhos, como a divisão entre publicação "convencional" e "alternativa"/"independente". Adotando uma abordagem relacional, sugere que uma sociologia da publicação de quadrinhos – e das indústrias culturais em geral – deve ser cautelosa ao aceitar noções que não encontram lastro conceitual sociológico, como "indústria".

---

[1] The following essay was originally published in *Media Industries* (mediaindustriesjournal.org), an open-access journal of critical media industries studies (WOO, 2015b). It has been revised for republication in *9a Arte*.

[2] Associate Professor of Communication and Media Studies, Carleton University, Ottawa, Canada. E-mail: benjaminwoo@cunet.carleton.ca. ORCID number: https://orcid.org/0000-0002-3153-6428.

Palavras-chave: Edição de quadrinhos. Economia política. Vendas. Indústrias de mídia.

Introduction

In English, the phrase "breaking into the comic book industry" refers to establishing a career in comics. A Google search for the term returns approximately 26,600 hits. Some are from creators' biographical statements, but many are either questions from or advice aimed at aspiring creative professionals. Like many comic book fans, I also once dreamed of breaking in. However, my idea of what this would actually look like was still profoundly shaped by what Charles Hatfield (2005, p. 78–79) calls the Myth of the Marvel Bullpen, the idea that comic books are made by a group of like-minded peers working in close collaboration in their publisher's offices. But Hatfield calls this a myth for a reason. I didn't understand that the Marvel Bullpen never really existed in quite the form depicted in "Stan's Soapbox," nor could I have known that almost nine in ten comics creators work from their own homes, typically in isolation. (This figure is drawn from a survey of 570 creators of English-language comics I conducted in 2013–14.) Indeed, the "breaking in" discourse creates a false impression of coherence and solidity by figuring the comic book industry as *a place* one *enters*. Yet, compared with my childhood fantasy at least, it seems that the American comic book industry has no there there.

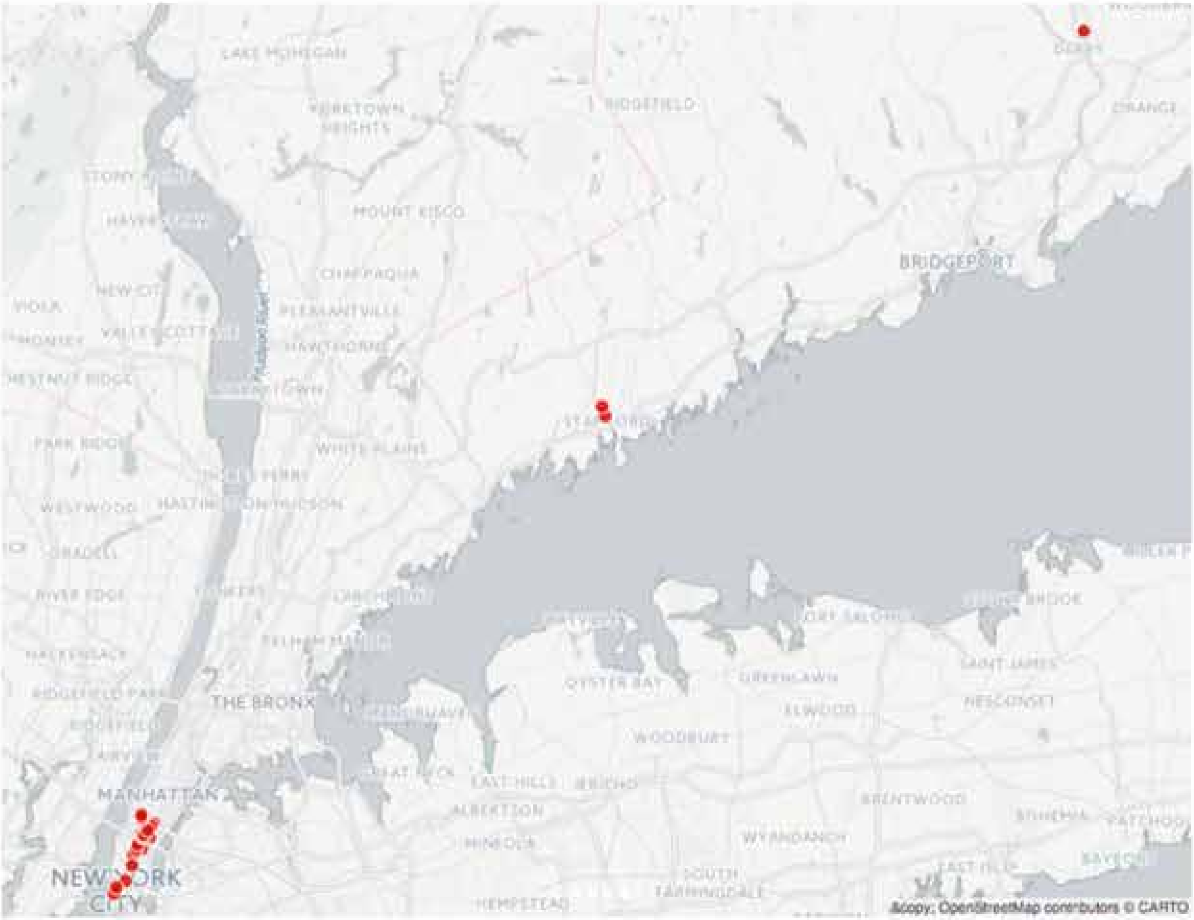
Media scholar Jonathan Sterne (2014, p. 50) has argued that "the music industry" invoked by both laypeople and scholars "is an incredibly limited way to understand how media industries and music interact." Simply put, the *music* industry is not synonymous with the *record* industry. Rather, music is produced by "a polymorphous set of relations among radically different industries and concerns…. There is no 'music industry.' There are many industries with many relationships to music" (STERNE, 2014, p. 53). Manufacturers of instruments and audio equipment, sheet music publishers, and concert promoters (among others) all seek to extract value from their engagement with music. Neglecting this fundamental fact means we profoundly misunderstand how music is produced. Much the same could be said of the field of comics, where comic book *publishing* should not be mistaken for *the* comic book industry. Printing, distribution, and retail are comic book industries, too – to say nothing of the industries that produce film and television, video games, and licensed merchandise based on intellectual property derived from comic books, or the manufacturers of art supplies and developers of computer software used in their production.

In this article, however, I want to push Sterne's point the other direction, exploring the internal diversity that destabilizes any given notion of an "industry," for even comic book publishing contains multitudes. I begin with an exploratory analysis, mapping the locations of about one hundred comic books and graphic novels publishers. This exercise reveals something of publishers' orientations to other cultural industries – to a certain extent, their self-conception as publishers of either *characters* or *books* is borne out in where they are located. This in some way replicates a long-standing distinction between "mainstream" and "independent" or "alternative" comics, but looking more closely at 2016 sales data for comic books and graphic novels, we will find that these labels do not mean quite what we take them for. Ultimately, I argue that the comic book "industry" teaches us to be wary of that term: It is an artifact of a mode of analysis, not a real object.

1 – Which Comic Book Industry?

The American comic book begins in the 1930s as the product of two existing publishing industries, newspapers and the pulps. Publishers printing collections of popular newspaper comic strips realized they could make more money by commissioning original content than by paying hefty licensing fees to the newspaper syndicates (GABILLIET, 2010, p. 15–16). Theoretically, the publishers creating this new cultural industry could have been located anywhere, but they weren't. Most of the comic book publishers active during the industry's heyday in the 1950s were based in New York City (figure 1). On the one hand, this seems like a textbook example of an industrial cluster. At a time when production methods were entirely analog, publishers relied on a localized population of freelance creatives and content "packagers." As Gordon (2017, p. 100) suggests, creatives' physical presence enabled editorial control of the production process. Indeed, several publishers' offices were within walking distance of Grand Central station, meaning freelancers could easily take their portfolios around from publisher to publisher and, once a job was secured, come in for meetings with editors as necessary. They could also conceivably find employment in cognate fields such as commercial illustration or advertising. On the other hand, New York City is also symbolically charged, signaling the alignment of the early comics industry with the publishing industries and (much more weakly) the world of arts and letters in general. While never entirely centralized in the way suggested by the Myth of the Marvel Bullpen, comic book production had clear physical boundaries in this period.

Fig. 1 – Comic Book Publishers (1950s). Locations of comic book publishers active in 1950s. Addresses originally compiled by Bart Beaty.



Source: The full dataset is available online at http://dx.doi.org/10.5683/SP/3NGFZY. Access on 20 Oct. 2020.

The complex spatiality of comic publishing today is summed up by an answer to one of the frequently asked questions on the First Second Books web site:

> The offices are in New York City, in the Flatiron Building where Fifth Avenue crosses Broadway, at 23rd Street. To be precise. But really, [First Second] comes to you from all over the world, since its creators are scattered all around America, all over Europe, Asia and Africa. So far, no one is making graphic novels for us in Antarctica, although we haven't checked the submissions pile today.[3]

This answer encapsulates a common narrative about the deterritorialization of comics production. Not only does First Second – an imprint of Macmillan/Holtzbrinck and an important publisher of graphic novels for the young-adult market – maintain a relatively ambitious translation program for foreign comics but, like many publishers, it takes advantage of a global market in creative labor. Contrasting comic book publishing with more densely clustered forms of cultural production, Norcliffe and Rendace (2003, p. 243) suggest comics represents "an alternative geography in which workers who are engaged in creative activities using sophisticated technologies (…) are comparatively dispersed." Publishers no longer need to be located near one another, either. This fits with a broader trope about the transcendence of space common in techno-utopian discourse, yet space remains an important organizing principle in this field.

I was able to locate street addresses or P.O. boxes for 101 publishers of comic books and graphic novels in the United States and Canada.[4] While some of this information may be out-of-date, the general patterns mapped in Figure 2 are suggestive. One of the map's most obvious features is a pronounced bicoastal clustering: Larger and more active presses are concentrated on the coasts of the United States, while presses located inland tend to be smaller, less established firms. For instance, nineteen comic book publishers are still headquartered in New York City. Notwithstanding Marvel Entertainment, publishers remaining in New York and its environs tend to be traditional trade presses (or imprints thereof) producing "graphic novels" for the general bookstore market. Notably, graphic novels represent one of the few areas of significant growth in

[3] Available at: https://us.macmillan.com/firstsecond/about/faq. Access on 22 Jun. 2017.
[4] Publishers featured in this map are those appearing Comichron 2016 Diamond sales estimates (https://www.comichron.com/yearlycomicssales/industrywide/2016-industrywide.html) and 2016 Nielsen BookScan Top 750 graphic novels report (https://www.comicsbeat.com/tilting-at-windmills-257-looking-at-bookscan-2016-more-than-10-million-sold/) for which an address could be determined. Addresses were sourced from information posted on publishers' websites, various online lead-generation and business intelligence directories and occasionally the WHOIS domain name registry. If a separate address could not be determined, imprints and sub-brands were collapsed into their parent company.

the American book publishing industry in recent years. However, if the original concentration of publishers in New York signified an alignment of comics with the world of publishing, the growth of Southern California–based publishers similarly represents a re-orientation towards Hollywood. All told, there were twenty-four comic book publishers in this second cluster, some of which literally share an address with a film studio. Even for presses that are not part of an entertainment conglomerate, a development deal for film or TV may represent a significant boost in revenue. Further up the coast, there were six publishers located in the Pacific Northwest, composing a third cluster of smaller, well-established companies like Fantagraphics, Dark Horse, Oni, and Top Shelf known for producing independent and alternative comics.

Fig. 2 – Comic Book and Graphic Novel Publishers (2016). Locations of 101 publishers with distinct street addresses or P.O. boxes appearing in 2016 sales reports from Diamond Comic Distributors and Nielsen BookScan. Markers are scaled by sales revenue.

Source: the full dataset is available online at http://dx.doi.org/10.5683/SP/R5ISLU [accessed 20 Oct. 2020].

Geography is not destiny, and my equation of location with "orientation" is an extreme simplification.[5] Yet, recent moves by publishers seem to reinforce these logics. For instance, in 2015 DC Comics relocated their entire operation from New York to Burbank, California, a move seen by many as renegotiating its relationship to its parent companies, DC Entertainment, Warner Bros. Entertainment, and WarnerMedia. The move more closely aligned DC with Burbank-based film, television and interactive divisions shortly after WarnerMedia divested itself of other publishing divisions, such as Warner Books (now, Hachette Book Group) and Time Inc., both headquartered in New York. Conversely, while several of Image Comics' individual imprints are located around southern California, the company's central headquarters moved from Berkeley, California, to Portland, Oregon, in 2017, registering spatially the way the company's brand has shifted away from Marvel and DC–style superheroics to a broader range of "groundlevel" works.[6] These examples further suggest that the orientations and trajectories I have sketched here are tied up in the regime of value that structures the Anglophone comics world (BEATY, WOO, 2016).

2 – Will the real mainstream please stand up?

Naturally, people have long observed internal cleavages in comic book production in the United States, notably differentiating between "mainstream" comics – typically identified with the superhero genre in general and Marvel and DC in particular – and its various discontents – typically identified as "alternative" or "independent" comics. It is, notably, the former that is usually conjured up by talk of the American comic book industry. Yet,

[5] Neither does a publisher's location determine where its creative workforce lives. Nonetheless, despite their potentially global dispersion, 72% of the respondents to my survey of creators resided in the United States, and 14% in just New York or New Jersey. The benefits of living near vibrant cultural scenes may outweigh higher living costs in the coastal hubs where publishers tend to headquarter, and the location of educational institutions that offer training in comics may also shape patterns of settlement.

[6] "'Groundlevel' was a term used [in the 1970s and 1980s] to describe comics produced by small, independent publishers, mostly in the genres of science fiction, fantasy, horror and superheroes" (SINGSEN, 2017, p. 157; see also COOK, 2016, p. 42).

these terms remain elusive, as can be seen in negative definitions of alternative and independent comics as *whatever mainstream comics are not*:

> Working in opposition to their mainstream counterparts, alternative comics are aimed at an educated adult audience that is willing to read what are often very realistic stories in a medium normally devoted to heroic fantasy. These comics are often political, criticizing social mores, cultural trends, and political issues. Others merely offer a skewed view of the world or give voice to non- or even anticorporate stories. (PUSTZ, 1999, p. x).

This is a highly tendentious definition, but at least alternative and independent music, film, games, and comics have been the subject of several important analyses, whether as phenomena in themselves or as components of a broader "indie culture" (HESMONDHALGH, 1999; PERREN, 2012; SIMON, 2013; HATFIELD, 2005; NEWMAN, 2009). The category they oppose receives much less attention; as Eric Weisbard (2015, p. 253) puts it, "'Mainstream' is a word we use without much questioning."

One of the few explicit attempts to articulate a positive definition of mainstream comics instead focuses on their creation as a cultural commodity. McAllister, Sewell, and Gordon (2001, p. 7) tell us a mainstream comic is "produced by for-profit businesses and distributed in routinized publication outlets." However, these criteria would also include most "alternative" comics, which are published by for-profit businesses and available in bookstores or on Amazon.com. A shift in focus to comics' political economy produces more stable objects of analysis but still fails to capture the mix of industrial, generic, and aesthetic qualities people have in mind when they categorize comics. These labels are not at all straightforward. They index important differences but, as Doug Singsen (2014, 173) argues, do so at the level of *cultural practices* not *objects*: "what allows the categories to function is not any stylistic or other feature of the comics themselves, but rather the discourse in which they participate." They are "position-takings" that enable artists, publishers, critics and readers to locate themselves in a cultural field (BOURDIEU, 1983, p. 312–13). However, the ground they stake out has shifted immensely.

Comics were once a commonplace feature of the American media landscape. Surveys conducted in the 1940s found that virtually all children and many adults were regular readers of comic books, and those who didn't read them would almost certainly see them in newsstands and at drug stores (ZORBAUGH, 1944). Jean-Paul Gabilliet (2010, p. 29–30) reports that a billion comic books were sold in the United States in 1952, garnering approximately $960 million in 2019 dollars.[7] This was, however, their peak. Despite the contemporary visibility of franchises derived from superhero comics, comics are now principally oriented towards a relatively restricted, subcultural audience of fans and collectors. This audience is reached through the direct market, a channel constituted by Diamond Comics Distributors and a network of approximately three thousand specialty retailers.[8] Are these comic books, specifically, in any way "mainstream"? An examination of sales in the direct market, even at a time when comics and graphic novels are once again making significant in-roads in popular consciousness, suggests they are not, especially when compared with what sells in regular bookstores.

According to sales estimates from John Jackson Miller's Comichron.com, Diamond sold just over 99 million comic books in 2016. Within this market, a top ten comic book could be expected to sell around 130 000 units in the month of its initial release.[9] Examining all titles for which Comichron has 2016 estimates, the average comic book sold 24 000 copies, while the median comic book sold only a little more than 13 000 copies.[10] Table 1 displays this data by publisher. Notably, Diamond has its own categories for organizing the field of comics production, distinguishing between "premier" publishers, which receive favored terms as a result of contractual relationships rather than direct sales performance, and the rest. Other industry reports based on Diamond sales charts refer to "top ten" publishers, which can vary from month to month and differ depending on whether they are ranked by units or revenue. Non-premier or non–top ten companies are sometimes described as "independent" or "small press" publishers, though this classification is based purely on sales performance.

[7] Cover price at the time was 10¢, which is now equivalent to US$0.96 according to the U.S. Bureau of Labor Statistics CPI Calculator.
[8] Diamond has held a de facto monopoly on the distribution of periodical comic books since the 1990s (McALLISTER, 2001, p. 24–26; HATFIELD, 2005, p. 20–23; GEARINO, 2017).
[9] These estimates come with several caveats: First, direct market sales are sales to comic shops rather than to readers. Second, unlike in the book trade, most comic books are sold on a non-returnable basis. Third, Diamond only reports sales for titles that perform above a certain, variable threshold. Fourth, sales are reported as an index where a reliably selling title (usually, *Batman*) has a value of 1.0.
[10] Because Diamond only releases data for titles surpassing a certain sales threshold, these averages are inflated.

Table 1: Comic Book Sales in Direct Market Channel (2016) by Publisher. Aggregated from John Jackson Miller's estimates of sales based on Diamond Comics Distributors monthly Top 300 ranking.

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

Source: the full dataset is available online at http://dx.doi.org/10.5683/SP/R5ISLU Access on 20 Oct. 2020].

Since periodical comic books are no longer widely sold outside of comic shops, a direct comparison with the bookstore market can only be made for graphic novels. While Diamond's best-selling title of 2016 (volume six of *Saga*) sold almost 48 000 copies and the top 120 graphic novels for 2016 (as a rough equivalent to the monthly top-ten comic books mentioned above) sold just over 12 000 copies on average, the *typical* graphic novel sold just over 1 700 copies to comic book stores. All told, in the direct market, the average comic book outsells the average graphic novel by a factor of 14 to 1 in terms of units or (given the higher price point of a graphic novel or trade paperback) approximately 2.5 to 1 in terms of revenue. However, in the same year that Diamond sold an estimated 4.5 million graphic novels to the direct market, *Publishers Weekly* reported that bookstores sold almost 12 million (MILLIOT, 2017). In fact, based on a manually corrected version of the 2016 Nielsen BookScan data, Brian Hibbs (2017) reported 17,3 million graphic novels sold for a total of almost $293,6 million in revenue. Given that there were over twenty-one thousand titles on offer, the bookstore market's long tail drags averages down significantly (813 copies or $13 786,48), yet its best sellers also an order of magnitude more successful than the direct market's.[11] Table 2 compares graphic novel sales in comic shops and bookstores, grouped by publisher (I have attempted to group publishers' various imprints together).

Table 2: Graphic Novel Sales in Direct Market and Bookstore channels (2016) by Publisher. Direct market sales aggregated from John Jackson Miller's estimates of sales based on Diamond Comics Distributors monthly Top 300 ranking. Bookstore sales from Brian Hibbs's cleaned version of the Nielsen BookScan Top 750 report for the comics category.

[11] While Hibbs discusses the complete BookScan report for the comics category, he has only released the Top 750 comics report, which provides the basis for the following analysis. BookScan compiles point of sale data, meaning that these numbers reflect copies actually sold to customers. They do not, however, include all sales, as some retailers do not report to BookScan, and BookScan does not track school and library sales. These are, therefore, unreliable but very suggestive figures.

Rank[a]	Publisher	Direct Market Units Sold	Direct Market Sales Revenue ($)	Bookstores Units Sold	Bookstores Sales Revenue ($)
1	Marvel Comics (Disney)	1,404,311	38,651,333.48	555,715	12,088,275.00
2	DC Comics (Warner Bros.)	1,174,021	25,265,723.31	1,234,047	23,203,069.00
3	Image Comics	930,289	13,667,338.11	908,655	22,917,759.00
4	Scholastic Corporation[b]	5,957	73,655.43	1,873,530	22,958,094.00
5	VIZ Media	176,060	2,065,971.40	1,487,641	20,230,497.00
6	Simon & Schuster[c]	1,402	26,860.08	602,111	9,198,618.00
7	Dark Horse Comics	179,984	3,538,345.78	266,296	4,551,820.00
8	Penguin Random House[d]	59,529	866,393.37	372,125	5,874,514.00
9	Yen Press[e]	-	-	395,643	5,664,829.00
10	IDW Publishing[f]	158,511	3,491,577.56	157,661	3,664,001.00
11	Kodansha USA	-	-	468,669	5,562,428.00
12	Andrews McMeel Publishing	-	-	432,262	4,507,300.00
13	HarperCollins Publishers[g]	2,336	42,019.42	195,179	3,497,885.00
14	Oni Press	61,783	1,241,188.17	46,437	1,212,723.00
15	Seven Seas Entertainment	-	-	166,793	2,434,724.00
16	Macmillan Publishers (Holtzbrinck)[h]	33,920	471,242.80	129,663	1,716,834.00
17	Boom! Studios[i]	96,601	1,620,718.99	33,385	473,842.00
18	Abrams Books (La Martinière)	1,237	19,550.15	145,298	1,693,471.00
19	Hachette Book Group (Lagardère)[j]	24,228	355,561.79	66,098	1,308,790.00
20	Joe Books	8,482	100,263.18	117,596	1,322,664.00
21	Vertical (Kodansha / Dai Nippon)	-	-	73,099	1,263,575.00
22	Fantagraphics Books	24,420	632,075.93	17,531	464,375.00
23	Dynamite Entertainment (Dynamic Forces)	37,705	780,818.95	9,211	230,183.00
24	Valiant Comics	55,211	815,767.89	-	-
25	Mariner Books (Houghton Mifflin Harcourt)	-	-	45,470	687,374.00
26	Disney Publishing Worldwide[k]	-	-	34,881	575,607.00
27	Sky Pony Press (Skyhorse Publishing)	-	-	47,653	571,359.00
28	Archie Comic Publications	26,162	466,932.38	4,203	37,785.00
29	Cartoon Books	4,916	73,494.20	9,504	379,685.00
30	Titan Books	22,984	433,131.16	-	-
31	Drawn & Quarterly	4,842	99,300.90	11,326	247,671.00
32	Udon Entertainment	7,850	121,485.50	16,174	214,229.00
33	Regnery Publishing	-	-	15,365	307,146.00
34	Humanoids Publishing	7,195	178,334.53	-	-
35	Benitez Productions	8,554	159,738.46	-	-
36	Seven Stories Press	-	-	9,330	158,144.00
37	Avatar Press	7,110	152,698.90	-	-
38	Abstract Studio	3,156	125,702.60	-	-
39	Action Lab Comics	9,595	121,310.05	-	-
40	Bloomsbury Publishing	-	-	6,368	120,992.00
41	NBM[l]	6,008	66,520.92	6,615	52,854.00
42	Aftershock Comics	6,213	114,292.87	-	-

43	Tokyopop	5,796	80,505.04	4,331	30,274.00
44	Black Mask Studios	4,523	94,281.77	-	-
45	Lion Forge Comics[m]	4,355	80,690.45	-	-
46	Jet City Comics (Amazon)	-	-	5,304	79,295.00
47	Zenescope Entertainment	4,420	61,708.80	-	-
48	SuBLime (VIZ Media / Animate)	-	-	4,057	52,700.00
49	Hermes Press	1,029	46,976.74	-	-
50	Aspen MLT	3,084	44,753.16	-	-
...	...	...	...	...	...
84	Last Gasp	389	1,945.00	-	-

a. Ranked by total revenue in both markets.
b. Includes Scholastic Press, Graphix, Arthur A. Levine, and Blue Sky Press imprints.
c. Includes Aladdin Books, Margaret K. McElderry, Pocket Books, and Touchstone Books imprints.
d. Includes Alfred A. Knopf Books for Young Readers, Ballantine Books, Crown Books for Young Readers, Dial Books, Pantheon, Random House Books for Young Readers, Ten Speed Press, and Tundra Books imprints.
e. Includes Yen On.

f. Includes Top Shelf Productions.

g. Includes HarperCollins, HarperTeen, and HarperTorch imprints.
h. Includes First Second, Square Fish, and St Martins imprints.
i. Includes BOOM!, BOOM! Box, and ka-BOOM! imprints. As of Thursday, June 15, 2017, Fox acquired a "significant minority stake" {http://www.hollywoodreporter.com/heat-vision/fox-acquires-significant-stake-indie-comic-company-boom-studios-1014046} in Boom! Studios.
j. Includes Grand Central Publishing, Hyperion Books, Little Brown & Co., and Running Press imprints.
k. Includes Disney Editions, Disney–Hyperion, Disney–Lucasfilm, and Disney Press imprints, but not Marvel Comics.
l. Includes Papercutz.
m. Includes the "Magnetic Collection," formerly Magnetic Press.

Source: The full dataset is available online at http://dx.doi.org/10.5683/SP/R5ISLU Access on 20 Oct. 2020].

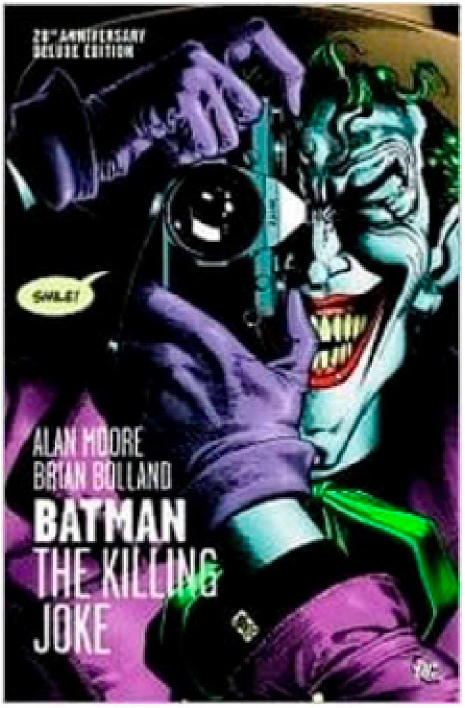
.

It is striking that, of the 84 publishers of graphic novels present in either the Diamond or BookScan sales data, only 24 appear in both, suggesting that the comic shop and bookstore markets constitute two solitudes, at least at the level of best sellers. Not one of the top twenty publishers by overall revenue appears in the Diamond data and not in the BookScan report, while four are in BookScan but not Diamond (Yen Press, Kodansha, Andrews McMeel, and Seven Seas, nos. 12, 13, 14, and 17, respectively). Of the remaining top-twenty companies, only four derive more revenue from the direct market than bookstores: Marvel (76%), Boom! (77%), DC (52%), and Oni (51%). For comparison, Scholastic (#4) and Simon & Schuster (#6) both derive 99% of their graphic novel sales from the bookstore market. At the other end of the list, only two of the bottom fifty publishers by overall revenue (NBM/Papercutz [#41] and Tokyopop [#43]) appear in the sales data for both markets and five (Seven Stories [#36], Bloomsbury [#40], Jet City [#46], SuBLime [#48], and Graphic Library [#52]) appear only in the bookstore data; the remaining forty-three are only in the Diamond data set, suggesting they sell principally or exclusively through the specialty comic book store market.

However, comics publishing also looks *qualitatively* different when we leave the confines of the direct market retail channel. As Hibbs (2017) notes, the titles that are successful in the bookstore market (imperfectly represented by Nielsen BookScan data) give a very different picture than accounts based on the subcultural audience of comics fans: “Eighteen of the Top Twenty are books aimed at younger readers…. Only five of the top twenty books are created by white men, and only three of them could be considered work primarily aimed or created through the Direct Market comic book system.” Moreover, the only superhero title in the BookScan top twenty – Alan Moore and Brian Bolland’s *Batman: the killing joke* (Figure 3) – came in at number eight with 130 907 copies sold. These data also show manga’s significant for the US bookstore market, with 9 manga publishers representing 26,6% of the bookstore market in terms of units sold and 22,6% in terms of revenue, compared with only 4% and 2,3% of the direct market, respectively. Undoubtedly, a more fine-grained analysis would uncover other metrics that would further delineate the differences between comics cultures, but a case study of one cartoonist may also provide some indications of the scope of comic book publishing outside so-called mainstream comics.[12]

[12] For ease of reference, I have compiled Miller’s direct market sales estimates and Hibbs’s cleaned BookScan report in a single Microsoft Excel workbook (http://dx.doi.org/10.5683/SP/R5ISLU).

Figure 3 – *Batman: the killing joke*, the only superhero title in the BookScan top twenty

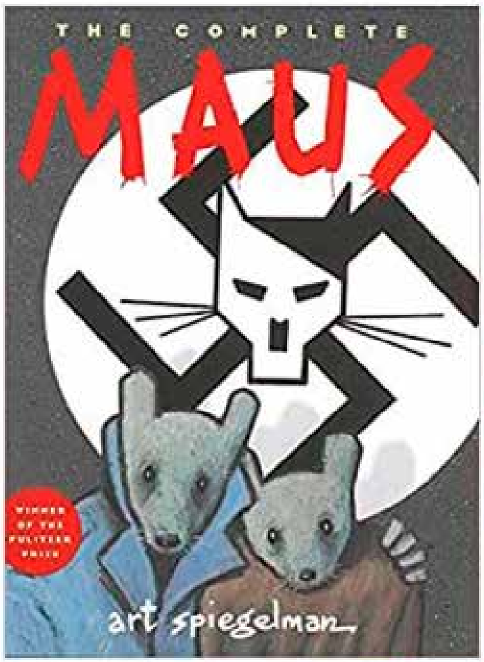


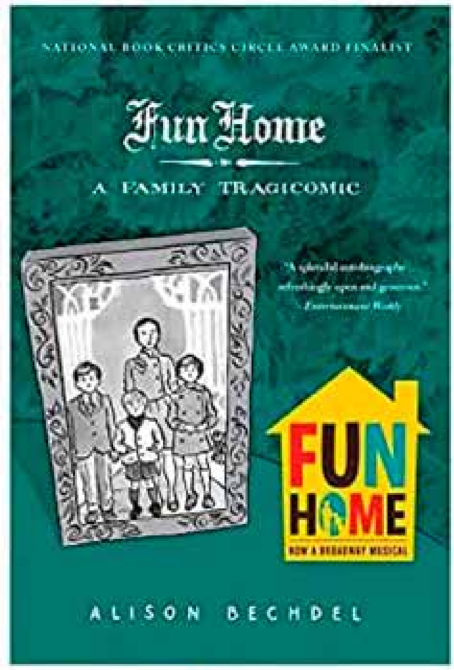
Source: Observatório de Histórias em Quadrinhos da Escola de Comunicações e Artes da Universidade de São Paulo

Raina Telgemeier is a towering figure in the contemporary comics field, but one who is perpetually overlooked because her work mainly addresses young readers, especially girls (BEATY, WOO, 2016, p. 97-107; KASHTAN, 2017). When she was named *The Beat*'s Comics Industry Person of the Year for 2014 (MacDONALD, 2015), her books *Smile* and *Sisters* had an estimated 2,9 million copies in print, and she held multiple spots on *The New York Times*' paperback graphic books bestseller list, which she continued to dominate until the paper discontinued it in late 2016. As of that list's last appearance in *The Times Book Review*, between her original graphic novels and adaptations of Ann M. Martin's Baby-Sitters Club novels, Telgemeier held 5 of its 10 spots, and those 5 works had been on the list for a combined 621 weeks. (Notably, none of the works on the paperback list were superhero comics, though one did appear on the final hardcover graphic books list on January 29.) In the BookScan data set, Telgemeier was the author of 8 of the top 20 titles, representing 1,3 million copies and nearly $10 million in sales in 2016 alone (HIBBS, 2017). Given the fact that BookScan does not include sales to libraries or through school book fairs, Telgemeier's actual figures are certainly underreported, but this is nonetheless suggestive of radically different conceptions of success than those afforded by the direct-market publishing and retailing ecosystem.

If, as Pustz (1999, p. 10) argues, mainstream comics will "tell whatever kind of story, whatever genre, will sell best … at any given time," then the success of trade book publishers' graphic novel lists, of manga licensors, and of cartoonists like Telgemeier challenge inherited ideas about the mainstream. According to Bourdieu (1983, p. 319–320), every field of cultural production can be divided in two. In the sub-field of restricted production, typically associated with the *avant garde*, culture is produced for other producers and those consumers who have internalized "producer-oriented" values (GANS, 1999). Here, the autonomous principle of legitimation ("art for art's sake") reigns supreme. In the sub-field of large-scale production, typically associated with commercial art and popular culture, works are judged more by the heteronomous principle of legitimation based on external signs of success, and economic capital plays a larger role than cultural capital in determining overall status. As a result of tensions between the two sub-fields, prestige and economic success have an inverse relationship, and Bourdieu (1983) famously called fields of cultural production "the economic world reversed." The field of comics "reverses" the ideal-typical cultural field once more. On the one hand, while the heteronomous principle is indeed important to mainstream producers, this sector does not address large, mass audiences in the way that commercial literature, film, television, and music do. Its scale is simply too small to represent "large-scale production" – even its best sellers don't sell all that well. On the other hand, alternative and independent comics are not necessarily *avant garde*. Genuinely aesthetically difficult comics circulating in *avant garde* art worlds certainly do exist, but they are rare among the most celebrated and canonical works of comic art, whether memoirs like *Maus* (SPIEGELMAN, 1980-1991, figure 4) and Alison Bechdel's (2006) *Fun Home* (figure 5) or elevated genre fare like Moore and Gibbons's (1986-1987) *Watchmen* (figure 6) or Vaughan and Staples's (2012) *Saga*. These works also, as we have seen, have the potential for significant commercial success. This returns us to Singsen's (2014) point, and one Michael Z. Newman (2009, p. 16) makes of "indie cultures" more generally, that "indie" is a discourse "whose meanings … far exceed the literal designation of media products that are made independently of major firms." Depending on the state of the field, this oppositional discourse can be mobilized and attached to quite different products – including works that are, by any other standard, mainstream.

Figures 4, 5 and 6 – *Maus*, *Fun Home* and *Watchmen* – celebrated and canonical works of comic art





Source: Observatório de Histórias em Quadrinhos da Escola de Comunicações e Artes da Universidade de São Paulo

So, who really represents the mainstream of comics publishing and comics culture in the United States? If received notions of "mainstream comics" has enabled one genre and arguably just two publishing companies to stand in for the comics industry and, at times, the form in general, the view that Marvel and DC's superhero comic books are the norm against which all other comics production must be judged is increasingly difficult to maintain. But, since these labels are mutually constitutive position-takings, neither is it particularly useful to crown young-adult graphic novels (or any other genre or tradition of cartooning) as the *real* mainstream. Rather, we have to keep in view the diversity of works, styles, formats, and business models that characterize the field of American comic books.

Conclusion: System and Art World

While many comic books fans have an interest in the behind-the-scenes machinations that produce their comics, the emerging academic field of comics studies has lagged behind. In the Anglophone academy, most comics scholars work or were trained in departments of literary studies, and formal and narrative features of comic art have received much more attention than their production, circulation or reception. This has begun to change. Brienza and Johnston's (2016) *Cultures of Comics Work*, for instance, collects recent work on the production of comics and graphic novels. At the same time, comics scholarship now appears in special issues, edited collections, and handbooks about media industries more generally (see, e.g., GORDON, 2013; PERREN, 2015; WOO, 2015b). I welcome this new attention to industrial and broadly sociological factors, whether inspired by the production cultures literature, the labour turn in British cultural studies, or the political economy of communication, but a "media industries" approach that attends to the limits and pressures exerted on cultural production by virtue of its commodity form is different from one that purports to take "the American comic book industry" as its object. For, as I have demonstrated, that label disguises a great deal of difference. Indeed, it is wrong in every respect: it is not *American* but integrated into multinational media conglomerates employing a globalized workforce; it doesn't produce *comic books*, but intellectual property that circulates across multiple media, ranging from film, television and video games to licensed merchandise and even Broadway theatre (e.g., *It's a Bird…It's a Plane…It's Superman* (1966) or *Fun Home* (2015)); and, finally, it isn't *an industry*. Attempts to salvage the term by, for example, separating independent artists and presses from more clearly "industrial" publishers similarly wither under scrutiny. Some "alternative"/"artisanal" comics are released by presses that are subsidiaries of gigantic media companies and may even be the subject of Hollywood adaptations (e.g., *American Splendor* (2003) or *Wilson* (2017)), while many "mainstream"/"industrial" comics ostensibly produced for profit motive and nothing more struggle to continue publication. Other forms of comics production do not neatly fit into either category. The locus of creativity is not media companies but the "polymorphous set of relations" (STERNE, 2014, p. 53) taking place around cultural goods, only some of which are industrialized, and diversity must be the starting point of a sociology of comics publishing.

Perhaps other media industries show more systematicity than comic book publishing. Even so, I suspect most break down at their margins, particularly if failed careers, amateur and hobbyist production, "piracy," and alternative models of production, distribution and remuneration are included within the frame of analysis. This is not an accident. As Bernard Miège (1979, 122) argues, capital can never fully industrialize the production of cultural commodities:

> In our society, in fact, cultural products must continue to be marked by the stamp of the unique, of genius, in order to be standardized…. On the one hand the research laboratories attached to the major publishing houses are capable of producing success but they can also meet with failure. But at the same time small production companies can attain great temporary success. And since the development of a more and more collective labour process presents considerable risks in the event of failure, one understands why the process has been held back and why the major publishers, who generally have at their command very good systems of distribution, prefer to distribute the successes of their less well organized competitors.

Media industries enable certain forms of artistic production but also stand in a parasitic relationship with cultural scenes (STRAW, 1991, 2004; WOO, POYNTZ, RENNIE, 2016; SILVER, CLARK, 2016), the "overproductive signifying communities" (SHANK, 1994, p. 122) from which new works, styles, genres, and forms emerge. This is particularly true of Miège's (1979, p. 308) "Type 2" cultural products, where individual, often precariously employed, artists and authors bear the costs of "research" on behalf of cultural industries. To put it differently, playing on Habermas (1987), system cannot entirely colonize art world without destroying its own principal inputs – namely, symbolic creativity and the skilled labor that attends to it.

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

> The *boundary* of the field is a stake of struggles, and the social scientist's task is not to draw a dividing-line between the agents involved in it, by imposing a so-called operational definition, which is most likely to be imposed on him by his own prejudices or presuppositions, but to describe a *state* (long-lasting or temporary) of these struggles and therefore of the frontier delimiting the territory held by the competing agents. (BOURDIEU, 1983, p. 324)

Rather, this "classification struggle" (BOURDIEU, 2010, p. 481) over a field's borders is shaped by values, interests and unexamined prejudices: What objects do we need to study? Where do they come from? Where and to whom are they sold? The answers have real consequences for who and what counts when we study media industries.

References

AMERICAN SPLENDOR. Director: Shari Springer Berman and Robert Pulcini. New York: Good Machine; Dark Horse Entertainment, 2003. 101 min, color.

BEATY, Bart.; WOO, Benjamin. *The greatest comic book of all time*: symbolic capital and the field of American comic books. New York: Palgrave Macmillan, 2016.

BECHDEL, Alison. *Fun home*: a family tragicomic. Boston, MA: Mariner Books, 2006.

BOURDIEU, Pierre. *Distinction*: a social critique of the judgement of taste. Abingdon, UK: Routledge, 2010.

_______. The field of cultural production, or: the economic world reversed. *Poetics*, v.12, n.4–5, p. 311–356, 1983.

BRIENZA, Casey; JOHNSTON, Paddy. (ed.). *Cultures of comics work*. New York: Palgrave Macmillan, 2016.

COOK, Roy T. Underground and alternative comics. In: BRAMLETT, Frank; COOK, Roy T.; MESKIN, Aaron. (org.) *The Routledge companion to comics*. New York: Routledge, 2016, p. 34–43.

FUN HOME. Music: Jeanine Tesori. Lyrics and Book: Lisa Kron. New York, Broadway: Circle in the Square Theatre, 2015.

GABILLIET, Jean-Paul. *Of comics and men*: a cultural history of American comic books. Jackson: University Press of Mississippi, 2010.

GANS, Herbert. J. *Popular culture and high culture*: an analysis and evaluation of taste. 2nd ed. New York: Basic Books, 1999.

GEARINO, Dan. *Comic shop*: the retail mavericks who gave us a new geek culture. Columbus: Ohio University Press; Swallow Press, 2017.

GORDON, Ian. Comics, creators, and copyright: on the ownership of serial narratives by multiple authors. In: GRAY, Jonathan; JOHNSON, Derek. (ed.) *A companion to media authorship*. Malden, MA: Wiley-Blackwell, 2013. p. 221–36.

_______. *Superman*: the persistence of an American icon. New Brunswick, NJ: Rutgers University Press, 2017.

HABERMAS, Jurgen. Lifeworld and system: a critique of functionalist reason. *Theory of communicative action*. Cambridge: Polity Press, 1987. v. 2.

HATFIELD, Charles. *Alternative comics*: an emerging literature. Jackson: University Press of Mississippi, 2005.

HESMONDHALGH, David. Indie: the institutional politics and aesthetics of a popular music genre. *Cultural studies*, v.13, n.1, p. 34–61, 1999.

HIBBS, Brian. Tilting at windmills #257: looking at BookScan 2016 – more than 10 million sold. March 7, 2017. Available at: http://www.comicsbeat.com/tilting-at-windmills-257-looking-at-bookscan-2016-more-than-10-million-sold/. Access on 20 out. 2020].

IT'S A BIRD... IT'S A PLANE... IT'S SUPERMAN. Music: Charles Strouse. Lyrics: Lee Adams. Book: David Newman and Robert Benton. New York, Broadway: Alvin Theatre, 1966.

KASHTAN, A. “Those aren’t really comics”: Raina Telgemeier and the limitations of direct-market centrism. COMIC ARTS FORUM, Seattle, WA, November, 2017.

MacDONALD, Heidi. Announcing: the comics industry person of the year 2014: Raina Telgemeier. *The beat*, Jan. 1, 2015.

Available at: http://www.comicsbeat.com/announcing-the-comics-industry-person-of-the-year-2014-raina-telgemeier/. Access on 20 Oct. 2020.

McALLISTER, Matthew P. Ownership concentration in the US comic book industry. In: _______; SEWELL, E. H.; GORDON, I. (ed.). *Comics and ideology*. New York: Peter Lang, 2001. p. 15–38.

_______; SEWELL, Edward H., Jr.; GORDON, Ian. Introducing comics and ideology. In: _______. (ed.). *Comics and ideology*. New York: Peter Lang, 2001. p. 1–13.

MIÈGE, Bernard. The cultural commodity. *Media, culture and society*, v.1, n. 3, p. 297–311, 1979.

MILLIOT, Jim. Adult nonfiction stayed hot in 2016. *Publishers Weekly*, Jan. 13, 2017. Available at: https://www.publishersweekly.com/pw/by-topic/industry-news/publisher-news/article/72501-adult-nonfiction-stayed-hot-in-2016.html. Access on 19 out. 2020].

MOORE, Alan; BOLLAND, Brian. *Batman*: the killing joke. New York: DC Comics, 1988.

_______; GIBBONS, Dave. Watchmen. New York: DC Comics, 1986-1987. 12v.

NEWMAN, Michael Z. Indie culture: in pursuit of the authentic autonomous alternative. *Cinema Journal*, v. 48, n. 3, p. 16–34, 2009.

NORCLIFFE, Glen; RENDACE, Olivero. New geographies of comic book production in North America: the new artisan, distancing, and the periodic social economy. *Economic Geography*, v. 79, n. 3, p. 241–63, 2003.

PERREN, Alisa. *Indie, inc.*: Miramax and the transformation of Hollywood in the 1990s. Austin: University of Texas Press, 2012.

_______. The trick of the trades: media industries studies and the American comic book industry. In: BANKS, Miranda; CONOR, Bridget; MAYER, Vichy. (ed.) *Production studies, The sequel*: cultural studies of global media industries. New York: Routledge, 2015, p. 227–37.

PUSTZ, Michael J. *Comic book culture*: fanboys and true believers. Jackson: University Press of Mississippi, 1999.

SHANK, Barry. *Dissonant identities*: the rock'n'roll scene in Austin, Texas. Hanover, NH: Wesleyan University Press, 1994.

SILVER, Daniel Aaron; CLARK, Terry Nichols. *Scenescapes*: how qualities of place shape social life. University of Chicago Press, 2016.

SIMON, Bart. (org.) Indie, eh? *Loading…*, v. 7, n. 11, 2013. Special issue.

SINGSEN, Doug. An alternative by any other name: genre-splicing and mainstream genres in alternative comics. *Journal of Graphic Novels and Comics*, v. 5, n. 2, p. 170–191, 2014.

_______. Critical perspectives on mainstream, groundlevel, and alternative comics in *The Comics Journal*, 1977 to 1996. *Journal of Graphic Novels and Comics*, v. 8, n. 2, p. 156–72, 2017.

SPIEGELMAN, Art. *Maus*. New York: Raw Books & Graphics, 1980-1991. 2v.

STERNE, Jonathan. There is no music industry. *Media Industries*, v. 1, n. 1, p. 50–55, 2014. Disponível em: http://www.mediaindustriesjournal.org/index.php/mij/article/view/17. Acesso em 17 out. 2020.

STRAW, Will. Cultural scenes. *Loisir et Société / Society and Leisure*, v. 27, n. 2, p. 411–22, 2004.

_______. Systems of articulation, logics of change: communities and scenes in popular music. *Cultural Studies*, v. 5, n. 3, p. 368–88, 1991.

VAUGHAM, Brian K; STAPLES, Fiona. *Saga*. Portland, OR: Image Comics, 2012-.

WEISBARD, Eric. How do you solve a problem like a mainstream?: charting the musical middle. *American Quarterly*, v. 67, n. 1, p. 253–265, 2015a.

WILSON. Director: Craig Johnson. Los Angeles: Searchlight Pictures, 2017. 94 min., color.

WOO, Benjamin. Erasing the lines between leisure and labor: creative work in the comics world. *Spectator*, v. 35, n. 2, p. 57–64, 2015b.

_______. Is there a comic book industry? *Media Industries*, v. 5, n. 1, p. 27-46, 2018.

_______; POYNTZ, Stuart R.; RENNIE, Jamie. (ed.) *Scene thinking*: cultural studies from the scenes perspective. New York: Routledge, 2016.

ZORBAUGH, Harvey. The comics - there they stand! *Journal of Educational Sociology*, v. 18, n. 4, p. 196–203, 1944.