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Entertainment Assembled:

The Marvel Cinematic Universe, a Case Study in Transmedia

By

Drew Menard

Presented in Partial Fulfillment of the Requirements for the

Master of Arts

In Strategic Communication

Liberty University

School of Communication & Creative Arts

2015

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By

Drew Menard

APPROVED BY:

Carey L. Martin, Ph.D., Chair Date
Professor
School of Communication & Creative Arts
Liberty University

Norman C. Mintle, Ph.D. Date
Dean
School of Communication & Creative Arts
Liberty University

Acknowledgements

Foremost, I am indebted to my wife, Naomi. Her support has been vital to my success: in my education, in my career, and in my life. She and our children are my greatest joy.

I would like to thank Dr. Carey Martin for his guidance throughout this project. His expertise was an asset, as was his passion for transmedia and film, which served as my inspiration for this thesis. I am grateful and humbled that he agreed to chair this project.

I also want to thank Dr. Norman Mintle for lending his insight, expertise, and wisdom to this project; it is much sharper for it. His leadership, both as a professor and dean, has been appreciated.

As a writer, I would be remiss if I did not acknowledge those who have been critical in shaping my abilities over the years, there have been a few, but none more so than Mitzi Bible.

I want to thank all of the pioneers of transmedia studies, Henry Jenkins, Houston Howard, Christy Dena, Geoffrey Long, Tyler Weaver, and others, who blazed trails in world building research and have inspired me to do the same.

Thanks to Liberty University for encouraging me to be the best version of myself, to be excellent, both as a professional and as a human being.

Finally, to all of my friends and family, you have meant the world to me.

Grace and peace.

Abstract

As technology has made the world smaller, with media consumption increasing exponentially, consumers expect their entertainment worlds to be larger. With one of the most successful film franchises of all time to its name, Marvel Entertainment is not only a leader in the box office, it is an innovator in its use of world building in storytelling. It is no secret that the films that make up the Marvel Cinematic Universe (MCU) are set within the same fictional universe. Furthermore, Marvel has incorporated a serial television series into this grand narrative and incorporated secondary elements, including short films and comic books, in order to take audiences deeper. This method resembles an emerging topic of interest in communication studies, that of transmedia storytelling (often referred to simply as transmedia). Transmedia, briefly, is the telling of a story across multiple media channels where each individual narrative has the ability to stand-alone and yet, makes a worthy contribution to the grand narrative. On its own, any transmedia installment may be enjoyed by a casual consumer, however, the consumption of all installments, across media channels, provides a more enriching experience.

The purpose of this study was to evaluate the extent to which Marvel has applied the principles of transmedia to its Cinematic Universe, to investigate how strongly it tied its various media installments together into one compelling, overarching grand narrative. To accomplish the purpose of this study, as is more robustly explained in the methodology chapter, a thorough evaluation of the MCU's various installments was conducted, searching for an assortment of storytelling elements, as described by transmedia experts as key components of a compelling

transmedia venture. These elements serve as connections between the separate installments of a transmedia narrative.

This study found that the MCU is indeed saturated with connections between its individual stories, across all media platforms. This evidences the grand extent to which Marvel has crafted a transmedia universe. In short, this study finds that not only is Marvel a leader in terms of box office success, it is a narrative innovator, a frontrunner in the emerging realm of transmedia storytelling.

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Chapter I: Introduction to and Justification of the Topic

In the beginning, there were stories. From stone tablets to their digital descendants, cave drawings to 3D animation, throughout the course of human history storytelling has been and remains one of the most powerful communication methods. Certainly the media has evolved, but the nature of the content—regardless of the format—has held, and continues to hold, the power to persuade, to embolden, to discourage, to inspire, to relay, to create, to recount the past, and to predict the future.

Recorded history, from the creation account to the latest viral news circulating the Internet, exists as a collection of narratives. Storytelling is one of the most powerful forms of persuasion (Tattam, 2010) and arguably the primary—perhaps only—way people interpret and understand the world around them (see Fisher, 1985; Bruner, 2004; Givone, 2011). Stories have never been limited by anything but the human imagination. As God's breath through clay gave life to Adam's soul, so too do human beings mirror this creative power by conceiving new worlds, filled with characters that, to some, seem more real and become companions in life more so than peers.

Narrative has never been limited to one form of expression, nor has a single story, or storyworld, been containable within a single media format. And as mankind has advanced technologically, so have our storytelling methods. From drawings on cave walls to words etched in stone and eventually printed on paper, to more modern methods afforded in this digital age: radio, television, and the

Internet, mankind continues to leverage innovation in order to better tell stories and ensure they will continue to be shared for generations.

The digital age has done more than transform the way people communicate, it has revolutionized the way stories are both shared and consumed. With greater access to media, consumers are finding more stories competing for their attention, and, as a result, creators are utilizing more formats to share stories and engage audiences. Some of the most innovative storytellers have taken their narratives beyond the binding of books or the confines of a screen and opened universes for audiences to explore, from one media format to the next, with each format opening a new door within the greater realm. This phenomenon, known as transmedia storytelling, has yet to reach its full potential. Henry Jenkins—the Provost's Professor of Communication, Journalism, and Cinematic Arts at the University of Southern California—is the most widely respected scholar on the subject and describes transmedia simply as "the art of worldmaking" (2006, p. 21). He follows with a more robust explanation:

> A transmedia story unfolds across multiple media platforms with each new text making a distinctive and valuable contribution to the whole. In the ideal form of transmedia storytelling, each medium does what it does best—so that a story might be introduced in film, expanded through television, novels, and comics; its world might be explored through game play or experienced as an amusement park attraction. Each franchise entry needs to be self-contained so you don't need to have seen the film to enjoy the game. (Jenkins, 2006, pp. 97-98)

In short, then, transmedia storytelling (or transmedia narrative) is a story that takes place across multiple media platforms where each individual narrative has the ability to stand-alone and yet, makes a worthy contribution to the whole.

Researchers within the communication and literary disciplines have been studying the evolution of transmedia, noting the economic uncertainties it holds for media executives (see Jenkins, Ford, Green, 2013, p. 196; Morton, 2013) and the difficulty of sustaining tight-knit transmedia franchises over time (see Weaver in Jenkins, 2013, part one). But many who study the phenomenon also recognize its potential: that transmedia storytelling has the power to revolutionize the way audiences interact with stories. "A great continuity and mythology gives audiences something to dig into and a reason to hunt for back issues and return month after month. The only way stories—be it a transmedia story experience, video game, comics, television, novel—inspire that sort of emotional and time investment is through incredible storytelling and characters that the audience wants to revisit again and again" (Weaver in Jenkins, 2013, part one).

Audiences have had opportunities to experience franchises across media formats for decades. Transmedia brands, such as the *Teenage Mutant Ninja Turtles*, have allowed consumers to interact with characters and explore storyworlds through television, video games, and movies (see Kinder, 1991). These brands, however, have not maintained a tight-knit continuity from one medium to the next. Geoffrey Long (2007) noted that there is a distinction between this transmedia branding and true transmedia (p. 40). Another franchise, however, revolutionized the way audiences, children primarily, interact with a storyworld: *Pokémon*.

Jenkins—the father of modern transmedia studies—points out that by its design, *Pokémon's* narrative is intended to unfold "across games, television programs, films, and books *with no media privileged over any other*," (Jenkins, 2003, emphasis mine). While for a generation the serial drama, told through an ensemble cast during an hour-long time block became the chief format for storytelling, Jenkins declared that in the next generation this, on its own, will seem simple and obsolete. "The kids who have grown up consuming and enjoying *Pokémon* across media are going to expect this same kind of experience from *The West Wing* as they get older," (Jenkins, 2003).

As the power of transmedia becomes more evident, more prominent organizations have begun dabbling in it. In fact, one of the most powerful entertainment companies, The Walt Disney Company, was an early pioneer in cross-media utilization, and has since then been fine-tuning these methods. Disney has utilized almost every form of media to engage audiences in storytelling, from its early efforts in animation and live entertainment (including theme parks) to television, film, music, radio, and more (see Zagar, 2013). In fact, Disney Imagineering Research & Development, Inc., is committed to furthering the greater transmedia vision of Disney—that is "the telling of a story across multiple platforms and formats (LivingWorlds.Disney.com)—through innovation. Through the vision of Walt Disney, continued now by some of the world's most creative and skilled storytellers, visionaries, artists, technicians, and more, the company has immersed audiences in a magical world of entertainment. This world is unrivaled in the entertainment industry and its stories have sparked the imaginations of generation after generation of viewers.

Marvel Entertainment, owned by Disney since 2009, has become a box-office champion through its bold cinematic endeavors. And through its rise to film domination in the superhero world, Marvel has begun to expand its Cinematic Universe (Marvel Cinematic Universe, henceforth referred to as the MCU) into other media formats. In the 2014 documentary, *Marvel Studios: Assembling a Universe*, which aired on ABC, Marvel executives, directors, and producers explained how the MCU had intentionally been designed to expand and crossover into other media formats, including the 2013 primetime action/drama *Agents of S.H.I.E.L.D.* (henceforth referred to simply as *SHIELD*), which marked the most ambitious cross-media leap for the company (see Baruh & Bushmore, 2014). Quite simply, Marvel has declared to its global audience that it is on the front lines of transmedia implementation.

Considering how successful Marvel has been, and ultimately how influential it may be to the future of storytelling, it is vital that researchers hold the company accountable for how well it builds its transmedia universe. Transmedia is likely to be the future of storytelling (see Jenkins, 2003, quoted above), and if such a visible frontrunner in entertainment is all in, so to speak, then its methods will likely shape how future storytellers embark on this journey.

As was noted earlier, as narratives expand to include other media, it becomes increasingly difficult to maintain continuity—an element that keeps loyal fans invested in the story (Weaver in Jenkins, 2013, part one). In fact, Marvel operates thousands of "universes" (see http://marvel.wikia.com/Multiverse/Universe_Listing) so that what happens in one

closed storyline will not disrupt what is happening in another. Still, Marvel has been a champion of transmedia experimentation, with its Animated Universe in the 1990s interacting somewhat with trading cards, select comics, and video games. With the MCU testing the depths of transmedia through its television endeavors (with several more Netflix streaming shows lined up to expand the universe), Marvel is paving the way for greater transmediation in entertainment (and even in social justice/nonprofit campaigns, see Cosner, 2014).

The purpose of this study was to examine the Marvel Cinematic Universe and determine how Marvel is applying the principles of transmedia to that storyworld. After examining foundational elements of effective transmedia storytelling, such as those pointed out by Jenkins—Is each story able to stand on its own? Does each make a valuable contribution to the whole?—this thesis analyzes the strength of Marvel's transmedia storytelling within its Cinematic Universe.

Author Tyler Weaver notes that there are different approaches to transmedia. There are those that are created from the outset to be transmedia narratives and those that are made into transmedia narratives afterward, for the sake of marketability (Weaver, 2013, p. 11). While the latter might seem worthy of criticism, one also cannot expect storytelling empires to not care about the bottom line. As consumers (and critics) we should, however, expect quality regardless of the intent of the product. This brings us to Weaver's third approach to transmedia, "crap transmedia," which is a poorly executed iteration of the second approach.

So whether Marvel is truly interested in telling great stories, as it claims (see Baruh & Bushmore, 2014), or simply cashing in on its box office success may not be

the bottom line. (In fact, one cannot say that the intention behind true transmedia narratives should not be financially motivated, at least to some degree.) The importance is the value that the greater narrative brings to the consumer. This study sought to examine just that by asking the *how* questions. (How is Marvel tying its universe together through the principles of transmedia?) Following a review of literature, this thesis more stringently defines these questions.

This study should help pave the way for continued research into the transmedia phenomenon, as well as encourage further transmedia case studies on notable entertainment organizations, such as Disney and Marvel. Storytelling is, as was argued earlier, one of the primary ways in which we interpret and interact with the world in which we live. And since transmedia is the future of storytelling (see Weaver, 2013), the more prominent it becomes the more of a demand there will be for research and study of it. Furthermore, the more that leaders in entertainment test the waters of transmedia, the more important it will be for researchers to hold them accountable for how well or poorly they tread the depths of good storytelling.

In the next chapter, this thesis presents a review of literature, exploring notable research on the transmedia phenomenon, examples of transmedia case studies, as well as historical ties to other narrative theory. At the conclusion of the literature review, the research questions for this study are presented. The subsequent chapter will then explain the methodology that was used to answer those questions.

Chapter II: Review of Literature

Before beginning the study it is important to understand what transmedia storytelling is. The phenomenon is a relatively new topic of study, a product of the digital age. However, the overarching concept has a much deeper history in narrative theory. Before delving into some of this history, this review of literature explores contemporary research on the subject of transmedia, in order to provide a strong understanding of the topic.

Transmedia Storytelling Explained

The most widely respected scholar on the subject is Henry Jenkins—the Provost's Professor of Communication, Journalism, and Cinematic Arts at the University of Southern California. In his book, *Convergence Culture: Where Old and New Media Collide*, Jenkins simply describes transmedia storytelling as "the art of worldmaking" (p. 21). A more robust explanation from the book is as follows:

> A transmedia story unfolds across multiple media platforms with each new text making a distinctive and valuable contribution to the whole. In the ideal form of transmedia storytelling, each medium does what it does best—so that a story might be introduced in film, expanded through television, novels, and comics; its world might be explored through game play or experienced as an amusement park attraction. Each franchise entry needs to be self-contained so you don't need to have seen the film to enjoy the game. (Jenkins, 2006, pp. 97-98)

Similarly, Ubisoft Montreal's Brand Creative Director Louis Pierre-Pharand proposed these characteristics of a transmedia storytelling at the 2012 StoryWorld

Conference in Hollywood, CA: "(1.) A story world building technique (2.) that produces co-ordinated, multi-platform stories (3.) with each platform produc(ing) its own stand-alone narrative (4.) that creates new entries into the world" (King, 2012).

In his book, *Comics for Film, Games, and Animation*, Tyler Weaver provides a solid, concise definition that seems to incorporate all the critical elements in defining transmedia storytelling:

> The crafting of stories that unfold across multiple media platforms, in which each piece interacts with the others to deepen the whole—but is capable of standing on its own—giving the audience the choice as to how deep into the experience to go (Weaver, 2013, p. 8).

Weaver further explains that there are two basic approaches to transmedia storytelling, either the crafting of a story to be told across media platforms from the outset, or taking a story from one medium and incorporating other media in order to deepen the world created. Weaver defines these two approaches, respectively, as *narrative transmedia* and *additive transmedia* (Weaver, 2013, p. 11). A third type of transmedia, as defined by Weaver, is "crap transmedia," which is typically a lackluster form of the second type, one that he describes as created only for the sake of marketing and "comes from the wallet instead of from the story" (p. 11).

For a transmedia franchise to be successful, Jenkins (in a 2003 article for the *MIT Technology Review*) points out that each medium must be used to do what it does best. As characters and other elements of the storytelling universe are explored, it is ideal to do so using the strengths of the medium being used. Not every

media attracts the same market—film and television tend to attract the broadest audiences and comics and video games the narrowest—and a good transmedia franchise relates to the greatest audience by "pitching the content differently" through various media (Jenkins, 2003).

Weaver explained the strengths and weaknesses of various media platforms. Film, for example, is one of the most visually engaging experiences and is primarily action-based (when utilized to its full potential). Games allow users to be the protagonist and become immersed to high degree within the storyworld. Novels/prose are one of the most personal forms of media (and the least expensive to produce) and give a lot of freedom in terms of structure. Television is character-driven and personal in the sense that audiences get to know the characters. Web series are low budget and quickly accessible. They also have excellent potential for audience interaction (through comments) and devotion. Comic books are great for world building and providing backstory (among other strengths—Weaver devotes about 200 pages of his book to the topic). Social media is an excellent source for engagement and dialogue, (Weaver, 2013, pp. 29-30).

Jenkins referenced *Pokémon* as an example of a strong transmedia storytelling franchise. By its design, *Pokémon's* narrative is intended to unfold "across games, television programs, films, and books *with no media privileged over any other*," (Jenkins, 2003, emphasis mine). While for a generation the serial drama, told through an ensemble cast during an hour-long time block became the chief format for storytelling, Jenkins declared that in the next generation this, on its own, will seem simple. "The kids who have grown up consuming and enjoying *Pokémon*

across media are going to expect this same kind of experience from *The West Wing* as they get older," (Jenkins, 2003).

Similarly, in his book, *Make Your Story Really Stinkin' Big*, visionary entertainment mogul Houston Howard explains how transmedia is becoming a standard for 21st Century storytelling. He explains that transmedia storytelling was born from cultural shifts, where traditional storytelling methods have been rendered "outdated and ineffective with today's YouTube Generation Z" (2013, p. xvii).

> The way people are consuming media has changed (and it's still changing) and 360 Storyweaving is an extension of that. Today's young people, the so-called "digital natives," are growing up in a connected world that seems completely natural to them. They and others are changing and rewriting the rule book of what is possible … the age of this new form of storytelling has only just begun. (Howard, 2013, p. xix)

Howard's book serves as a how-to manual for storytellers interested in utilizing transmedia principles. Howard explains that at its core, transmedia "simply describes an innovative way to grow and expand a story" (2013, p. xvi). He goes on to write that this method should be used to "facilitate a rich and meaningful experience" for the audience, which will "ensure your theme will thrive in a convergent culture" (p. 90).

In his doctoral dissertation, Marc Ruppel explains that the use of different platforms is part of the experience that makes transmedia storytelling unique:

> While site-to-site relationships can form on a mono-media and segmented level (such as the serialized content of a web series, multiple issues of a graphic novel, or the various chapters of a Choose-Your-Own-Adventure book), transmedia movements only truly occur when multiple, distinct platforms are traversed in order to access larger experiences. This is because each platform—from a novel to a mobile phone to a television show—constitutes a specific material, organizational and interactional logic that is distinct from other expressions. (Ruppel, 2012, p. 39)

Geoffrey Long, in his master's thesis, provides good insight on crafting a transmedia narrative:

> By paying close attention to staying in canon, building an open world, maintaining a consistent tone across extensions, carefully deciding when to begin building a transmedia franchise, addressing open questions while posing new ones, and looking for ways to help audiences keep track of how each extension relates to each other, transmedia storytellers can weave complex narratives that will prove rewarding to audiences, academics and producers alike. (2007, p. 3)

Long suggests that strong transmedia narratives tend to center on a world rather than a character. A storyteller may focus on one character for a certain narrative, but must realize that within a transmedia universe another storyteller may want to focus on a completely different character.

> [W]hen developing a narrative that's meant to extend across multiple media forms, the world must be considered a primary character of its own, because

> many transmedia narratives aren't the story of one character at all, but the story of a world. Special attention must be paid to developing a stage upon which multiple storylines (often in different media types) can unfurl, and every story must maintain the consistency of that world. (48). … A storyteller looking to craft a potential transmedia narrative should carefully craft the world in which that story exists, and then make passing references to other cultures, characters, events, places, sciences or philosophies of that world during the course of the narrative to simultaneously spark audience imaginations through negative capability and provide potential openings for future migratory cues. (68)

Long poses 10 takeaways to help guide content creators in weaving strong transmedia narratives:

> A good transmedia extension should make a valuable contribution to the franchise as a whole. … Extensions of a transmedia franchise should stay in cannon. … A transmedia story is often the story of a world. … Extensions of a transmedia franchise should maintain the tone of the world. … It is important to consider when the decision was made to transmediate a story. … Determine whether the story's world is open or closed; if it's closed, crack it open. … Utilize hermeneutic codes, negative capability, and migratory cues to strengthen intertextual bonds between extensions. … Address outstanding questions from other extensions. … Raise new questions for further expansion. … Look for ways to graphically and systematically display these relationships. (pp. 163-167)

Long's takeaways, as they relate to telling a grand transmedia narrative across multiple elements, can be simplified to (1) telling a cohesive story of a universe, (2) using signals (hermeneutic codes, negative capability, migratory cues) to relate separate extensions within the world, and (3) use separate extensions to raise new questions and answer outstanding questions from other extensions. Negative capability, briefly, is purposely inserting gaps in the narrative to evoke an enjoyable sense of mystery or doubt in the audience, which Long likens to Marc Ruppel's description of migratory cues.

Ruppel explains that migratory cues are signals within a narrative that are designed to link separate extensions of a transmedia universe. A migratory cue "assists an audience in making correspondences and connections between sites" (2012, p. 62). Furthermore, these signs may also prompt a consumer to visit other extensions or serve as a signal for them to recall information from another extension.

> Upon recognizing a migratory cue's potential trajectory across sites, we aggregate the content we already have had contact with, shift our vantage point to another site and, often, another media platform, and then deploy this knowledge as a tool for understanding the events of the subsequent site. (Ruppel, 2012, p. 63)

Howard poses a similar, and perhaps simpler, description of this connecting element of transmedia in his book. Because every "micro-story" within the grand transmedia narrative should have "a unique contribution to the unfolding story,"

Howard writes that transmedia-minded content creators should use additive comprehension.

> Additive comprehension incentivizes the audience to cross over and experience different stories and comes in the form of revealing new details about the macro-story event, discovering a new part of the setting, learning more about the characters, and learning new details about another micro-story in the franchise. (Howard, 2013, p. 106)

Transmedia experts overwhelmingly agree that true transmedia storytelling is more than simply telling stories across multiple media platforms—connections need to be made between the various extensions of the narrative. In order to build a solid foundational understanding of transmedia storytelling, it is important to realize other distinctions that separate transmedia from similar concepts.

Important Distinctions

Long makes a key distinction between adaptations and true transmedia stories. The former is the re-telling of a story through a different media platform than it was originally told, such as with Peter Jackson's *Lord of the Rings* film trilogy, which is an adaptation of J.R.R Tolkien's novels (Long, 2007, p. 22). He explains that every time a story is adapted it is reinterpreted, often in order to play to the strengths of the media format in which it is being presented.

As was noted in the previous section, Jenkins and Weaver each explain that as a transmedia story is expanded into different media, it is important that the strengths of each individual format are being utilized. Long takes that a step further, saying that stories within true transmedia narratives are those which are

experienced in the format they were created to be experienced in. He points to the Bible, which some—like David Bordwell (Jenkins, 2009)—have used as an early example of transmedia storytelling since many who experienced the book throughout the centuries could not read but engaged it through other media forms like singing hymns, listening to sermons, and looking at art (including stained glass windows). Long contends that this is not transmedia storytelling in its true form:

> There is a difference between how one person chooses to experience a narrative and how the narrative was designed to be experienced. If Genesis only existed as stained glass, Exodus as spoken words, Leviticus as music and Deuteronomy as brushstrokes on canvas, then the Bible would objectively be a transmedial franchise. (Long, 2007, p. 24)

Long explained that transmedia narratives that were designed intentionally with transmediation in mind tend to have a "noticeable aesthetic difference" than those that weren't (p. 19). Narratives intended to be self-contained are not usually created with multiple media formats in mind. But in the present media culture, Long notes that most narratives will incorporate some sort of cross-media element, whether or not it is grafted on as an afterthought (pp. 19-20). "If a story wasn't intended to spawn other stories, then it might have been written as a 'closed' world and later extensions may feel artificial" (p. 165). (See Weaver's reference to "crap transmedia" in the previous section.) Long noted, however, that there are ways to "crack open" a closed world.

Another important distinction made by Long is the difference between transmedia branding and transmedia storytelling. Transmedia, he says, is often used

as an umbrella term for both (some also mistakenly use it to mean “multimedia” or “cross-media”). A common mistake is made in instances of transmedia branding (what could be called franchising) versus true transmedia narration. A cereal box bearing a character’s image, Long says, cannot be considered an extension of the transmedia narrative unless it contributes something new to the narrative. Among his examples of this were the *Star Trek* and *Star Wars* franchises, which employ some canonical elements, but have a great deal of merchandising and fan-generated content that do not always contribute to one cohesive narrative.

> [E]ach component of a transmedia story is designed as canonical from the outset. While it's still possible to argue for a distinction between ‘primary elements’ (the films) and ‘secondary elements’ (the comics, the videogames, the anime, and everything else) in [*The Matrix*] franchise, plot points were revealed in the secondary components that greatly enriched one's understanding of what was happening in the primary components. Fans that consumed these additional components came away with a fuller understanding and a better experience of the world as a whole. (2007, p. 40)

Long illustrates this by describing that within a transmedia brand, the narrative timelines will be separate from media format to media format, and even from story to story within a given platform. Conversely, a true transmedia story will operate on a single timeline. In this case, Long points out that different media formats might act as chapters within a greater narrative.

Another distinction that should be made is between transmedia narrative and transfiction, which was proposed by Christy Dena in a 2006 article for *Cross Media Entertainment*:

> By transfiction I refer to stories that are distributed over more than one text, one medium. Each text, each story on each device or each website *is not* autonomous, unlike Henry Jenkins' transmedia storytelling. In transfiction (a term to counter Jenkins', though they should be the other way around!), the story is dependent on all the pieces on each medium, device or site to be read/experienced for it to be understood. Basically, no single segment will be sufficient. These will vary between being experienced simultaneously and sequentially. Examples we see now are parallel narratives with TV shows that you can participate with by answering a quiz on the Web, mobiles, etc. (especially here in [Australia]). But, we'll see stories, not just games being experienced this way. In consequence too, we'll see more technologies for having 'hyperlinks' between media. Using blue-tooth, wireless, infra-red or something. (Dena, 2006)

Dena's transfiction is a stingier explanation of transmedia. In transfiction, each media extension of the narrative needs to be consumed in order to understand the whole. Long (2007, p. 18) likens this to reading a book, with the chapters represented by different media, whereas in transmedia storytelling, each element should be able to be fully enjoyed and understood on its own while still making some contribution to the narrative as a whole.

Furthermore, Dena explains that transfiction is about something more than just the differentiation of media—it is about the experience. She says that it is not just important for creators to share narratives through different channels, but to know how the consumer is going to feel when experiencing them. That aspect, she says, could broaden the transmedia scope to include more than just different media but different experiences as well.

> I consider any distribution across space (beyond the singular) a higher-level category that encompasses intramedium and intermedium works. That is: any expansion beyond the singular can happen within a media platform and across media platforms. Not all expansions within a media platform are equivalent though. Transmedia practices are the latter sub-category of this greater expansive concern then, privileging fictions expressed across distinct media. Any movement away from the notion of the singular is significant, but a subset of this idea—the practice of expressing a (fictional) world across distinct media—is an under-recognised [sic] phenomenon and so is the focus of this thesis. This under-recognised [sic] phenomenon refers to expression of a (fictional) world across physically distinct hardware or objects, such as a television, laptop, book, photograph, cinema, statue or vase. The qualifying trait is its (usually) haptically-distinct [sic] nature, which is not the same as media within a medium platform (images, sound or even websites on a computer). An audience member or player usually has to engage with more than one interaction technology. They may tap on a keyboard on a computer (and listen and watch and read), as well as turn pages in a book (and read

> text and images), as well as push buttons and twiddle a gaming console controller (and watch, listen and read), as well as run through the streets or shakes hands with an actor playing a character. The distinct nature refers not just to the nature of the technologies or media, therefore, but also the material experience of them. (Dena, 2013, p. 57)

Long argues (and I agree) that Dena's transfiction is really a subset of Jenkins' transmedia. Not all instances of transmedia storytelling are transfiction, but all instances of transfiction are an occurrence of transmedia storytelling (Long, 2007, pp.18-19).

With a sturdy foundation in place—adequately distinguishing true transmedia from similar concepts—it is time to explore some of the history surrounding the transmedia phenomenon.

The Rise of Transmedia

In a 2007 article, Dena noted that transmedia narrative, or cross-platform/media storytelling, as it is understood today, is a recent phenomenon, due to the rise of digital technology and the Internet. She described an early instance of a 1999 crossover television episode of NBC's *Homicide: Life of the Street* that interacted with an online webcast that featured its own unique characters who had different insight on a case from the TV episode's plot. The online episode featured characters that were not a part of the television cast ("second shift" workers) who investigated a murder and then closed the case. The television characters then re-opened and solved the case. The storyline was then concluded by the second shift team via two more webcasts. Dena said that this sort of movement had to, first of all,

take place, and also make a positive contribution to how the work was experienced in order for it to be successful (Dena, 2007).

Ruppel also asserted the importance of modern technology to the rise of transmedia narratives:

> [I]n transmedia contexts a fictional world is not simply the product of one platform but of several: a controlled combination of digital and analog media; of gameplay and narrative; aural, oral, visual, tactile and interactive platforms; imageless novels and image-laden graphic novels; of newspapers, films and television shows and DVDs; video games , interactive fiction and electronic poetry; CDs, mp3s, live performances and recordings of live performances; phone calls, text messages and emails; weblogs, wikis and websites.
>
> In a paradigm shift of the first order, contemporary productions are currently treating the whole of the medial ecology as a multimodal palette that allows a fictional world to be realized with a vast expressiveness. Such a shift has already created within it new genres of fiction, such as the Alternate Reality Game (ARG), where audiences and the platforms they use on a daily basis (such mobile phones) are incorporated into the fictional world as important characters and objects in their own right. (Ruppel, 2012, p. 4)

Similarly, Jenkins, in a 2003 article in the *MIT Technology Review*, cited the importance of modern technology to transmedia. He explains what he calls "convergence culture" (which will be explored more in an upcoming section), in

which new media (like the Internet and mobile devices) interact with old media (like television or books):

> [W]e have entered an era of media convergence that makes the flow of content across media channels almost inevitable. The move toward digital effects in film and the improved quality of video game graphics means that it is becoming much more realistic to lower production costs by sharing assets across media. Everything about the structure of the modern entertainment industry was designed with this single idea in mind—the construction and enhancement of entertainment franchises. (Jenkins, 2003)

In a 2004 article, Jill Walker discusses the phenomenon of distributed narratives, which, like transmedia narratives, are a product of digital age media consumption habits—wherein information is largely gathered in fragments. These distributed narratives, she explains, are where consumers gather pieces of information from one media channel—such as an email, poster, weblog, or unsolicited text message—that provides a valuable piece of information on its own, but requires interaction with other media to get the full story (such as seeing a poster and then getting more information from a website it directs viewers to). Walker notes that historically narratives were constructed to achieve unity. She referenced Aristotle's dramatic unities of time, space, and action, which describe the constraints of a story in terms of theme, plot, and time. Hollywood films and television sitcoms tend to still obey these. But the rising trend of fragmented narratives is challenging these on all three levels.

Tyler Weaver describes the power and potential of storytelling in this digital age:

> We live in a hyper-connected world. In every single person carrying a Blackberry or iPhone, a Kindle or iPad, you have a person just looking to be immersed in a story. It's our job to give them what they don't even know they want—and by doing so, usher in a new age of storytelling. (Weaver, 2013, p. 20)

While the advent of digital media and the connectivity it produced has empowered transmedia storytellers, the overarching concept is nothing new. Before further exploring how transmedia is understood today, it is prudent to examine how it has been understood historically, as well as how it relates to narrative theory.

A Look Back

No one is claiming that the idea of transmedia is anything new—just that it is manifesting itself in new and exciting ways in the digital age. In their respective works, Dena and Walker, both point to concepts in earlier studies that relate to transmedia. Dena noted transmedia's correlation with franchising, especially that which took place in the 1980s and '90s. Much of Dena's history on the subject was indebted to the works of Marsha Kinder.

In her 1991 book, *Playing with Power in Movies, Television, and Video Games*, Marsha Kinder explores "intertextual relations across different narrative media" (p. 2). She identifies what she calls "supersystems," which are not unlike Long's description of transmedia branding:

> In order to be a supersystem, the network must cut across several modes of image production; must appeal to diverse generations, classes, and ethnic subcultures, who in turn are targeted with diverse strategies; must foster "collectability" through a proliferation of related products; and must undergo a sudden increase in commodification, the success of which reflexively becomes a "media event" that dramatically accelerates the growth curve of the system's commercial success. (p. 123)

She continues:

> The supersystem coordinates the growth curves both of its marketable components and of its consumers, assuring young customers that they themselves form the nucleus of their own personal entertainment system, which in turn is positioned within a larger network of popular culture. (p. 125)

Kinder notes the power of transmedia branding, especially considering the powerful role television plays in introducing children to narrative. Using the example of the *Teenage Mutant Ninja Turtles* franchise, she explains that children were able to pass back-and-forth between passively interacting with the franchise through television and actively engaging it through video games (p. 3).

> This combined mode of spectatorship helps to account for the extraordinary success of that commercial supersystem of transmedia intertextuality constructed around Teenage Mutant Ninja Turtles, those ultimate sliding signifiers who transgress every important border, except gender. Within this Turtle network, young players are encouraged to define themselves not in

> opposition to the alien Other [sic] but as voracious consumers—like PacMan, who defeats his enemies by eating them. Thus, like the protean Turtles, who imitate old masters (both the Italian Renaissance artists after whom they are named and the Japanese ninja warriors whose martial arts skills they practice), children are learning to function as transformative mutants. (p. 3)

Kinder also notes the power of narrative in framing reality:

> As a means of structuring events within patterns of space, time, and causality, narrative creates a context for interpreting all perceptions. Narrative maps the world and its inhabitants, including one's own position within that grid. In acquiring the ability to understand stories, the child is situated as a perceiving, thinking, feeling, acting, speaking subject within a series of narrative fields—as a person in a family saga, as a spectator who tunes in to individual tales and identifies with their characters, and as a performer who repeats cultural myths and sometimes generates new transformations. (p. 2)

Walker also points out the power of narrative and the importance to understand its significance:

> Understanding how narratives can be split open and spread out is important because narratives are one of our main ways of understanding ourselves and of understanding our world. When the world changes, our ways of understanding it must change too. (Walker, 2004, p. 2)

Understanding narrative theory, then, is important in understanding transmedia.

A Brief Exploration of Narrative Theory

Philosopher Sergio Givone theorized that knowledge is ultimately a collection of stories, as thoughts are understood and shared in narrative (Givone, 2011). As he explored some of the key ideas on narrative thought and explored the relationship of philosophy and science, he proposed that truth is processed in narrative form and that literature is a means to share what we know about the world; it is, then, a dimension of truth.

Jerome Bruner echoes this sentiment, contending that narrative is the most omnipresent form of thinking: "'world making' is the principal function of mind, whether in the sciences or in the arts" (Bruner, 2004). He argues that there seems to be "no other way of describing 'lived time' save in the form of narrative."

Walter R. Fisher studied the history of narrative. Channeling scripture, he explained that from the beginning, there was the word, which he said is narrative, our way of understanding and making sense of the world around us.

> [A]nd in the beginning, *logos* meant story, reason, rationale, conception, discourse, and/or thought. Thus, all forms of human expression and communication—from epic to adventure, from biblical narrative to statuary—came within its purview. (Fisher, 1985, p. 74).

Fisher argues that people are narrative beings that make decisions through this lens. Experience is essentially a series of logical puzzles that people solve "through rational analysis."

Perhaps this is why storytelling is thought to be one of—if not the—most powerful methods of persuasion, because narrative creates common ground

between the persuader and the audience, thus making the argument more appealing (Tatum, 2010).

At first glance one might think that the creator holds all the power in the storytelling exchange, but, as Marco Caracciolo stated in a 2011 presentation at the Ohio State University, an individual's embodied experience is projected into whatever narrative they are exposed to. In short, because the audience only understands the story in relation to their experience, though the creator does project theirs in and through the message, the story is co-created by the audience and creator.

And this collaborative process between presenter and audience is exactly what Jenkins investigates when he explores convergence culture.

Convergence Culture and Transmedia Storytelling

A large part of the transmedia experience is the power the consumer holds. Weaver notes that transmedia is not about the media but rather immersing audiences in community. He says that the work of the creator is only 50 percent of the composition; the other 50 percent is in the audience's hands:

> Transmedia is about discovery, and the choice of how much the audience is willing to discover. You cannot make things so convoluted and complex that they will be overwhelmed, with stories concluding in one medium then jumping to another, with little to no regard for choice. We are as much in the hands of the audience as they can be in ours. (Weaver, 2013, p. 44)

In *Convergence Culture*, Jenkins expresses the importance of the audience's role in transmedia:

> Transmedia storytelling refers 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 communities. Transmedia storytelling is the art of world making. To fully experience any fictional world, consumers must assume the role of hunters and gatherers, chasing down bits of the story across media channels, comparing notes with each other via online discussion groups, and collaborating to ensure everyone who invests time and effort will come away with a richer entertainment experience. (Jenkins, 2006, p. 21)

In her thesis, Dena notes that semiotics plays an important role in how transmedia narratives are understood. There are times when what the audience interprets varies from what the practitioner intends:

> Indeed, while meaning is made from of the various decisions practitioners make, meaning continues to be made by many others, including interpreters. The study of transmedia practice simply widens the scope of possible meaning-making points beyond the end product, and in this case mostly towards the domain of practice of design. (Dena, 2009, p. 13)

A driving force behind this convergence culture is a phenomenon Jenkins refers to as "collective intelligence." Technology has paved the way for the audience to play an even more integral part in the co-creative process. This began as a boom in online collective intelligence—which refers to the "ability of virtual communities to leverage the combined expertise of their members" (Jenkins, 2006, p. 27). Because the Internet allows people across the country to find other interested

parties in a particular topic (Jenkins illustrates with the television program *Survivor*), they are able to leverage each other's knowledge to share insights and ideas on a particular story. This can—without the creator even knowing—assign new meanings to symbols or ideas presented in a story, thus giving the audience a certain level of power.

Google has leveraged technology to take the audience's involvement to never-before-imagined heights. Using its flagship phone, Google has created—with help from Pixar—a totally unique user experience (which they call "spotlight stories") where an animated world on the phone—witnessed in first-person—is unique to the user. The story recognizes the user's eye movements, allowing them to look anywhere in the storyworld they choose. If they look away from the screen it pauses, allowing them to resume at their leisure. Though a backbone story is told, there are endless possibilities to how the story will unfold for the user, based on which direction they go in the story (Levy, 2013).

Similarly, Madefire, an interactive app for comic book readers, is creating an interactive storytelling world (Karim, 2013). By utilizing old media—comic books—and new media—a digital app—Madefire is engaging niche users in stories in a revolutionary way. Jenkins points out that niche users dictate how and to what degree content is distributed (Jenkins, 2006, p. 98). This is important because the larger the niche, the more diverse the audience is, the more profitable it will be and the more widespread it will be. By identifying specific niches—particularly ones that will be drawn to certain platforms—such as is the case of Madefire, storytellers can

assimilate revolutionary ideas without being expected to draw mass appeal overnight.

But no matter how much a content distributor thinks they know, there is always a level of uncertainty about the potential success—or failure—of a creative venture, especially one that is as revolutionary as some of the ideas mentioned earlier. The uncertainty principle, as described in Henry Jenkins', Sam Ford's, and Joshua Green's *Spreadable Media*, explains the struggle creative industries have in predicting and measuring products' success (Jenkins, Ford, & Green, 2013, p. 196). But thanks to digital media, there can be a lower cost of production. This is where a symbiotic relationship between old and new media is important and why many content creators hope to catch the attention of an old media distributor, which will use a more traditional means to promote and share (and ultimately sell) their content. So while old media enterprises can still appeal to a wide audience, they trust new media and innovation to bring new ventures under its umbrella.

While new media might have shaken up the economic landscape of media platforms to a certain degree, old media business models are still intact, and largely depended upon. Major studios still warrant larger budgets for their films and reap the rewards at the box office. Books are marketed based on their ability to make the bestseller list. Audiences do not have unlimited time, so they expect the professionals to assist them by narrowing the queue. Filmmaker Hansen Hosein writes:

> The reality is still that humans have only so much time and interest in consuming media. When virtually everyone can produce content, the

> challenge becomes convincing people to pay attention and effect a transaction—share the content, get involved, or act in some way on what's been learned. (Hosein, 2010)

As was mentioned earlier, Long and Weaver both say that whether or not they are executing it well, major content producers are experimenting with transmedia. The following is a look at some prominent examples of transmedia franchises.

Notable Transmedia Case Studies

An early and prominent example of a transmedia franchise used by Jenkins is *The Matrix*, which was created by Lana (formerly Larry) and Andy Wachowski. The franchise includes three feature films, a video game, a series of web-based (subsequently released online) comics, and several animated shorts (in the anime tradition). Each of the works, Jenkins notes, contributes something unique to the greater narrative of the franchise, thus making it "not one experience, but many" (Jenkins, 2003, Nov. 6).

Jenkins notes some issues, however, with *The Matrix*. Critics did not fully appreciate it because they evaluated it solely within the framework of one media platfrom (i.e. watching one film and only judging it as a film rather than appreciating the groundbreaking design). It also violated the rule that one does not have to have experienced other media installments in order to get what is going on in another. Drew Morton (2013), noting the increased budgets and decreased box office return of each subsequent installment of the film franchise, said the construction of *The Matrix* may have been too ambitious. It was simply too complex for the casual

viewer and did not provide enough of a reward for the die-hard fans who explored the story across all media.

Neil Perryman (2008) presented the BBC's *Dr. Who* as a prime example of transmedia storytelling:

> A factory that can fashion a single world under a collective roof to create distinctive—yet linked—programming, spanning platforms, audiences and channels is now regarded by the BBC's hierarchy as a template for all major television commissioning decisions in the future. (p. 37)

Perryman explained the television program's various offshoots into other media from almost immediately after its inception and continuously over the four decades of the show's history. Many of these were fan-generated, in conjunction with the rise of Internet forums (an example of collective intelligence). From books and comics to audio dramas and webisodes, the show utilized just about any media platform to explore different elements of the *Dr. Who* universe, including spin-offs focusing on certain antagonists. As producers of the program realized the extent of this fan interest, and in an effort to collect on the marketability of the franchise, more transmedia elements were experimented with.

Shortly after the television program's inception, *Dr. Who* released a hardback annual that featured comic strips and prose designed "to be enjoyed in tandem with the show." Spin-off books focusing on villains soon followed. In the early stages of the Internet, online discussion groups dissected story arcs. Fan fiction started to become widely published and audio dramas expanded the universe. This eventually led to fan-produced video projects, plays, and multimedia projects. In the mid 2000s

the BBC began a transmedia strategy that included mini-episodes designed to be watched on mobile phones (mobisodes). This was declared by the producer to be a testing ground for mobile television.

Perryman asserts that the ultimate transmedia success of the franchise was due largely to the loyal fan base it had accrued over time, and their commitment to seeing its universe expanded through alternative forms of media:

> Central to Jenkins' definition of transmedia storytelling (2003, 2006: 96) is the suggestion that consumers who actively engage with a franchise that flows across different platforms can potentially enjoy "new levels of insight and [an] experience [that] refreshes the franchise and sustains consumer loyalty" (Perryman, 2008, pp. 31-32).

Drew Morton, an Assistant Professor of Mass Communication at Texas A&M University (Texarkana), presented the *Scott Pilgrim* franchise (henceforth referred to simply as "*Scott Pilgrim*") as a strong example of transmedia storytelling. Morton's choice is intriguing because rather than focusing on narrative to appeal to consumers, *Scott Pilgrim* was united across media formats by visual style. Morton explains the theory of remediation—the representation of one media format within another—and showed how the franchise used stylistic elements to connect various stories. Within each of the various media *Scott Pilgrim* stories were presented through—comics, a video game, and a feature film—were elements signaling back to the others.

Morton says that more blatant forms of transmedia storytelling attempt to point consumers directly to other media in order to gather more information. This,

he argued, has caused problems, "in the opinion of the entertainment industry, transmedia is far from being a successfully established concept, both in terms of narrative and economics," (Morton, 2013). He further explained that film-based video games tend to feel "shotty" as if only produced to be a quick cash-in from the original medium (see Weaver's explanation of "crap transmedia"). These "cash-ins" further Morton's case that transmedia storytelling, when done poorly, seems to point to other media solely for the sake of consumption, rather than to present the audience with a valuable contribution to the overall story. In the case of Scott Pilgrim, the video game was created separately from the film and is stylistically unique.

Morton declares that *Scott Pilgrim*'s use of remediation provided a balanced reward for both audiences, "By avoiding transmedia storytelling, the Scott Pilgrim experience appeases fans of the franchise without alienating the casual consumer with narrative homework," (Morton, 2013). Stylistic remediation, he said, is therefore a transmedia tool that provides unique experiences in each media format. Still, Morton conceded that even *Scott Pilgrim*'s formula was not overly successful—it received mixed reviews and did poorly in the box office.

Another notable point Morton made in his video was that comics translate well to film. Graphic novel film adaptations (not true instances of transmediation) like *Sin City* and *300* used stylistic remediation (as did other less-well received projects like *Watchmen* and *The Spirit*). Morton says that every few years one of these projects succeeds, which green lights more experimentation with transmedia in comic franchises.

In her master's thesis, Tabethia Cosner determined that the principles of transmedia narrative could be applied to a nonfiction storyworld, such as a religious organization. She analyzed the relationship of various media presented by Campus Crusade for Christ, including its use of *The Jesus Film*. She also investigated the human rights campaign *Kony 2012* by Invisible Children and its impact in raising awareness against an African cult/militia leader. Its use of a short film, social media engagement, community events, and other media forms proved to be extremely effective.

Since transmedia promotes examining elements, such as characters, through a different lens, Cosner determined that it is often appropriate to incorporate fictional elements into a nonfictional world, in order to connect with a wider audience. This, however, has some slight limitations in order to protect the integrity of the message.

Considering Morton's point about the recurring successes of graphic novel film adaptations, as well as that several examples mentioned earlier (such as *Pokémon*) fall into the fantasy/sci-fi genre, this review now looks at how comics (and stories within that vein/genre) make excellent transmedia franchises, as well as discusses issues of maintaining continuity in a transmedia universe.

Comics, Transmedia, and Continuity

Jenkins and Tyler Weaver discussed transmedia storytelling at length in a series of interviews on their respective websites. One of the central topics of this discussion was how comic book characters, namely superheroes, are great subjects for transmedia storytelling. Jenkins used Superman as an example:

> From the very start, one of the powers of the superhero has been the capacity to leap across media in a single bound. Part of what cemented Superman's role in the American popular imagination was the degree to which he came at consumers from multiple media at once—as a character who moved from comic books to comic strips, radio, animated shorts, live action serials, all in a matter of a few years, and then, television series, feature films, and computer games. This process of extending the mythology by absorbing elements associated with these other media has refreshed the character over time and made it feel that much more vivid in the minds of its fans. (Jenkins, 2013, part one)

Weaver agreed:

> The superhero genre is an iconic representation of being more than we are and of tapping into the best qualities of human nature, the mythological potential in all of us. With that in mind, there are aspects to the superhero genre that are more visceral in other media. There's nothing like seeing Superman fly on the big screen. (Weaver in Jenkins, 2013, part one)

Weaver points out that video games are to the current generation what comic books were to 20th century children. Adding in the "you are the hero" element to storytelling through games adds appeal and creates competition for other forms of media.

Weaver and Jenkins discussed some of the problems in managing a transmedia universe over decades, including the struggle of maintaining continuity and that of balancing nostalgia with presenting new, fresh ideas.

> [T]he problem goes much deeper than demands on time. While continuity is a chain that produces longevity, unlocks story potential and gives fans something to dig into and a means to demonstrate expertise, it can strangle innovation and storytelling when it is wielded in the name of nostalgia and isn't in line with the values and storytelling tendencies of the current generation.
>
> A great continuity and mythology gives audiences something to dig into and a reason to hunt for back issues and return month after month. The only way stories—be it a transmedia story experience, video game, comic book, television series, novel—inspire that sort of emotional and time investment is through incredible storytelling and characters that the audience wants to revisit again and again. (Weaver in Jenkins, 2013, part one)

Considering how long a franchise may last, and the constant influence from audience interaction, Weaver said cohesiveness may be an ideal, but it is difficult to achieve:

> As is often the case, reality interferes with the ideal. When something is explored and mined by human beings over the course of decades, hiccups are bound to occur. Chains are great in spurring creative solutions to problems, but when pulled too tightly, they can cut off circulation. One way forces you to be creative, the other makes you a prisoner. (Weaver in Jenkins, 2013, part two)

On the issue of continuity Jenkins explained that it is difficult to get everything to line up over long periods of time because elements of the story are

"being built by different divisions of companies" (Jenkins in Weaver, 2013, March 4). He posed a solution that companies could instead explore characters through multiple lenses.

Long (2007, pp. 33-34) noted that cohesiveness and canon are important factors in deciphering between transmedia branding and true transmedia narratives. He suggested that in transmedia narratives, the world can serve as the main character with various media installments exploring different aspects of it.

Jenkins also referred to collective intelligence in comics, explaining that continuity rewards avid fans over time. As a producer or publisher of content, continuity is important because it builds loyalty. Ideally, die-hard fans will consume any content produced within the storyworld. But not everyone consumes this way, which is why it is important "to design continuity in a way that people can pick and choose and it becomes a very complex thing to manage" (Jenkins in Weaver, 2013, March 4). The collector of expertise is rewarded with strong continuity and knowledge whereas the creator is rewarded with consumer loyalty, which is why it needs to be both easy to create loyalty (enough context for casual fans to enjoy one piece) and reward it (tie-ins to other media).

What about Marvel?

With a solid understanding of transmedia storytelling in place, the attention now turns to Marvel. As a frontrunner in cinematic entertainment, there is no doubt that Marvel Studios has the resources and know-how to create a universe that keeps audiences coming back. But considering that the boundaries of the MCU have extended beyond the borders of the silver screen, the question becomes, "How does

Marvel fit into transmedia studies?" There is no doubt that the company is a giant in entertainment, however, the strength of its transmedia narrative—particularly if it settles for a transmedia brand (which in its own right is not necessarily a bad thing) or crap transmedia—could influence future transmedia endeavors.

Considering everything that was covered in this review of literature, the question of whether or not Marvel's Cinematic Universe can be classified as a true transmedia narrative comes to the forefront of discussion. While in principle it is not impossible to create and test a theory to answer this quantitative *yes/no* question, for the purposes of this study, I thought it was more appropriate to test *how* Marvel has applied the principles of transmedia to its Cinematic Universe in order to tie together a compelling, overarching grand narrative. To do this, I considered what appears to be the consensus among experts—Jenkins, Long, Weaver, and others—as elements of a strong transmedia narrative. The questions I sought to answer specifically, based on the findings outlined in this review of literature are as follows:

RQ1—How has Marvel used canon/world building to tie its various media narratives together within its Cinematic Universe?

RQ2—How has Marvel employed additive comprehension to strengthen the relationship between film, short film, television, and print media narratives within its Cinematic Universe?

In the next section I explain the methodological approach that I used in order to address these questions.

Chapter III: Methodology

In order to achieve the purposes of this thesis—and ultimately help to answer how the MCU has applied the principles of true transmedia storytelling—a case study of a subset of film, print media, and television extensions of the MCU was conducted. This helped to answer the two primary research questions that examine *how* Marvel has tied the narratives of its various media extensions together.

In his book *Case Study Research* (2009), Robert Yin defends the use of the case study in qualitative research studies. He said that this is the best model when investigating a new phenomenon and seeking to answer a *how* question and when the researcher has no control over behavioral events (Yin, 2009, p. 8). As it relates to this study, I am seeking to find out *how* Marvel is employing the principles of transmedia in its Cinematic Universe. As was explained in the review of literature, while the concept of transmediation is not all that new, the transmedia phenomenon is quite new, as is its emergence as a topic for academic research. Since this case study examined existing media, there was no control over any of the content.

Yin explains that in framing a case study, it is important to identify and define the unit of analysis (2009, p. 29). In less than a decade, the MCU has yielded tremendous amounts of content to consider for this study. To date, 10 feature length films, five short films, more than 32 television episodes, and more than 20 tie-in comic books have been released under the auspices of the MCU. Because this thesis focuses on the cross-medial nature of the MCU, particularly the addition of television to the greater narrative, I examined all of the primary media elements (film and television) of the MCU, as well as some of its secondary elements (short

film and comics) through the end of 2014. These elements included the first season-and-a-half (32 episodes) of the ABC television series *Agents of S.H.I.E.L.D.,* as well as the MCU films *Iron Man* (2008), *The Incredible Hulk* (2008), *Iron Man 2* (2010), *Thor* (2011), *Captain America: The First Avenger* (2011), *The Avengers* (2012), *Iron Man 3* (2013), *Thor: The Dark World* (2013), *Captain America: The Winter Solider* (2014), and *Guardians of the Galaxy* (2014); short films (One-Shots) *The Consultant* (2011), *A Funny Thing Happened on the Way to Thor's Hammer* (2011), *Item 47* (2012), *Agent Carter* (2013), and *All Hail the King* (2014); and the eight-chapter comic book *Avengers* prelude *Fury's Big Week* (2012). Because the other comics mostly serve as tie-ins to a single film, they were not studied for the purposes of this thesis. Since *Fury's Big Week* ties in to at least four films and two short films within the MCU, it was the strongest example of how print installments were used to enrich the greater narrative, and, therefore, included in this study.

To answer the research questions, I followed Yin's "construct validity" design, which uses a chain of evidence to "identify correct operational measures" for the phenomena being studied (2009, p. 40). While Yin said this is a challenging endeavor, it is also effective when the operational measures are clearly identified (these will be explained as they related to each research question). To build this chain of evidence, which ultimately determined how (or if) the MCU is utilizing transmedia principles, extensive notes were taken during viewings (or readings) of each individual installment and then compared within the context of the grand narrative. In short, how each story relates, based on terms outlined below, within the big picture of the MCU was evaluated.

In answering the two research questions, it was important to understand what constitutes transmedia storytelling as proposed by experts, such as Jenkins, Weaver, and Long, respectively:

> A transmedia story unfolds across multiple media platforms with each new text making a distinctive and valuable contribution to the whole. In the ideal form of transmedia storytelling, each medium does what it does best—so that a story might be introduced in film, expanded through television, novels, and comics; its world might be explored through game play or experienced as an amusement park attraction. Each franchise entry needs to be self-contained so you don't need to have seen the film to enjoy the game. (Jenkins, 2006, pp. 97-98)

> The crafting of stories that unfold across multiple media platforms, in which each piece interacts with the others to deepen the whole—but is capable of standing on its own—giving the audience the choice as to how deep into the experience to go. (Weaver, 2013, p. 8)

In his thesis, Long makes an important distinction between true transmedia narratives and transmedia branding. This is revealed in two key elements from Weaver's definition: "is capable of standing on its own" and "*interacts with the others* to deepen the whole" (Weaver, 2013, p. 8, emphasis mine). Conversely, in a transmedia brand (which is not true transmedia) the installments may not interact or may not be able to stand on their own.

So, to answer the first research question, **how has Marvel used canon/world building to tie its various media narratives together within its**

Cinematic Universe, I looked to an explanation of strong transmedia storytelling as presented by Long:

> *A storyteller looking to craft a potential transmedia narrative should carefully craft the world in which that story exists, and then make passing references to other cultures, characters, events, places, sciences or philosophies of that world during the course of the narrative* to simultaneously spark audience imaginations through negative capability and provide potential openings for future migratory cues. (Long 2007, p. 68, emphasis mine)

Simply put, if the various MCU elements exist within the same universe, then I expected to find consistent references to characters, places, events, etc. across the media elements during the course of my research.

In seeking to answer the second question, **how has Marvel employed additive comprehension to strengthen the relationship between film, short film, television, and print media narratives within its Cinematic Universe**, I revisited Long's explanation of negative capability, Ruppel's description of migratory cues, and Howard's additive comprehension concept, which all describe a similar transmedia construct: connecting the story.

Long suggests that well-told transmedia narratives employ negative capability in the greater narrative. Negative capability, briefly, is purposely inserting gaps in the narrative to evoke an enjoyable sense of mystery or doubt in the audience. This relates to Ruppel's description of migratory cues, which are small pieces of information embedded within a story that signal viewers toward another media format. These serve as hints to look for more. Long explained the importance

of these: "[P]lot points were revealed in the secondary components that greatly enriched one's understanding of what was happening in primary components. Fans that consumed these additional components came away with a fuller understanding and better experience of the world as a whole" (Long, 2007, p. 40). Similarly, Howard's explanation of additive comprehension asserts that "every micro-story needs to have a unique contribution to the unfolding story" (Howard, 2013, p. 91). By revealing new details about events, enhancing understanding of the setting, further developing a character, or inserting signals to other franchise extensions, the audience is incentivized to consume more installments of the transmedia narrative (p. 106).

With that in mind, what I sought to identify as I viewed the various media elements in the MCU were plot points nestled in the various narratives that answered outstanding questions from other narratives or raised new questions based on the understanding of another story, as well as plot points which enriched the understanding of the greater narrative by connecting events between more than one installment.

Chapter IV: Research Findings and Analysis

The purpose of this study, as described more robustly above, was to examine how Marvel, through its Cinematic Universe, has applied the principles of transmedia in order to present a compelling, overarching grand narrative that influences each of its various media installments. As a leader in entertainment, one that is likely to be looked to as an example of transmedia implementation for generations to come, it is important that Marvel be critically analyzed. Transmedia storytelling was earlier explained to be an emerging communication phenomenon which describes narratives told across multiple media platforms, where each individual story has the ability to stand on its own while also making a valuable contribution to the grand narrative.

During the research phase of this study, all of the primary narrative elements (film, television) and many of the secondary narrative elements (short film, print media) of the MCU (through the end of 2014) were examined to see how Marvel has used stories across multiple media formats to tell an overarching grand narrative. To do this, I first looked at how the MCU connected individual stories from its various media extensions together through world building, or canon. More precisely, I sought to answer: **How has Marvel used canon/world building to tie its various media narratives together within its Cinematic Universe (RQ1)?** To see if these stories truly existed within the same narrative universe, I took note of depictions of and references to characters, organizations, events, locations, and sciences/natural laws across the various installments.

After identifying the links that connected this chain of evidence, I tested their strength by examining how these connections helped to make the experience richer for audiences. This helped to answer: **How has Marvel employed additive comprehension to strengthen the relationship between film, short film, television, and print media narratives within its Cinematic Universe (RQ2)?** As I examined various plot points nestled within individual installments, I took note of how they enriched the understanding of the greater narrative by referencing events from a different installment, connecting the events between more than one installment, or posing or raising new questions based on the understanding of another installment. The findings for each research question are explained, and then analyzed, followed by a more thorough analysis of the whole of the research. Finally, an acknowledgement of the limitations of this study and suggested areas for future research are presented.

Findings of RQ1—How has Marvel used canon/world building to tie its various media narratives together within its Cinematic Universe?

In order to establish a chain of evidence to determine how the Marvel Cinematic Universe has tied its various media narratives (film, television, short film, print media) together, to see if these stories truly existed within the same narrative universe, during the research phase of this study depictions of and references to characters, organizations, events, locations, and sciences/natural laws across the various installments were noted. In Houston Howard's book, *Make Your Story Really Stinkin' Big*, he explains that there are three types of character connections within a transmedia narrative: personal appearance, where a character appears in multiple

stories; personal reference, where a character is referenced in another story; and a family tree appearance, where a family member of a character from one story appears in another (2013, pp. 132-133). This method can likewise be applied to organizations, events, and locations, as well as the natural laws by which a storytelling universe operates. Below are findings and analysis of each, followed by a summarizing analysis.

Characters: Across the 10 films, five short films, 32 television episodes, and eight-chapter comic book reviewed, there were approximately 40 characters that recurred, through reference or appearance, in separate franchise installments of the Marvel Cinematic Universe. This does not account for recurring characters that only appear or are referenced again in subsequent installments of a single franchise, such as a character appearing in both *Iron Man* and *Iron Man 2*. It should also be noted that only one character (Agent Felix Blake) that was first introduced in short film appeared in any other installments, and that no characters that were first introduced on television were referenced or appeared in film. Note: Archive footage of a character appearing in another installment was considered a personal appearance while an image of a character shown in another installment was considered a personal reference. Since all appearances in print media are images, all character appearances were assumed to be personal appearances unless the frame indicated otherwise.

Of the numerous characters referenced across multiple MCU installments, about 35 appear or are mentioned in more than one media format, at least 20 of which make personal appearances in more than one media format. There are five

characters that appear in both film and television, and 10 characters that appear in both a film and a short film. Character appearances vary from brief cameos to major roles in storylines.

The most widespread character in the MCU is S.H.I.E.L.D. (see Organizations for description of S.H.I.E.L.D.) Agent Phil Coulson (portrayed on TV and film by actor Clark Gregg). Coulson is introduced in *Iron Man* (2008) where he appears briefly as a supporting character in a few scenes. His role is reprised in *Iron Man 2* (2010), *Thor* (2011), and *The Avengers* (2012), where he is killed in the line of duty. Coulson also stars in Marvel One-Shots (short films) *The Consultant* (2011), which takes before the events of *The Avengers*, and *A Funny Thing Happened on the Way to Thor's Hammer* (2011), which is set before the events of *Thor*. Coulson also appears in all eight chapters of the Avengers's prelude comic *Fury's Big Week*, which takes place during and after the events of *Iron Man 2* (2010), *The Incredible Hulk* (2008), and *Thor*, and coincides with events from *Captain America: The First Avenger* (2011). Though the character died in *The Avengers*, Coulson is a main character in the television series *Agents of S.H.I.E.L.D.* (henceforth referred to as *SHIELD*, 2013-), with the mystery of his resurrection serving as a recurring plot element for much of the first season.

S.H.I.E.L.D. Director Nick Fury (portrayed onscreen by Samuel L. Jackson) is another frequently recurring character in the MCU. Though Fury is not a regular character on *SHIELD*, the character has appeared in more feature films than Coulson, and has been referenced in at least 17 TV episodes (Season 1: Episodes 1, 2, 7, 8, 9, 11, 12, 14, 15, 16, 17, 18, 19, 20, 21; S2: E 1, 7, 8, 9), in addition to three

appearances (S1: E 2, 11 [archive footage], 22). Fury's film appearances include *Iron Man*, *Iron Man 2*, *Thor*, *Captain America: The First Avenger*, *The Avengers*, and *Captain America: The Winter Soldier* (2014). Fury is the main character in *Fury's Big Week*. The character does not appear in any One-Shots, however, Fury is referenced in *The Consultant* and *Item 47* (2012).

Fury's second, Commander Maria Hill (portrayed onscreen by Cobie Smulders) makes a number of, usually brief, appearances throughout the MCU. Hill is introduced in *The Avengers*, where she participates in two major action sequences and fills a supporting role in a few other scenes. The character also appears in *Captain America: The Winter Soldier*, as well as two episodes of *SHIELD* (S1: E 1, 20). In the television series Hill is also mentioned in three other episodes (S1: E 11, 18, 19).

Two other S.H.I.E.L.D. agents make notable cross-media appearances: Jasper Sitwell (portrayed onscreen by Maximiliano Hernández) and Felix Blake (portrayed onscreen by Titus Welliver). Sitwell, who first appears in a minor role in *Thor*, stars in both *The Consultant* and *Item 47*, in which Blake is introduced. Blake appears in one episode (S1: E 16) of *SHIELD* and is reference in two more (S1: E 6, 17). Sitwell makes two more feature film appearances—*The Avengers* and *Captain America: The Winter Soldier*—both in more prominent supporting roles, and appears in three *SHIELD* episodes (S1: E 7, 15, 16) with references in at least two more (S1: E 11, 17). Sitwell is also a character in *Fury's Big Week*, appearing in Chapter 5 and referenced in Chapters 2 and 4.

While frequent character appearances certainly support the MCU as a transmedia narrative, examples of less frequently occurring characters making appearances in multiple media formats also serves strengthen the case of Marvel's transmedia employment. For example, Sif (portrayed by Jaimie Alexander) appears in both *Thor* films, as well as in Season 1, Episode 15 of *SHIELD*. Emil Blonsky (AKA Abomination, portrayed onscreen by Tim Roth), the antagonist from *The Incredible Hulk*, also appears via stock footage (as Abomination) in *The Consultant* and is referenced in *SHIELD* (S1: E 13). Gen. Thaddeus Ross (AKA Thunderbolt Ross, portrayed onscreen by William Hurt) and Tony Stark (AKA Iron Man, portrayed onscreen by Robert Downey Jr.) also appear in *The Consultant*. Trevor Slattery (portrayed by Ben Kingsley) and Justin Hammer (portrayed by Sam Rockewell) both appear in *All Hail the King* after single Iron Man franchise (3 and 2, respectively) appearances. Hammer is also referenced in *Fury's Big Week*. Senator Stern (portrayed by Garry Shandling) first appears in *Iron Man 2* before being referenced in *Fury's Big Week* and appearing in *Captain America: The Winter Soldier*, illustrating that elected officials are consistent across the MCU. Sgt. Timothy "Dum Dum" Dugan and Jim Morita (portrayed by Neal McDonough and Kenneth Choi, respectively) both appear in *SHIELD* Season 2 Episode 1 after their debut appearances in *Captain America: The First Avenger* and a personal reference (image) in the second Captain America film. Peggy Carter (portrayed by Hayley Atwell) appears in both Captain America films and is the main character of Marvel One-Shot *Agent Carter*. Carter also appears in two *SHIELD* episodes (S2, E 1, 8).

In *Fury's Big Week* alone, at least 18 characters recur outside of the medium in which they were first introduced (no primary characters were introduced for the first time in this comic book). These characters include, Fury, Coulson, and Sitwell, as well as Tony Stark, Lt. Col. James Rhodes (AKA War Machine [appears in War Machine armor only]), and Ivan Vanko (AKA Whiplash) from the *Iron Man* franchise; Bruce Banner (AKA Hulk), Gen. Ross, Samuel Sterns (AKA Mr. Blue), and Blonsky from *The Incredible Hulk* franchise; Thor, Jane Foster, Darcy Lewis, Erik Selvig, and Loki from the *Thor* franchise; Steve Rogers (AKA Captain America) from the *Captain America* franchise; and S.H.I.E.L.D. operatives Natasha Romanoff (AKA Black Widow, introduced in *Iron Man 2*) and Clint Barton (AKA Hawkeye, introduced in *Thor*). This marks the only cross-media appearances (not including references) for 11 of these characters—Rhodes, Vanko, Banner, Sterns, Thor, Foster, Lewis, Selvig, and Loki. Rhodes and Lewis have appeared in multiple films within the same franchise, and Foster's lone out of franchise appearance is an image only. Sterns and Vanko each only appear in one feature film. (The intersecting storylines depicted in *Fury's Big Week* are explored further in the research findings and analysis for RQ2.)

The strongest family tree connection in the MCU is that of Howard (portrayed younger by Dominic Cooper and older by John Slattery) and Tony Stark. Tony, in the film *Iron Man*, is the first character (major or otherwise) introduced in the MCU. The film references Howard, who then appears (as does Tony) for the first time in *Iron Man 2*. In *Captain America: The First Avenger*, a younger Howard Stark is portrayed, who again appears briefly in *Agent Carter*. Tony makes brief appearances in *The Incredible Hulk* and *The Consultant*—which each depict the same scene with

Tony and Gen. Ross. Tony appears prominently in *The Avengers* (wherein Howard is mentioned) and in *Iron Man 3* and is referenced frequently in *SHIELD*. Howard is referenced at least once in *SHIELD* (S2, E 1).

Aside from the Starks, the only other major family tree appearance is that of Agent Antoine Triplett (portrayed by B.J. Britt), who is said to be a descendant of one of the Howling Commandos (a team of soldiers organized by Captain America in *The First Avenger*). The Howling Commandos are described further under Organizations.

Though personal appearances certainly lend credibility to the idea that all of the various media installments of the Marvel Cinematic Universe take place in a single, cohesive world, there is also much to be said for mere references. Just as in real life a friend or family member of one person in a circle of influence may only be known to others within the circle through pictures or descriptions, talking about or showing images of a character in other media installments strengthens the transmedia bond between franchises within that fictional universe.

While Banner—who appears as the main character of *The Incredible Hulk*, as well as a leading character in *The Avengers* and in a brief cameo in *Iron Man 3*—does not appear in *SHIELD* or any of the One-Shots, the character is referenced in just about every MCU franchise, across all media. Banner is referenced in both the films *Thor* and *Captain America: The Winter Soldier*, and in *The Consultant*, as well as directly in two *SHIELD* episodes (S1, E 1, 19), with several more references to Banner's alter ego the Hulk throughout the series. Banner's references reveal his professional affiliations with characters in other franchises, such as Selvig

(portrayed by Stellan Skarsgård), as well as the extent of his expertise as a scientist—having worked on projects that effect plot points in *Captain America: The Winter Soldier* and *SHIELD*, as well as projects that were affected by plot points from *Captain America: The First Avenger*.

One of the most interesting uses of a minor character in the MCU—and perhaps one of the most revealing of the strengths of the MCU grand narrative—is that of Audrey Nathan (portrayed by Amy Acker), who is known only as "the cellist" until her first, and only, MCU personal appearance in *SHIELD* Season 1 Episode 19. Nathan's first mentions (two, to be precise) are in *The Avengers*, followed by faint references in *SHIELD* Season 1 episodes 10, 11, and 18, as well as Season 2 Episode 8. Nathan is presented as a love interest of Coulson's, which viewers are reminded of only in passing until her debut appearance nearly two years later. (Nathan's relationship with Coulson is explored further in the research findings and analysis for RQ2.)

As Sen. Stern's appearances in *Iron Man* and *Captain America* films (as well as a reference in *Fury's Big Week*) indicate a cohesive narrative across the MCU—at least to the degree that multiple franchises include the same elected government officials—so too does the reference of President Ellis (portrayed by William Sadler) in the second Captain America film following the character's introduction, by way of appearance, in *Iron Man 3*. Similarly, Sec. Alexander Pierce (portrayed by Robert Redford) is referenced in three *SHIELD* episodes (S1: E 19, 20; S2: E 8), after debuting in *Captain America: The Winter Soldier*.

Whether through reference or personal appearance, characters are overwhelmingly used to cohesively tie together the MCU. Not only are character reappearances and references used frequently, they are mostly consistent. For example, Nick Fury wears an eye patch in all appearances through the release of *Captain America: The Winter Soldier*, where, at the end of the film, Fury sheds the eye patch and dons sunglasses. When Fury appears in the Season 1 finale of *SHIELD* (E 22), he is wearing sunglasses instead of the eye patch.

Though the original actors mostly reprised character roles, some were recast, though this did not majorly affect character consistency. Rhodes maintained his personality and demeanor, as well as his relationship with Tony Stark, despite being recast after the first Iron Man film. When Don Cheadle assumed the role formerly depicted by Terrence Howard (and all subsequent onscreen appearances), though the two actors do not look alike, the character maintained the serious, no-nonsense tone, as well as the role of not only Stark's trusted friend, but one that looks out for his friend's best interest—the grounded yang to Tony Stark's often reckless and destructive yin. Similarly, character consistency was used so strongly with supporting character Fandral that the recasting of the character (from Josh Dallas in *Thor* to Zachary Levi in *Thor: The Dark World*) was hardly noticeable.

The most disruptive recasting was that of Banner. Though Mark Ruffalo maintained Banner's reserved, unimposing demeanor when he assumed the mantle in *The Avengers*, his performance was notably distinct from Edward Norton's portrayal of Banner in *The Incredible Hulk*. Though one could hardly criticize two talented actors for being uniquely recognizable (a similar case could be made for

Howard and Cheadle), unlike Rhodes there were nuances to Banner's character that, upon deep criticism, cause one to question whether this was in fact the same character. The two most prominent examples are in Banner's accessories—he wears a heart rate monitor on the inside of his left wrist in *The Incredible Hulk* and a watch face up on his left wrist in *The Avengers*—and his treatment of the Hulk (the green beast into which he transforms, similar to Dr. Jekyll's Hyde): in the first film Banner will not acknowledge the Hulk as a person, often referring to the Hulk as "it" or "thing," whereas in *The Avengers* Banner repeatedly refers to the Hulk as "the other guy." While distracting, both of these differences could be explained with an understanding of how Banner's relationship to the Hulk evolved between the two films: in *The Avengers* it is suggested that Banner may have come to terms with his duality and revealed that he has learned to control it. Considering he wore the heart rate monitor in the first film to alert him of rapid heart palpitations, which could indicate an oncoming transformation, and that Banner may have softened in his feelings toward the Hulk, the differences may be explained. Regardless of this irregularity, as a whole the MCU maintains a strong canon in regard to characters.

Organizations: Like characters, organizations may appear or be referenced across various installments of a transmedia narrative in order to alert audiences to the consistency of the universe. In the MCU this includes the use of character groups/alliances, fictional companies and their projects, and ideological affiliations. There are at least 11 of these that extend outside of a franchise. An organizational appearance includes any time that its members, logo, or products were depicted,

including in pictures (such as an organization's seal stamped on a file). A reference is credited any time that an organization is named in dialogue.

As the title organization for the MCU's television series, S.H.I.E.L.D. (a non-governmental covert spy and counter-terrorism agency) is the most widely depicted organization. It is referenced or appears in every television episode, all eight chapters of *Fury's Big Week*, in four of the five (all but *All Hail the King*) One-Shots, and in nine of the 10 (all but *Guardians of the Galaxy*) films reviewed. Of these, S.H.I.E.L.D. is reduced to only a mere reference in *Iron Man 3* and *Agent Carter*, which takes place chronologically before S.H.I.E.L.D. was founded. *Agent Carter*, however, does discuss the founding of S.H.I.E.L.D. and its title character works for its parent organization, the SSR.

In the various installments, S.H.I.E.L.D. has various iterations of two primary logos. Both are of an eagle, one of which is more birdlike and the other sleeker, consistent with modern, digital art. The marks are consistently used within the timeline, the former mark used for all S.H.I.E.L.D. logo appearances that take place chronologically before 2011 (even scenes from installments released after 2011 that were set pre-2011) and the former used (interchangeably, though more prominently) after its introduction in 2012.

Perhaps the only criticism of the consistent use of organizations within the MCU is due to a gag based on S.H.I.E.L.D.'s name. S.H.I.E.L.D. was first introduced as "the Strategic Homeland Intervention, Enforcement and Logistics Division" by Coulson in *Iron Man*, the complexity of the organization's name being a running joke throughout the film. As Agent Grant Ward (portrayed onscreen by Brett Dalton) of

SHIELD said in the show's first episode, "someone really wanted [the] initials to spell out 'SHIELD.'" While the fully unpacked acronym might have succeeded in garnering a few laughs—and delaying comic fan satisfaction upon realizing S.H.I.E.L.D. was a part of the MCU—it may have failed the universe's continuity. Throughout *Iron Man*, characters stumble over the organization's name before Coulson, in the last scene, tells Potts (portrayed by Gwyneth Paltrow), "Just call us SHIELD." Throughout the subsequent installments of the MCU, even in scenes that take place chronologically before *Iron Man*, the organization is overwhelmingly referred to as "SHIELD." In fact, when Howard Stark suggests Peggy Carter run the newly formed organization (at the end of *Agent Carter*), he calls it "SHIELD." Documents depicted in episodes of *SHIELD* and elsewhere in MCU installments, such as the files shown at the beginning of *The Incredible Hulk*, are typically stamped S.H.I.E.L.D., SHIELD, or with the organization's eagle moniker (though the full name is also stamped on documents).

Though it could be argued that the writers of *Iron Man* were not consistent with writers from other media installments, considering that the organization is referred to as "SHIELD" both before and after the events of that film, it does not necessarily prove a breach of canon either. Understanding that Howard Stark was a founding member of S.H.I.E.L.D., it is then logical to assume that his son, Tony, and Tony's most trusted employee, Ms. Potts, would recognize the name. Knowing Tony's personal state at that point in the *Iron Man* film—highly skeptical of any government or covert organization—it is logical to assume that Coulson may have

intentionally used the full acronym to diminish the chance of the organization being denied an audience before its intent was explained.

S.H.I.E.L.D.'s parent organization, the SSR (or Strategic Scientific Reserve), also makes numerous MCU appearances. The SSR is introduced in the first Captain America film and is referenced in the sequel, as well as in a *SHIELD* episode (S1: E 12) for its role in S.H.I.E.L.D.'s history. The SSR also appears in *Agent Carter* and three more *SHIELD* episodes (S1: E 14; S2: E 1, 8) through old files, equipment, or in flashbacks.

Stark Industries, an organization founded by Howard Stark and passed on to his son, appears in all three Iron Man films, in both Captain America films, as well as in *The Incredible Hulk* and *The Avengers*. Tony and Howard each have more personal references and appearances (as was described earlier) throughout the MCU.

In addition to corporate entities, there are also organizations, better called teams, in the MCU that are made up of allied characters. Two of the most widely noted teams are The Avengers and The Howling Commandos.

The Avengers, after which the 2012 film is named, were first introduced as an initiative of S.H.I.E.L.D. in a post-credit sequence in *Iron Man*, when Fury visits Tony Stark. Between this first reference and *The Avengers*, the initiative is referred to directly in *Iron Man 2* and in passing in *The Incredible Hulk* (Tony Stark mentions to Gen. Ross, "We are putting a team together"), and in the title of the first Captain America film (though there is no direct reference in the film). The initiative is also referenced in *The Consultant* and *Fury's Big Week*. After The Avengers are assembled as a team in their film debut (consisting of Captain America, Iron Man, Hulk, Thor,

Black Widow, and Hawkeye), both the team and its members are frequently referenced in following installments, as well as appearances in subsequent films (for example, Captain America appears in *The Winter Soldier*). Not counting references to individual members, The Avengers are directly referenced (sometimes as "the heroes of New York,") in at least seven *SHIELD* episodes (S 1: E 1, 3, 5, 6, 10, 20, 22). In Season 1 Episode 22 Fury tells Coulson that he was also an avenger.

The Howling Commandos are introduced in *Captain America: The First Avenger* and are referenced, by way of an image, in *Captain America: The Winter Soldier*. Two of its members, Dugan and Morita, appear in an episode of *SHIELD* (S2: E 1). The team is also referenced in *SHIELD* (S1: E 19, 21; S2: E8), establishing a familial link between Agent Triplett and the team.

One of the most prominent ideological alliances within the MCU is HYDRA, the nemesis of S.H.I.E.L.D. (HYDRA is a more extreme form of Nazism that operates under an ideology of superiority and compliance.) The organization appears throughout the MCU with appearances in three films—both Captain America films and *The Avengers*—and several *SHIELD* episodes. Before it is revealed that HYDRA has infiltrated S.H.I.E.L.D.'s ranks in Season 1 of *SHIELD*, the organization is referenced in episodes 2 and 12. In Season 1 Episode 17, coinciding with the events of *The Winter Soldier*, HYDRA stages a coup within S.H.I.E.L.D., altering the direction of the television series. After the uprising, HYDRA is featured in every subsequent *SHIELD* episode. Its members, such as Agent Sitwell, appear in other MCU films and One-Shots as well.

Less overt organizational appearances also help to strengthen the continuity of the MCU. Roxxon Oil, for example, appears on a sign in *Iron Man* and is referenced in *Iron Man 3*. A Roxxon gas station is the setting for *A Funny Thing Happened on the Way to Thor's Hammer*, with the same station appearing again in *Fury's Big Week*, this time visited by Barton with signs of Coulson's destructive visit evident. An early scene in *SHIELD* Season 1 Episode 9 takes place at a Roxxon gas station. The appearance of Roxxon within the MCU is not unlike the appearance of Shell or Exxon within the day of a typical American.

The fictional terrorist organization the Ten Rings appears in both *Iron Man* and *Iron Man 3*, as well as in *All Hail the King*. It is also referenced in *Iron Man 2*. References and appearances by the Ten Rings are comparable to those of Al-Quaeda or Boko Haram in our world.

Advanced Idea Mechanics (A.I.M.) debuts in the film *Iron Man 3* and is referenced again in Season 1 Episode 12 of *SHIELD*. One of its projects, Extremis (used in the *Iron Man 3* villain's plot), is referenced in at least four *SHIELD* episodes (S1: E 1, 5, 12, 21) for its relationship to another project, Centipede, which furthered the research of Extremis (and other projects, see Science, Technology, and Natural Laws).

Events: One of the most powerful ways to demonstrate a cohesive transmedia narrative is through events. Events may be referenced directly by affecting the plot or setting of separate installments or more subtly through references. Various installments may also depict events from different perspectives (this is also explored to a greater degree in the findings and analysis for RQ2). There

were at least 20 major events identified that were referenced in multiple installments, 17 of which were referenced outside of the franchise in which they were introduced, and 15 were referenced in more than one media format.

No event has had a more wide-reaching impact on the MCU narrative than "the Battle of New York," the climax to *The Avengers* in which the marquee team staves off an alien invasion in the Big Apple for all the world to see. After this battle takes place, it is referenced in three films, *Iron Man 3*, *Thor: The Dark World*, and *Captain America: The Winter Soldier*, with its fallout impacting the plots of each to varying degrees (explored in the research findings and analysis for RQ2). Though the battle is not referenced directly in *Guardians of the Galaxy*, a Chitauri, of the same race of the creatures who invaded New York, appears in the background of one scene and Thanos, along with his servant, the Other, who orchestrated the attack, appear in other scenes. The fallout of the battle is also the subject of One-Shot *Item 47* and *SHIELD* Season 1 Episode 6. It is referenced numerous times in *SHIELD* and is tied so closely to Coulson's death that distinguishing those references is often difficult. The battle changed the dynamic of the narrative universe across the MCU—as Tony Stark said in *Iron Man 3*, "Nothing's been the same since New York"—as it revealed to the fictional world the existence of not just superheroes but extraterrestrial life, magical technology, and the threat of intergalactic war. From there S.H.I.E.L.D. struggles to operate in secrecy and humanity realizes both the reality of the supernatural and how small it is in this fictional universe. An interesting takeaway from New York is its integration into casual conversation. Just as 9/11 reshaped the way Americans see the world, New York has impacted the

MCU, and its references are just as casual, ranging from "the time aliens invaded New York," to simply "New York." These references were not only consistent, but often so scant that without having seen *The Avengers* a viewer could easily miss them.

Prior to the Battle of New York in *The Avengers*, Coulson is killed when Loki (portrayed onscreen by Tom Hiddleston) stabs him through the heart with a spear. This event is significant because Coulson is a main character on *Agents of S.H.I.E.L.D.*, which begins chronologically after New York. This event becomes a recurring plot point of *SHIELD*, first as the circumstances which led to Coulson's resurrection are investigated across Season 1 episodes 1-14 and continuing through the fall finale (episode 10) of Season 2, as Coulson grapples with the consequences.

Another universe-shattering event for this fictional world was the rise of HYDRA/fall of S.H.I.E.L.D., which was a major plot point in *Captain America: The Winter Soldier*, and severely altered the way in which S.H.I.E.L.D. operated in its television series—which was already 16 episodes into its first season. During the film, and later on TV, it was revealed that HYDRA, which Captain America thought he had defeated during World War II, had secretly built a following within S.H.I.E.L.D.'s ranks that had infiltrated its highest levels. After the Battle of New York, HYDRA began plotting its resurgence, believing the world had changed enough to accept its ideology. In preventing an act of genocide at the hands of HYDRA, Captain America dismantled both organizations, forcing them to each operate in the shadows. After *The Winter Soldier*, nearly every *SHIELD* episode referenced the event to some degree, and affected the way in which the fictional organization operated—its

members no longer wielded respected authority as agents of a prominent organization and were forced to work much more covertly. After the rise of HYDRA, the rivalry between the organizations became a recurring plot theme for the television series. As a side note, in *The Avengers* Banner questions why S.H.I.E.L.D. needs to monitor Captain America as a potential threat. In *The Winter Soldier* it not only confirms this by revealing that the captain's apartment is bugged and his neighbor was a planted agent, it explains that he was being monitored because he poses a threat to HYDRA.

Each of the title Marvel film characters—Iron Man, Hulk, Thor, Captain America—take part in one or more major events that are referenced throughout the other MCU installments. (These events are explored in greater detail as it relates to additive comprehension in the research findings and analysis for RQ2.) Iron Man, for example, is injured while being kidnapped by terrorists, resulting in shards of shrapnel being embedded in his chest. This event not only affects the plot of the first film in the franchise, as well as its two sequels, but is also referenced in both *Fury's Big Week* and *The Avengers*, furthering the plot of the former and used to emotionally link two characters in the latter.

Two events depicted in *The Incredible Hulk*—Banner's transformation at Culver University after Gen. Ross ambushes him with artillery and "the Harlem Incident," a battle between Banner's and Blonsky's alter egos in New York—are referenced in later MCU installments. The event at Culver University, for example, is explored from a different perspective in *Fury's Big Week*, and news coverage of the event is visible on Tony Stark's computer screen in *Iron Man 2* (the same news

anchor is depicted in both films). *Fury's Big Week* also depicts an image of Banner working in a soda bottling plant, the same Brazilian plant where Banner's first few scenes in *The Incredible Hulk* film are set.

"The Harlem Incident," as Sitwell describes it in *The Consultant*, is the subject of the short film—more specifically its aftermath is the subject of the short film. It is also depicted from another perspective in *Fury's Big Week*. The incident is referenced casually by Banner in *The Avengers*, when he tells his teammates, "The last time I was in New York I kind of broke Harlem," and even more subtly in *SHIELD* Season 1 Episode 13 when Blonsky's cryogenic cell—in the film, comic, and short film it is revealed that Blonsky, following the incident, is taken by Gen. Ross into custody—is mentioned.

Thor (portrayed onscreen by Chris Hemsworth) is introduced in the MCU before his film debut thanks to a few references to "New Mexico" (an event that is referenced regularly in subsequent MCU installments) in *Iron Man 2*, culminating with a scene revealing Thor's hammer lodged in rock in a crater in the New Mexico desert. New Mexico begins with a series of weather anomalies, discovered by Foster (portrayed by Natalie Portman) in *Thor* and tracked simultaneously by Coulson in *Fury's Big Week*. In the film *Thor*, the weather anomalies are revealed to be the result of Odin (portrayed by Anthony Hopkins), Thor's father, banishing his son to earth and stripping him of his power, including his magical hammer Mjölnir, which is also sent to earth (King Arthur style—unable to be moved except by one who is worthy). New Mexico—more specifically the fictional town of Puente Antiguo and the surrounding dessert—becomes the setting for much of the second and third acts

of *Thor*, culminating in a battle between Thor and the Destroyer (a giant robot-like creature that can be controlled, in this case by Loki). Similar to the Battle of New York, the event is referenced casually throughout the MCU, often simply as "New Mexico," illustrating that characters understand the event as familiarly as Americans may 9/11. In addition to *Iron Man 2* and *Fury's Big Week* the event is also referenced in *SHIELD* episodes (S1: E 1, 8, 15), *The Avengers*, and *Thor: The Dark World*. The *SHIELD* references are interesting due to their diversity—in S1 E 1 Coulson mentions the hammer, in S1 E 8 Coulson mentions that this is not the first time he has held an Asgardian in captivity (to Prof. Elliot Randolph [portrayed by Peter MacNicol] referring to the time in the *Thor* film when he apprehended Thor in New Mexico), and in S1 E 15 Coulson recognizes Sif from having fought with Thor in New Mexico. Coulson's trip to New Mexico—to where he is dispatched by Fury in both *Iron Man 2* and *Fury's Big Week*—is the subject of *A Funny Thing Happened on the Way to Thor's Hammer*.

The climax of *Thor: The Dark World*, in which an alien spacecraft crashes into Greenwich, England, and shatters the windows of the Painted Hall of Old Royal Naval College, is referenced in *SHIELD* Season 1 Episode 8 when characters are dispatched to the hall to deal with the event's aftermath (archive footage of the film event is shown), and again in the following episode when the anomalous wormholes to alien worlds, depicted in the film, are central to the episode's plot.

At the beginning of *Thor* it is explained that Asgardians—and other alien creatures—have visited earth at times in centuries past. This aspect of the MCU history is tied to the plot of *Captain America: The First Avenger*, as its antagonist,

Johann Schmidt (AKA the Red Skull, portrayed by Hugo Weaving), begins his nefarious quest in the film's opening scene by discovering the Tesseract, an ancient cube of power left by Asgardians centuries before. The history of Asgardians visiting earth is also referenced in *SHIELD* Season 1 episodes 8 and 15. Similarly, in the opening scene of *Guardians of the Galaxy*, Peter Quill is taken by an alien spacecraft and, in Season 2 of *SHIELD*, it is revealed that ancient creatures, identified as of the Kree race (often referred to in *SHIELD* as "blue angels"), visited earth in centuries past (episodes 8, 9, and 10). A Kree is first shown in Season 1 Episode 14 (and again in Episode 15) of *SHIELD*, though its origin remains a mystery until Season 2. The Kree appear throughout *Guardians of the Galaxy*—which was released more than four months after Season 1 episodes 14 and 15.

At the climax of *Captain America: The First Avenger*, Steve Rogers (portrayed onscreen by Chris Evans) crashes an aircraft into the arctic in order to prevent its cargo—a slew of energy weapons created from the Tesseract—from destroying New York City. This event reverberates across the MCU. The crash is relived at the beginning of One-Shot *Agent Carter* and in *The Avengers*, as well as in *Captain America: The Winter Soldier*. Rogers' body—which is discovered 65 years later at the end of *The First Avenger* and successfully resuscitated from being frozen—is searched for, and discovered, in *Fury's Big Week* (the discovery is also depicted in *The First Avenger*). A passing quip by Tony Stark—shown both in *The Incredible Hulk* and *The Consultant*—references the event: Stark tells Gen. Ross that the super soldier program (which Rogers was a successful result of and Ross was seeking to replicate) "was put on ice for a reason."

Similar to some of the major events MCU installments, less prominent events are referenced in other storylines to strengthen the cohesiveness of the grand narrative. For example, Sitwell is on the Lemurian Star ship in an early sequence in *Captain America: The Winter Solider*. In *SHIELD* Season 1 Episode 16, which takes place prior to the film, Sitwell is told to report to the Lemurian Star.

At the end of *Iron Man 2*, Tony Stark is asked by Fury to be a consultant for S.H.I.E.L.D. (This is also depicted from another perspective in *Fury's Big Week*.) Tony Stark references this when he is asked to join The Avengers in the film, reminding Coulson of his "official consulting hours." The premise of One-Shot *The Consultant* illustrates the nature of his consulting role when it is revealed (and depicted) that Tony Stark was acting as a consultant for S.H.I.E.L.D. during his appearance in *The Incredible Hulk*.

Across individual narratives in various media installments of the MCU, events are used quite consistently to reinforce the canon of the storyworld. Because events are so crucial to both individual stories and the grand narrative of the universe, many of these and other events will be explored in more detail in the findings and analysis for RQ2.

Locations: Many locations within the MCU also serve as settings for some of its most pivotal events (see previous section). Rather than revisit these, a few more locations are presented, in addition to those described above in relation to events.

The Triskelion, S.H.I.E.L.D.'s Washington, D.C., headquarters, is first referenced in *SHIELD* Season 1 Episode 7. The building is referenced two more times (in S1: E 14 and 16) before it appears (and is destroyed) in *Captain America:*

The Winter Soldier. It is referenced at least three more times in *SHIELD* after its destruction (S1: E 17, 20; S2: E 7).

Asgard, the home world of Thor, appears in both of the title character's films. The world is also referenced directly in *SHIELD* Season 1 (episodes 8, 13, and 15).

Stark Tower appears in the final stages of construction in *The Avengers* and is referenced in the first episode of *SHIELD*.

Science, Technology, and Natural Laws: From computers and explosives to energy weapons, wormholes, and spacecraft, the world of the MCU features an array of gadgets and phenomena that are uncharacteristic of our world (which is to be expected in a work of science fiction). Though many of the settings for MCU installments take place in an earth presented very similar to our own, some settings take place on alien worlds. Since this Cinematic Universe is a created work of science fiction, studying the laws by which it operates (as well as the science and technology depicted in it) was very useful in understanding how strongly the universe was knit together across media platforms.

In the first Thor film, the title character says to Foster, "Your ancestors called it magic, but you call it science. I come from a place where they are one and the same." This quote is relevant in that it describes the blurred lines between science and fiction in the MCU. With that in mind, technologies and phenomena that would likely be considered fantasy in our world are considered science or technology for the purposes of this study.

A great many of the sciences and technologies depicted and referenced across the MCU are tied to the quest to create the superior man, the super soldier

project. These include the super soldier serum, gamma radiation, the Extremis project, the Centipede project, and the GH325 serum. Though individual storylines stem from each, all are tied to the concept of creating a superhuman being. In the MCU, this is not only possible, but also successful to varying degrees. The next few paragraphs explain the relation of each of the previously mentioned projects in relation to super soldiers.

In *The Incredible Hulk* Gen. Ross explains to Blonsky that Bruce Banner's work with gamma radiation was not, as Banner was led to believe, for radiation resistance but so that the army could create super soldiers. This research led to Banner's transformation into the Hulk, which remains dormant inside him and is triggered by rage. Gen. Ross further explains that the army had created a serum that replicated the results, to a lesser degree. Blonsky takes multiple doses of the serum, leading to his transformation into the Abomination. Fury also mentions this in *Fury's Big Week* in a scene when he confronts Ross. Fury warns Ross of the dangers of his "half-assed super soldier experiment." At the end of the film (some time later after Ross takes Blonsky into custody), Tony Stark reminds Ross, "The super soldier program was put on ice for a reason."

Tony Stark's quip also serves a reference to the events of *Captain America: The First Avenger* (which was released after the Hulk film). In the first Captain America film, Schmidt is a product of an early super soldier experiment by Nazi Germany during World War II (the side effects of which left Schmidt disfigured). The creator of that serum, Dr. Abraham Erskine (portrayed by Stanley Tucci), having since defected to the United States, chooses Rogers as the test subject for his

improved formula. The experiment—which Howard Stark helped engineer and administer—was a success and Rogers not only gains muscle mass and height, he receives superhuman strength, agility, and resilience/healing. Erskine is killed following the experiment, which prevents any future replications of the serum. However in *Captain America: The Winter Soldier*, it is revealed that Bucky Barnes (AKA the Winter Soldier, portrayed by Sebastian Stan)—who was experimented on by Nazi's in *The First Avenger* before being rescued and later going missing—was also a successful test subject of the super soldier program, with abilities mirroring those of Rogers.

Rogers and Barnes not only display similar abilities, they both have unnaturally long lifespans thanks to freezing, further illustrating the consistency of natural laws in the MCU. Rogers is lost in the arctic sometime in 1945 and is found and successfully resuscitated about 65 years later during events in *Captain America: The First Avenger* (specifically in the opening and closing scenes). Similarly, Barnes disappears in an icy wilderness during a mission gone awry in *The First Avenger*. In *The Winter Soldier* it is revealed that Barnes' body was frozen and later recovered—and continuously frozen and unfrozen to keep him as an active operative for decades.

The relation of the Captain America and Hulk events are discussed in *The Avengers* when Banner explains that his plight is a result of attempting to replicate Rogers' successful transformation (which was consistent with information revealed in *The Incredible Hulk*). Rogers' status as a super soldier is referenced frequently in

other installments, including the Captain America sequel (which shows archive footage from the first film) and in several *SHIELD* episodes.

In *Iron Man 3*, A.I.M. creates Extremis, a formula that gives enhanced abilities to humans, including the ability to regrow limbs. This formula, however, is highly unstable, often resulting in subjects exploding. This project is furthered by Centipede, as part of the recurring plot of *SHIELD* Season 1. Centipede eventually stabilizes its version of the Extremis serum and is able to create its own super soldiers, with the effects wearing off after time. Extremis is referenced directly in Season 1 episodes 1, 5, 12, and 21. Also, during Season 1 of *SHIELD* it is revealed that Coulson's resurrection was due to the use of GH325, a serum concocted from alien DNA. The GH325 serum is used to perfect Centipede's version of Extremis.

The existence of super soldiers in the MCU creates its own set of physical rules as it relates to resilience, injury, and healing. These superhuman abilities are not only evident to varying degrees in enhanced human characters, such as Rogers (Captain America), Barnes (the Winter Soldier), and the Hulk, alien races, which appear throughout the MCU, also display varying degrees of superhuman abilities. Enhanced humans can survive even the most unfathomable conditions (refer also to Rogers' and Barnes' lifespans above). For example, Hulk is riddled with bullets and energy blasts several times in both *The Incredible Hulk* and *The Avengers*. In both, the creature also displays tremendous strength and the ability to bound over skyscrapers.

The GH325 serum is created from the corpse of a Kree. In *Guardians of the Galaxy*, Kree are depicted as one of the more powerful races in the universe. Though

the Kree-based serum was used to resurrect Coulson, as well as heal or prolong the life of other characters (see S1: E 14, 15, 20, 21, 22; S2: E 7, 8, 9, 10), it is not inconsistent with the laws of the MCU for human and alien DNA to be compatible. In *Guardians of the Galaxy* it is revealed that Quill is only half human, his alien DNA being credited with helping him survive contact with the infinity stone (which incinerated other characters on contact).

Alien biology is also shown to have negative effects on humans. In *SHIELD* Season 1 Episode 6, a Chitauri virus fatally infects at least three people who came into contact with a helmet discovered after the Battle of New York. The GH325 serum causes madness in humans (exceptions apply to a select group of humans) in a recurring plot theme beginning in *SHIELD* Season 1, Episode 20 and culminating (while spurring a new plot theme) in Season 2, Episode 7. The complexity of alien biology, however, appears to remain consistent—whether useful or dangerous—across the MCU.

Alien races such as Asgardians (of which Thor and Sif are), Chitauri, and Frost Giants appear in various MCU installments and display varying levels of abilities, which all appear to be consistent throughout. Asgardians, for example, are introduced in *Thor* and show tremendous power and resilience. Trauma that would unquestionably kill or otherwise severely incapacitate a human—like being pummeled repeatedly into concrete by a giant Hulk (as Loki was in *The Avengers*)—serves usually to only inconvenience an Asgardian (as it did Loki). On earth Asgardians are referred to as gods. In both *Thor* and *Thor: The Dark World* it is explained that these beings can live for thousands of years. In *SHIELD* Season 1

Episode 8 Randolph is revealed to be an Asgardian that has lived on earth for centuries. Understanding the history (see events) of Asgardians visiting earth in its ancient times and that these beings live extended lifespans, it is feasible to believe this within the grand story of the MCU.

Of the alien races that recur throughout the MCU (there are several in *Guardians of the Galaxy* which do not appear outside the film) the Chitauri are among the most fragile. Though they are larger in stature and stronger than humans, during the Battle of New York they are killed in battle as easily as human soldiers are killed in other battles. However, considering that "earth's mightiest heroes," The Avengers, are the ones battling the Chitauri, and that the creatures render New York's citizens all but helpless, it is presumable that these beings are stronger and more resilient than humans. In any case, the varying level of abilities across the alien races is consistently treated from race to race, and from installment to installment.

The stones of power—as they are called in *Guardians of the Galaxy*—include the Tesseract and the Aether and are objects of near-unlimited power that appear as the subject of conflict in several MCU films. The Tesseract is introduced in *Captain America: The First Avenger*, referenced in *Thor*, and appears again in *The Avengers*. The Tesseract can be used as an energy source, to create energy weapons, and to create portals to other worlds. The Aether, which is introduced in *Thor: The Dark World*, is shown to have the ability to destroy worlds. The Tesseract appears briefly in *Thor: The Dark World*, and both appear in *Guardians of the Galaxy* when the stones of power (also called infinity stones) are described. Understanding the

existence of these stones, and their power, provides a richer knowledge of how the laws of science operate in the MCU. Wormholes and highly destructive energy weapons, for example, are possible.

According to the *Thor* film, the universe of the MCU consists of nine realms. This astronomical assertion is not disputed (from a narrative perspective, though some human characters question it at first) and is confirmed in *Thor: The Dark World*. The world's tree, a diagram Thor uses to illustrate the nine realms, is shown on an engraving in *Captain America: The First Avenger*. The nine realms are referenced in *SHIELD* Season 1 Episode 15.

Travel across space and these nine realms is possible in the MCU by a number of means. Various spacecraft, with the ability to traverse the universe in little time, are depicted in *Thor: The Dark World* and in *Guardians of the Galaxy*. Thor's primary means of travel between worlds is the Bifrost, a rainbow bridge that transports travelers anywhere almost instantaneously. When the bridge touches down, it leaves a stamp, a Norse symbol, on the ground. This stamp is depicted consistently when Bifrost travel is used, by Thor, other Asgardians, and Foster in *Thor* and *Thor: The Dark World*, and by Sif in *SHIELD* Season 1 Episode 15. The Bifrost is also discussed—and its existence predicted—in *Fury's Big Week*. In the comic, Coulson predicts that the weather anomalies discovered by Foster could be signaling an Einstein-Rosen Bridge (bridge between worlds), which Sevlig and Foster also discuss in *Thor*.

The more widely used mode of intergalactic travel, however, is through wormholes, portals from one world to another. In *Thor* it is revealed that Loki

knows of secret paths between worlds (explaining his ability to travel from world to world undetected), knowledge that is put to use in *Thor: The Dark World*. These paths are explained as the way Lorelei (portrayed by Elena Satine) made her way to earth in *SHIELD* Season 1 Episode 15.

In *The Avengers* Loki is also able to use the Tesseract to travel between worlds and, with some engineering, able to use it to create a wormhole large enough to bring an army to earth (setting off the Battle of New York). Tony Stark crosses through the portal with a nuclear missile to thwart the attack, returning just before the portal is closed. The Tesseract is then used by Thor to return himself and Loki to Asgard at the film's conclusion. Stark's experience in the wormhole is referenced several times in *Iron Man 3*, implied to have caused post-traumatic stress disorder (PTSD) in the character. The Tesseract also creates a portal, into which Schmidt is banished, at the climax of *Captain America: The First Avenger*.

In the second Thor film, it is explained that every 5,000 years the nine realms converge, which causes the lines between them to become blurred—this allows for erratic travel between them. During the convergence, not only are objects and creatures able to pass between worlds, the laws of gravity on earth bend. This anomaly is depicted and referenced consistently between its introduction in *Thor: The Dark World* and the related storylines in *SHIELD* (S1: E 7, 9, 15), most notably in Episode 9 where a character is discovered to have been trapped between earth and another world as a result of the convergence.

Not only do the natural laws of the MCU affect the realm of the physical, they impact the mental as well. Mind control—characters having their bodies and wills

controlled by another character or force—is a recurring subject in MCU storylines. Through the Tesseract's power, both Barton (portrayed onscreen by Jeremy Renner) and Selvig (and others) come under Loki's control in *The Avengers*. Selvig refers to his experience in *Thor: The Dark World*, saying, "I had a god in my head, I don't recommend it." Similarly, when Foster comes in contact with the Aether in *Thor: The Dark World*, it not only nearly kills her, it also affects her mental state, causing her to have visions of destruction (consistent with the Aether's purpose).

In *SHIELD* Season 2 episodes 9 and 10 Alphonso "Mack" Mackenzie (portrayed by Henry Simmons) loses control of his mind and body when he enters an underground Kree city. He is used to fight off S.H.I.E.L.D. agents and to guide select humans to a temple.

In addition to supernatural means, in the MCU humans use brainwashing to gain control of others. In *Captain America: The Winter Soldier* it is explained that Barnes' memory was wiped over-and-over to assure his compliance for HYDRA operatives. HYDRA uses a similar method—with consistent results—to control S.H.I.E.L.D. agents in *SHIELD* Season 2, Episode 3.

Alien technology affords the ability to create energy weapons (which emit brightly colored bursts of light) in the MCU. The Tesseract is used by Schmidt to create mankind's first of such weapons in *Captain America: The First Avenger*. These HYDRA weapons appear again in *The Avengers* when Rogers discovers that S.H.I.E.L.D.—which recovered the Tesseract shortly after his crash—had been using the Tesseract to create its own weapons. *Fury's Big Week* chronicles the organization's desire to utilize the Tesseract's power, as well as its recruitment of

Selvig (also depicted briefly in *Captain America: The First Avenger*) to help with that endeavor.

When the Destroyer is introduced in *Thor*, it is shown to have the power to fire bright orange bursts of energy. A similar orange burst comes from a weapon wielded by Coulson in *The Avengers* and *SHIELD* Season 1 Episode 22. In *Fury's Big Week* it is revealed that S.H.I.E.L.D. assumed control of the Destroyer after New Mexico and used it to build the weapon.

In the Battle of New York the Chitauri use energy weapons. One of these weapons is recovered by two civilians as part of the main plot of *Item 47*. The end of the film suggests that S.H.I.E.L.D., after recovering the weapon, was able to use it to create prototypes of new weapons, though this has yet to be explored further.

Energy weapons are used throughout *Guardians of the Galaxy*. Energy force fields are also used in both *Guardians of the Galaxy* and in *Thor: The Dark World*. The force fields in both films have a similar aesthetic (translucent gold).

Though much of the MCU's advanced technology is of alien origin, human ingenuity in the universe has also produced creations notable to the continuity.

In the first Iron Man film, Tony Stark uses a series of transparent projections to create 3D images that are responsive to touch. This computer technology is used throughout the three Iron Man films, as well as by both Stark and S.H.I.E.L.D. in *The Avengers*, *Item 47*, *Captain America: The Winter Soldier*, and in *SHIELD* Season 1 Episodes 1, 8, and 9. A similar, though more advanced, system is shown in *Thor: The Dark World* and throughout *Guardians of the Galaxy*.

In *Iron Man 2* Tony Stark creates a new element, which is used to save his life. The creation of the element is also referenced in *Fury's Big Week* and is used in S.H.I.E.L.D.'s Tesseract research. No name is given for the element, though the comic book explains this was due to Stark having legal difficulties in attempting to name it "Badassium."

As *Captain America: The Winter Soldier* reaches its climax, Romanoff (portrayed onscreen by Scarlett Johansson) uses a mask to alter her appearance, making her face look like that of another character. This same technology is used in *SHIELD* Season 2 Episode 4. The mask used in the television series malfunctions and permanently alters the face of the character, Agent 33, wearing it. Agent 33 reappears in episodes 9 and 10 of the second season with the altered appearance.

Fury uses a special laser tool to cut through a street and escape an assault in *Captain America: The Winter Soldier*. This same laser system is used in *SHIELD* Season 1 Episode 17. Also in *The Winter Soldier*, a S.H.I.E.L.D. vehicle has a touch screen windshield monitor. The same technology appears in *SHIELD* Season 1 Episode 3.

Summary and Analysis for RQ1

As was described in greater detail above, the Marvel Cinematic Universe maintained strong continuity throughout its various cross-media installments through the use of characters, organizations, events, locations, and science/technology/natural laws. Through personal appearances and personal references by characters in multiple media formats, the MCU strengthened the relationship between its installments. Likewise, through the consistent treatment of

technology and natural laws, as well as organizations, and the consistent depiction of locations, the MCU maintained a tight-knit continuity, consistent with a true transmedia narrative. Finally, events were depicted and referenced consistently throughout the narrative to give audiences a deeper understanding of the connections between various installments. This aspect of the storytelling—the connections between events from installment to installment—is explored further below, in the findings and analysis for Research Question 2.

Findings of RQ2— How has Marvel employed additive comprehension to strengthen the relationship between film, short film, television, and print media narratives within its Cinematic Universe?

In describing how to weave a successful transmedia narrative, Geoffrey Long (2007) notes the importance of negative capability—the purposeful insertion of gaps within the narrative to create a sense of mystery for the audience. This relates to Marc Ruppel's (2012) description of migratory cues—which are plot points hidden within a story to signal audiences toward a story in another media format—because the latter can be used with the former to connect separate installments of a transmedia franchise. Howard described this more simply in his description of additive comprehension:

> Additive comprehension incentivizes the audience to cross over and experience different stories and comes in the form of revealing new details about the macro-story event, discovering a new part of the setting, learning more about the characters, and learning new details about another micro-story in the franchise. (Howard, 2013, p. 106)

This aspect of the MCU is what was examined in seeking to answer RQ2. Quite simply, what are the connections that tie the Marvel Cinematic Universe together across different installments and various media? Numerous such connections were identified in the research process. Below are some examples of the findings, both of ones that are wide-reaching and impacting a number of installments, as well as ones that are less expansive but demonstrate the intricacy of the MCU grand narrative.

As a brief reminder, by definition stories within a transmedia narrative must have the ability to stand alone while simultaneously giving individuals who consumed other stories a richer experience. This is important to note because as the additive comprehension aspect of the MCU was evaluated, individual installments were also considered for their ability to be enjoyed without prior knowledge of other installments. It is also important to note that a story's ability to stand on its own is not necessarily contingent upon the ability for an audience to understand the significance of every reference made in a particular narrative. For example, though a full understanding of the MCU would make a viewer aware when watching *The Avengers* that the weapon Coulson trains on Loki was created from the Destroyer—which S.H.I.E.L.D. apprehended at the end of *Thor*—absence of such knowledge (which could only be gleaned from reading *Fury's Big Week*) does not impact a viewer's ability to enjoy the film. Likewise, though it is typically best to watch a sequel, such as *Iron Man 2*, after the first film in a series, like *Iron Man*, one can usually still enjoy the second film's primary plot without having had to have seen its predecessor. So while events in the first film might enrich a viewer's experience, having not seen them as depicted in the first film should not cripple a viewer's

ability to follow the plot of the sequel. This note is relevant as it relates to the intersecting storylines—especially throughout franchise installments like Iron Man (1, 2, and 3)—described below.

One of the strongest conduits of additive comprehension in the MCU is the eight-chapter comic book *Fury's Big Week*, which provides an alternate perspective for at least six major events, and several more minor events, spanning six films: *Iron Man*, *The Incredible Hulk*, *Iron Man 2*, *Thor, Captain America: The First Avenger*, and *The Avengers*. It also ties to the storylines of *The Consultant* and *A Funny Thing Happened on the Way to Thor's Hammer*. The comic book not only depicts these prominent events, it helps to enrich the understanding of them, especially as the storyline for each event continues through its primary individual franchise installment (such as Iron Man or Thor) and relates to the MCU's grand narrative.

The first major event in the MCU is Tony Stark's kidnapping in *Iron Man*, which results in shrapnel being embedded in his chest, threatening to invade his heart. This prompts Stark to create the arc reactor, a device he inserts into his chest in order to keep the shrapnel at bay. In *Iron Man 2*, Stark learns that the arc reactor is poisoning him with radiation, threatening claim his life in the near future. While a viewer would have a more enriching experience viewing *Iron Man 2* after having already seen the *Iron Man* film, the story is developed enough, with references to the first film, so that not seeing the first film will not affect a viewer's ability to enjoy the plot of the second. However, the situation as understood with both knowledge gleaned from the two films and *Fury's Big Week* provides a more rewarding experience.

During *Iron Man 2*, Fury confronts Stark—who has all but given up on life—to find a solution to the threat. Fury finds Stark in a giant donut sign atop Randy's Donuts. This image reappears in *Fury's Big Week*. In this scene, Romanoff, unbeknown to Stark, injects him with a temporary solution: "lithium dioxide," which Fury says could dampen the poisoning effects temporarily. Fury explains that he had dispatched Romanoff to monitor Stark when Fury learned Stark was ill. Though this information is not presented in a way that causes one to question how Fury came to know so much about Stark's woes, or how he was able to create an antidote, *Fury's Big Week* sheds more light on the matter.

In Chapter 2 of *Fury's Big Week*, Fury—who is monitoring both Stark and Banner while facilitating a search for Rogers' body and receiving updates about strange weather conditions in New Mexico from Coulson—is alerted of Stark's near-fatal condition after laboratory technicians analyzed a blood sample. In the chapter a lab-tech gives Fury the lithium dioxide, explaining that it is not a cure but rather a way to temporarily slow the symptoms of the poisoning. At the end of Chapter 2, the opening of the Randy's Donut scene is depicted from Fury's perspective. In the comic book Fury commands Romanoff to go in through the back of the shop to ensure the perimeter is secure. He also instructs Romanoff to stick Stark in the neck with the needle upon his signal. In the film, when Romanoff appears (seemingly out of nowhere) she tells Fury the perimeter is secure. Later, Fury snaps his fingers and says, "Stick him," and Romanoff suddenly injects Stark with the solution. Though Fury's command can easily be overlooked in the film (enriching the surprise of

Romanoff's action), the perspective from the comic book provides a unique insight to how the scene unfolded.

Ultimately, Stark creates a new element to power the arc reactor without the damaging effects. This part of the story is depicted in both *Iron Man 2*, from Stark's perspective, and briefly in *Fury's Big Week*, from Fury's perspective. Other scenes leading up to Fury's confrontation of Stark in *Iron Man 2* are depicted in Fury's *Big Week*, including the birthday party where Rhodes (in War Machine armor) battles a drunken Stark (in Iron Man armor), destroying the interior Stark's Malibu home. Though in viewing *Iron Man 2* it would be clear that Stark's arc reactor was poisoning him, *Fury's Big Week* paints more details to other character's (like Fury's and Romanoff's) roles in his salvation.

Later in Fury's Big Week, in Chapter 3, Romanoff's role in the climactic scene of *Iron Man 2*, the Stark Expo battle (Whiplash vs. Iron Man and War Machine), is revisited. In the film, she hacks into Hammer-Tech's system to help Rhodes regain control of the War Machine armor. In the comic book, it is revealed that she is simultaneously conversing with Fury, who ultimately dispatches her to Virginia, explaining her haste departure from the film. In Chapter 4 Romanoff is ordered to keep an eye on Banner, and ensure that he is not captured by Gen. Ross. This begins to tie the plot of *The Incredible Hulk* more strongly to the greater narrative of the MCU.

The story of *The Incredible Hulk* chronicles Banner's evasion of Gen. Ross while seeking to cure himself of the Hulk—the monster into which Banner transforms when he becomes angry. At the beginning of the film, Banner is living in

Rio de Janeiro, Brazil while working at a bottling plant. In the first chapter of *Fury's Big Week*, it is revealed that S.H.I.E.L.D. is monitoring Banner. An image of Banner working in the bottling plant is depicted. After a failed apprehension attempt of Banner by Gen. Ross in Brazil, Banner makes his way to Culver University in Virginia. In Chapter 2 of the comic, while Fury is about to meet with the laboratory technicians about Stark's condition, he is told over the phone by Sitwell—who it is revealed has been monitoring Banner undercover—that Banner cleared customs. This reference helps lend perspective to the relationship of the two story's timelines.

At Culver University, Gen. Ross, along with some heavy artillery led by Blonsky, again attempts to apprehend Banner. Romanoff, having been dispatched (in Chapter 4) to follow Banner after her role in the Stark Expo battle (depicted in *Iron Man 2* and partially in chapters 3 and 4), witnesses the assault (in chapters 4 and 5), in which Banner transforms into the Hulk, defeats Blonsky (who has been genetically enhanced by an experimental super soldier serum), and escapes. Fury explains in Chapter 4 that he had to pull Sitwell off of Banner surveillance to aid in New Mexico (which will be explained shortly). News coverage of the event (with the same news correspondent shown in both films) at Culver University is shown briefly on a computer screen near the end of *Iron Man 2*, the day after the Stark Expo battle, which is consistent with the timeline depicted in *Fury's Big Week*.

After the incident at Culver University, Banner, in the film, makes his way to Grayburn College in Harlem where he meets Dr. Sterns. With the help of Sterns, Banner tests a potential cure of the Hulk. After the test, Banner is apprehended by

Gen. Ross. Blonsky then forces Sterns to enhance him to the same degree as the Hulk. After Blonsky is transformed (into the Abomination), Sterns suffers a head injury, which exposes him to the chemical used to transform Blonsky. This leads up to the Harlem Incident—referenced after the film in *The Consultant*, *The Avengers*, and *SHIELD* Season 1 Episode 13—which is depicted in part and referenced from both Fury and Romanoff's perspective in Chapter 7. During the Harlem Incident the Hulk defeats Blonsky, who is on a violent rampage in Harlem. Gen. Ross then takes Blonsky into custody and Banner escapes (all of which is depicted and described in both the film and comic book).

In Chapter 6, Fury confronts Ross just before he goes to New York to apprehend Banner at Grayburn. Romanoff is dispatched to intercept Banner, but is too late, she watches as he is taken away and then as the Abomination bursts through the walls. Romanoff then goes inside and apprehends Sterns, who is not seen again after being injured in *The Incredible Hulk*, enriching the understanding of that event.

Not only does *Fury's Big Week* provide further perspective into the events of *The Incredible Hulk*, it also sets up the storyline for *The Consultant*. Fury disagrees with Ross during their interactions, and, as part of the comic's main storyline, it is revealed that the World Security Council (which oversees S.H.I.E.L.D.) is interested in collaborating with Ross. In *The Consultant*, it is further explained that when Ross took Blonsky into captivity after the Harlem Incident, the council showed interest in recruiting Blonsky for the Avengers Initiative. Coulson and Sitwell successfully devise a plan in which they send Stark, who is now a S.H.I.E.L.D. consultant (as was

depicted in *Fury's Big Week* and *Iron Man 2*), to intentionally fail the negotiations for Blonsky's release (part of the conversation between Gen. Ross and Stark is depicted in both the One-Shot and in the final scene of *The Incredible Hulk*). *The Consultant*, then, expands a viewer's understanding of the MCU, both by illustrating part of what Stark's role as a consultant for S.H.I.E.L.D. entails and by linking the events of *The Incredible Hulk*, *Iron Man 2*, and *Fury's Big Week*.

While Fury is attempting to save Stark's life and prevent Banner from being apprehended and used as a government lab rat, Coulson tries to alert him of weather anomalies in New Mexico. Chapter 3 of the comic books shows an image of Foster and Lewis tracking the strange weather in the desert, as was depicted in the opening scene (and subsequent scenes) of *Thor*. Coulson appears in both *Iron Man 2* and *Thor*. In the former film, Coulson is tasked by Fury to prevent Stark from deviating from his task (which is to save his own life), and more specifically to prevent Stark from leaving his home, where he was to be working. During this time in *Iron Man 2* Stark leaves his home for a period of time. In the film, after Stark returns to his home, Coulson appears and reprimands Stark for breaking the perimeter. Stark asks Coulson where he has been, to which Coulson simply responds, "I was doing some stuff." Shortly thereafter, Coulson explains to Stark that he has been reassigned to New Mexico. Chapter 3 of *Fury's Big Week* reveals that while Coulson was supposed to be watching Stark he was closely monitoring the situation in New Mexico. Shortly before Thor's hammer crashes into earth—which is depicted in the final scene of *Iron Man 2*, at the end of Chapter 3, and in *Thor*—Fury

chides Coulson for allowing Stark to leave under his watch before dispatching Coulson to New Mexico.

The short film, *A Funny Thing Happened on the Way to Thor's Hammer*, chronicles an adventure from Coulson's trip from Malibu to New Mexico where he thwarts a would-be robbery at a Roxxon gas station. In the process, some shelving is damaged. Barton visits the same location briefly in Chapter 4 of *Fury's Big Week*. Caution tape highlights the areas damaged in Coulson's tussle. The events of Coulson's trip to New Mexico may not be essential to the plot of either *Iron Man 2* or *Thor*, however, the short film on its own enriches the viewer's understanding of both Coulson's abilities and his timeline between the two films. The reference to the event in the comic book serves as an acknowledgement of its place in the grand MCU timeline.

The strange weather Coulson was monitoring is explained in the film *Thor* to be the result of Odin, Thor's father, banishing his son to earth and stripping him of his power, including his magical hammer Mjölnir, which is also sent to earth (King Arthur style—unable to be moved except by one who is worthy). New Mexico—more specifically the fictional town of Puente Antiguo and the surrounding dessert—becomes the setting for much of the second and third acts of *Thor*, culminating in a battle between Thor and the Destroyer (a giant robot-like creature that can be controlled, in this case by Loki). Before the climactic battle, S.H.I.E.L.D. builds a containment facility around the hammer, which is embedded in rock and unable to be moved. Thor breaks into the facility in an attempt to retrieve his weapon. During this time Barton is dispatched by Coulson to monitor the situation.

After Thor realizes that his power to wield the hammer has truly vanished, Coulson takes him into custody. While Thor is held captive, Coulson visits him and then leaves the room. Loki pays a visit to Thor before Coulson returns. Thor then escapes with the help of Selvig and Foster before Loki eventually sends the Destroyer to annihilate Thor. During his battle with the Destroyer, Thor proves his worth and regains control of Mjölnir, which he uses to defeat the Destroyer.

Chapters 4 and 5 provide another perspective to the events of New Mexico, and chapters 6-8 deal with its aftermath, providing more enriching information for a comic book reader without taking away from the individual experience of either reading the book or watching the film. In Chapter 4, while Thor is breaking into the S.H.I.E.L.D. camp, Barton is depicted just arriving on the scene (after having been called in by Fury and making a stop at the Roxxon gas station). It then parallels Coulson's ordering Barton to keep an eye on Thor in the film. While Coulson begins to question Thor, Barton notices Foster arrive outside the fence. He pulls Coulson from his meeting to discuss the matter (allowing Loki to pay Thor a visit, which is also depicted, in part, in the chapter) and the two decide to allow Thor to escape with a surveillance tail (this helps to explain why Thor's escape in the film was met with so little resistance). In Chapter 5, scenes from Thor's battle with the Destroyer are depicted, revealing that during the fray Coulson saved Sitwell's life. After Thor's victory, the next few chapters chronicle how S.H.I.E.L.D. collects the Destroyer and ultimately creates a weapon from the technology. The weapon appears in *The Avengers* and *SHIELD* Episode 22 with no reference to its origin. *Fury's Big Week*

enriches the experience for both by providing more backstory to the weapon's development, backstory that is not necessary to the enjoyment of the other stories.

While *Fury's Big Week* entails destructive events with Iron Man, the Hulk, and Thor, it simultaneously furthers the plot of *Captain America: The First Avenger*, which is predominantly set during World War II (all of the other events are set in May of 2010). During the war, HYDRA founder Johann Schmidt discovers the Tesseract, an ancient cube of tremendous power (it is revealed in the film to have been left on earth during events depicted in *Thor*). During Steve Rogers' climactic confrontation with Schmidt, the Tesseract is lost at sea and Rogers is forced to crash-land into the arctic. The Tesseract is recovered (by Tony Stark's father, Howard, working with S.H.I.E.L.D.'s predecessor, the SSR) but Rogers' body is not found until about 65 years later. The crash is re-portrayed in *Agent Carter* and in part in *The Avengers* and *Captain America: The Winter Soldier*.

Rogers' acclimation to society is an important theme in both *The Avengers* and *The Winter Soldier*, and understanding that he is misplaced in history (a WWII soldier trapped in the post-modern era) is key to understanding either of those stories. Though viewing *The First Avenger* certainly makes for a more enriching experience, both subsequent films adequately explain the situation through the use of flashbacks and dialogue references to the past events. In short, viewing all three provides the richest experience, but any of the stories are capable of standing alone (to the degree that a sequel could be expected to). Furthermore, *Agent Carter* provides an even deeper aspect to the story by depicting the crash from the perspective of Peggy Carter, Rogers' love interest, who was on the radio with him

when the plane went down. A portion of the short film deals with her grieving in the aftermath. The two characters have a chance to reunite in *The Winter Soldier* (Carter having aged with the times and Rogers still in the prime of life). *Agent Carter* is a strong use of transmedia—telling its own story (a spy adventure starring Carter) while enriching the knowledge of another story through another character's perspective.

Fury's Big Week enlightens readers about the search for Rogers' body. The opening scene of Chapter 1 portrays moments from before the crash. It then shows S.H.I.E.L.D. recovering debris more than 60 years later as Fury leads a search Rogers. This is perhaps the most questionable strand to this web of a story as—at that point in the MCU timeline—there was no precedent set forth for Fury to assume that Rogers' body would be of any use to him. Not only is Fury searching tirelessly for Rogers (claiming it could help with the Tesseract research), he does so behind the back of the World Security Council after they command him to stop searching. Though Fury's actions in the comic make little sense—giving the impression that this storyline may have been a forced attempt to more strongly tie Fury's storyline to Captain America's—it nonetheless fits within the overall canon of the MCU as Rogers body is discovered and S.H.I.E.L.D. does manage to thaw and resuscitate him (as is explained at the end of *Captain America: The First Avenger*, *The Avengers*, and *Captain America: The Winter Soldier*). The discovery of Rogers' body is mentioned in the opening and closing chapters of *Fury's Big Week* (which set up and then give closure to the "big week" flashback depicted in the other six issues).

During Fury's search for Rogers, before the other events begin to really gain traction, the World Security Council pressures Fury to allocate more resources to studying the Tesseract. Fury says that it is being studied as a possible source for clean, sustainable energy (this is also discussed in *The Avengers*, and is mentioned in *SHIELD* Season 1 episodes 1 and 8). The events of the "big week" prompt Fury to consider the need to further explore the Tesseract, possibly to create weapons—which is a point of contention in *The Avengers*. The comic book more strongly ties together the decision by S.H.I.E.L.D. to create Tesseract weapons and the reasoning Fury provides in *The Avengers*. In the film, Fury justifies this decision by recounting New Mexico and pointing out that mankind then realized how poorly armed it was in comparison to *Thor* and creatures of his stripe, and that it was important that mankind be prepared to defend itself. Fury admits that he was apprehensive to do this but did it anyway for the sake of protecting earth. The emotional gravity of Fury's decision—which is merely referenced in the film—is shown in Chapter 7 of Fury's Big Week. After successfully preventing Blonsky from destroying Harlem and Banner from being captured, helping Stark to create a new element, and assuming control of the Destroyer, Fury and Romanoff discuss how unprepared S.H.I.E.L.D. was to handle the events. Fury vows to never be this unprepared again before recruiting Selvig to work on the Tesseract project. Selvig's involvement with the Tesseract project is mentioned at the end of *Captain America: The First Avenger*, and tied to the plot of *The Avengers*, as Loki (through mind control) uses Selvig's experience with the Tesseract to engineer a machine to amplify its power (leading to the Battle of New York). Though Fury's description of his decision to advance the

Tesseract studies was adequately explained in *The Avengers*, readers of *Fury's Big Week* will likely be more sympathetic to it.

Banner's Harlem Incident, Stark's life-saving arc reactor, Thor's visit to earth, and Captain America's discovery and experience with the Tesseract are mentioned in *The Avengers*, though only limited knowledge of each, that which is presented in the film, is necessary to understand the film on its own. *The Avengers* has its own plot that is only dependent on limited knowledge of each storyline. For example, Captain America's struggle to adapt to the future is a part of his character development in the story of *The Avengers*. Though viewing *Captain America: The First Avenger* would give a viewer more backstory to understand the character's history, enough information (by way of flashbacks) is presented in *The Avengers* to keep audience members who have not seen *The First Avenger* from enjoying *The Avengers*. In summary, through an understanding of each of the separate MCU films through 2012, in addition to *Agent Carter*, *The Consultant*, *A Funny Thing Happened on the Way to Thor's Hammer*, and *Fury's Big Week*, many of the events are shown to have a relationship within a grand narrative—a relationship that does not need to be understood in order to enjoy a single installment—contributing to the transmedia experience of the MCU.

Just as many events intersect in *Fury's Big Week*, so do they in *The Avengers*. In many ways, *The Avengers* serves as the combined sequel for all of the installments prior to its release (*Iron Man*, *The Incredible Hulk*, *Iron Man 2*, *A Funny Thing Happened on the Way to Thor's Hammer*, *Thor*, *The Consultant*, *Captain America: The First Avenger, Agent Carter, Fury's Big Week*) as well as the combined prequel for all

of the subsequent installments (*Item 47*, *Iron Man 3*, *SHIELD*, *Thor: The Dark World*, *All Hail The King*, *Captain America: The Winter Soldier, Guardians of the Galaxy*). The film's relationship to its predecessors is detailed extensively above. Understanding how the events of *The Avengers* influences the universe going forward also adds to the overall MCU experience.

The film *Guardians of the Galaxy* seems to be the most distant narrative from the rest of the MCU, however, Thanos the Titan appears in both *Guardians* and *The Avengers*. In both instances Thanos is interested in obtaining a stone of power—first the Tesseract in *The Avengers* and then the unnamed infinity stone in *Guardians*. Also, at the end of *Thor: The Dark World* two characters (Sif and Volstagg) interact with a character from *Guardians* (the Collector).

The climactic Battle of New York in *The Avengers* is referenced in every subsequent installment of the MCU—so much so that not having seen the film could affect the viewing experience of any following story. Though the event is extremely influential, the plots of each subsequent installment do not depend on an understanding of the event itself—but are nonetheless greatly enriched by it.

For example, in *Thor: The Dark World*, Loki is in captivity on Asgard because he led the New York invasion. Some context is presented—as would typically be treated in a film sequel—for Loki's imprisonment, most notably through a dialogue between Loki and his parents when he is sentenced to prison at the beginning of the film for his crimes in *The Avengers* and *Thor*. But the film's primary plot revolves around the Dark Elves seeking control of the Aether; so while passing references are made to New York, the film does stand on its own. Still, the experience is certainly

richer with an understanding of both the events of *Thor*—where Loki's rivalry with his brother, Thor, ended with his being lost in space—and *The Avengers*—where Loki returns to seek his vengeance—especially when, in *The Dark World*, Thor looks to Loki for help, giving the character a chance at redemption.

Iron Man 3 not only deals beautifully with the aftermath of *The Avengers*, it closes the arc from the very first scene of the MCU, where shrapnel is lodged in Tony Stark's chest (which was explained earlier). At the end of the film, after coming to terms with everything that he has been through, Stark has the shrapnel surgically removed. Before getting to that point, Stark grapples with panic attacks and other emotional issues throughout much of the film. While Stark's erratic behavior could be understood without having witnessed what happened in New York during *The Avengers* (*Iron Man 3* does explain that the Battle of New York was an alien invasion and that Stark went through a wormhole at some point during the battle), viewers who got to know Stark throughout his character journey across three previous films would understand how drastically the world had changed, and how much that affected Stark, a man of science and reason. Stark's apparent bout with PTSD, while understandable without prior story knowledge, is greatly enriched by the full transmedia experience.

The major storylines intersecting throughout the MCU are numerous, beyond what has already been presented. Perhaps an equally important case for the MCU's successful implementation of transmedia principles is found in how additive comprehension is used to connect smaller storylines.

In *Thor: The Dark World* there is a prison break in Asgard when the city is invaded. This thread is expanded in *SHIELD* Season 1 Episode 15 when one of the escapees, Lorelei, makes her way to earth and wreaks havoc. The television episode also sheds more light on the emotional dynamic of the Thor franchise. In the episode, Sif is dispatched to earth to retrieve Lorelei. In the ensuing confrontation, Lorelei mocks Sif for her failure to successfully woo Thor (who started and developed a relationship with Foster during the two films), saying that he does not regard her any more highly than a pet. In *Thor: The Dark World*, Sif's facial expressions and body language (especially toward Thor and Foster, separately and together) suggest that she may have strong feelings for Thor. Though the revelation does tie the plot of the episode to the film, the episode does not hinge on that knowledge. The information merely enriches the experience of both.

During *Captain America: The Winter Soldier*, Fury announces that he is going "off the grid." Before the film was even released, in *SHIELD* Season 1 Episode 14, Coulson, who works for Fury, was desperate for answers only Fury could give (Fury was referenced frequently up to that point and had made an appearance in the show's second episode). In Episode 15 Sitwell tells Coulson that Fury is off the grid. In the film, Fury reappears, only to apparently be killed. In Episode 16, Coulson learns that Fury is back and in Episode 17 he hears that Fury is dead. Coulson expresses his disbelief at the announcement, noting Fury "is a hard man to kill." Toward the end of the film, Fury reappears, having faked his death. This is referenced in Episode 18. Fury sheds his eye patch for sunglasses in the final scenes of *The Winter Soldier*. Fury makes an appearance in *SHIELD* Season 1 Episode 22,

wearing sunglasses, rather than the eye patch he had worn in his previous appearance. Though the TV episodes unfolded across a number of weeks, their relationship to the timeline of the film—and in the grand scheme of the MCU—is more clearly illustrated with the use of additive comprehension.

In the first Iron Man film it is revealed that Howard Stark and his wife were killed in a car accident. Viewers are reminded of this in *Iron Man 2*. In *Captain America: The Winter Soldier* it is revealed that this was not an accident but an assassination generated by HYDRA. (Howard Stark was also a character in the first Captain America film.) But the revelation does not necessarily distract from the overall plot of the second film, especially considering that the comment was made in passing. Even if a viewer had viewed no previous MCU installments, the comment was made so quickly that it could easily be overlooked in the grand scheme of the plot. Viewers of just the Iron Man franchise would be led to believe Howard Stark's death was an accident, but those who also viewed *The Winter Soldier* were rewarded with a deeper understanding of that event. This is a small, yet powerful, illustration of the use of additive comprehension in the MCU.

One of the most rewarding—and also one of the smallest—story threads within the MCU is that of Coulson's love interest: the cellist. This mini-story is introduced in passing in *The Avengers*, when Pepper Potts, who is with Tony Stark, asks Coulson about his love life. She asks Coulson if he and "the cellist" are still "a thing." Coulson responds by telling Potts that she had moved back to Portland. The cellist is also referenced by Stark later in the film. The cellist is not referenced again until Episode 10 of the first *SHIELD* season (more than a year later), and then only in

passing, when Coulson mentions that she is the second chair of the Portland Symphony Orchestra. Coulson talks about the relationship and his longing to be reunited with her. The reason for their separation is explained—after Coulson was killed just before the Battle of New York (in *The Avengers*) she was alerted of his passing. After Coulson's resurrection (revealed as part of the *SHIELD* Season 1 storyline) the cellist had already been notified of his passing and Coulson was forced to maintain secrecy. In the following episode (11), while being psychologically tortured, Coulson is reassured that "she did love you" and that she "cried for days" when S.H.I.E.L.D. told her he had died. The cellist is referenced again in Season 1 Episode 18 before Episode 19 when the character makes her debut appearance and her name, Audrey Nathan, is revealed. As a supporting character in a few films, Coulson's character is not developed deeply. However, one small reference planted in the character's final film appearance blossomed over the course of the character's reintroduction into another media format.

Summary and Analysis for RQ2

Based on the numerous connections woven throughout the MCU's storylines, across media platforms, it is clear that additive comprehension was used to strengthen the bonds across its transmedia narrative. Not only do several prominent storylines have clear ties to storylines from other installments, smaller storylines are referenced and explored in greater depth in other media extensions of the grand narrative. Furthermore, additive comprehension is used in such a way that it does not call into question the cohesiveness of the narrative. While the simple answer to the second research question might be "good" or "excellent," such terms

are subjective and not quantifiable by research standards. However, based on the chain of evidence explained, the case for the MCU being a successful experiment in transmedia does appear to be strongly supported based on its employment of additive comprehension across its various media installments.

Final Discussion

After a thorough review of the transmedia efforts of the Marvel Cinematic Universe, I would propose that the MCU is a trailblazer for the future of storytelling as we know it. While the experience may not be as rich and meaningful as other, perhaps even more pure, transmedia efforts from a philosophical standpoint, there is no question (for this I refer to the box office success) that it at least lends itself to an enriching experience. Furthermore, while other more artistic experiments in transmedia may more strongly utilize the principles of transmedia (to this I could not speak in depth, considering the nature of this study) no other entertainment venture, that I am aware of, has reached this level of prominence while staying true to the basic principles of transmedia, as the MCU.

In its storytelling, the MCU more than adequately uses consistent references and reappearances by characters (and their family members to a lesser degree), organizations, events, and locations, as well as a consistent use of sciences/natural laws within its narrative universe. In addition, the MCU employs extensive additive comprehension in order to connect its separate installments, across media channels, providing a more enriching experience for those willing to consume more media. Inconsistencies in any of these areas (such as references to the organization

S.H.I.E.L.D. in *Iron Man* vs. in all other MCU installments) were minor, so as to not raise serious question to the continuity of the MCU's grand narrative.

Marvel's storytelling universe is crafted in such a way that a viewer could potentially enjoy any installment without necessarily having to consume the rest. It should be noted that sequels (*Iron Man 2*, *Thor: The Dark World*, etc.) are much more enjoyable when consumed in sequence within their respective film franchises. This, however, would be expected of any sequel, and, still, the primary plot of each sequel is not heavily contingent upon a full understanding of the previous film's plot. To accomplish this, Marvel uses dialogue and backstory in its subsequent films to help new viewers along with the plot. In any case, consumption of the whole of the MCU—across all media platforms—does provide the most rewarding experience.

My strongest criticism of the MCU is not in the canon of its narrative, but rather in the evident preferential treatment of media platforms. Jenkins, in his writings, notes that the strongest uses of transmedia are ones "with no media privileged over any other" (Jenkins, 2003). Considering that no characters who were first introduced on television have (to date) made an appearance in film (though the reverse has occurred several times) and, furthermore, that no driving plot points introduced on television were carried forth to the silver screen. Plots within secondary elements, including all of the One-Shots and *Fury's Big Week*, rely heavily on plot points from film installments. Though they are each presented in such a way to tell a closed, stand-alone story, these stories are greatly influenced by events from feature films. For example, *All Hail the King* focuses on Trevor Slattery following his arrest in *Iron Man 3*. News footage in the One-Shot provides adequate context for his

incarceration, however, having viewed firsthand the plot of *Iron Man 3*, a viewer would understand more deeply the severity of Slattery's crime (he posed as a warlord to deter attention from a corporate leader's villainous plot).

While from a surface perspective this may seem as a flaw in the transmedia entertainment value of the universe, upon deeper reflection this preferential treatment is justified. Jenkins (2003) notes that not every media format attracts the same audience—film and television attract the broadest crowd. Considering this is Marvel's "Cinematic" Universe, it stands to reason that film would be the driving vehicle of this endeavor. And while the Hollywood system of yielding lackluster entertainment for an easy profit is a detestable entertainment model, one cannot criticize an entertainment organization for seeking to make a profit. So, Marvel's films serving as both the primary source of revenue and the primary source of narrative material does not necessarily diminish the value of its full, cross-media universe, in fact it makes fiscal sense. Furthermore, it is reasonable to tell the broadest parts of the story for the broadest audience, leaving the enriching elements for the more enthusiastic fans to gain a deeper understanding of the grand narrative. This is consistent with the spirit of transmedia.

Though film has been the most prominent source of driving plot material across the MCU (such as with Coulson's death and the Battle of New York in *The Avengers* or the rise of HYDRA in *Captain America: The Winter Soldier*), Marvel has been taking innovative leaps with its television series. The first season tied many of its plot storylines to those of feature films (such as with the convergence of the nine realms in *Thor: The Dark World* and with the dismantling of S.H.I.E.L.D. in *Captain*

America: The Winter Soldier). And the series continued to take leaps by introducing new aspects of the universe, even before film. For example, in *SHIELD* Season 1 Episode 14 (aired March 4, 2014) a blue-skinned corpse appears. Later, in Season 2 Episode 9, it is revealed that this creature was a Kree—which were featured prominently in *Guardians of the Galaxy* (released August 1, 2014). Therefore, the introduction of the Kree race on television predates the release of the film by several months. This was taken a step further in the final episodes of the fall slate of *SHIELD*'s second season, which culminated in two of its characters entering an underground temple (built on earth by Kree) and undergoing metamorphosis (S2: E 10). This was revealed (Abrams, 2014) to be the introduction of the Inhumans, which was announced by Marvel as an upcoming feature film (slated for release July 12, 2019). This further exemplified Marvel's status as an ambitious groundbreaker in the world of entertainment, more specifically in transmedia.

As the current generation of digital natives comes of age, the world of entertainment, the expectations consumers have for their media, is likely to shift. With an increasingly connected world, with entertainment available literally on-demand, consumers are going to be most engaged by the storytelling ventures that immerse them in a world—perhaps one day even around the clock. With that in mind, Marvel's transmedia endeavors are likely to serve as a model for future blockbuster narrative franchises.

Limitations

The primary limitation to this study—as is in almost every area of life—was time. All 10 films, 32 television episodes, five short films, and eight chapters of a

comic book were reviewed and analyzed over the span of a few months. This timeframe affected the number of viewings and re-viewings of the numerous media extensions throughout the research criticism process.

Furthermore, the MCU is continuing to produce more content—since the cutoff date for this study (the end of 2014), Marvel has released another television series, as well as continued the second season of *SHIELD*, and has a forthcoming straight-to-Netflix series along with two feature films slated for theatrical release during the summer of 2015. The connections described above are continuously expanding throughout this growing narrative universe. With that in mind, this study was limited in its ability to research and analyze the full scope of the MCU. For years to come, so long as Marvel produces content within the Cinematic Universe canon, this will be a limitation to any study of it.

Finally, while this study was conducted with the utmost meticulousness and discipline, human error was unquestionably a limitation, to some degree.

Suggested Areas for Future Research

Considering that transmedia experiments are being conducted on a grander scale, it would be interesting to see a quantitative study focusing on the number of viewers each extension of a given transmedia franchise, from media format to media format, garners. This likely will help researchers begin to understand how successful the transmedia effect is, and, more specifically, perhaps how effective transmedia is at drawing viewers to another media extension because of their experience in a different one.

As content creators, such as Houston Howard, continue to take ambitious leaps in transmedia storytelling, a researcher could follow one such venture from conception to inception. This would help to give insight on the development and implementation of transmedia, a potentially valuable study to the future of storytelling.

Since video games have the ability to immerse audiences in a storyworld like few other media formats, a study could be conducted on the use of video games in building a transmedia universe. It would be interesting to see this researched, both with video games serving as a supplement to a transmedia world centered in another medium, and as the backbone of a transmedia universe.

Noting that Kevin Feige has served as an executive producer for all of the MCU's feature films, a study should be conducted on the producer as the transmedia auteur. Jenkins has noted that, so far, many of the most successful transmedia franchises have run with a single creator in control (2003). There is something to be said, then, for a producer's role in crafting and maintaining a transmedia enterprise. On a side note it would be interesting to explore why Feige is not listed as a producer on *SHIELD*, though he was one for *Agent Carter* (the 2015 television series), and see if there is any correlation to the critical reception of the respective series.

In regard to my research, as new content is added into the MCU canon, it would be interesting to see how well Marvel maintains its continuity across an ever-expanding transmedia endeavor, especially considering that the MCU is extending its reach with four upcoming direct-to-Netflix series (as well as with eight episodes

of *Agent Carter* on ABC earlier this year). It would also be valuable to see a more in-depth exploration of one element described in this study, such as characters, or a single event, as a more meticulous criticism of Marvel's ability to build a transmedia narrative. Finally, I recommend a comparative analysis between Marvel's approach to universe building versus that of its rival organization, DC Comics (which is about to test Marvel in the box office with its own forthcoming cinematic universe films). Not only are the two superhero-genre organizations rival powerhouses, they have distinct approaches to their cinematic and television ventures. While Marvel seeks to build continuity across television and cinema (as well as other extensions mentioned in this study), through its transmedia MCU, DC is limiting its cinematic universe to the silver screen. Its various television series are not a part of the DC cinematic universe canon, and, with licensing to multiple networks (such as the CW and FOX), canon is not necessarily maintained across the various TV extensions. This study would likely yield most interesting results in regard to storytelling philosophy and practice, and prove beneficial to the future study of transmedia.

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